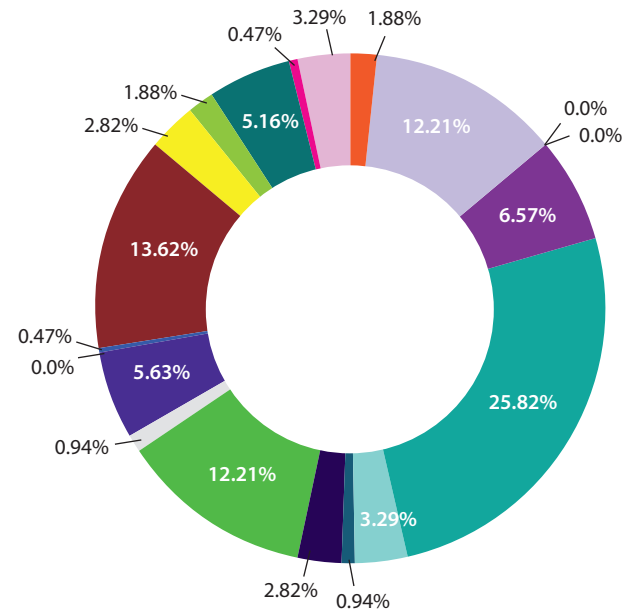


MERCHANDISING HIGHLIGHTS:

BUSINESS CATEGORY	# OF BUSINESSES	% OF TOTAL
MAJOR/ANCHOR STORES	4	1.88
SPECIALTY RETAIL	26	12.21
HOME FURNISHINGS/HOME DECOR		0.00
CLOTHING & ACCESSORIES		0.00
FAST FOOD/TAKE-OUT	14	6.57
RESTAURANT	55	25.82
CAFE	7	3.29
PUBS, CLUBS, & ENTERTAINMENT	2	0.94
RETAIL FOOD	6	2.82
PERSONAL SERVICES	26	12.21
FINANCIAL SERVICES	2	0.94
PROFESSIONAL SERVICES	12	5.63
AUTOMOTIVE SERVICES/PARTS		0.00
FITNESS & RECREATION	1	0.47
VACANT	29	13.62
HOTEL	6	2.82
COMMUNITY SERVICES & INSTITUTIONAL	4	1.88
OFFICE	11	5.16
SCHOOLS/COLLEGES/LEARNING	1	0.47
UNDER CONSTRUCTION	7	3.29
TOTAL	213	100.00



- Well-anchored with a large/modern Safeway, a BC Liquor Store, and Whole Foods Market.
- Secondary retail anchors include CIBC and VanCity (both part of the Safeway development) as well as a selection of mid-priced, boutique hotels.
- Anchors establish the primary role of Lower Robson Street as a local neighbourhood shopping precinct.
- Personal, financial, and professional services comprise 19% of all businesses helping retain local shoppers.
- 55 restaurants and 14 fast food businesses comprise 32% of all businesses.
- Strong draw to the area created by concentration of Japanese and Korean restaurants.

MERCHANDISING GAPS & OPPORTUNITIES

Lower Robson is the central commercial area for a large and growing high-density population in the immediate area. It is also the closest commercial area for wealthy residents of Coal Harbour and the Bayshore lands. Lower Robson is a gateway for regional and international visitors due to its close proximity to the Stanley Park as well as the regional traffic using West Georgia Street. There are several hotels in this area that also draw visitor traffic to Lower Robson. The following merchandising opportunities have been identified to better serve the local area population and regional traffic:

Personal, Professional, and Financial Services

It is important to maintain and enhance the local service role of Lower Robson. The Service category is quite well represented in Lower Robson. A couple of possible additions in the category include:

- Bank/credit union
- Financial management
- printing/copying
- post office

Specialty Retail

Lower Robson could support additions in the Specialty Retail category:

- soaps/lotions/fragrances
- world news/magazines
- sporting goods/sports wear
- fashion accessories
- luggage/leather goods
- cards/stationery
- florist
- vitamins/supplements
- gardening/patio supplies
- bedding and linens
- kitchen accessories
- homedecorations

Specialty & Impulse Foods

A broader selection of specialty & impulse foods would add to the interest and variety for local shoppers and visitors to Lower Robson:

- fish/seafood
- fresh pasta
- gelato
- fresh/frozen meats
- cookies/muffins
- delis
- cheeses
- bakeries
- fine chocolate
- juice bar
- confectionary

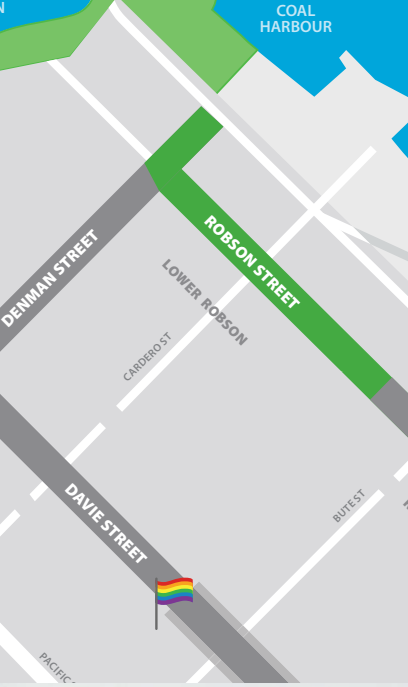
FOR FURTHER INFORMATION:

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GENERAL CHARACTER:

- Commercial precinct includes the 213 commercial businesses along a 5-block area between Jervis Street and Denman Street plus those businesses along Denman Street located between Georgia Street and Robson Street.
- Lower Robson is a popular shopping area with both local area residents and regional visitors.
- There is a significant grade change between Nicola and Jervis.
- Most of the retail activity is concentrated west of Nicola though this will expand east with redevelopment.
- Retail character is influenced by nearby Stanley Park, particularly on Denman Street between Georgia and Robson Street.
- There were 10 hotel developments in Lower Robson until 2018 providing an important source of retail/service demand; current redevelopment activity focused on mixed-use residential will shift demand slightly toward local retail.

KEY DEMOGRAPHICS:

- Census 2016 data confirms Lower Robson as a high density residential area with approximately 15,692 persons within a 3-block walking distance, a 5.1% increase in population from 2011.
- Average household size 1.6 for Lower Robson versus 2.5 for Metro Vancouver.
- Smaller household size translates into a lower median household income of \$52,240 vs. \$72,662 for the region. However, median personal income is \$34,053, higher than for Metro Vancouver which is \$32,612.
- Visible minorities comprise 35.2% of the population; 48.1% in Metro Vancouver.
- The median age of the population is 38.6, lower than Metro Vancouver at 40.9.
- 11,000 people in 2016 had post-secondary education while 2,025 households earned over \$100,000 per year.
- Just over 54% of the population is single (never married) compared to 37% in Metro Vancouver.

TRAFFIC:

- High levels of both vehicular and pedestrian traffic throughout the day and evenings, seven days per week.
- Vehicular traffic is comprised of both local and regional traffic.
- Average Daily Traffic Counts : Approx. 8,000 vehicles**

24 Hour Pedestrian Traffic Counts - June 2017 to May 2018 (12 month average)

Two Locations:

1300 Block (South Side)	Daily Average * (ped counter under counting, corrected by 30%)	Busiest Days on Average	Business Hour(s)
Weekday	7,106	Fridays	5pm - 7pm
Weekend	8,704	Saturdays	2pm - 7pm
1600 Block (North Side)	Daily Average	Busiest Days on Average	Business Hour(s)
Weekday	6,210	Fridays	5pm - 8pm
Weekend	7,500	Saturdays	2pm - 8pm

Note: Sunday, August 6 busiest single day: 18,900 south side and 14,268 north side (Pride Parade).

PARKING:

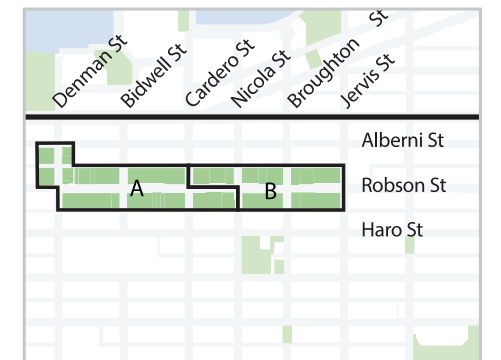
On Street Parking: Approx. 83 stalls; \$1.00 - \$3.00 per hour day time; \$2.00 - \$3.00 per hour evenings; free after 10pm

Off-Street Parking: 155 stalls, \$2.00 - \$4.00 per hour



ZONING GUIDELINES:

- Building heights can generally be up to: Area 'A': 64 metres (210 feet)
Area 'B': 91.4 metres (300 feet)
- Podium heights can generally be up to:
Area 'A': 2 storeys Area 'B': 3 storeys
- Density: Area 'A': up to 7 FSR Area 'B': up to 8.75 FSR (minimum 1.2 commercial)
- Support mixed-use development with continuous active commercial frontages.
- Consider increased density through contributions to social housing or rental housing.
- Allow larger commercial floor plates, appropriate for hillsides, in Area 'B'.



RECENT/EXPECTED ACTIVITY:

- Redevelopment of Safeway site has helped modernize the area and established a retail landmark.
- 1675 Robson Street - future redevelopment opportunity for current Whole Foods site/parking lot.
- 1401 Robson Street - future development opportunity for vacant site.
- Asia Standard is replacing the Empire Landmark Hotel at 1400 Robson with a mixed use development. Proposed two towers (31 & 32 stories) with 300 residential units. Retail at grade and office space on second floor.
- GWL Realty is developing 1500 Robson from a two storey commercial building to a 21 storey mixed-use building. The proposal includes 127 market rental dwelling units with retail use on the ground floor.
- The Georgia-Alberni Corridor has seven active redevelopment applications: four on Alberni Street in the 1400, 1500 and 1600 blocks, and three on West Georgia in the 1400 and 1500 blocks. Total number of residential units planned is just over 1,500.

METRO VANCOUVER RESIDENTS' SURVEY

[By Justason Market Intelligence, October 2017, 913 adults, online, +/- 3.2% error]

- Overall impression of West End remains positive, approx. 80% responded very or somewhat positive. Down slightly from 84% reported in 2014.
- Frequency of visits downtown: 97% come at least once per year; 31% weekly. Mostly from North Shore (53%), other Vancouver (49%) and eastern suburbs like Bby/Coq (28%).
- Reasons for visiting listed for downtown starting with entertainment, eating, shopping followed by sightseeing with visitors.
- When asked what would encourage more visitation top two responses were to improve parking (40%) and better traffic flow/transit service (39%).
- Mode of transport to West End: car 59%; transit 22%; walk 11%.