



REPORT TO MAYOR AND COUNCIL

PRESENTED: MAY 25, 2009 - SPECIAL MEETING
FROM: COMMUNITY DEVELOPMENT DIVISION
SUBJECT: WILLOWBROOK / WILLOUGHBY COMMERCIAL STUDY

REPORT: 09-69
FILE: 6480 - 30 - 001

RECOMMENDATION(S):

That Council receive the report entitled "Willowbrook/Willoughby Commercial Study", for information.

EXECUTIVE SUMMARY:

Numerous changes have taken place since the Official Community Plan, the Willoughby Community Plan and various neighbourhood plans were adopted by Council. To ensure a good understanding of the impact of these changes and position the Township to meet the current and future needs of the community, a commercial analysis was conducted for the Willowbrook/Willoughby area. Coriolis Consulting Corp. has recently completed a study to forecast the short, medium and long-term demand of commercial development in Willowbrook/Willoughby. The analysis and information provided in the study will be used to assist the Township in land use policy and planning decisions. With a 2031 horizon, following is a summary of the study's key findings and recommendations:

- 1.2 million to 1.6 million ft² of additional retail and service space required for major or sub-regional oriented retail and service businesses;
- about 840,000 ft² of additional retail and service space required for local oriented retail and service businesses;
- 1.4 million to 1.6 million ft² of additional regional office space required;
- approximately 300,000 ft² of additional local office space required;
- major or sub-regional retail and service locations should be planned in Willowbrook and Carvolth areas;
- a network of local oriented commercial areas should be planned to include three primary nodes and up to ten neighbourhood convenience locations;
- consideration should be given to phasing the three primary commercial nodes, based on a primary trade area of about 8,000 to 10,000 to support a major grocery (supermarket) operation anchoring a range of other businesses;
- encourage future regional oriented office demand to locate in Willowbrook to reinforce the Regional Town Centre as a primary office location in Langley; and

- accommodate office users that require a high quality business park location in Carvolth and other nearby sites along 200 Street;
- adopt appropriate policies and strategies to ensure viability of all local commercial centres in a comprehensive manner to encourage pedestrian rather than car-oriented development.

PURPOSE:

This report provides a summary of a study on the current and future needs of commercial space in the Willowbrook/Willoughby area.

BACKGROUND/HISTORY:

The Official Community Plan (OCP) provides policies for commercial development to meet the needs of Township residents. The policies ensure that commercial developments occur at an appropriate scale and function as a community focus. In conjunction with other OCP objectives, the policies contribute to the overall goal of building complete communities by providing a balance between commercial and other land uses.

The Willowbrook Community Plan (1991) designates lands south of 64 Avenue, west of 200 Street and much of the land south of 68 Avenue, east of 200 Street, as Regional Commercial or Business/Office Park. The Langley Town Centre Plan (1994) provides a basis for designation of the area as a Regional Town Centre in the Livable region Strategic Plan (1996). The Willoughby Community Plan (1998) includes designations for a Willoughby Town Centre and neighbourhood commercial centres in the area.

Since the adoption of these plans, many changes have taken place. Some of them include:

- Changes in the South of Fraser area: A large amount of commercial development has been completed in South Surrey/White Rock and Cloverdale/East Clayton. These new commercial areas will compete with the Langley Regional Town Centre for commercial retail customers.
- Changes in Sustainability: The Sustainability Charter has an objective to focus on compact urban form and mixed use neighbourhoods. Broad Township policies are changing to meet this objective (as outlined below).
- Changes in Community and Neighbourhood Plans: In 2008, the OCP was amended to include policies for high density residential development. Also in the same year, the Yorkson Neighbourhood Plan was updated to address changing issues such as aging population, rising land values, increased energy costs and limited urban land development area. The projected build-out population for Yorkson increased from 16,500 in the original plan to 28,000 in the updated plan.

It is important to have a good understanding of the changing needs of the community to ensure that adequate land is available for commercial development in the right locations and at the right time. The Long Range Planning Department retained Coriolis Consulting Corp. to forecast the demand of long-term commercial development in Willowbrook/Willoughby. Their report is provided as Attachment A.

DISCUSSION/ANALYSIS:

Using information available and policies in place at the end of 2008, Coriolis conducted the analysis with the timeframe between 2008 and 2031. The study examined commercial development at three levels as outlined below and described in the project's Terms of Reference:

1. Subregional: The subregion is a part of the Metro Vancouver region. It includes Langley, Surrey, White Rock, Maple Ridge and Pitt Meadows.
2. Corridor-wide: The corridor includes the Willowbrook/Willoughby area.

3. Local: Local areas include are commercial nodes such as the Willowbrook Regional Town Centre, Willoughby Town Centre, Carvolth, and Jericho.

Key findings of the study:

- Major or Subregional Oriented Retail and Service Commercial: There will be demand for 1.2 million to 1.6 million square feet of additional retail and service space for major or subregional oriented retail and service businesses that require a large trade area population. Examples of major or subregional oriented businesses include department stores, large building supply stores, warehouse stores, big box retailers, specialty retailers, major restaurants and car dealerships. These businesses require large floorplates, often in excess of 100,000 square feet. However, many are small (such as clothing stores or specialty retailers), often in the 2,000 to 5,000 square feet range.
- Local Oriented Retail and Service Commercial: There will be demand for about 840,000 square feet of additional retail and service space for local oriented retail and service businesses that serve the day-to-day needs of residents in Willowbrook/Willoughby. Examples of local oriented businesses include grocery stores, pharmacies, banks, salons video rentals, small restaurants, cafés and personal services. Most of these businesses require less than 10,000 square feet, with the exceptions of pharmacies (which often in the 10,000 to 20,000 square feet range) and supermarkets (which are typically in the 25,000 to 50,000 square feet range).
- Regional Oriented Office: There will be demand for 1.4 million to 1.6 million square feet of office space from users that serve a broader geographic market. Examples of these users include regional or subregional head offices of large companies.
- Local Oriented Office: There will be demand for about 300,000 square feet of local office space in Willowbrook/Willoughby from businesses serving the local residents, such as medical tenants, realty offices, travel agents, insurance agents and other services.

Based on the findings, Coriolis made several recommendations. They are summarized as follows:

1. Plan for two major or subregional retail and service locations:
 - Willowbrook: As a Regional Town Centre, the Willowbrook area will continue to densify over time with infill commercial and mixed use development. While there are some constraints to development, there is still potential to provide additional floorspace.
 - Carvolth: The Carvolth area is attractive to subregional retail businesses due to convenient vehicular access. However, if Carvolth is permitted to develop as a regional oriented retail and service district, it should not be used to accommodate local oriented retail development. There are other locations that are attractive for local commercial development, but limited opportunities to accommodate regional oriented retail development in the Township.
2. Plan a network of local oriented commercial areas in Willoughby, including three primary nodes and up to ten neighbourhood convenience locations, as follows:

- Willoughby Town Centre: The Willoughby Town Centre at 80 Avenue and 208 Street could accommodate 350,000 to 400,000 square feet of floorspace, including two supermarkets within a single commercial district but not a series of shopping areas. The estimated land requirement is about 25 acres.
 - Gordon/Smith: A commercial node is recommended for the Gordon and Smith Neighbourhoods at a corner of the 72 Avenue and 208 Street intersection, primarily to serve the residents south of 72 Avenue. This node would provide about 150,000 square feet, including a supermarket, on about 10 acres.
 - Jericho: A commercial node is recommended for the West Latimer neighbourhood which could accommodate 150,000 to 200,000 square feet of floorspace, including one supermarket on 10 to 15 acres. This node could be planned in conjunction with commercial uses that complement the Langley Events Centre (e.g. restaurants), provided the uses that serve the residents (grocery store, drug store) are located west of 200 Street.
 - Neighbourhood Convenience: There is potential for up to ten neighbourhood convenience locations accommodating up to 5,000 square feet on about 0.3 acre per location throughout Willoughby.
3. Consider phasing the three primary commercial nodes, based on a primary trade area of about 8,000 to 10,000 to support a supermarket anchoring a range of other businesses, as follows:
 - i. Willoughby Town Centre Phase 1 (150,000 to 200,000 square feet of floorspace)
 - ii. Gordon/Smith (150,000 square feet of floorspace)
 - iii. Willoughby Town Centre Phase 2 (150,000 to 200,000 square feet of floorspace)
 - iv. Jericho (150,000 to 200,000 square feet of floorspace).
 4. Encourage future regional oriented office demand to locate in Willowbrook to reinforce the Regional Town Centre as a primary office location in Langley.
 5. Accommodate office users that require a high quality business park location in Carvolth and other nearby sites along 200 Street. Office uses in these areas should be limited to those:
 - attached to a warehouse, distribution or sales/service function,
 - requiring ground floor loading access for equipment, and
 - requiring large floorplates.

Community Implications

Sub-Regional Retail, Service and Office

The Langley Regional Town Centre has accommodated most of the retail growth in Langley in the past decade. Based on a 2003 study by Metro Vancouver, the Langley Regional Town Centre provided the largest retail floor space in the region outside Downtown Vancouver in 2001, at over 5.3 million square feet. It is important to continue to support retail and office use in the Regional Town Centre to sustain a strong community core and build on sustainability principles of compact growth and mixed use.

The Carvolth area also provides an attractive site in a unique location for some retail expansion, but it is recommended that current retail commercial policies (maximum retail gross floor area cannot exceed 4,844 square feet) remain in effect as there is adequate land in the Regional Town Centre to provide land for additional retail development. The Carvolth area does provide a good location for certain office uses and the Township should continue to promote an appropriate designation for the Carvolth area in the Metro Vancouver Regional Growth Strategy.

Local and Neighbourhood Retail and Service

Local community centres are conceived to be the heart of the community where the largest floorspace retail outlets are expected to locate. These are planned to be the centre of activity in the community, with mixed uses and high design and amenity requirements. As centres of the community it is important that sufficient population exist in close proximity to support the services in the commercial centre and to create a complete community.

The Willoughby Town Centre is designated at 80 Avenue and 208 Street and has been planned to accommodate the scale and mixed use recommended by Coriolis. The Yorkson Neighbourhood Plan provides for a pedestrian-oriented development with mixed use and high quality design elements. An application has been submitted for the first phase of this development.

The draft Jericho Sub-Neighbourhood Plan area is proposing commercial use, including community retail and a large amount of Business/Office Park development and mixed use. The projected population in the area west of 200 Street will be sufficient to support a neighbourhood centre in the Jericho area when that area is developed, but the existing population cannot support such a centre now. Floorspace and land use requirements are important in ensuring adequate ultimate land allocations, but supporting population must be in place to create a complete community. Previous Council policy has encouraged development of complete communities by ensuring commercial development is limited (e.g. maximum 450m² or 4,844 square feet gross floor area for any retail use) in some areas until a community commercial centre can be established to avoid a piecemeal approach resulting in automobile-oriented development.

As the local population to support a centre at Jericho will not exist for several years, the centre will cater almost exclusively to automobile-oriented traffic along 200 Street. The centre will serve as an automobile dominated mall serving passers-by rather than a more pedestrian-oriented centre serving local population, consistent with sustainability concepts. Staff will explore with the proponent appropriate policies to make the centre a local neighbourhood centre rather than an automobile-oriented one designed to serve through traffic, for example:

- limitations on floorspace of individual stores (e.g. 450 m² or 4,484 square feet) until a sufficient population resides in the area to warrant larger stores, or
- provision of residential development concurrent with commercial development as part of a planned and phased strategy.

Three corners at 208 Street and 72 Avenue are designated for commercial development. The southeast corner is the only one currently in a neighbourhood plan (Northwest Gordon Estate), but is not large enough to accommodate the recommended 10 acres. The commercial designation on the southeast corner could be considered in the 208 Street review that will be initiated later this year. Consideration could be given to a different land use designation than commercial on the southeast corner and future consolidation of the two commercial designations on the north side of 72 Avenue into one commercial development on either the northeast or northwest corner to develop an integrated pedestrian-oriented centre in the future.

Small walkable neighbourhood convenience locations consisting of a few stores oriented to serve the immediate neighbourhood will be considered in the neighbourhood planning process. These commercial centres would consist of a few storefronts with small floorspaces, e.g. 800 to 2,400 square feet, accommodated in a stand-alone building, or preferably as part of a mixed use building.

Respectfully submitted,

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STRATEGIC PLANNER
for
COMMUNITY DEVELOPMENT DIVISION

ATTACHMENT A Forecasts of Demand for Commercial Space in Willowbrook and
Willoughby: 2008 to 2031

Forecasts of Demand for Commercial Space in Willowbrook and Willoughby: 2008 to 2031

Final Draft
19 May 2009

Prepared for:
Township of Langley

By:
Coriolis Consulting Corp.

Table of Contents

1.0	Introduction	1
1.1	Background	1
1.2	Approach to Analysis	1
2.0	Trade Area and Population Projections	3
2.1	Subregional Trade Area.....	3
2.2	Population Projections	3
3.0	Retail and Service Forecasts	5
3.1	Retail and Service Space per Capita.....	5
3.1.1	Existing Floorspace Ratios in the GVRD	6
3.1.2	Retail and Service Spending per Capita	7
3.1.3	Estimated Supportable Space per Capita	8
3.2	Analysis of Existing Conditions and Trends.....	8
3.2.1	Existing Retail and Service Space in the Primary Trade Area.....	9
3.2.2	Existing Retail and Service Space in the Secondary Trade Area	10
3.3	Forecast of Demand for Retail and Service Space in Langley	10
3.3.1	Forecast of Demand for Retail and Service Space in Major Commercial Locations which Draw from the Subregional Trade Area	11
3.3.2	Forecast of Demand for Retail and Service Space in Local/Neighbourhood Shopping Areas in Willoughby and Willowbrook.	14
3.3.3	Overall Retail and Service Demand in Study Area.....	15
3.4	Implications for Planning.....	16
3.4.1	Regional Oriented Locations	16
3.4.2	Local/Neighbourhood Shopping Districts in Willoughby	18
3.5	Phasing of Local Commercial Areas	24
4.0	Office Forecasts	27
4.1	Analysis of Existing Conditions and Trends.....	28
4.1.1	Regional Office Market	28

4.1.2	Langley Office Market.....	28
4.2	Forecast of Future Office Demand.....	29
4.2.1	Local Oriented Office Demand	29
4.2.2	Regional Oriented Office Demand	29
4.3	Implications for Planning.....	30
4.3.1	Regional Oriented Locations	30
4.3.2	Local/Neighbourhood Oriented Locations.....	31
5.0	Conclusions and Recommendations.....	32
5.1	Demand Forecasts	32
5.2	Planning Recommendations	33
5.2.1	Regional Locations.....	34
5.2.2	Local Commercial Areas	35
5.2.3	Phasing of Local Commercial Areas.....	36
Appendix	38

1.0 Introduction

1.1 Background

Willowbrook and Willoughby are communities located along the 200th Street corridor, between the Fraser Highway and Highway 1, in the Township of Langley. The Township has recently adopted a planning framework for the consideration of increased residential densities in the Yorkson neighbourhood in Willoughby and the Willowbrook Regional Town Centre. Increased density will result in a larger trade area population, which is likely to require more commercial space than is contemplated in current land use plans.

In addition, over the past several years there have been significant increases in the total amount of commercial floor space at Walnut Grove, at the expanded Highway 1/200th Street interchange and in the Willowbrook Regional Town Centre, which may affect the distribution of future commercial development in the western part of the Township. There are also changes to the regional transportation network (including the Golden Ears Bridge and the planned South Fraser Perimeter Road) that are likely to affect the Township's commercial development prospects in a regional context.

Therefore, the Township is updating its commercial land use policies for Willowbrook and Willoughby.

As an input to the update, Coriolis Consulting Corp. was retained to estimate the future commercial floorspace (retail, service and office) demand in Willowbrook and Willoughby and to evaluate the commercial land use planning implications. The forecast period for this analysis is 2008 to 2031.

1.2 Approach to Analysis

The Township is interested in the future prospects for large-scale regional-oriented development as well as smaller local-oriented commercial space. Therefore, our analysis examined the prospects for commercial land use at three scales based on the following scope in the terms of reference:

1. Subregional: In the large subregion made up of Langley, Surrey, Maple Ridge, and Pitt Meadows (which contains a large part of the retail inventory serving the area north of the Fraser) we examined the outlook for the future pattern of commercial development and the implications for the Willowbrook Regional Town Centre and Willoughby.

2. Corridor-wide: Based on the subregional analysis above and a more detailed look at population growth potential in the Willowbrook/Willoughby subarea, we examined the total outlook for commercial land use in this study area and the likely distribution between major centres and smaller commercial centres within the study area.
3. Local: Based on the total outlook for Willowbrook/Willoughby, we examined the implications for detailed commercial land use planning in the study area, including the size, role, and character of the Willowbrook Regional Town Centre, Willoughby Town Centre, Carvolth node, Jericho, Walnut Grove, and other existing or potential commercial centres in the corridor.

2.0 Trade Area and Population Projections

2.1 Subregional Trade Area

The Township of Langley is part of a large subregional commercial trade area.

The primary trade area includes:

- The Township of Langley.
- The City of Langley.
- The Cloverdale/Clayton area of Surrey.
- Other nearby portions of north Surrey (although these areas have limited population).

The secondary trade area includes:

- South Surrey and White Rock. Historically, the Willowbrook Regional Town Centre has been the most convenient regional oriented shopping location for South Surrey and White Rock residents. However, South Surrey is the focus of a large amount of recently completed and planned retail development that will compete with the Regional Town Centre area, so residents of this area will likely rely less on Langley for major retail purchases over time.
- Pitt Meadows/Maple Ridge. Currently, Langley likely draws a limited amount of retail demand from residents of these two communities. However, with the introduction of the Golden Ears Bridge, it is possible that Langley will draw inflow spending from the north side of the Fraser River.

Langley also draws inflow spending from people who work in Langley, but live outside the trade area, and from traffic passing through the community on the regional highway network. However, during the forecast period, the vast majority of retail and service spending in Langley will come from residents of the communities listed above.

2.2 Population Projections

We estimate that the 2008 population of the primary trade area was about 174,000, up from about 150,000 in 2001. Therefore, the primary trade area has been growing at about 2.1% per year since 2001.

The secondary trade area had a 2008 population of about 177,000, up from about 155,000 in 2001. Therefore, the secondary trade area has been growing at about 1.9% per year).

The total trade area grew from about 305,000 in 2001 to 351,000 in 2008, equivalent to an average rate of about 2.0% per year.

Based on our analysis of historic population growth in the primary and secondary trade areas plus available projections (from local municipalities and BC Stats), we examined a range of realistic, potential population growth scenarios for the different segments of the trade area. The scenarios that we examined resulted in a total 2031 trade area population ranging between about 525,000 and 560,000.

Our commercial forecasts are based on a population growth scenario that falls near the middle of this range, as outlined in Exhibit 1. As shown, this scenario assumes that the primary trade area will grow from about 174,000 in 2008 to about 278,000 in 2031 (about 2.1% per year). The secondary trade area will grow from about 177,000 in 2008 to 268,000 in 2031 (about 1.8% per year). Growth in the overall trade area is assumed to average about 1.9% per year from 2008 to 2031.

Exhibit 1: Projected Population in the Primary and Secondary Trade Area

Primary Trade Area	2006	2008	2011	2021	2031
Township of Langley ¹	96,245	102,773	111,511	143,607	171,896
City of Langley	24,899	25,352	26,276	29,605	33,355
Total Langley	121,144	128,125	137,787	173,211	205,251
Cloverdale/Clayton	43,000	46,000	48,816	59,506	72,537
Subtotal	164,144	174,125	186,602	232,717	277,788
Secondary Trade Area	2006	2008	2011	2021	2031
South Surrey/White Rock	81,505	84,942	90,310	111,231	137,787
Pitt Meadows/Maple Ridge	89,084	92,156	97,205	114,095	130,214
Subtotal	170,589	177,098	187,515	225,326	268,001
Total Trade Area	334,733	351,223	374,117	458,043	545,789

¹ The population projection for the Township of Langley is based on the figures provided by the Township adjusted upward by 2.87% in 2006 to account for the estimated 2006 Stats Can census undercount for BC. The adjustment for the undercount results in figures that are slightly higher than the Township's projection.

3.0 Retail and Service Forecasts

Retail and service businesses (such as restaurants, hair salons, video rentals, cafes) both tend to occupy grade level commercial space and the distinction between the two types of businesses is often blurred (for example a café might also sell retail goods). Therefore, we combine our forecast of demand for retail and service space.

Our total retail and service demand forecast is divided into two different categories:

1. An estimate of the demand for regional oriented retail and service space. In the GVRD, this space is located in the Regional Town Centres (RTCs), in concentrations of large format retail stores on major arterial roads (e.g. along United Boulevard in Coquitlam or Bridgeport Road in Richmond) or in highly specialized locations (such as at YVR). Tenants include clothing and department stores, home décor and large building supply stores, chain restaurants, a variety of large format stores as well as smaller scale retailers that want to locate in a regional oriented shopping location. Some of these businesses are large (such as department stores or home improvement stores), often in excess of 100,000 sq.ft. However, many are small (such as clothing stores or specialty retailers), often in the 2,000 to 5,000 sq.ft. range.
2. An estimate of the demand for local oriented retail and service space. This local-serving space is occupied by businesses that meet the everyday needs of residents, typically located along neighbourhood commercial streets, in small retail plazas, community-oriented shopping malls, or in scattered locations. Common tenants include supermarkets and specialty food stores, restaurants and cafes, drycleaners, hair salons, pharmacies, liquor stores, small pet supplies, local hardware stores, and video rental outlets. Most of these businesses are less than 10,000 sq.ft. The main exceptions are pharmacies (which are often in the 10,000 to 20,000 sq.ft. range) and supermarkets (which are typically in the 25,000 to 50,000 sq.ft. range).

These two different types of space tend to have different locational preferences. By dividing the demand estimate, it allows us to comment on the likely geographic distribution of total retail and service demand within the Township.

3.1 Retail and Service Space per Capita

To forecast future retail and service demand in Langley, our approach is to apply an estimate of the supportable retail and service floorspace per capita to the projected population in the trade area. Because our analysis examines the potential demand for two different types of retail and service space (subregional-oriented retail and service floorspace and local-oriented retail and service space), we first need to determine the supportable retail and service space per capita for each type of these two kinds of commercial space. This section documents our estimate of supportable space per capita.

3.1.1 Existing Floorspace Ratios in the GVRD

Retail and service demand in a city or region is largely determined by the number of residents and their incomes and spending patterns (and to a lesser degree on employee and visitor spending).

The City of Vancouver has more retail and service space per capita than other municipalities in Greater Vancouver because it captures most of the non-resident spending in the region. Based on detailed floorspace data that we compiled², outside of the City of Vancouver there is about 42 sq.ft. of retail and service space for every resident.

This retail and service space can be divided into two general categories based on its spatial location. We completed separate forecasts of potential demand for each of the two categories (the combination of the two forecasts results in our total retail and service demand forecast for the Township):

1. Space located in major commercial locations and regional shopping areas. This region-serving retail space tends to be occupied by businesses that provide goods and services to a large sub-regional trade area population. Holding aside the City of Vancouver, we estimate that there is an average of 22 sq.ft. per capita of region-serving retail space in Greater Vancouver. Existing region-serving retail space in Langley is focused in the Willowbrook Regional Town Centre area.
2. Space in locally oriented retail and service districts. This local-serving space is occupied by businesses that meet the everyday needs of residents, typically located along neighbourhood commercial streets, in small retail plazas, community-oriented shopping malls, or in scattered locations. We estimate that there is an average of 20 sq.ft. per capita of local-serving retail and service space in Greater Vancouver outside of the City of Vancouver. The Township's local-serving retail space is focused mainly in neighbourhood commercial areas in Walnut Grove, Aldergrove, Murrayville, Fort Langley, Willoughby, and along major arterials including 200th Street.

Supermarket space makes up a significant portion of the local-oriented space. We estimate that there is about 4 sq.ft. of supermarket space per capita in the region. The other 16 sq.ft. of local oriented space is made up a wide variety of retail and service businesses.

The ratio of retail floorspace to population differs for each municipality because municipal boundaries rarely correspond to retail trade areas (e.g., the Township and City of Langley make up a single retail trade area). Communities with more retail space than the regional average draw retail demand from adjacent communities; communities with less than average retail space per capita export sales to stores in other municipalities.

² This analysis is based primarily on BC Assessment floorspace data, with adjustments by Coriolis Consulting Corp. for omissions in the data.

3.1.2 Retail and Service Spending per Capita

We also analyzed retail and service expenditures per capita in BC and used this analysis to estimate total retail and service spending in Langley by type of business and the amount of retail space that is supportable based on the spending. The following table summarizes the estimated retail and service spending per capita.

Exhibit 2: Estimated Annual Retail and Service Spending per Person

2007/2008 Annual Retail Spending by Category		Annual Sales per Capita
1	new car Dealers	\$2,092.70
2	used and rec motor vehicles and parts	\$435.57
3	gas stations	\$1,696.62
4	furniture stores	\$289.21
5	home furnishing stores	\$241.12
6	computer and software stores	\$54.91
7	home electronics and appliances	\$503.97
8	home centres and hardware	\$667.88
9	specialized building materials and garden stores	\$200.50
10	supermarkets	\$2,313.13
11	convenience and specialty foods	\$207.64
12	beer,wine, liquor	\$677.88
13	pharmacies and personal care stores	\$700.18
14	clothing stores	\$567.94
15	shoes, accessories and jewelry	\$171.22
16	general merchandise	\$1,445.20
17	sporting goods, hobby, music, books	\$435.09
18	miscellaneous stores	\$386.55
	Subtotal Retail Spending	\$13,087.31
19	services ³ (2005 data)	\$1,672.92
	Total Retail and Service	\$14,760.23
	Totals Excluding Auto Related (items 1, 2, 3)	\$10,535.34

Source: Based on Statistics Canada and BC Stats data

Excluding automotive related uses (which often have limited floorspace, but large site requirements), retail and service expenditures in BC total at least \$10,535 per person (the total is actually higher as data is not available for all services). Retail sales in different businesses vary widely depending on the store. Based on available data, average sales per sq.ft. range from a

³ This includes spending at service businesses that typically locate in grade level commercial space, such as restaurants, drycleaning, hair care, bicycle repair, auto service, and photofinishing. The spending data is not available for all services so this figure understates total spending at grade level commercial services.

low of about \$175 per sq.ft. up to a high of over \$1000 per sq.ft. depending on the retail segment and the store location, with average sales per sq.ft. between roughly \$200 and \$300 per sq.ft. for most retail categories. Using the mid-point of about \$250 per sq.ft. per year, spending by the average resident would support 42 sq.ft. of retail and service space (\$10,535 per person/\$250 per sq.ft. = 42 sq.ft. per person) within a regional trade area, which matches the empirical evidence outlined in Section 3.1.1.

This data also indicates that each residents should support about 4 sq.ft. of supermarket space per capita, assuming an average sales per sq.ft. of about \$600 per sq.ft. at the average supermarket (\$2313 of spending per capita / \$600 per sq.ft. = 3.9 sq.ft. of supermarket space per capita).

3.1.3 Estimated Supportable Space per Capita

Overall, our analysis indicates that, on average, Langley residents likely support about 42 sq.ft. of retail and service space per capita within the regional trade area. About 22 sq.ft. of this supportable space goes to the types of businesses that generally locate in major retail and commercial locations. The other 20 sq.ft. supports businesses that serve the day to day needs of the community so it would be focused in local/neighbourhood oriented locations (with about 4 sq.ft. of supermarket space and 16 sq.ft. of other local-oriented businesses).

3.2 Analysis of Existing Conditions and Trends

We completed an analysis of the subregional retail and service market to help determine the Township of Langley's existing and expected future role in the subregional retail market, consisting of Langley, Surrey and Pitt Meadows/Maple Ridge. Our analysis included the following steps:

1. We examined the existing pattern of retail and service development in the subregion and in Langley in particular.
2. We examined market conditions (vacancy, new development) in the Langley trade area.
3. Using data that we have from BC Assessment Authority, supplemented with our own research, we completed a detailed analysis of the existing amount and distribution and the historic growth in the total amount of retail and service floorspace in the municipalities in Langley's trade area.

4. We analyzed the number and location of major retail chains by municipality to determine which municipalities have gaps in the inventory of retail businesses, such as department stores, large building supply stores, large specialty retail businesses, and grocery stores.

3.2.1 Existing Retail and Service Space in the Primary Trade Area

The Township of Langley has about 2.1 million sq.ft. of retail and service space in local/neighbourhood oriented locations (such as Walnut Grove, Fort Langley, Murrayville, Aldergrove). This is about the amount retail and service space that we would expect for its current population (20 sq.ft. per capita).

There is currently 8.2 million sq.ft., or about 47 sq.ft. of retail and service per capita, in the primary trade area (City and Township of Langley plus Cloverdale/Clayton). Of this, we estimate that about 3.5 million sq.ft., or 20 sq.ft. per capita, is in locally oriented retail locations and about 4.7 million sq.ft., or 27 sq.ft. per capita, is in major commercial/subregional locations⁴. The following table compares the existing situation in Langley with the regional average.

Exhibit 3: Existing Retail and Service Space Per Capita

	Primary Trade Area	GVRD (excluding Vancouver)
Total Retail and Service Space per Capita	47 sq.ft.	42 sq.ft.
Regional Oriented Space per Capita	27 sq.ft.	22 sq.ft.
Local Oriented Space per Capita	20 sq.ft.	20 sq.ft.

This indicates that Langley’s primary trade area is currently importing a significant amount of retail spending from other locations. We estimate that inflow spending is supporting about 23%⁵ more regional oriented retail and service space in Langley than is supported by the local population. Much of this imported spending is supporting retail businesses in the Willowbrook Regional Town Centre area.

There are few major retail chains that have operations in the Lower Mainland that do not already have a presence in Langley. The only notable large retailer not yet in Langley is IKEA (which only has 2 locations in the Lower Mainland). In addition, Rona’s existing Langley location is smaller than typical so it may be interested in expanding/relocating. Lowe’s is also expanding into Canada and will likely be interested in a location to serve Langley at some point. An evaluation of the number and location of major retail chains by municipality is included in the appendix.

⁴ This assumes that about 500,000 sq.ft. of the 3.0 million sq.ft. in the City of Langley is locally oriented (about 20 sq.ft. per capita).

⁵ 27 sq.ft. per capita/22 sq.ft. per capita = 1.23.

3.2.2 Existing Retail and Service Space in the Secondary Trade Area

There is about 40 sq.ft. of retail and service space per capita in South Surrey/White Rock (including the recently completed phases of Grandview Corners), suggesting that these communities have about the amount of retail space that would be expected for their population. This is up from about 33 sq.ft per capita in 2006. In the past, residents of these communities exported a significant share of their retail spending. Our review of planned projects indicates that (in addition to the recently completed phases of Grandview Corners), there are currently several other significant retail projects planned for South Surrey. In total, these planned projects could bring over 900,000 sq.ft. of additional space to the market which suggests that residents of South Surrey/White Rock will have greater retail selection over time and will be less likely to shop in the City and Township of Langley.

There is about 35 sq.ft. of retail and service space per capita in Pitt Meadows and Maple Ridge. Residents of these communities are exporting retail expenditures to adjacent municipalities, such as Coquitlam and Port Coquitlam. There are no existing plans for major additions to the Pitt Meadows or Maple Ridge retail inventory and there is very little land in retail locations that is available for large scale retail development. Smart Centres has acquired lands in both municipalities (Albion Flats in Maple Ridge and land on the north side of Lougheed in Pitt Meadows) and is interested in building a large scale shopping centre (or two), but at this point approvals are uncertain. During the foreseeable future, residents of these communities will continue to export sales to other municipalities.

3.3 Forecast of Demand for Retail and Service Space in Langley

We completed our forecast of demand for additional retail and service space in Langley in two steps:

1. First, we projected demand for the type of retail and service space that focuses in major commercial locations that draw from the subregional trade area.
2. Second, we projected demand for retail and service space at local oriented commercial locations, with a focus on Willoughby and Willowbrook.

3.3.1 Forecast of Demand for Retail and Service Space in Major Commercial Locations which Draw from the Subregional Trade Area

We examined the potential demand for retail and service space that will likely locate in major/subregional shopping locations in Langley. This category includes businesses that require a large trade area population (so typically draw from a large geographic area) such as department stores, discount department stores, large building supply outlets, warehouse stores, big box retailers, specialty retailers, clothing stores, major restaurants, and auto dealers. This category also includes some retail businesses that serve the day to day needs of residents, but choose to locate in a major retail concentration, such as some large food stores and some services. In Langley, these types of businesses will be interested in sites in the Willowbrook Regional Town Centre area or in any new regional oriented shopping districts planned along the 200th Street corridor.

We completed two forecasts of subregional oriented retail and service demand that differ based on the assumed inflow spending from the secondary trade area.

Our analysis indicates that inflow spending is currently adding 20% to 25% to the amount of regional oriented retail space in Langley (Township and City combined).

To evaluate the potential inflow from the secondary trade area in the future, we considered the following:

- Historically, Langley experienced significant retail inflow because of its role as the main retail centre for the Langley, South Surrey, Maple Ridge/Pitt Meadows and Abbotsford areas. However, over the past several years all of these areas have experienced large additions to the stock of regional oriented retail businesses. Therefore, the surrounding communities are now retaining more of their retail potential and retail inflow to Langley has been declining.
- Langley should continue to experience significant inflow spending because of its role as a major employment centre, drawing retail and service spending from people who work in Langley, but live elsewhere.
- Langley will continue to benefit from inflow spending from South Surrey. However, this inflow will decline over time due to the large additions of new and planned retail space in South Surrey.
- As the population of Maple Ridge and Pitt Meadows grows, these communities will be able to attract new retailers (if development sites are available) that allow these municipalities to retain more retail and service spending, possibly reducing inflow spending to Langley. The upgrade to the Pitt River Bridge will also mean that any outflow spending from Maple Ridge and Pitt Meadows could increasingly go to the Coquitlam and Port Coquitlam. On the other hand, the opening of the Golden Ears Bridge will make Langley more accessible to the

residents of Pitt Meadows and Maple Ridge. This will increase inflow spending to Langley if the improved accessibility is not offset by the planned bridge tolls.

Overall, we think that inflow spending to Langley from the secondary trade area will likely decline over the long term due to increase selection in the secondary trade area. Therefore, both of our demand scenarios assume less inflow retail spending to Langley over time.

Low Demand Scenario

To forecast demand for retail and service space that will go to major commercial locations in Langley we applied our estimate of 22 sq.ft. of retail and service space per capita in major commercial/subregional oriented locations to the expected population in the primary trade in 2031. We then grossed this figure up to account for inflow spending from the secondary trade area.

Our analysis indicates that the population of the primary trade area (Langley and Cloverdale/Clayton) will support about 6.1 million sq.ft. of retail and service space in major commercial locations by 2031 (277,788 population x 22 sq.ft. per capita).

Our low scenario assumes that inflow spending from the secondary trade area declines significantly over time, resulting in an additional 5% of retail demand in Langley by 2031 (down from 20% to 25% in 2008). Therefore, total regional-oriented retail and service demand in Langley (Township and City) would be about 6.4 million sq.ft. by 2031. As of 2008, there is about 4.7 million sq.ft. of existing space in Willowbrook and the City of Langley⁶, so there will be demand for an additional 1.7 million sq.ft. of retail and service space between 2008 and 2031. This is a 36% increase over the existing inventory of retail and service space in subregional oriented shopping locations in Langley.

Our low demand scenario for regional oriented retail and service space in Langley is summarized in the following table.

Exhibit 4: Lower Regional Oriented Demand Scenario

Lower Demand Scenario	2008	2031	Change
Demand from Langley/Cloverdale Residents	3.8 million sq.ft.	6.1 million sq.ft.	2.3 million sq.ft.
Inflow from Secondary Trade Area	0.9 million sq.ft.	0.3 million sq.ft.	-0.6 million sq.ft.
Total Demand	4.7 million sq.ft.	6.4 million sq.ft.	1.7 million sq.ft.

This additional subregional oriented retail and service demand will go to the Willowbrook Regional Town Centre and any planned major commercial locations along the 200th Street corridor in Willoughby. This low scenario is conservative as it assumes very little inflow spending to Langley as of 2031.

⁶ This figure assumes that 500,000 sq.ft. of the 3.0 million sq.ft. of retail and service in the City of Langley is local oriented retail and service space so it is excluded from our existing regional oriented inventory.

High Demand Scenario

Our high demand scenario assumes that inflow spending only declines modestly over time, resulting in an additional 15% of demand in Langley (down from 20% to 25%). Therefore, regional-oriented retail and service demand in Langley (Township and City) would total about 7.0 million sq.ft. by 2031, or an additional 2.3 million sq.ft. between 2008 and 2031. This is a 49% increase over the existing 4.7 million sq.ft. of subregional oriented retail and service space in Willowbrook and the City of Langley.

Our high demand scenario for regional oriented retail and service space in Langley is summarized in the following table.

Exhibit 5: Higher Regional Oriented Demand Scenario

Higher Demand Scenario	2008	2031	Change
Demand from Langley/Cloverdale Residents	3.8 million sq.ft.	6.1 million sq.ft.	2.3 million sq.ft.
Inflow from Secondary Trade Area	0.9 million sq.ft.	0.9 million sq.ft.	0 million sq.ft.
Total Demand	4.7 million sq.ft.	7.0 million sq.ft.	2.3 million sq.ft.

This additional subregional oriented retail and service demand will go to the Willowbrook Regional Town Centre and any planned major commercial locations along the 200th Street corridor in Willoughby. This high scenario may be optimistic as it assumes continued significant inflow to Langley despite increasing competition in the secondary trade area.

Share of Projected Regional Oriented Demand to the Township

The Regional Town Centre functions as a single retail and service market area, although it spans the boundary of the Township and the City. Because it functions as a single market area, it is difficult to forecast the share of our estimated demand that will go to the Township and the share that will go to the City. However, for planning purposes, the Township is interested in gauging the share that could go to sites on the Township's side of the municipal boundary.

To estimate the portion that could go to the Township, we examined the recent split in new regional oriented retail and service development between the Township and the City of Langley and we examined the supply of land that is available for regional oriented retail and service development in the Township and the City:

1. We estimate that the Township of Langley has accounted for about 70% of the total regional oriented retail and service space built in Langley since 1997, with the remaining 30% going to the City.
2. The Township of Langley has a significant amount of vacant (or highly under-utilized) land in Willowbrook and Willoughby (mainly in the Carvolth portion of Willoughby near Highway 1) that is attractive for regional oriented retail businesses so it has the ability to continue to accommodate regional oriented retail development if commercial land use policy permits.

The City of Langley has a large amount of land fronting on the Langley Bypass that is currently used for industrial purposes, but designated for commercial use. Over time, portions

of this land will likely be attractive for redevelopment and could accommodate regional oriented retail and service businesses. Therefore, the City also has the ability to accommodate a share of projected regional-oriented demand if planning policies permit.

If Carvolth (or other land near the interchange) is permitted to accommodate regional oriented retail businesses, we would expect the Township to capture about 70% of our projected regional oriented commercial demand (in Willowbrook and along the 200th Street corridor) and the City of Langley to capture about 30% (on sites fronting on the Langley Bypass).

Therefore, we estimate that there will be demand for an additional 1.2 million sq.ft. to 1.6 million sq.ft. of retail and service space in the Township's major commercial and subregional oriented shopping locations between 2008 and 2031.

3.3.2 Forecast of Demand for Retail and Service Space in Local/Neighbourhood Shopping Areas in Willoughby and Willowbrook

In addition to our estimated demand for retail and service space in subregional/major commercial locations, there will be demand for additional retail and service space in locally oriented/neighbourhood commercial locations in the Township.

Locally oriented retail and service space is comprised of the businesses that serve the day to day needs of residents, such as grocery stores, pharmacies, banks, salons, video rental, small restaurants/pubs, cafes, liquor stores, delis, small hardware stores and personal services.

Overall, our local retail and service analysis indicates that:

1. The Township of Langley has about 2.1 million sq.ft. of retail and service outside of Willowbrook, or about 20 sq.ft. per capita. This is the amount of locally oriented retail and service space that we would expect for a community of this size.
2. Adjacent municipalities/communities are well-served with locally oriented retail space and have the ability to accommodate additional space over time as their populations grow so the locally oriented retailers in the Township will likely see little net inflow from residents of neighbouring communities over time (there will be some influx – particularly from the City of Langley and Clayton – but this will likely be offset by outflow to the same locations).

To forecast demand for retail and service space that will go to local oriented commercial locations we applied our estimate of 20 sq.ft. of retail and service space per capita to the expected population growth in the Township from 2008 to 2031.

We estimate that total demand for local oriented retail and service space in the Township will be about 3.4 million sq.ft. by 2031 (172,000 residents x 20 sq.ft. per capita), or about 1.3 million sq.ft. more than the existing inventory of locally oriented retail space in the Township (2.1 million sq.ft.).

The Willowbrook/Willoughby area is expected to account for about 32.3% of the Township’s total population in 2031 (54,000 out of 167,100⁷). Therefore, we would expect total local oriented retail and service demand in these two areas to be about 1.1 million sq.ft. by 2031 (3.4 million sq.ft. x 32.3%). There is currently about 268,000 sq.ft. of space in Willoughby (the space in Willowbrook falls into our subregional category in the preceding section) so we estimate demand for an additional 840,000 sq.ft. or so of local oriented retail and service space in Willowbrook/Willoughby between 2008 and 2031.

Retail and service businesses generating the demand for this additional space will look for locations in the Willowbrook/Willoughby that offer convenient access and visibility to residents of the immediate neighbourhood.

Our forecast of local oriented retail and service space in Langley is summarized in the following tables.

Exhibit 6a: Local Oriented Retail and Service Demand Forecast for the Township

	2008	2031
Total Demand from Township of Langley Residents	2.1 million sq.ft.	3.4 million sq.ft.
Existing Inventory in Township	2.1 million sq.ft.	2.1 million sq.ft.
Growth from 2008 to 2031	n/a	1.3 million sq.ft.

Exhibit 6b: Local Oriented Retail and Service Demand Forecast for Willowbrook/Willoughby

	2008	2031
Demand from Willowbrook/Willoughby Residents ⁸	0.3 million sq.ft.	1.1 million sq.ft.
Existing Inventory in Willoughby ⁹	0.2 to 0.3 million sq.ft.	0.2 to 0.3 million sq.ft.
Growth from 2008 to 2031	n/a	0.8 to 0.9 million sq.ft.

3.3.3 Overall Retail and Service Demand in Study Area

Combined, we estimate total additional retail and service demand in Willowbrook and Willoughby from 2008 to 2031 as follows:

1. 1.2 million to 1.6 million sq.ft. of additional retail and service space in major/subregional oriented commercial locations.
2. 0.8 million to 0.9 million sq.ft. of additional local oriented retail and service space in neighbourhood/community commercial areas.

⁷ This figure excludes an estimate of the net census undercount so it is slightly lower than the total Township population projection that we have used in our analysis.

⁸ 2008 estimate based on 20 sq.ft. per capita and a total 2008 population of 16,974.

⁹ The retail and service floorspace in Willowbrook is all included in the regional oriented category in Section 3.3.1

3.4 Implications for Planning

We were asked to comment on the implications of our retail and service analysis for commercial land use planning in the Willowbrook/Willoughby area, including the size, role and character of:

1. The Willowbrook Regional Town Centre.
2. The Carvolth mixed-use node (at 200th Street and 86th Avenue).
3. The Willoughby Town Centre (at 208th Street and 80th Avenue).
4. The Jericho area (at 200th Street and 80th Avenue).
5. Any other commercial centres that should be considered.

3.4.1 Regional Oriented Locations

We estimate that there will be demand for about 1.2 million to 1.6 million sq.ft. of retail and service space in the Township of Langley's commercial locations that cater to subregional oriented businesses. At typical suburban retail and service densities of about 0.35 FSR, we estimate that between 80 and 105 acres of land would be required to accommodate all of the estimated demand.

Currently, the Willowbrook area is the only subregional commercial district in the Township. Because it is well established and includes a wide selection of major retail businesses, it will continue to be an attractive location for this type of development and will continue to be the dominant retail and service area in Langley. However, it will become increasingly difficult to accommodate retail and service expansion in this area because:

1. There is a limited number of large vacant sites. Based on fieldwork and mapping from the Township, we estimate that there are roughly 25 to 30 acres of vacant land in the Willowbrook area that are designated for commercial use and attractive for retail and service development. Therefore, Willowbrook cannot accommodate all of our estimated subregional oriented retail and service demand on vacant sites.
2. Although large portions of the area are used for surface parking, it is not financially attractive to build retail space on surface parking lots if the existing parking stalls covered by the new building need to be replaced in a new parking structure as the cost of building underground or structured parking is significantly higher than retail land value. This may change over time if retail land values and retail lease rates increase, but during the foreseeable future, this will be a constraint on adding retail space.

3. Over the long term, infill and redevelopment will likely occur (particularly if the Township encourages higher density residential development in Willowbrook), but this may not result in a net increase in retail space as existing space will be demolished.

Our analysis indicates that there is clearly an opportunity for an additional subregional oriented shopping location in the Township, in addition to Willowbrook.

There will be demand from retail and service businesses that serve the subregional trade area for sites in the 200th Street corridor, near the interchange with Highway 1. This location provides very convenient access for customers from a broad geographic area, including Walnut Grove, Willoughby, Clayton, Pitt Meadows/Maple Ridge, and North Surrey. In addition, this area has a large supply of vacant land to accommodate new development and a significant amount is already designated for commercial use. About 48 acres is currently designated commercial at Carvolth (but some of this is already developed) and there is a large area of surrounding land designated for business park that is not yet developed.

The Township needs to decide how to direct future retail and service demand. Our analysis indicates that there will be significantly more demand for regional oriented retail and service space than can be accommodated in Willowbrook. Part of the Carvolth area has been designated for commercial development and would be attractive to regional oriented retailers. However, current planning policy restricts the size of retail businesses permitted in Carvolth to about 5,000 sq.ft. so regional oriented retail development has not occurred. The Township has two options.

Designate Carvolth as a Regional Oriented Retail District

The Township could allow a portion of Carvolth to evolve into a regional oriented retail district. This would have a positive impact on the tax base in the Township as it would allow the Township to accommodate all of the projected retail and service growth. It would also create an opportunity to free up sites in Willowbrook for redevelopment to higher densities if some of the large floorplate users in Willowbrook relocated to Carvolth. This could help Willowbrook evolve into a more urban, mixed-use commercial centre over time.

Limit Retail Development in Carvolth

The Township could limit retail and service uses in Carvolth so that it does not develop into a regional oriented commercial location, retaining it entirely for business park development (plus small scale retail users). Under this option, our forecasted regional oriented retail demand could not be accommodated in the Township so it would go elsewhere. We would expect the unmet regional oriented retail demand to create additional pressure to redevelop the industrial lands in the City of Langley and possibly create additional retail demand in Cloverdale.

Suggested Planning Approach

We recommend that the Township consider planning for two major retail and service locations to accommodate the projected demand for regional oriented retail and service space:

1. Willowbrook. This area will continue to be the major commercial location in the Township. Over time, there is an opportunity to densify the Willowbrook commercial area (if desired) with infill commercial development and higher density mixed use residential and commercial projects. However, there is a limited amount of vacant land that is attractive for retail and service use so the ability to add to the total inventory of retail and service space appears to be constrained.
2. Carvolth. There is an opportunity for a significant subregional oriented retail and service commercial district at Carvolth. This area will be attractive to retail businesses that draw from a large geographic area, including large scale retail businesses and as well as smaller scale and specialty retail, service and entertainment businesses. Given that these businesses draw from a large geographic area, convenient vehicular access at a subregional level access and sufficient parking will be important. If Carvolth is permitted to develop as a regional oriented retail and service district, it should not be used to accommodate local oriented retail development. There are other locations that are attractive for local commercial development, but limited opportunities to accommodate regional oriented retail development in the Township.

3.4.2 Local/Neighbourhood Shopping Districts in Willoughby

We estimate that there will be demand for about 840,000 sq.ft. of additional retail and service space in local oriented retail and service locations in Willoughby and Willowbrook between 2008 and 2031. Willowbrook is already a well established commercial area (with some local and regional serving businesses) and it will attract substantial retail growth over the forecast period (as outlined in Section 3.4.1). Some of the growth in Willowbrook will come from businesses that are local serving, but draw from a larger area (such as large scale grocery stores) so this type of growth is accounted for in our forecasts in Section 3.4.1.

This section provides our recommendation on the number, size and location of local oriented commercial locations that should be considered in Willoughby given our demand outlook.

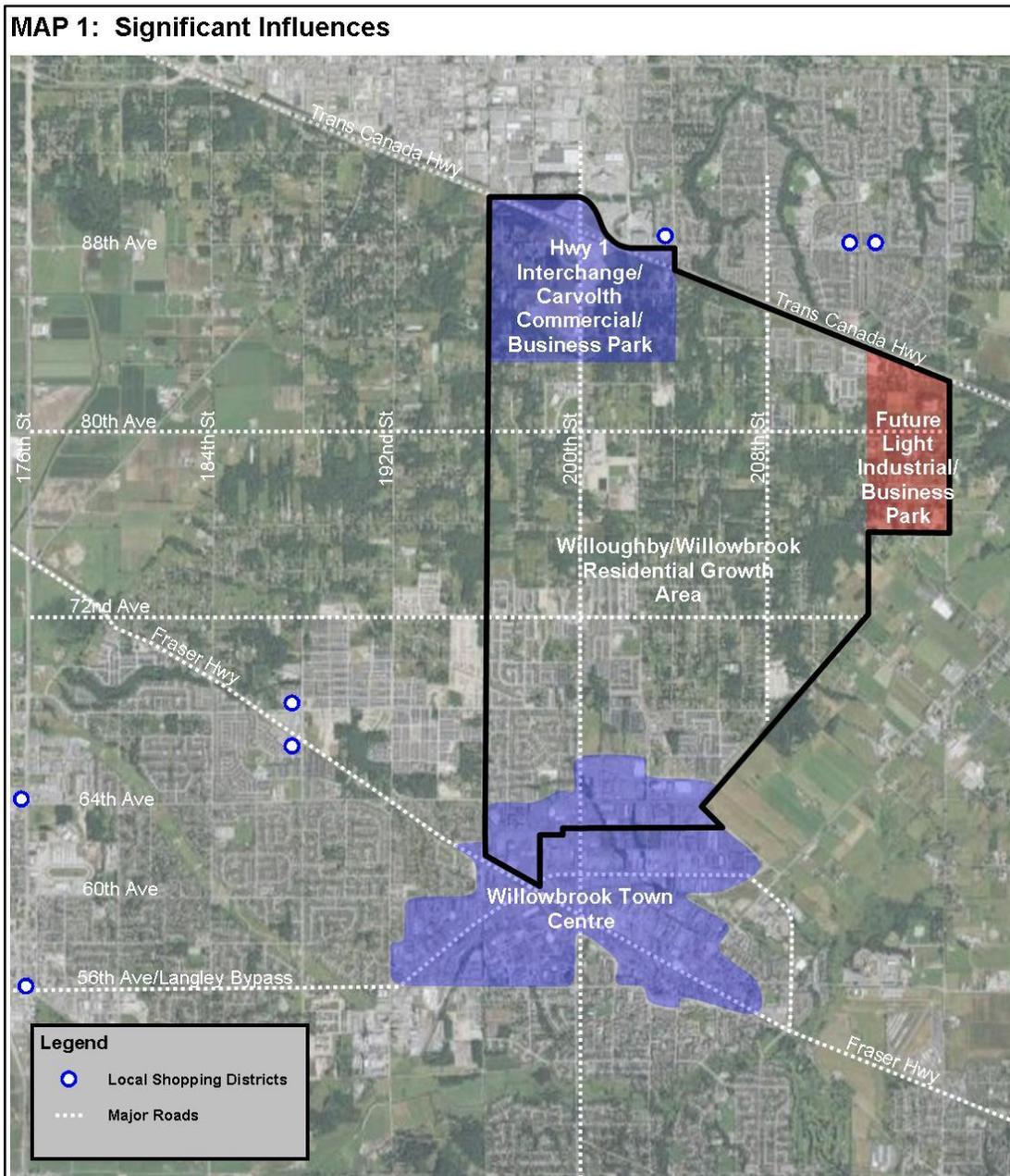
To help determine the implications of our overall local oriented retail and service demand forecasts for the local area commercial planning policies, we examined a variety of factors that could influence the potential number and location of neighbourhood serving commercial districts:

1. The existing significant influences, such as the existing road network, pattern of local commercial development, and boundaries of the residential growth area in Willoughby.

2. The potential number of local commercial locations in Willoughby given our demand forecasts.
3. The location of planned commercial development in Willoughby.
4. The potential timing and geographic distribution of future population growth in Willoughby.

Existing Significant Influences

The existing major road network, location of major commercial locations, location of surrounding community oriented shopping districts, and boundary of the Willowbrook/Willoughby residential growth area are shown on Map 1.



The main implications of these influences are:

- The study area is bracketed by the Willowbrook Regional Town Centre on the south and the planned Carvolth Business Park and Highway interchange on the north. These major existing and planned commercial areas will draw customers from a wide geographic area and, due to their scale and mix of businesses, will not be attractive locations for neighbourhood/local oriented businesses.
- The surrounding residential areas (such as Clayton, Cloverdale, Walnut Grove, City of Langley) are well served by community oriented commercial districts so local oriented businesses in the Willoughby area are unlikely to draw significant net inflow spending from these areas.
- The main north-south roads through Willoughby are 200th Street and 208th Street and the main east-west routes are 72nd Avenue and 80th Avenue. Frontage on these routes will be attractive to retail and service businesses as it will provide visibility and convenient vehicular access.
- The Willowbrook/Willoughby residential growth area is bounded by areas that are designated for rural and industrial uses so residential growth will occur in a relatively small, defined geographic area (about 5km north-south by 3 km east-west at the widest point). This may limit the number of local oriented commercial districts that are required to conveniently serve the Willoughby area.

Potential Number of Local Oriented Shopping Districts

To help determine the number of additional neighbourhood shopping locations that are warranted in the Willoughby area, we examined the potential demand for grocery store space, the main anchor tenant of most neighbourhood shopping districts. Based on our analysis of supermarket and specialty food store expenditures per capita, sales per square foot at supermarkets and on the existing amount of supermarket space per capita in Langley, we estimate that Langley residents should support about 4.0 sq.ft. of supermarket space per capita.

By 2031, there will be about 54,000 residents in Willowbrook/Willoughby, which is an increase of about 37,000 over 2008. The additional 37,000 residents will support demand for about 148,000 sq.ft. of additional supermarket space in the area (the total Willowbrook/Willoughby population will support more space than this, but existing supermarkets in Willowbrook already rely on the existing 17,000 residents in these areas so the existing population is not included in this calculation).

Newer supermarkets generally range from a low of about 25,000 sq.ft. up to a maximum of about 50,000 sq.ft., with most neighbourhood oriented stores in the 25,000 to 35,000 sq.ft. range. At 30,000 sq.ft. per new supermarket, this suggests that the Township should be considering about 5 additional neighbourhood shopping districts in the Willowbrook/Willoughby area by 2031 (with

the potential for more in the longer term). One of these is likely to go to Willowbrook (as Willowbrook's population will grow and our understanding is that an applicant is currently interested in including a new supermarket in the Willowbrook area) so there is potential for up to 4 supermarkets in Willoughby.

Existing and Planned Local Oriented Commercial Centres in Willoughby

The existing and planned local oriented commercial centres in Willoughby are as follows:

- The intersection of 72nd Avenue and 200th Street includes commercial space at each corner. This node does not include a supermarket and is surrounded by residential projects so there is limited ability to expand this node.
- The Willoughby Town Centre is planned for intersection of 80th Avenue and 208th Street. The Town Centre is envisioned to be the focus of local oriented commercial development in the Willoughby area. This area is well-suited for significant commercial development as it is highly accessible and has not been subdivided into small parcels so it is still practical to assemble a relatively large site.
- The Jericho area is located between 80th Avenue and 76th Avenue along 200th Street. This area includes the recently completed 240,000 sq.ft. Langley Events Centre and an older garden centre/nursery, and it is immediately south of an emerging business park. Based on discussions with the Township, our understanding is that a developer is interested in pursuing commercial development at a site in the Jericho area.
- The Willoughby Community Plan identifies the intersection of 72nd Avenue and 208th Street as a potential local oriented commercial node. There are currently no plans for commercial development at this location, but it would be a highly accessible location.
- Carvolth is designated for commercial development. This area is well suited for subregional oriented retail and service businesses. Some local oriented businesses will likely be drawn to this area to take advantage of the 200th Street exposure. However, if Carvolth is permitted to evolve into a major subregional commercial location, local oriented retail and service businesses should be encouraged (or required) to locate elsewhere in Willoughby, retaining lands at Carvolth for region-serving businesses.
- The Willowbrook Regional Town Centre includes some vacant sites that are designated for commercial use which could accommodate new retail and service development. Based on discussions with the Township, our understanding is that a developer is proposing a supermarket for a large site between 66th Avenue and 68th Avenue on 200th Street. The Willowbrook Regional Town Centre will continue to be the dominant regional oriented commercial district in Langley. Given that it is also a residential growth area, there will be demand for some expansion of the local oriented retail businesses in Willowbrook.

Expected Timing and Distribution of Population Growth in Willoughby and Willowbrook

There are not any detailed population forecasts available for each of the neighbourhoods within Willoughby and Willowbrook. However, our understanding is that the estimated residential capacity by neighbourhood is approximately as follows (this is not the 2031 forecast as build-out will likely take much longer):

Exhibit 7: Potential Population by Neighbourhood

Neighbourhood	Estimated 2008 ¹⁰ Population	Assumed Population Capacity	Potential Growth
Carvolth	50	248	198
East Latimer	400	11,499	11,099
West Latimer	450	11,635	11,185
Yorkson	2,688	27,717	25,034
NE Gordon	950	4,478	3,528
Routley	3,196	3,196	0
Smith	350	4,056	3,706
SW Gordon	5,300	8,237	2,937
Williams	300	410	110
Willowbrook	3,295	5,798	2,503
Total	16,974	77,274	60,300

The major growth areas in Willoughby will be Yorkson and Latimer. In the long term, Yorkson and Latimer (East and West) will account for about 70% of the Willoughby population and about 80% of the Willoughby residential growth. The remainder will be focused mainly in the southern part of Willoughby, in Gordon, Smith and Routley (which is almost built-out).

Based on discussions with the Township, it is reasonable to assume that residential growth is likely to be focused in Yorkson, NE Gordon, SW Gordon and Smith between 2008 and 2031. Growth in Latimer and Willowbrook is anticipated to be moderate up to 2031.

This suggests that the priority for local oriented commercial space will be in locations that serve the Yorkson, Gordon and Routley neighbourhoods (Routley is already developed).

Suggested Network of Local Commercial Areas

Given our demand estimates and the factors evaluated above, we recommend the following approach to local area commercial planning in Willoughby and Willowbrook.

1. We estimate that there will be demand for about 840,000 sq.ft. of additional retail and service space in local oriented retail and service locations in Willoughby and Willowbrook between 2008 and 2031 (and more in the longer term).

¹⁰ This is a rough estimated by Coriolis Consulting based on a ballpark estimate of the number of existing housing units and an assumed population per housing unit.

2. Some of this demand will likely go to the locations outside the primary local commercial areas, so we make the following deductions from our overall demand estimate:

- Typically, a share of local oriented demand is attracted to neighbourhood oriented convenience locations that are often comprised of convenience stores plus other small businesses (e.g., potentially a café, hair salon, drycleaner, or other small businesses). We would suggest planning about one neighbourhood convenience location per 5000 residents in Willoughby, or about 10 by 2031. Assuming 7,500 sq.ft. per location on average (likely 2 to 5 small businesses), these locations would accommodate about 75,000 sq.ft. of the overall estimated demand. These should be distributed throughout the Willoughby area.
- Some local oriented businesses will be attracted to sites along 200th Street that are already designated or zoned for commercial use, particularly in the Carvolth area. In addition, some local oriented businesses (such as restaurants) will locate in Willowbrook. We assume that about 75,000 sq.ft. of our overall demand will fall into these categories.

After allowing for these deductions, we estimate (by 2031) there will be roughly 700,000 sq.ft. of additional retail and service demand that will focus in the main local oriented commercial districts in Willoughby, including about four supermarkets.

3. Given that there will be demand for up to about four additional supermarkets, there is an opportunity for up to four local oriented shopping districts in Willoughby. However, if four are designated, this could reduce the opportunity to create a larger, comprehensive Town Centre in Willoughby. At the low end, two local commercial districts could be considered. However, in the long term, there will be a large population to the west of 200th Street (in West Latimer and Routley) and a large population in the southern portion of the Willoughby that are somewhat removed from the planned Willoughby Town Centre. Therefore, we recommend that three significant local oriented commercial districts be considered for Willoughby, including:

- One significant commercial district at the location of the planned Willoughby Town Centre. This could include about 350,000 to 400,000 sq.ft. of retail and service space (likely requiring about 25 acres assuming retail and service site coverage of 0.35). There is market potential for two separate supermarkets at this location, but we think that this area should be planned as a single commercial district, not a series of separate shopping centres. For example, a plan that is similar to the two newer shopping centres on the opposite sides of the Fraser Highway at about 188th Street in the Clayton area of Surrey should be avoided. Combined, these two shopping centres had the potential to create a lively, pedestrian oriented shopping district. However, they are divided by the Fraser Highway which makes them function like two independent projects.

The Town Centre should also be a focus for multifamily residential and civic facilities for the Willoughby area.

- One smaller commercial district, of about 150,000 to 200,000 sq.ft. (including one supermarket), to serve the residents to the west of 200th Street (likely requiring about 10 to 15 acres). This district should be located south of Carvolth and north of Routley in the West Latimer neighbourhood. The portion of the Jericho area to the west of 200th Street would be a good candidate to accommodate the portion of the space that is local/neighbourhood oriented.

There is also an opportunity to include some commercial space in this same general location on the west side of 200th Street associated with the Langley Events Centre. However, it will be difficult to tie together the commercial space on each side of 200th Street as 200th Street will act as a significant barrier. Therefore, we suggest that any commercial space in the Jericho area to the west of 200th Street include uses that serve the residents to the west of 200th, such as a supermarket, pharmacy and other local oriented businesses. Commercial space on the west side of 200th Street, should complement the Langley Events Centre and include destination oriented uses such as restaurants.

- One smaller commercial district, of about 150,000 sq.ft. (including one supermarket), to serve the residents to south of 72nd Avenue (likely requiring about 10 acres). The intersection of 72nd Avenue and 208th Street would be a good candidate.
4. As outlined in point 2, in addition to the three main local commercial districts, we suggest planning up to ten neighbourhood convenience locations in Willoughby (with about 5000 sq.ft. per location, or about 0.3 acres). These neighbourhood convenience locations should be planned to serve a neighbourhood trade area of about 5,000 residents each. The locations should be distributed throughout the Willoughby area within convenient walking distance of residents and should be planned to coincide with residential development within the immediate neighbourhood trade area.

3.5 Phasing of Local Commercial Areas

In addition to recommending a long term pattern for local oriented commercial development in Willoughby, we were also asked by the Township to recommend a phasing strategy for the three recommended local oriented commercial areas.

Each local oriented commercial area will require a primary trade area population of about 8,000 to 10,000 to support a supermarket and the full range of businesses that typically locate in a neighbourhood shopping centre/district. Otherwise, it will need to draw customers from outside the trade area. Therefore, the potential timing for each of these three commercial areas depends on the population within its primary trade area:

1. The Willoughby Town Centre area will be the largest of the three recommended local commercial areas, serving the residents of Yorkson, Williams and East Latimer.
2. The local commercial area at Jericho will primarily serve the residents of West Latimer and the portion of Routley to the north of 72nd Avenue. We would expect 200th Street to act as a significant barrier so this local commercial area will mainly serve residents on the west side of 200th Street.
3. The local commercial area at 72nd Avenue and 208th Street will serve the residents of North East Gordon, South West Gordon, and Smith, although the residents in the southern portion of these communities (south of 68th Avenue) may find the supermarkets in Willowbrook more convenient so we have excluded these residents from this trade area.

Based on our rough estimates of the current population in each of the Willoughby neighbourhoods, on the pattern of existing residential development applications, and on information from the Township about the possible sequence of residential development and population growth by neighbourhood, we estimate that the population of the primary trade for each of the three local commercial areas will be roughly as follows over time¹¹.

Primary Trade Area	Estimated 2008 ¹² Population	Assumed 2021 Population	Assumed Build-out population
Willoughby Town Centre Trade Area	3,350	22,900	39,600
Jericho Trade Area – West of 200 th Street	1,300	1,650	12,700
72 nd Avenue and 208 th Street Trade Area	4,300	12,500	13,500

As shown in the table, none of the three recommended commercial locations has sufficient population to support a neighbourhood shopping centre/district now. However, the Willoughby Town Centre trade area has a large number of active residential development proposals (in the Yorkson neighbourhood) and it is expected to experience strong population growth over the short term. In addition, the 72nd and 208th commercial area trade area is currently experiencing residential development activity and strong population growth (North East and South West Gordon areas). The trade area for Jericho (West Latimer) does not have any residential development applications and is not expected to experience significant population growth in the foreseeable future.

By 2021, we would expect that:

1. The population of the Willoughby Town Centre trade area (mainly Yorkson) will support a large local commercial shopping district of roughly 350,000 to 400,000 sq.ft. of retail and service floorspace. This could be completed in two or more phases as it would likely include two supermarkets.

¹¹ These figures are rough estimates and exclude the residents of Willowbrook, Routley (south of 72nd Avenue) and Southwest Gordon (south of 68th Avenue).

¹² This is a rough estimated by Coriolis Consulting based on a ballpark estimate of the number of existing housing units within each trade area and an assumed population per housing unit.

2. The population of the trade area of the local shopping centre/district at 72nd Avenue and 208th Street (mainly South West Gordon, North East Gordon and Smith) will support a local commercial area of about 150,000 sq.ft. of retail and service floorspace.
3. The population of the trade area for a local shopping centre/district at Jericho (west of 200th Street) will not yet be large enough to support a full local oriented shopping centre/district. However, by build-out the population of this trade area will support the full neighbourhood shopping district outlined in Section 3.4 (150,000 to 200,000 sq.ft. of floorspace).

Based on the assumed pace and distribution of residential development and population growth, we recommend phasing the development of the three local commercial areas in Willoughby as follows:

1. Phase 1 of the Willoughby Town Centre (150,000 to 200,000 sq.ft. of floorspace).
2. The local commercial centre at 72nd Avenue and 208th Street (150,000 sq.ft. of floorspace).
3. Phase 2 of the Willoughby Town Centre (150,000 to 200,000 sq.ft. of floorspace).
4. The local commercial centre on the west side of 200th Street and 80th Avenue (150,000 to 200,000 sq.ft. of floorspace).

We understand that there is currently a proposal for a 3 to 5 acre commercial project at Jericho (at 80th Avenue, possibly on both the east and west sides of 200th Street) which could include a national drug store chain. Assuming a site coverage of about 0.35, this project could include between 45,000 and 75,000 sq.ft. of grade level commercial floorspace.

Given the small existing population in West Latimer and the relatively small scale of the proposal, this proposed project appears to be mainly capitalizing on the exposure provided by 200th Street rather than acting as a neighbourhood shopping district to primarily serve existing West Latimer residents.

The proposal does not include a supermarket and it is not large enough to provide the full range of businesses that will serve the day to day shopping requirements of existing and future Yorkson residents, so (on its own) it is unlikely to significantly delay the development of the Willoughby Town Centre. However, if approved, it risks creating a precedent for piecemeal commercial development in a location that provides a very attractive opportunity to create a neighbourhood oriented shopping district to serve the residents of West Latimer in the long term.

The residential population in this area does not yet support significant commercial development. We recommend that the Township not allow neighbourhood commercial development in this location until residential development in West Latimer is well underway. The Township should ensure that long range commercial planning policy creates the opportunity for a strong local/neighbourhood shopping district in the Jericho area, west of 200th Street.

4.0 Office Forecasts

Outside of Downtown Vancouver, there are three broad types of office space in the region:

1. Space located in neighbourhood shopping streets, in retail plazas, or in community-oriented shopping locations. This locally oriented office space tends to be occupied by doctors, dentists, lawyers, accountants, travel agents or other users that serve the everyday needs of local residents.
2. Space located in business/office parks. This space is often occupied by office users serving a sub-regional (or broader) customer base. The users often place an emphasis on access to the regional highway system. Langley has a significant amount of this type of space, including newer buildings along the 200th Street corridor as well as the Willowbrook area.
3. Space located in higher order business centres, such as Metrotown and to a lesser degree other Regional Town Centres. This space is often occupied by larger or more specialized office space tenants that also serve a broad subregional (or larger) geographic market. Like most municipalities in the GVRD, the Township of Langley has a limited amount of this type of office space.

Langley has office space that serves the local population in commercial areas throughout the Township. Langley also has office space occupied by office users serving sub-regional or regional clients (or broader markets). This sub-regional office space is primarily located in the Willowbrook Regional Town Centre.

We completed an analysis of the Langley office market to help determine the Township's existing and expected future role in the regional office market. Our analysis included the following steps:

1. We examined the existing pattern of office development in the region and in Langley in particular.
2. We examined office market conditions (lease rates, vacancy, amount of new development) in Langley.
3. Using data that we have from BC Assessment Authority supplemented with our own research, we completed an analysis of the existing amount office space in Langley and growth in Langley's office space.
4. We examined population trends and projections for Langley to estimate potential demand for local oriented office space in Langley.
5. We evaluated the outlook for Langley's role in the subregional office market and estimated potential future subregional oriented office demand.

4.1 Analysis of Existing Conditions and Trends

4.1.1 Regional Office Market

Outside of Downtown Vancouver, we estimate that there is 22 sq.ft. of office space per capita in Greater Vancouver. This ratio varies widely across the major sub-regions, from a low of about 8 sq.ft. per capita in the North East Sector and Pitt Meadows/Maple Ridge to about 38 sq.ft. per capita in Richmond. Communities with office space per capita ratios at the low end of this range tend to only have office space serving the immediate local needs (e.g., medical, realty, insurance, local government). The amount of office space beyond 8 sq.ft. per capita in any community reflects the degree to which that community is a regional office location.

4.1.2 Langley Office Market

The Township of Langley currently has about 1.1 million sq.ft. of office space in commercial locations (excludes office at industrial sites). The City of Langley has an estimated inventory of about 0.7 million sq.ft. so the total Langley office inventory is about 1.8 million sq.ft.

Combined, the City and Township of Langley have about 14 sq.ft. of office space per capita which indicates that Langley is an office centre that serves a subregional market that is somewhat larger than the two municipalities, but not at the scale of Metrotown or Richmond Town Centre.

We estimate that new office development in the City and Township of Langley has averaged about 60,000 to 70,000 sq.ft. per year over the past decade. Almost all of this new space has been built in the Township.

4.2 Forecast of Future Office Demand

We completed a forecast future office demand in Langley in two separate categories:

1. Locally oriented office demand is comprised of businesses serving the local residents. This typically includes medical tenants, realty offices, travel agents, insurance agents and other services.
2. Demand from office users that are serving a broader geographic market.

4.2.1 Local Oriented Office Demand

Demand for local oriented office space is linked to population growth. Our analysis indicates that each resident should support about 8 sq.ft. of local oriented office space. The Township's population is anticipated to grow from about 103,000 in 2008 to about 172,000 in 2031.

Based on this projected population growth, we would expect growth in local office demand in the Township to total about 550,000 sq.ft. between 2008 and 2031 (69,000 additional residents x 8 sq.ft. per capita). Willowbrook/Willoughby should capture about 55% of this demand (as it will account for about 55% of the estimated population growth), or about 300,000 sq.ft. in total.

Some of this 300,000 sq.ft. will locate in Willoughby's local oriented commercial areas (along with the estimated demand for local oriented retail and service space). However, some of it will likely prefer a location in the Willowbrook Regional Town Centre or on commercial sites offering exposure to 200th Street.

4.2.2 Regional Oriented Office Demand

Because Langley is well served by the regional highway network and has a strong established commercial market it acts as a subregional office location serving the Fraser Valley. This space tends to locate in the Willowbrook Regional Town Centre or in office buildings near the 200th Street and Highway 1 interchange.

Based on available data, we estimate that demand for office space from users serving the subregional market has averaged about 55,000 to 60,000 sq.ft. per year over the past decade or so (out of the 60,000 to 70,000 sq.ft. of total office demand).

The introduction of the Golden Ears Bridge and the South Fraser Perimeter Road will help Langley become an increasingly attractive office location. However, Langley is not served by rapid transit and we anticipate Langley to face increasing competition from other suburban office

locations, such as Surrey City Centre (which is focusing on attracting office development) and Coquitlam Town Centre (when the planned Evergreen Line is completed).

If office demand in Langley increases by about 10% to 15%, demand would average 60,000 sq.ft. to 70,000 sq.ft. of office space per year from this segment of the office market. Total demand from this segment would be 1.4 to 1.6 million sq.ft. between 2008 and 2031. Almost all of this regional oriented demand will go to the Township. The preferred location from these office users will be sites in the Willowbrook Regional Town Centre or along the 200th Street corridor (such as in Carvolth or the Langley Business Centre).

4.3 Implications for Planning

4.3.1 Regional Oriented Locations

We estimate that there will be demand for about 1.4 to 1.6 million sq.ft. of additional office space in regional oriented locations in the Township. There are two locations that will be attractive for regional oriented office users:

1. The Willowbrook area. We recommend that the Township encourage future regional oriented office demand to locate in Willowbrook. This will create the opportunity to densify the Regional Town Centre and re-inforce its role as the primary office location in Langley.
2. Carvolth and other nearby sites along 200th Street. These sites can play an important role in the Langley office market by accommodating office users that are not suitable for Willowbrook. We suggest limiting the office tenants in these locations to:
 - Office users that are attached to a warehouse, distribution or sales/service function. These are not appropriate for the Willowbrook Regional Town Centre.
 - Office users that may require ground floor loading access for equipment, such as engineering companies.
 - Office users that need large floorplates. These users may have difficulty assembling the site sizes needed to accommodate their floorplates in the Willowbrook Regional Town Centre.

This approach will help reinforce Willowbrook as the main office location in Langley and still accommodate office users that require a high quality business park location.

4.3.2 Local/Neighbourhood Oriented Locations

We estimate that there will be demand in the Willowbrook/Willoughby area for 300,000 sq.ft. of office space that serves the local residents. Of this, we would anticipate a maximum of 150,000 sq.ft. to go to the main local commercial areas in Willoughby.

A share of this demand will likely go to Willowbrook or to sites zoned for commercial use along 200th Street. However, some will go to the local commercial areas in Willoughby. Therefore, the local commercial areas in Willoughby should be planned to allow upper floor office space above retail and service space. This local oriented office demand can be accommodated at the suggested locations within the site size recommendations outlined in our local retail and service planning recommendations.

5.0 Conclusions and Recommendations

5.1 Demand Forecasts

Our demand forecasts for the Willoughby and Willowbrook study area can be summarized as follows.

Exhibit 8: Summary of Demand Forecasts

Floorspace Demand (sq.ft.)	2008 to 2031
Total Retail and Service Floorspace Demand	2.0 to 2.4 million sq.ft.
Local Oriented Retail and Service	0.8 million sq.ft.
Regional Oriented Retail and Service	1.2 to 1.6 million sq.ft.
Total Office Floorspace Demand	1.7 to 1.9 million sq.ft.
Local Oriented Office Demand	0.3 million sq.ft.
Regional Oriented Office Demand	1.4 to 1.6 million sq.ft.

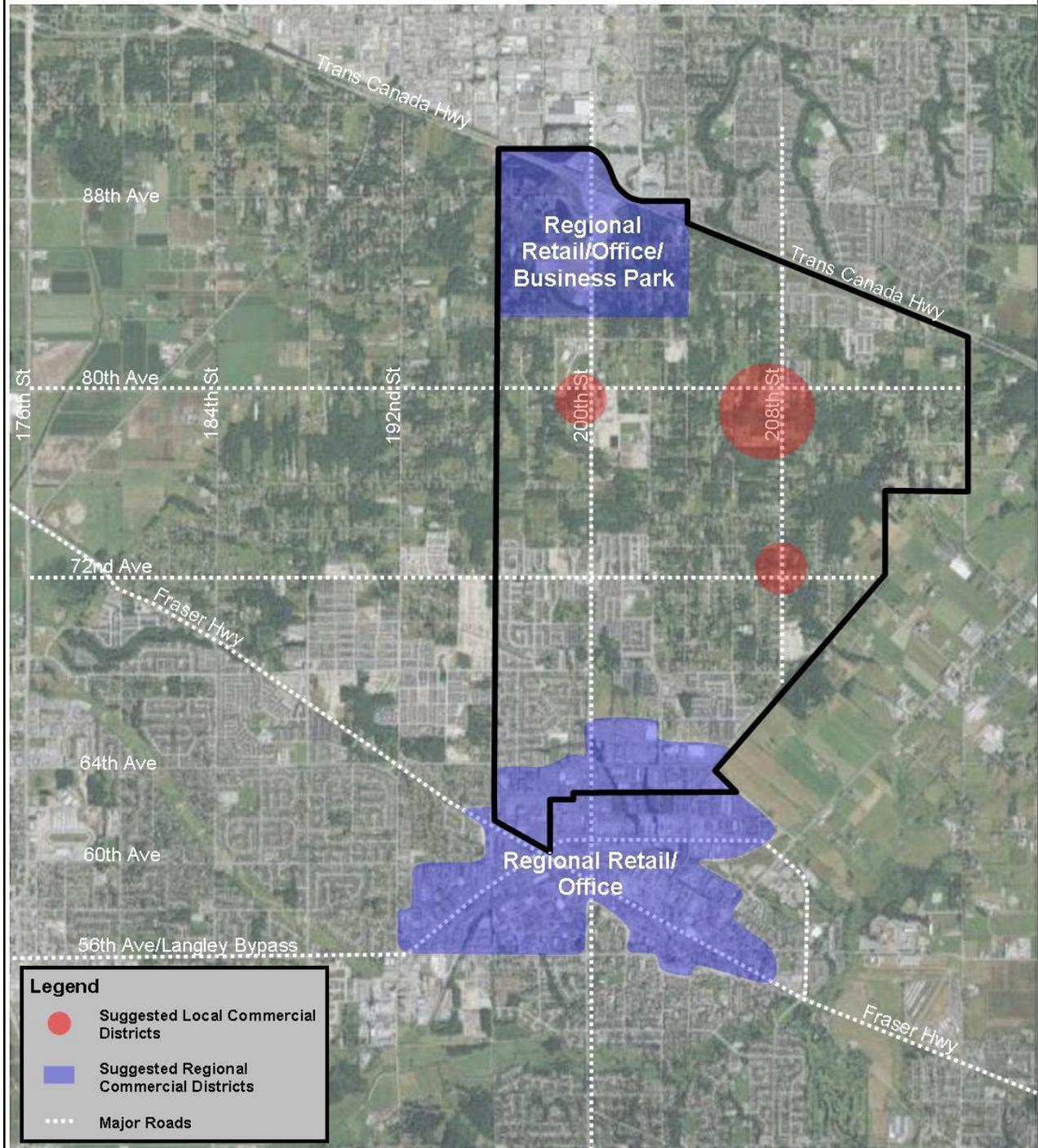
The regional oriented demand will go to Willowbrook and Carvolth (or nearby sites).

The local oriented demand will go primarily to local commercial areas in the Willoughby area, although some will also go to Willowbrook and to commercial sites offering exposure to 200th Street.

5.2 Planning Recommendations

Our recommended network of commercial planning areas is illustrated on Map 2.

MAP 2: Recommended Commercial Locations



5.2.1 Regional Locations

The Township should plan for two major retail and service locations to accommodate the projected 1.2 to 1.6 million sq.ft. of demand for regional oriented retail and service space and the 1.4 to 1.6 million sq.ft. of regional oriented office demand:

1. Willowbrook. This area should continue to be the major commercial location in the Township. Over time, there is an opportunity to densify the Willowbrook commercial area (if desired) with infill commercial development and higher density mixed use residential and commercial projects. However, there is a limited amount of vacant land that is attractive for retail and service use so the ability to add to the total inventory of retail and service space appears to be constrained.

The Township should encourage future regional oriented office demand to locate in Willowbrook. This will create the opportunity to densify the Regional Town Centre and re-inforce its role as the primary office location in Langley.

2. Carvolth. There is an opportunity for a significant subregional oriented retail and service commercial district at Carvolth. This area will be attractive to retail businesses that draw from a large geographic area, including large scale retail businesses and as well as smaller scale and specialty retail, service and entertainment businesses. Given that these businesses draw from a large geographic area, convenient vehicular access at a subregional level access and sufficient parking will be important.

Carvolth (and other nearby sites along 200th Street) can play an important role in the Langley office market, accommodating businesses that are not well suited for the Willowbrook Regional Town Centre. We suggest limiting the office tenants in these locations to:

- Office users that are attached to a warehouse, distribution or sales/service function. These are not appropriate for the Willowbrook Regional Town Centre.
- Office users that may require ground floor loading access for equipment, such as engineering companies.
- Office users that need large floorplates. These users may have difficulty assembling the site sizes needed to accommodate their floorplates in the Willowbrook Regional Town Centre.

This will help re-inforce Willowbrook's role as the main office location in Langley while providing opportunities for businesses that require a high quality business park location.

Some local oriented businesses will likely be drawn to the Carvolth area to take advantage of the 200th Street exposure. However, if Carvolth is permitted to evolve into a major subregional commercial location, local oriented retail and service businesses should be

encouraged (or required) to locate elsewhere in Willoughby, retaining lands at Carvolth for region-serving businesses.

5.2.2 Local Commercial Areas

1. We recommend that three main local oriented commercial districts be considered for Willoughby, including:

- One significant commercial district at the location of the planned Willoughby Town Centre. This could include about 350,000 to 400,000 sq.ft. of grade level retail and service space plus some upper floor local oriented office space (this would require about 25 acres of land). There is market potential for two separate supermarkets at this location, but we think that this area should be planned as a commercial district, not a series of separate shopping centres. The two newer shopping centres on opposite sides of the Fraser Highway at about 188th Street in the Clayton area of Surrey are an example to avoid. The combination of these two shopping centres had the potential to create a lively, pedestrian oriented shopping district. However, they are divided by the Fraser Highway which makes them function like two independent projects.

The Town Centre are should also be a focus for multifamily residential and civic facilities for the Willoughby area.

- One smaller commercial district, of about 150,000 to 200,000 sq.ft. of grade level retail and service space (including one supermarket) plus upper floor local oriented office space, to serve the residents to the west of 200th Street (requiring about 10 to 15 acres of land). This district should be located south of Carvolth and north of Routley in the West Latimer neighbourhood.

There is also an opportunity to include some commercial space in this same general location on the west side of 200th Street associated with the Langley Events Centre. However, it will be difficult to tie together the commercial space on each side of 200th Street as 200th Street will act as a significant barrier. Therefore, we suggest that any commercial space in the Jericho area to the west of 200th Street include uses that serve the residents to the west of 200th, such as a supermarket, pharmacy and other local oriented businesses. Commercial space on the west side of 200th Street, should complement the Langley Events Centre and include destination oriented uses such as restaurants.

- One smaller commercial district, of about 150,000 sq.ft. of grade level retail and service space (including one supermarket) plus some upper floor office space, to serve the residents to south of 72nd Avenue (requiring a site of about 10 acres). The intersection of 72nd Avenue and 208th Street would be a good candidate.

2. In addition to the 3 main local commercial districts, we suggest planning up to ten neighbourhood convenience locations in Willoughby (with about 5,000 to 10,000 sq.ft. per location). These neighbourhood convenience locations should be planned to serve a neighbourhood trade area of about 5,000 residents each. The locations should be distributed throughout the Willoughby area within convenient walking distance of residents and should be planned to coincide with residential development within the immediate neighbourhood trade area.
3. Some of our local oriented commercial demand will likely go to sites along 200th Street that are already designated or zoned for commercial use and some will go to the Willowbrook area.

5.2.3 Phasing of Local Commercial Areas

None of the three recommended local commercial areas has sufficient population to support a neighbourhood shopping centre/district now. By 2021, we would expect that:

1. The population of the Willoughby Town Centre trade area (mainly Yorkson) will support a large local commercial shopping district of roughly 350,000 to 400,000 sq.ft. of retail and service floorspace. This could be completed in two or more phases as it would likely include two supermarkets.
2. The population of the trade area of the local shopping centre/district at 72nd Avenue and 208th Street (mainly South West Gordon, North East Gordon and Smith) will support a local commercial area of about 150,000 sq.ft. of retail and service floorspace.
3. The population of the trade area for a local shopping centre/district at Jericho (west of 200th Street) will not yet be large enough to support a full local oriented shopping centre/district. However, by build-out the population of this trade area will support the full neighbourhood shopping district outlined in Section 3.4 (150,000 to 200,000 sq.ft. of floorspace).

We recommend phasing the development of the three local commercial areas in Willoughby as follows:

1. Phase 1 of the Willoughby Town Centre (150,000 to 200,000 sq.ft. of floorspace).
2. The local commercial centre at 72nd Avenue and 208th Street (150,000 sq.ft. of floorspace).
3. Phase 2 of the Willoughby Town Centre (150,000 to 200,000 sq.ft. of floorspace).
4. The local commercial centre on the west side of 200th Street and 80th Avenue (150,000 to 200,000 sq.ft. of floorspace).

There is currently a proposal for a 3 to 5 acre commercial project at Jericho (at 80th Avenue, possibly on both the east and west sides of 200th Street) which could include a national drug store chain. Assuming a site coverage of about 0.35, this project could include between 45,000 and 75,000 sq.ft. of grade level commercial floorspace.

Given the small existing population in West Latimer and the relatively small scale of the proposal, this proposed project appears to be mainly capitalizing on the exposure provided by 200th Street rather than acting as a neighbourhood shopping district to primarily serve existing West Latimer residents.

If approved, this proposal risks creating a precedent for piecemeal commercial development in a location that provides a very attractive opportunity to create a neighbourhood oriented shopping district to serve the residents of West Latimer in the long term.

The residential population in this area does not yet support significant commercial development. We recommend that the Township not allow neighbourhood oriented commercial development in this location until residential development in West Latimer is well underway. The Township should ensure that long range commercial planning policy creates the opportunity for a strong local/neighbourhood shopping district in the Jericho area, west of 200th Street.

Appendix

Major Retail Chains by Location and Municipality

	Maple Ridge	Pitt Meadows	Abbotsford	Surrey	Langley
Buylow	no	no	no	no	4121 - 200th Street
Price Smart	no	no	32700 S. Fraser Way (Clearbrook)	10312 King George Hwy. (King George) 18710 Fraser Hwy. (Clayton)	20151 Fraser Hwy.
Whole Foods	no	no	no	no	no
Capers	no	no	no	no	no
Urban Fare	no	no	no	no	no
Thrifty's	no	no	no	no	no
Safeway	300-20201 Lougheed Hwy	no	100 - 32500 S. Fraser Way	7165 - 138 Street	6153 - 200 Street
				8860 - 152 Street	20871 Fraser Hwy
				7450 - 120 Street	27566 Fraser Hwy (Aldergrove)
				10355 King George Hwy	
Marketplace IGA	no	19150 Lougheed Hwy	600-3033 Immel St.	14865 - 108th Ave.	22259-48th Ave.
				101-15127 Highway 10	2410-200th St. RR2
			3270 Mt. Lehman Road Building H	17710 - #10 Hwy	117-8850 Walnut Grove Dr.
				303 - 15930 Fraser Hwy.	5501-204th St.
					9224 Glover Road (Fort Langley)
					20159 88th Avenue B101
Save-on Foods	22703 Lougheed Hwy	no	2140 Sumas Way	9014 - 152 Street	8840-210 St. (Walnut Grove)
				7320 King George Hwy	
	300-20395 Lougheed Hwy			12130 Nordel Way	20255 - 64th Ave.
				3033 152 Street	26310 Fraser Hwy (Aldergrove)
Supervalu	no	no	no	no	no
Extra Foods	22427 Dewdney Trunk Road (224th Street & Dewdney Trunk Road)	no	32900 S. Fraser Way Sevenoaks Shopping Centre (Corner of Gladwin & South Fraser Way)	18765 Fraser Highway (Corner of 188th Ave and Fraser Hwy)	3100 272 nd Street
Otter Co-op	no	no	no	no	3600 248 th Street
Real Canadian Superstore	no	19800 Lougheed Hwy (Block West of Dewdney Trunk Rd & Lougheed Hwy)	2855 Gladwin Road	14650 104th Avenue (104th Avenue & 148th St)	19857 Willowbrook Drive (Willowbrook & 200th St)
				7550 King George Hwy (King George & 74th Ave)	

	Maple Ridge	Pitt Meadows	Abbotsford	Surrey	Langley
H-Mart	no	no	no	19555 Fraser Hwy	no
T&T Supermarket	no	no	no	Central City Shopping Centre 3000 Central City (10153 King George Highway)	no
				101T-15277 100th Ave (100 Ave. & 152 St. in Guildford)	
Walmart	no	no	1812 Vedder Way	1000 Guildford Town Centre (152 St & 104 Avenue)	20202 66th Avenue (Hwy 10 & 202nd St)
				Walmart SuperCentre 2355 160 St. (160 St & 24 Avenue)	
				12451-88th Avenue (88th Ave & 126th St)	
Zellers	11850 224th Street (The Mall at Haney)	no	1225 Sumas Way (Abbotsford Power Centre)	10151 King George Hwy (Surrey Place Mall)	19705 Fraser Hwy (Willowbrook Mall)
				1715-152nd Street (Semiahmoo Shopping Centre)	
London Drugs	101-22709 Lougheed Hwy (Valley Fair Mall)	no	26-32700 S Fraser Way (West Oaks Mall)	17685 - 64th Avenue (Cloverdale)	20202-66th Avenue
				100-15355 24th Avenue (Peninsula Village Mall)	
				2340 Guildford Town Centre	
				10348 King George Hwy (London Station)	
Canadian Tire	11969 - 200th Street (Lougheed Hwy/ Dewdney Trunk Rd)	no	32513 S Fraser Way (Garden St / South Fraser)	7599 King George Hwy (76th Ave & King George)	6312-200th Street (200th & 64th Ave)
				7878 120th Street (Scott Road)	
				13665-102nd Avenue (North)	
				3059-152 Street (White Rock)	
Home Depot	no	no	1956 Vedder Way	7350-120th Street(South Surrey)	6550-200th Street
				2525-160th Street (White Rock)	
				12701-110th Avenue	
Rona-Revy	21213 Lougheed Hwy	no	32073 S Fraser Way (Clearbrook)	16659 Fraser Hwy (Fleetwood)	100-19600 Langley Bypass
				6965 King George Hwy (King George)	22454 48th Avenue (Curtis Lumber)
			34530 McConnell Rd	3165 King George Hwy (South Surrey)	

	Maple Ridge	Pitt Meadows	Abbotsford	Surrey	Langley
Costco	no	no	1127 Sumas Way	7423 King George Hwy	20499 64th Avenue
Office Depot	no	no	no	7488 King George Hwy (King's Cross Shopping Centre)	20150 Langley Bypass (Langley Power Centre)
Staples/ Business Depot	20050 Lougheed Hwy	no	110-32500 S Fraser Way	10136 King George Hwy (North)	200-20055 Willowbrook Dr
				3037-152nd Street (South Surrey/White Rock)	
Winners	11998 207th Street at Dewdney Trunk Road (Meadow Ridge Shopping Centre) No Longer Listed	19800 Lougheed Hwy (Meadowtown Centre)	1335 Sumas Way (Abbotsford Power Centre)	3091 152nd Street (South Point Exchange)	20150 Langley Bypass (Langley Power Centre)
				10153 King George Hwy (Central City)	
				15355 Fraser Hwy (Fleetwood Home Centre)	
				12101 72nd Avenue (@ Scott Rd) (Strawberry Hill Shopping Centre)	
Home Sense	no	19800 Lougheed Hwy (Meadowtown Centre)	100-1335 Sumas Way (Abbotsford Power Centre)	no	20015 Langley Bypass (@ 200th Street)
The Bay	no	no	32900 S Fraser Way (SevenOaks Mall)	1400 Guildford Town Centre (Guildford Town Centre)	320-19705 Fraser Hwy (Willowbrook Mall)
Sears	no	no	32900 S Fraser Way (SevenOaks Mall)	1730 Guildford Town Centre	19705 Fraser Hwy (Willowbrook Mall)
Future Shop	no	no	75-32700 S Fraser Way (West Oaks Mall)	7538-120th Street (Scott Road)	90-20150 Langley Bypass (Langley Power Centre)
				3200-10045 King George Hwy	
Best Buy	no	no	no	10025 King George Hwy (Central City)	20202-66th Avenue (200th St & 64th Avenue)
Chapters/Indigo/ Coles	no	no	312-32900 S. Fraser Way (SevenOaks Mall) - Coles	100-12101 72nd Avenue (Strawberry Hill)	115-20015 Langley Bypass (@ 200th St)
					456-19705 Fraser Hwy (Willowbrook Mall) - Coles
Home Outfitters	no	no	1425 Sumas Way	no	F1-20202 66th Avenue
The Brick	no	19068 Lougheed Hwy	2067 Sumas Way	6925 King George Hwy (Newton)	400-20020 Willowbrook Dr
			31877 S Fraser Way (Clearbrook)	3700-10153 King George Hwy	
Petcetera	no	19800 Lougheed Highway (Meadowtown Centre)	32497 S Fraser Way	7488 King George Hwy (King's Cross Shopping Centre)	no

	Maple Ridge	Pitt Meadows	Abbotsford	Surrey	Langley
Petsmart	no	no	1305 Sumas Way	12101 72nd Avenue (Guildford Town Centre)	150-20015 Langley Bypass
Michaels	no	403-19800 Lougheed Hwy	32700 S Fraser Way	no	80-20150 Langley Bypass
Sport Chek	no	402-19800 Lougheed Hwy (Meadowtown Centre)	32900 S Fraser Way (SevenOaks Mall)	120-12101 72 Avenue (Strawberry Hill)	19705 Fraser Hwy (Willowbrook Mall)
				1214 Guildford Town Centre (152 St. & 104 Avenue)	
Sport Mart	no	no	80-32700 S Fraser Way (West Oaks Mall)	2-8066 120th Street (Scott Road)	1-6121 200th Street
				10153 King George Hwy (2153 Central City)	
IKEA	no	no	no	no	no
Lowe's	no	no	no	no	no
Coast Mountain Sports	no	no	no	no	60-20150 Langley Bypass
De Serres	no	no	no	no	no