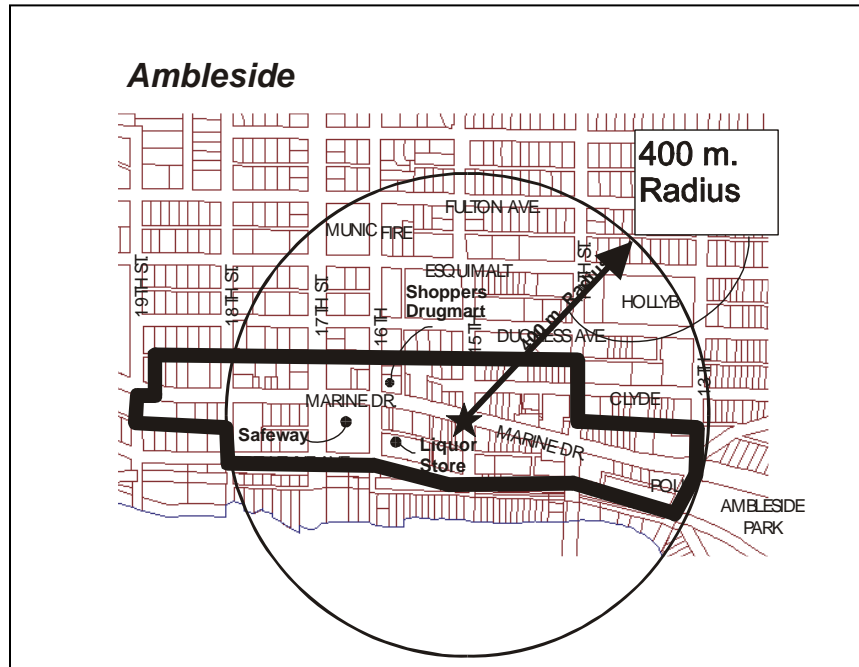


**Renewing the Heart of our Community  
Ambleside Business Area Review**

**Comparison of Local Shopping Districts**

**Discussion Paper  
West Vancouver Planning Department  
(April 2005)**



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## 1.0 INTRODUCTION

### 1.1 Purpose

The District of West Vancouver is undertaking a planning review of the Ambleside business area to develop goals, policies and initiatives that support a vision and role for Ambleside as a successful, healthy, attractive municipal town centre and local commercial area. The review explores opportunities for strengthening Ambleside and creating a successful commercial area by gaining a better understanding of local real estate economics, determining appropriate land uses and building forms, assessing view impacts and identifying success factors for street front commercial areas.

As part of this work, four other local shopping areas were compared to Ambleside to better understand its relative opportunities, constraints and overall characteristics in the context of the current planning review. This paper outlines the findings of that comparison.

### 1.2 Methodology

Comparisons to Ambleside were made with:

- Dunbar
  - 4<sup>th</sup> Avenue
  - Kerrisdale
  - Edgemont Village
- (see Appendix 1 – Maps)

These local shopping areas were chosen based on a combination of data availability (City of Vancouver 2004 study<sup>1</sup>), familiarity (generally well known local shopping areas that people can identify with), and role (local serving and in some cases local and city serving). Kerrisdale, 4<sup>th</sup> Avenue and Edgemont are generally considered to be healthy, successful shopping areas, while Dunbar is viewed as less so at the present time.

Comparison data is also provided on three other West Vancouver local shopping areas for information and general interest, but is not incorporated into the analysis of this paper:

- Dundarave
  - Caulfeild
  - Horseshoe Bay
- (see Appendix 1 and 2)

Fourteen variables within five general categories were examined:

1. Local Population Characteristics and Density within a 400 m. radius (5-7 min. walk):
  - total population
  - average household income
  - percentage of population age 20-44
  - percentage of population age 65+

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<sup>1</sup> “**Broadway—Arbutus Policy Review**” March 19, 2004 (City of Vancouver)

Local Population Characteristics and density within a 2 km radius (5 min. drive):

- total population
  - average household income
  - percentage of population age 20-44
  - percentage of population age 65+
2. Size and Scale of Shopping Area:
    - total number of businesses
    - overall length of the main street
  3. Traffic:
    - 24 hour average daily traffic counts
  4. Key Anchors and Retail/Business Mix:
    - largest store/anchor
    - retail/business mix
  5. Local Attractions:
    - civic presence/amenities

Data and conclusions are drawn from a number of sources, including the City of Vancouver 2004 Broadway-Arbutus Policy Review and Proposed Policy Directions report. This report was a key source of information on the Vancouver shopping areas, and provided a number of general insights and comments on local shopping areas. More detailed discussion on methodology for each category is provided below.

#### *Local Population Characteristics and Density*

Local population density, age and income were measured within a 400 metre radius (5-7 minute walking distance) and 2 km radius (5 minute drive) from an identified central “hub” point of the shopping district’s core. These indicators are important factors from a positioning and comparative perspective, particularly if a key aspect of a shopping area’s role is to be local serving. The population within these geographic areas is not intended to represent the entire consumer base for the area, as these areas can extend over several blocks and attract people from much farther than a five minute walk or drive. They provide a comparative sample of the typical characteristics of the surrounding population within two given distances from a central point.

Demographic data was obtained from the Statistics Canada 2001 census using a combination of dissemination area and census tract data. Statistics Canada provides 100% data for population by age groups, and a 20% sample for income.

#### *Size and Scale of Shopping Area*

Information on the number and type of Ambleside businesses was obtained from the 2001 Ambleside Business Area Review (Harris Hudema Consulting Group) and was based on an on-site inventory and manual recording of current uses. More recent business licensing data was also collected for Ambleside but is considered incomplete due to the significant proportion of businesses (around 30%) that do not obtain business licenses. The 4<sup>th</sup> Avenue data was based on a 2004 on-site retail inventory (Broadway-Arbutus Study). The Kerrisdale data was based on a 2002 on-site shopping area

inventory (Broadway- Arbutus Study). For the Vancouver locations there was some uncertainty about the boundaries used and whether or not all businesses or just those at grade were considered. Data was not available for Dunbar. Edgemont Village data is based on the Edgemont Village 2004 Business and Community Resources Guide. Data on Dundarave, Caulfeild and Horseshoe Bay businesses (included in Appendix 2) is based on a February 2005 on-site inventory (West Vancouver Planning staff).

Figures on shopping area length were obtained by measuring the length (in linear feet) of the longest main street(s) within the shopping area using scaled maps. For example, shopping area length for Ambleside includes 6 blocks of Marine Drive from 13<sup>th</sup> to 19<sup>th</sup>.

### *Traffic Volumes*

Traffic counts were obtained from the Engineering Departments of the respective municipalities for each of the local shopping areas.

### *Key Anchors and Retail Mix*

The source for key anchors was general staff knowledge of the areas and the Broadway- Arbutus Study (City of Vancouver, March 2004). Retail/business mix for Ambleside was obtained from an on site inventory conducted by Harris Hudema Consultants as part of the Ambleside Business Area Review (2001). The 4<sup>th</sup> Avenue data was based on a 2004 on-site retail inventory (Broadway- Arbutus Study). The Kerrisdale data was based on a 2002 on-site shopping area inventory (Broadway- Arbutus Study). Data on Dunbar was not available. Edgemont Village data was based on the Edgemont Village 2004 Business and Community Resources Guide. Data on Dundarave, Caulfeild and Horseshoe Bay businesses (included in Appendix 2) was based on a West Vancouver Planning Department on-site inventory (February 2005).

### *Local Attractions – Civic Presence / Amenities*

The source for civic presence and amenities was general staff knowledge of the areas and the Broadway Arbutus Study.

## **2.0 ANALYSIS**

### **2.1 Local Population Characteristics and Density**

Higher population densities surrounding a local shopping area increase the local consumer base, and contribute to pedestrian activity and vitality. Younger people typically buy more consumer goods, and households with higher incomes can generally afford to spend more on goods and services. In general, a higher concentration of young, high income residents surrounding a local shopping area is better able to support city serving speciality retail and also benefits local-serving uses.

*Key findings on Ambleside compared to the other areas:*

- second lowest population density within a 400 m radius (second to Edgemont)
- lowest population density within a 2 km radius
- lowest average household income within a 400 m radius
- second lowest average household income within a 2 km radius (second to 4<sup>th</sup>)
- highest percentage of population age 65+ within a 400 m radius and 2 km radius

**Table 1 - Demographics of Surrounding Areas**

from a central hub point within the core area	Dunbar 27 <sup>th</sup> & Dunbar	4 <sup>th</sup> Avenue 4 <sup>th</sup> btwn Yew & Vine	Kerrisdale 41 <sup>st</sup> & W.Blvd.	Edgemont Edgemont Blvd & Highland Blvd	Ambleside 15 <sup>th</sup> & Marine
<b>400 metre radius (5-7 minute walk)</b>					
Population within 400 metre radius	2200	6600	3300	1100	2600
Average Household Income	\$94,000	\$54,000	\$64,000	\$115,000	\$45,000
% of Population between 20 & 44	34%	65%	37%	27%	26%
% of Population 65 years or older	12%	8%	26%	20%	37%
<b>2 km radius (5 minute drive)</b>					
Population within 2 km radius	39,000	57,000	36,000	28,000	16,000
Average Household Income	\$104,000	\$68,000	\$102,000	\$83,000	\$81,000
% of Population between 20 & 44	35%	56%	31%	33%	24%
% of Population 65 years or older	13%	10%	18%	15%	28%

Population & Income figures are from Statistics Canada 2001 census data (census tracts and dissemination areas) within a radius from a central point within the local shopping area's core. Figures for West Vancouver overall are \$114,000 for average income, 25% for population age 20-44 and 22% for population age 65+.

Ambleside's population density in the 400 metre radius is low compared to other areas despite the relatively high density apartment area nearby, because the adjacent waterfront uses limit residential development to the south.

Lower average household incomes in the Ambleside area are associated with a higher proportion of older residents and relatively more affordable housing stock compared to other areas of West Vancouver (older housing on smaller lots, rental apartment buildings). Although the 4<sup>th</sup> Avenue area also has a low average household income (particularly in the 400 metre radius), this is offset by its younger population base.

## 2.2 Size and Scale of Shopping Area

A critical mass and concentration of shopping activity is required for a healthy, vibrant commercial area. The ideal size for a shopping area will vary depending on its role and function (e.g. local serving vs. city serving, town centre vs. neighbourhood retail). However, successful local shopping areas are typically three to five blocks long, with 3½ – 4 blocks being optimal. This is considered a reasonable walking distance for consumers.<sup>2</sup> In some cases, a shopping area may be comprised of several secondary

<sup>2</sup> This is based on a typical block length of approximately 500 feet.

areas, each three to five blocks long. For example in Ambleside, there is one main shopping area (along Marine Drive) and two additional secondary areas (Bellevue Avenue and Clyde Avenue) that are all part of the Ambleside Town Centre.<sup>3</sup>

Generally, it is considered advantageous to concentrate shopping activity in order to create retail continuity and make it convenient for shoppers to visit several stores/services in one stop without having to walk long distances.

*Key findings on Ambleside compared to the other areas:*

- second longest Main Street length (Ambleside from 13<sup>th</sup> to 19<sup>th</sup>)
- highest number of businesses

Compared to the other areas, Ambleside is generally longer and more spread out and has the greatest number of businesses. This may partly reflect Ambleside's role as a town centre, and the presence of the two secondary commercial areas on Bellevue and Clyde. Looking specifically at the Marine Drive corridor, which is 6 blocks long totalling almost 3000 linear feet, Ambleside is somewhat longer than the ideal (of 3-5 blocks at approximately 1500-2500 sq.ft.) for a local shopping area.<sup>4</sup>

**Table 2 - Local Shopping Area Characteristics**

INDICATORS	Dunbar (30 <sup>th</sup> to ½ block south of W.King Edward)	4 <sup>th</sup> Avenue (Burrard to Balsam)	Kerrisdale (41 <sup>st</sup> from Larch to Maple, West Blvd. from 37 <sup>th</sup> to 42 <sup>nd</sup> )	Edgemont (see map)	Ambleside (13 <sup>th</sup> to 19 <sup>th</sup> Marine, Bellevue, Clyde)
Total Number of Businesses*	N/Avail.	201	284	106	573*
LSA Main Street(s) Length	1640 ft	3281 ft	2461 ft	1312 ft	2953 ft**
24 Hour Average Daily Traffic Counts	Dunbar @ 23 <sup>rd</sup> : 19,166 Dunbar @ 30 <sup>th</sup> : 19,009	4 <sup>th</sup> Ave.: 27,000	41 <sup>st</sup> Ave.: 18,000 West Blvd.: 17,000	Edgemont Blvd s. of Ridgewood: 11,543 Edgemont Blvd e. of Highland: 9190	Marine @ 13 <sup>th</sup> – 22,820 Marine @ 15 <sup>th</sup> – 16,140 Marine @ 19 <sup>th</sup> – 14,190
Largest LSA Store	Stongs – 16,000 sq. ft.	Safeway – 28,000 sq. ft.	London Drugs – 31,000 sq. ft.	SuperValue – 16,000 sq. ft.	Safeway – 37,000 sq. ft.
Civic Presence / Amenities	Library	n/a	Library / Community Centre	Library	Police, Arts, Library, Municipal Hall, Parks and Seawalk

\*Total number of businesses does not include vacant stores. For Ambleside, the total number of businesses includes the sub-areas of Bellevue and Clyde Avenue.

\*\*LSA Length for Ambleside includes 6 blocks of Marine (13<sup>th</sup> – 19<sup>th</sup>).

<sup>3</sup> Gordon Harris Consulting (2005)

<sup>4</sup> The 4<sup>th</sup> Avenue Shopping Area is longer than Ambleside, and considered very successful. It is somewhat of an exception because it is comprised of a series of shopping areas along 4<sup>th</sup> Avenue.

## 2.3 Traffic Volumes

A central location with traffic volumes between 20,000 and 30,000 vehicles in a 24 hour period is considered a positive indicator for local shopping area health: higher volumes make it challenging to create a comfortable and attractive pedestrian environment.<sup>5</sup>

*Key findings on Ambleside compared to the other areas:*

Ambleside's traffic volumes (averaging around 18,000 between 13<sup>th</sup> and 19<sup>th</sup>) are comparable to the other areas, except for 4<sup>th</sup> Avenue which has higher volumes (see Table 2). Generally, Ambleside is well located within the overall transportation network in West Vancouver in a central location that is well served by transit.

## 2.4 Key Anchors and Retail/Business Mix

Successful local shopping areas require anchor stores such as supermarkets, drugstores, specialty food stores and/or city serving retailers to serve the local population, create activity and help draw customers to support other stores and services, resulting in a wider range of retail uses and services overall. A high concentration of restaurants and cafes can also enliven an area and support local serving functions. In general, the more successful the anchors are, the greater the general health of the shopping area. The availability of larger sites is important in accommodating larger local serving anchors and city serving specialty stores. However, managing the scale and impacts of larger stores (e.g. by setting limits on maximum store size) is also important in helping to ensure the local serving role, retail continuity and overall pedestrian scale is not compromised.<sup>6</sup>

*Key findings on Ambleside compared to the other areas:*

Ambleside has a lower representation of grocery/convenience uses than the other areas, although it does have one large full service grocery store (Safeway) and several other anchors such as Shoppers Drugmart and two liquor stores.

City serving specialty stores are less evident in Ambleside than the other areas, although there are a number of stores in this category (West Van Florist, Tools and Techniques, Avant Gardener). Examples of city serving specialty stores on 4<sup>th</sup> Avenue include Lulu Lemon, Coast Mountain Sports, Duthies Books, and a collection of music stores. Overall, the representation of specialty retail and department store type merchandise is lower in Ambleside compared to the other areas.

Ambleside has many restaurants and food services (44) and is comparable to 4<sup>th</sup> Avenue and Kerrisdale in terms of total numbers.

The most noticeable difference between Ambleside and the other shopping areas is its high number of personal and professional services and general office uses (400 businesses or 72% of total mix). This reflects Ambleside's unique role as a town centre, and these uses can support that function by creating local jobs, providing a wide range

<sup>5</sup> "Broadway—Arbutus Policy Review" March 19, 2004 (City of Vancouver)

<sup>6</sup> "Broadway—Arbutus Policy Review" March 19, 2004 (City of Vancouver proposes a maximum individual store size of 40,000 s.f. for the Broadway-Arbutus area).



of services, and adding day time consumers; however, it can create challenges in terms of retail continuity if businesses are too spread out.

**Table 3 – Retail & Business Mix**

CATEGORIES	4 <sup>th</sup> Avenue		Kerrisdale		Edgemont		Ambleside	
Total excluding vacant stores	201		284		106	100%	573	
<b>Total including vacant stores</b>	207	100%	296	100%	n/avail.		583	100%
<b>Grocery &amp; Convenience (GC)</b>	16	8%	20	7%	11	10%	15	3%
<b>Restaurant &amp; Food Service (Rest/F)</b>	45	22%	45	15%	9	8%	44	8%
<b>Specialty Retail / Department Store Type Merchandise (DSTM/SR)</b>	100	48%	95	32%	29	27%	83	14%
<b>Personal &amp; Professional Services (PPS)</b>	39	19%	125	42%	54	51%	243	42%
<b>General Business/Office (GB)</b>	n/avail	(included in PPS)	n/avail	(included in PPS)	1	1%	176	30%
<b>Auto (A)</b>	1	.5%	0	0%	2	2%	12	2%
<b>Vacant</b>	6	3%	12	4%	n/avail	n/avail	10	2%

see Appendix 2 for more detailed table with examples of uses

## 2.5 Civic Presence and Amenities

Civic and cultural amenities such as libraries, parks and community gathering places can contribute to activity and a sense of identity around a shopping area.

*Key findings on Ambleside compared to the other areas:*

Ambleside has a stronger civic presence and wider range of amenities than the other local shopping areas. This is consistent with its role as a municipal town centre. The cultural, recreation and natural amenities along the waterfront contribute to its overall attractiveness as a place to visit, shop, obtain services, and recreate.

## 3.0 CONCLUSIONS

### 3.1 Challenges and Opportunities

The comparison of local shopping districts suggests that some of Ambleside's attributes may present challenges for shopping area success. These include:

- a relatively low surrounding population density
- a relatively older, lower income local population
- lower representation of retail/department store type uses, and grocery/convenience uses
- a possible need to strengthen anchors and city serving specialty stores
- a long Main Street corridor (Marine Drive)

Ambleside has a number of positive attributes:

- a very attractive setting close to a number of community amenities i.e. park, waterfront, small scale cultural activities
- several anchor stores (although it could potentially benefit from more), some city serving specialty stores, and many cafes and restaurants
- a central, accessible location within the transportation network and traffic levels that are close to the ideal range for generating business while not detracting from the pedestrian environment

This information will help inform current work on the Ambleside Business Area Review.

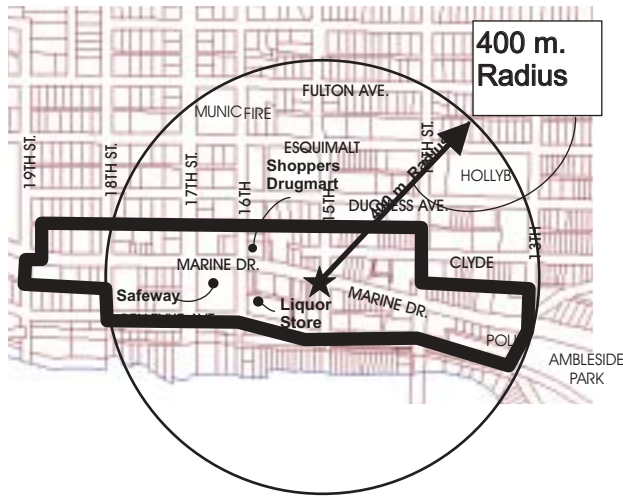
## **APPENDIX 1 – Maps of Local Shopping Areas**

*maps source file:*  
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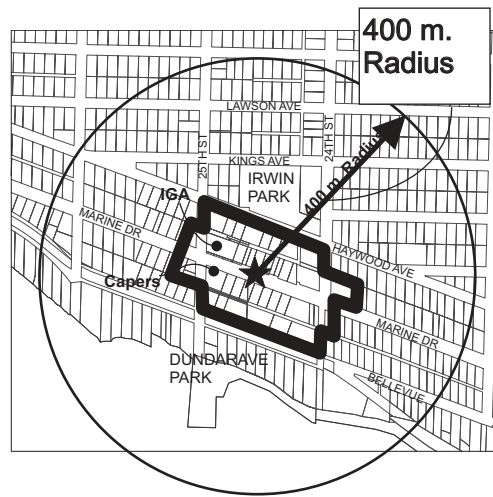
## **APPENDIX 2 – Local Shopping Areas Comparative Indicators**

*data source file:*  
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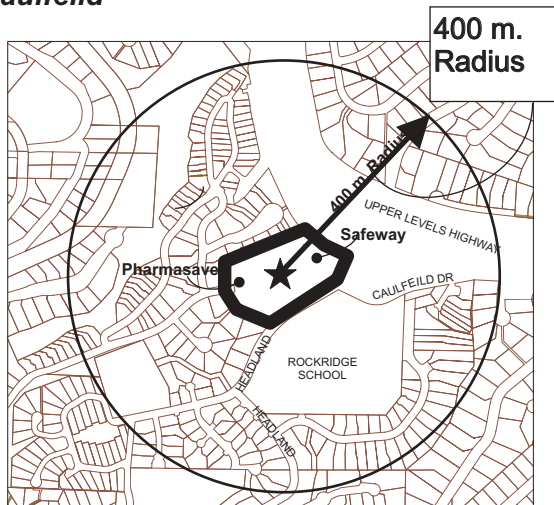
### Ambleside



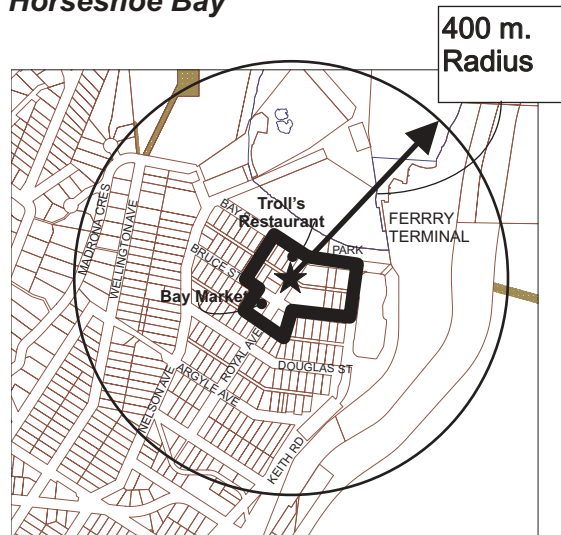
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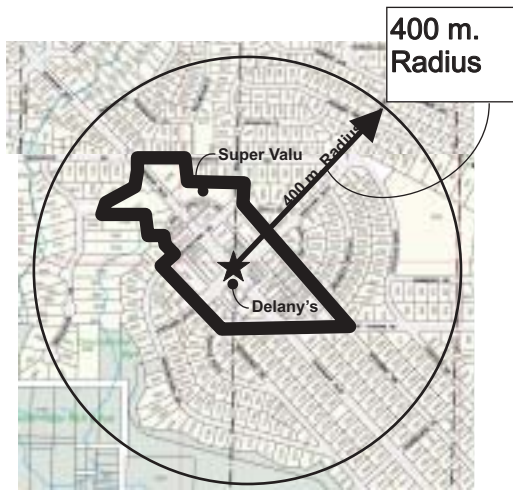
### Caulfeild



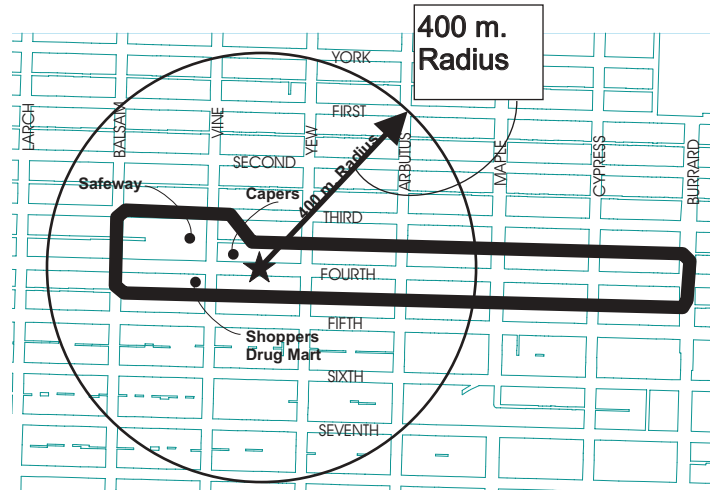
### Horseshoe Bay



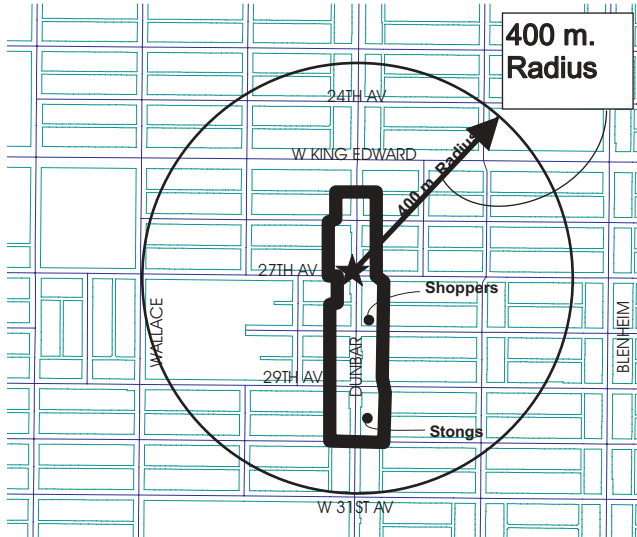
**Edgemont**



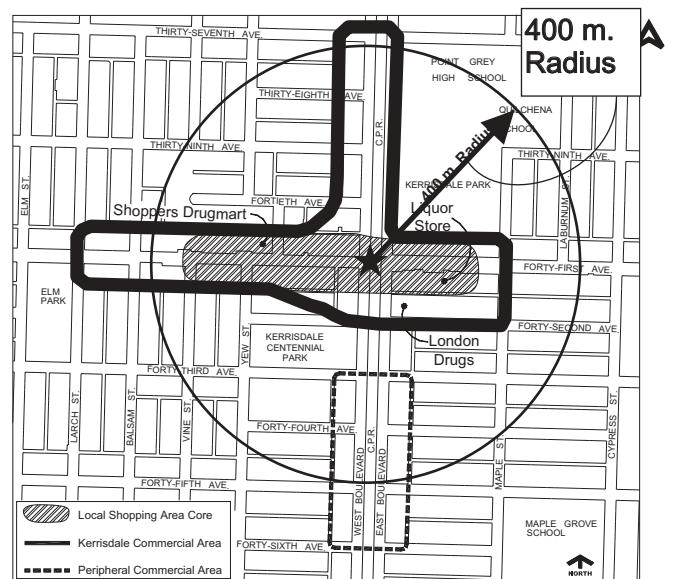
**4th**



**Dunbar**



**Kerrisdale**



## Local Shopping Areas (LSA) – Comparative Indicators

### Demographics of Surrounding Areas (see maps)

from a central hub within the core area (see maps)	Dunbar 27 <sup>th</sup> & Dunbar	4 <sup>th</sup> Avenue 4 <sup>th</sup> btwn Yew & Vine	Kerrisdale 41 <sup>st</sup> & W Blvd.	Edgemont Edgemont Blvd & Highland Blvd	Ambleside 15 <sup>th</sup> & Marine	Dundarave mid block 2400 Marine Dr	Horseshoe Bay Royal Ave (btwn Bruce & Bay St)	Caulfield Centre of Parking Area
<b>400 metre radius</b>								
Population within 400 metre radius	2200	6600	3300	1100	2600	1514	641	937
Average Household Income	\$94,000	\$54,000	\$64,000	\$115,000	\$45,000 (\$114,000 WV avg)	\$118,945	\$67,000	\$192,303
% of Population age 20-44	34%	65%	37%	27%	26% (25% WV avg)	21%	30%	25%
% of Population 65 years or older	12%	8%	26%	20%	37% (22% WV avg)	30%	16%	15%
<b>2 km radius</b>								
Population within 2 km radius	39,000	57,000	36,000	28,000	16,000	16,858	3,065	7,490
Average Household Income	\$104,000	\$68,000	\$102,000	\$83,000	\$81,000	\$104,078	\$111,535	\$174,149
% of Population between 20 & 44	35%	56%	31%	33%	24%	23%	25%	24%
% of Population 65 years or older	13%	10%	18%	15%	28%	27%	17%	15%

Population & Income figures are from Statistics Canada 2001 census data (census tracts and dissemination areas) within a radius from a central point within the local shopping area's core.

West Vancouver Averages:

household income: \$114,000

population age 20-44: 25%

population age 65+: 22%

Comparison Maps source file:

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## Local Shopping Areas (LSA) – Comparative Indicators

### Local Shopping Area Characteristics

INDICATORS	Dunbar	4 <sup>th</sup> Avenue	Kerrisdale	Edgemont	Ambleside	Dundarave	Horseshoe Bay	Caulfeild
Total Number of Businesses	N/avail.	201	284	106	573	139	28	26
Largest LSA Store	Stongs – 16,000 sq. ft.	Safeway – 28,000 sq. ft.	London Drugs – 31,000 sq. ft.	Supervalue	Safeway – 37,000 sq. ft.	Capers ICA (under const) – 25,000 sq.ft.	Bay Market	Safeway
LSA Main Street Length	1640 ft	3281 ft	2461 ft	1312 ft	2953 ft	1,148 ft	1,043 ft	722 ft
24 Hour Traffic Counts	Dunbar @ 23 <sup>rd</sup> . 19,166 Dunbar @ 30 <sup>th</sup> – 19,009	4 <sup>th</sup> Avenue: 27,000	41 <sup>st</sup> Avenue: 18,000 West Boulevard: 17,000	Edgemont Blvd (south of Ridgewood): 11,543 Edgemont Blvd (east of Highland) 9190	Marine @ 13 <sup>th</sup> : 22,820 Marine @ 15 <sup>th</sup> : 16,140 Marine @ 19 <sup>th</sup> : 14,190	Marine between 24 <sup>th</sup> and 25 <sup>th</sup> : 10,175	Bay Street: 15,900 (1990s)	Headland at highway interchange: 11,770 (2001)

Total number of businesses does not include vacant stores. Ambleside includes all businesses within the study area which includes Bellevue and Clyde Avenue. LSA Main Street length for Ambleside includes 6 blocks of Marine (13<sup>th</sup> – 19<sup>th</sup>).

## Local Shopping Areas (LSA) – Comparative Indicators

### Retail & Business Mix

CATEGORIES	4 <sup>th</sup> Avenue	Kerrisdale	Edgemont	Ambleside (Marine Only)	Dundarave (Marine Only)	Horseshoe Bay	Caulfeild
Total excluding vacant stores	201	284	106	573 (366)	139 (88)	28	26
<b>Total including vacant stores</b>	207	296	n/avail.	583 (373)	143 (89)	32	26
<b>Grocery &amp; Convenience (GC)</b> e.g.: - supermarket/grocers/produce - specialty food (e.g. butcher) - drugstore/pharmacy	16	20	11	15 (11)	4 (4)	3	6
<b>Restaurant &amp; Food Service (Rest/F)</b> e.g.: - restaurants/ fast food - café/bakery/deli - coffee shop	45	45	9	44 (38)	13 (13)	14	4
<b>Specialty Retail / Department Store Type Merchandise (DSTM/SR)</b> e.g.: - florist - eyewear - liquor/wine store - apparel/accessories - home furnishings/décor - electronics, appliances - vitamin store	100	95	29	83 (60)	26 (25)	3	7
<b>Personal &amp; Professional Services (PPS)</b> e.g.: - beauty, dry cleaning, hair - financial/bank, medical/dental - lawyer, accountant, architect, notary, optometrist - daycare, library	39	125	54	243 (146)	63 (32)	8	9
<b>General Business/Office (GB)</b>	n/avail	n/avail	1	176 (107)	31 (12)	0	0
<b>Auto (A)</b> e.g.: - gas station, auto repair, tires, auto sales	1	0	2	12 (4)	2 (2)	0	0
<b>Vacant</b>	6	12	n/avail	10 (7)	4 (1)	4	0

Kerrisdale and 4<sup>th</sup> Ave Source: Broadway- Arbutus Study (City of Vancouver, March 2004). Kerrisdale based on on-site inventory (2002). 4<sup>th</sup> Avenue based on on-site inventory (2004). Data on Dunbar is not available. Ambleside Business Area Review (Harris Hudema Consultants) on site inventory (2001). Dundarave, Horseshoe Bay, Caulfeild Source: Planning Dept. staff on site inventory (February 2005). Edgemont Village Source: Edgemont Village 2004 Business and Community Resources Guide.