Gabriola Island Local Trust Committee
Regular Meeting Addendum

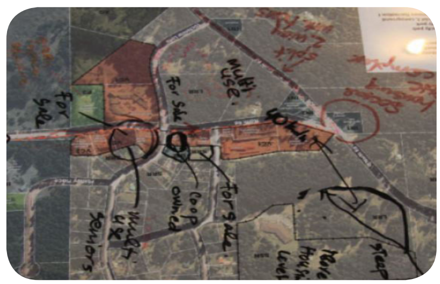
Date: September 7, 2017

Time: 10:15 am

Location: Gabriola Arts & Heritage Centre

476 South Road, Gabriola Island, BC

August 22, 2017



Gabriola Village Vision Plan

A Community-Led Planning Process
Envisioning the Future of
Gabriola Island's Village Centre

Final Report

from the Village Vision Planning Committee

village vision
gabriola island b.c.

For more information on the Village Vision community-led planning project please go to www.villagevision.ca.

Message from the Village Vision Planning Committee

This report is the culmination of a community-led planning process spanning four years. The volunteer Village Vision Planning Committee formed to support the Local Trust Committee in advancing planning for the Village Core. The initiative was generated from community discussions regarding the importance of having a coherent plan for the village core, informed by and supported by Gabriolans, that could guide decision makers over the next decade.

The planning committee is made up of individuals with ties to a variety of community organizations, however it is important to note that they act as individuals and do not act of behalf of any particular organization. The committee's role was to design and implement a planning process that would provide opportunities for all Gabriolans to have a voice in all aspects of village core planning and to translate that input into recommendations that local government could use in developing policies and plans to ensure a sustainable village core. The project has been volunteer-led and donation-supported.

From the outset, the committee saw its role as creating opportunities to gain and exchange knowledge and to create a space for Gabriolans to influence the future of the village core. In carrying out this work, the committee ensured that local government organizations were kept abreast of the process and the emerging results. We envisioned village core planning as a collaborative process, engaging Gabriolans and local government in co-creating a viable plan for our village core.

This plan is intended to be a catalyst document to inspire and guide future processes and decisions that affect the village centre. We know that the village will continue to evolve, and that change will be shaped by a complex interplay of many social, cultural, economic, environmental, political, and regulatory factors. The Vision Plan is therefore not prescriptive. Rather, the document provides a Guiding Principles framework, which could be used to evaluate future proposals. It suggests some Top Priorities for the near-term. It elaborates with some "Big Ideas" to consider for further planning – distilled from the many ideas suggested throughout the Village Vision process. It also provides Summary Recommendations to our local governments and other stakeholders outlining next steps.

There are many ideas and recommendations in the report; in the short to medium-term, we ask the Local Trust Committee to prioritize five critical issues:

- Implement a plan to increase attainable work-force housing options
- Investigate mechanisms to increase community control over key village properties
- In collaboration with the RDN and MOTI, implement pedestrian improvements
- Develop a plan for a central public gathering place
- Develop a multi-agency formal Village Strategy Plan to guide village core development over the next decade

Although we have completed the task we set out to accomplish, our work does not end with the presentation of this report to the Local Trust Committee, we will also be presenting findings to other government bodies whose mandates affect the village core, specifically the RDN and the Ministry of Transportation and Infrastructure. More importantly, we will continue to advocate, encourage and support cross-government, multi-agency planning to create a strategic plan to guide development in the Village Core for the next decade or longer.

This initiative was truly a community effort. We extend our thanks to the hundreds of Gabriolans who participated in planning workshops, the village business community for both input and donations; the many community organizations who enrich the life of our community; local government staff and elected officials for their uncritical willingness to engage in a non-traditional approach to planning; and a special thanks to Vancouver Island University for allowing the 2nd year Master's students to put their skills to use on our behalf.

Respectfully submitted,

Past and current members of the Village Vision Planning Committee:

Michelle Benjamin
Christine Bletcher
Diane Cornish
Dyan Dunsmoor-Farley
Steven Earle
Laura-Jean Kelly
John Peirce
Jim Ramsay
Julie Sperber
Megan Walker

Summarizing a Community-Led Planning Process

Many opinions were expressed about many ideas throughout the Village Vision process. The VVPC has developed this summary to reflect the perspectives of the majority of participants, as we heard them. However, it is important to recognize and include all voices of the discussion, as it has unfolded so far and continues to evolve. We have tried to summarize concerns and alternative points expressed throughout this process in this document; however, being a summary, not all perspectives will be captured here. It is therefore important, particularly for decision-makers, to also review the Appendices, especially the "full results" versions, to hear a fuller range of community voices, and in their original words. We also know that some community members could not or chose not to participate in the Village Vision workshops, surveys, and events. Other voices and perspectives may come forward during possible future follow-up planning processes.

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Part 1 – Introduction

Why village planning?

There is no existing village area plan

Gabriola's village centre has never undergone a comprehensive area planning process led by local government, as many other local and island communities have done for their village centres[1]. Instead, it has largely developed incrementally, considered on a parcel by parcel basis. However, there has long been community interest on Gabriola in taking a more proactive, comprehensive approach to planning for the village core, including an effort by the Advisory Planning Commission in the 1980's[2]. In 2011, the Islands Trust held a public engagement event to solicit input on the village core, as part of the Gabriola Island Official Community Plan review process[3]. Since then, further village planning has been on the Gabriola Local Trust Committee's Project List[4], with a "Village Core Review" added in 2015, but it has not yet been made a priority project for active effort. In 2014, Village Vision was initiated by community members from Sustainable Gabriola and the Chamber of Commerce, to advance village planning through a volunteer, community-led visioning process.

Desire for an improved planning approach

Throughout the Village Vision process, many community members have expressed concern with how the village form and character has developed under the ad hoc planning process (See Appendix A – Community Discussion Summary, as well as the other engagement summary documents). Some primary themes of the concerns are: lack of pedestrian safety and accessibility; aesthetics and design; a car-oriented, strip mall development pattern; a lack of cohesiveness and continuity; a lack of a clear "heart" and other people-oriented places; uncoordinated infrastructure; inconsistent cooperation between governing agencies; and, traffic flow and parking issues. Many suggested that comprehensive planning could lead to more sustainable, place-making, systems-based thinking, and better address principles such as people places, walkability, ecological carrying capacity, and the local economy.

Coordination between agencies and other stakeholders

Having a comprehensive plan could also help better coordinate between the different private and public stakeholders who shape how the village centre evolves. This is especially relevant on Gabriola, as an un-

1 Examples include Bowen Island's Snug Cove planning, Quadra Island's Quathiaski Cove Village Plan, Salt Spring Island's Ganges village planning, and rural village plans for other Regional District of Nanaimo electoral areas, such as Cedar, Bowser, and Schooner Cove.

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2 As referenced by Paul Grignon, http://paulgrignon.netfirms.com/GabriolaTourMap/LockinvarPlan/map.html.

3 http://www.islandstrust.bc.ca/islands/local-trust-areas/gabriola/projects-initiatives/gabriola-local-trust-committee-completed-projects/village-core-review/.

4 http://www.islandstrust.bc.ca/islands/local-trust-areas/gabriola/projects-initiatives/gabriola-local-trust-committee-completed-projects/village-core-review/.

incorporated Islands Trust area, where there are three primary public agencies with jurisdiction and influence in the village core:

- The Islands Trust, which is responsible for land use planning, but with limited tools and resources, has no ability to own and develop land[5].
- The Regional District of Nanaimo (RDN), which provides other services such as community parks and waste management, and has other capacities, such as the ability to own land, or borrow funds.
- The Ministry of Transportation and Infrastructure (MOTI), a provincial agency which owns and manages Gabriola's roads and approves subdivisions.

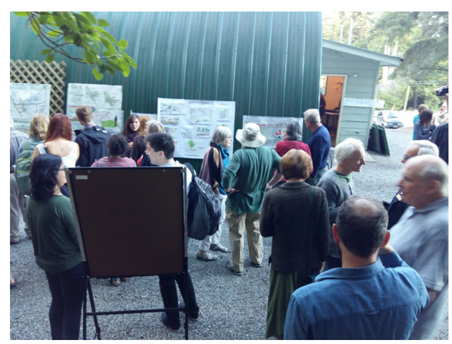
Having a comprehensive plan that all agencies support could help better coordinate their actions in a cohesive approach to place-making and sustainability in the village centre area.

Guidance for development

Additionally, there are still some key undeveloped parcels in the village centre area. Other properties are (or may eventually be) planning redevelopment and improvements. New land use and project ideas for the village area were also suggested by the community during the Village Vision process. In a rural community, any such investments are rare opportunities, and cohesive planning can better ensure they are contributions to a whole greater than the sum of its parts. Undertaking a proactive and holistic planning process can also facilitate creative collaborations and synergies between these different projects and stakeholders. It can be a more positive, community-empowered, and coordinated approach to encouraging change the community can support, instead of merely reacting to market-led development.

Purposes of this document

The Village Vision process was launched with all of these purposes in mind. This resulting Vision Plan is not a regulatory document. It is intended to be a catalyst document to inspire and guide future processes and decisions that affect the village centre. We know that



5 Except conservation areas through the Islands Trust Fund.

the village will continue to evolve, and that change will be shaped by a complex interplay of many social, cultural, economic, environmental, political, and regulatory factors. The Vision Plan is therefore not prescriptive. Rather, the document provides a Guiding Principles framework, which could be used to evaluate future proposals. It suggests some Top Priorities for near term further planning effort. It elaborates with some “Big Ideas” to consider for further planning – distilled from the many ideas suggested throughout the Village Vision process. It also provides some Summary Recommendations for next steps to our local governments and other stakeholders.

The Village Vision Design Concepts Questionnaire asked respondents "What would you like this Plan to do?" In order of importance as determined by weighted average of responses[6]:

1. Provide a cohesive vision, so each individual planning or design decision has a framework for how to best contribute to the greater, long-term vision.
2. Provide recommendations to our elected representatives on specific projects and policies to develop.
3. Provide property developers with guidance on community principles and preferences.
4. Provide both graphic and written ideas that can inspire on-going community dialogue.
5. Be a tool for coordinating inter-governmental agency collaboration.
6. Inspire community champions/advocates for key principles.

Project Background and Overview

Project Background

Village Vision is an initiative launched in 2014 by members of Sustainable Gabriola and the Gabriola Chamber of Commerce. It is facilitated by the volunteer Village Vision Planning Committee (VVPC), which also includes members from other community groups and organizations on the island. The committee developed a Terms of Reference for the project, available on the project website (villagevision.ca). The committee’s goal was to facilitate a community dialogue, welcoming to all viewpoints, to examine ideas and principles for the future of the village core.

Project Overview

The VVPC hosted five community workshops over the course of 2 years, focused on: 1) Scoping the Project, 2) Land Use, 3) Housing, 4) Water, and 5) Open Space and Connectivity. The workshop format typically consisted of keynote talks from expert guest speakers, then break-out groups to discuss specific

6. Note that not all Gabriolans who participated agreed with undertaking comprehensive planning for the village centre. Some of the reasons expressed included: a concern that it would encourage development; that the village is already built out; that long-range planning is impractical; and that the ideas are infeasible.

issues and ideas. Additional outreach efforts include a “catch-up” evening coffee house session and “pop-up” booths at the summer Saturday Market and special events, where the VVPC collected responses to “provocative questions”. The input is summarized in Appendix A – Community Discussion Summary. Two inter-governmental meetings were also held, with participation from the Islands Trust, the RDN and MoTI, along with VVPC members, to discuss the process and results of the project, and encourage collaborative relationships with local government.

There were other major components to the project. The first was a Rural Village Character Image Preference Questionnaire. This was a 2016 on-line questionnaire asking Gabriolans for feedback on 65 images and how well the land use, character, or idea portrayed in each image fit their vision for the village. The results are summarized in Appendix C – Rural Character Image Preference Survey Results Summary.

The second was a three-day Design Visioning Workshop. Seventeen second-year Vancouver Island University Master of Community Planning students worked in four teams to develop Design Concepts for the future of the village, based on the community feedback to date. Each team also included a member of the VVPC, who provided local expertise and ensured the community workshops’ feedback was incorporated. The Design Visioning Workshop also included three community events – a guest lecture/discussion, an open house to comment and participate in the work in progress, and a final presentation and comment/discussion session. Graphics from the workshop were also posted in the Agricultural Hall for 3 weeks, and staffed by the VVPC during the Saturday Market. The design concepts, site analysis, goals and principles, and common themes are summarized in Appendix D – Design Visioning Workshop Summary Report.

The third was a Design Concepts Questionnaire, an on-line questionnaire asking Gabriolans for feedback on summarized ideas from the four Design Concepts. The results are summarized in Appendix E – Design Concepts Questionnaire Summary Report, and in the “Big Ideas” section of this report.

The final component was a series of stakeholder meetings to present the results to local business/property owners and community groups, and hear their input. Summary notes from these meetings are included in Appendix F.

Part 2 – The Vision

Vision Statement

Based on the community feedback heard throughout the process, the VVPC drafted the following Vision Statement. It is a bold and long-term view, set at a level where most Gabriolans can find common ground.

> Gabriola's village is the heart of the island. It is where Gabriolans gather to shop, celebrate, play, exercise, socialize, eat, work and live – a vibrant and walkable village at the center of our larger island community. The compact, mixed-use design enhances connection, vitality, and walkability, and reduces development and habitat fragmentation in the more rural areas of the island. Innovative and sustainable infrastructure ensures development respects the area's carrying capacity. Our streets and walkways are valuable public open space that put pedestrians and cyclists first, creating a welcoming, attractive, and safe environment for alternative transportation, or to "park once then walk". Places and buildings are well designed, human-scale, and use a local and creative vernacular, creating a distinctive and memorable village environment that is compelling for visitors and residents alike. The village is also the center of a strong, locally based economy that supports working families, demographic diversity, and a healthy, sustainable quality of life. Our governing bodies and private development work collaboratively to ensure public and private improvement projects contribute to the greater village context, and make incremental progress towards the community's vision for Gabriola's village core.

Guiding Principles

The VVPC also drafted the following Guiding Principles, based on the community input collected. Guiding principles represent core precepts or values that can provide guidance throughout evolving circumstances, despite changes in opportunities, strategies, or goals. They provide a framework for evaluating the existing village against the vision, and direction for future discussion and decision making as the village evolves.

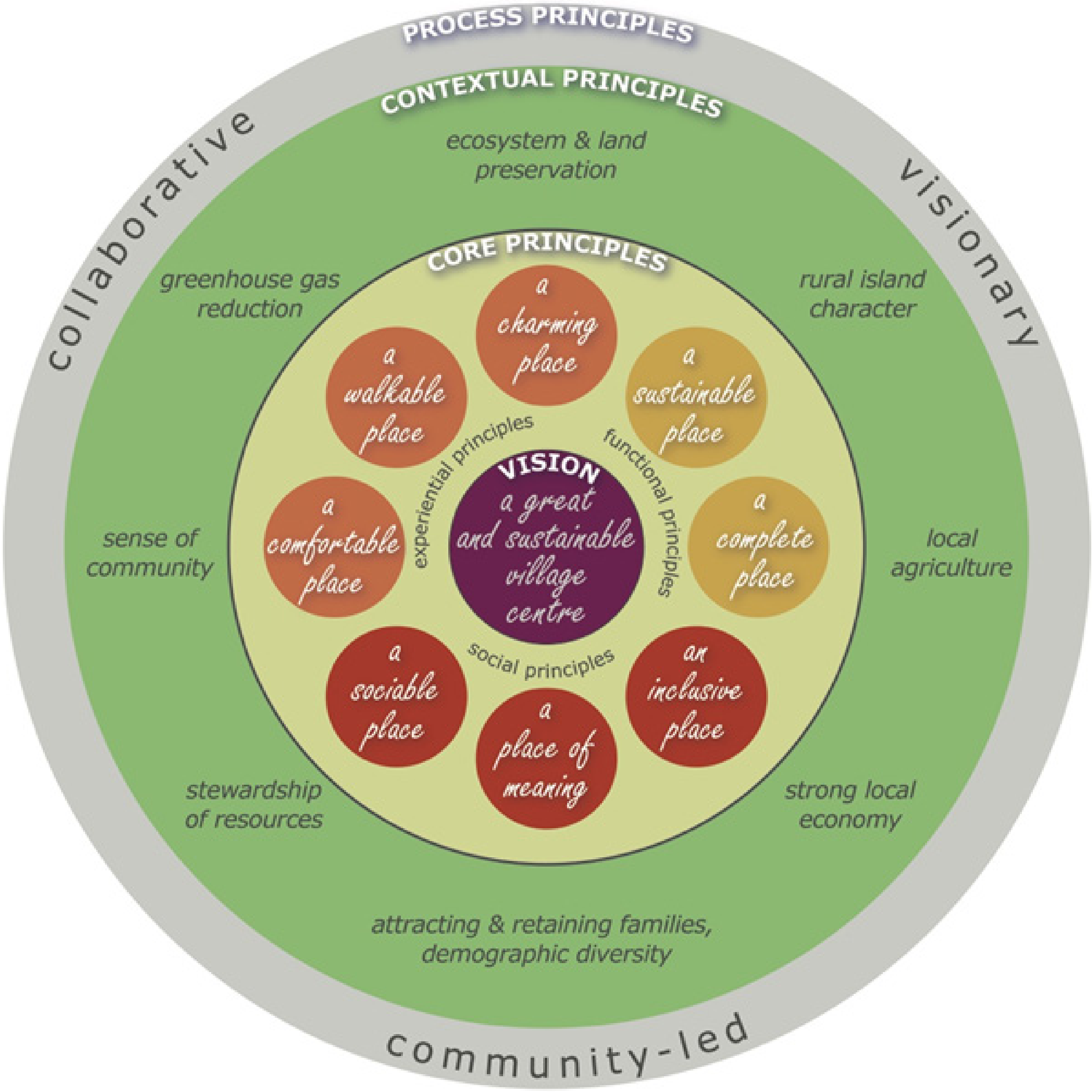


Figure 1. Guiding Principles Framework

The Guiding Principles Framework

Many principles, issues, and ideas were expressed during the Village Vision process that applied to the whole island, not just the village. Also, it is important that decisions for the future of the village area consider impacts not just for an individual property, but also how they would impact the entire village as a cohesive place, and the whole island as a complete community Therefore, the Guiding Principles Framework includes “levels” of principles. At the core is the Vision – a great, sustainable village place. All future decisions should be supporting this core concept. The next ring is the Core Principles, which offer more specific guidance for decisions and actions in the village core area. The next ring is the Contextual Principles; these are values that apply to the whole island. These include ecosystem health and land preservation, greenhouse gas reduction, sense of community, stewardship of resources, attracting and retaining families (demographic diversity), a strong local economy, local agriculture, and a rural island character. The outer ring is the Process Principles, recognizing that most participating Gabriolans asked for a more proactive and collaborative approach to planning for the village core.

The Core Principles

The Core Principles are grouped in three categories - social, functional, and experiential:

The Social Principles

These principles provide direction on how the village can best contribute to a strong sense of community.

A sociable place - Village place-making should enhance its role as the island's social heart. Key concepts are that it should include high quality gathering places, with variety in size, features and sun exposure. The Village should be pedestrian-oriented, encouraging street activity and spontaneous meetings in public space. It should be vibrant, assuring the presence of people in public at different times of the day and year. And it should be celebratory, able to host special events comfortably and memorably, both indoors and out. It should encourage community facilities to be based in the village core, creating a center of gravity, interdependencies/synergies, collective energy, convenience, and extended hours of activity.

A place of meaning – Village place-making should enhance community pride in the village, and promote a distinct sense of community. Key concepts include preservation and celebration of special features, whether heritage and distinct elements like the Arts and Heritage centre or Folklife Village, or landscape features such as significant trees or The Commons' wetlands. Site planning, building details, materials and landscaping should also reflect and contribute to a local vernacular and thus sense of identity. Community-led initiatives (suggestions have included landscaping or participatory public art projects) build stewardship and pride. Local culture should be showcased, such as artisan craftsmanship or public art elements, highlighting Gabriola as the 'Isle of the Arts'.

An inclusive place – The village should welcome all and support diversity, including housing, services, amenities, and infrastructure for all ages and incomes. All public places, including streets, should meet basic accessibility standards, so anyone, including those with low-mobility, can comfortably and safely move from one place to another without using a car.

The Functional Principles

These principles provide guidance on how the village can best serve the community, in terms of the functions it provides.

A sustainable place – A fundamental principle is that the village area needs to be environmentally and economically sustainable, prerequisites for its role in social sustainability (which is the focus of the social principles). A key concept is that the village's water and sewerage systems must be collectively within the area's carrying capacity, now, and in anticipation of growing climate change. The village also has a role to play in promoting land conservation and reducing greenhouse gases, via strategies such as encouraging transfers of undeveloped densities from more rural and sensitive areas of the island, to where a walkable island lifestyle is more feasible. Green building and site design strategies should be considered to reduce negative environmental impacts. The village is also an important contributor to the island economy; planning and design decisions should consider how to support local businesses, including how to make the village a more attractive experience for locals and visitors. Improvements must also be fiscally sustainable – with funding strategies that address both capital as well as long-term management costs.

A complete place – The village should contain a mix of uses in order to be a vibrant heart to the island community, including housing, work, shopping, gathering, and amenity opportunities. Important community amenities should be clustered within easy walking distance of each other, creating a vibrant, identifiable hub, and allowing for potential complimentary interdependencies.

Ideas supporting this principle were expressed by the majority of participants in the Village Vision process. However, it should be noted that this proposed principle is probably the most likely to be debated, based on some comments in the surveys, emails from community members, discussion at Village Vision workshops and stakeholder meetings, and known "hot topics" on the island. The primary points of debate include: anything perceived as supporting additional residential densities on the island; carrying capacity concerns for water and septic needs, especially if "compactness" is encouraged; congestion and parking issues with adding additional uses to the village, especially special event spaces; differing opinions on the appropriate rural character for Gabriola's village; and concerns of duplicating services/amenities elsewhere on the island.

The Experiential Principles

These principles provide guidance as to what positively contributes to an individual's physical, psychological, and emotional experience of the village.

A charming place – The village should be appealing and attractive. A key concept is human-scale places and details, including streets, buildings, and gathering places. Component elements should be designed to respond to the context, contribute to overall congruence, create a village that is more than the sum of its parts, and provide a continuously interesting experience for pedestrians. Place design details should also reflect human aesthetic preferences such as harmony, balance, enclosure, rhythm, colour, authenticity, and proportion, and evoke positive emotional experiences such as delight, curiosity, or excitement.

A walkable place – The village should promote walking and physical activity. Walking from place to place encourages social interaction, greater walk-in business, and overall sense of vibrancy, and promotes health. Many factors can contribute to making a place "walkable", where walking becomes an easy transportation choice, including proximity and density of housing, compactness of amenities, continuity of interest, safe connected pathways, the relationship of buildings to the street, and traffic calming designs.

A comfortable place –The village should feel comfortable and safe. It should promote pedestrian, cyclist and vehicular safety. The layout should be intuitive, where one easily understands how to get from one place to another, and where the village area amenities begin and end. It should be convenient to access and navigate. Designs should consider human physical needs, such as places to sit both in the shade and

EXPERIENTIAL PRINCIPLES	SOCIAL PRINCIPLES	FUNCTIONAL PRINCIPLES
A charming place	***A sociable place***	***A sustainable place***
Human scale	Gathering places	Land conservation
Inviting	Pedestrian oriented	Compact
Authentic	Vibrant	Carrying capacity
Continuity	Celebratory	Green buildings
Attractive		Fiscally sustainable
Fun	***An Inclusive place***	Visitor-friendly
	Economically diverse	
A comfortable place	Accessible	***A complete place***
Safe	Welcoming	Mixed use
Legible		Clustered amenities
Comfort	***A place of meaning***	
Convenient	Heritage	
Choice	Local culture	
	Optimism	
A walkable place	Pride	
Walkable	Rural	
Active	Community-led	

Table 1 -. Key Attributes of the Core Principles

Part 3 – Ideas and Priority Recommendations

VVPC's Recommended Top Priorities (by 2022)

The Village Vision Planning Committee developed the following top priorities, based on the community input heard throughout the Village Vision Process. We recommend action on these items by our local governments in the near to mid-term (by 2022).

1. **Village Strategy Plan** – In response to the significant visioning effort over the past 3 years, we request the Gabriola Local Trust Committee undertake a formal village planning effort, such as a Neighborhood Plan or Strategy, in close collaboration with the RDN and MoTI. This effort could also encompass some or all of the following priorities.
2. **Increased attainable housing options** – Once 2016 census data has been fully released, the Gabriola Local Trust Committee should undertake an updated Housing Needs Assessment, and then an expanded Housing Options Project, especially to consider options for increasing housing opportunities for workers, family, and seniors within walking distance of the village core. (See Big Ideas 15 and 16).

3. **Community control over key village properties** – initiate through the RDNor a potential community land-trust organization or cooperative, or support efforts by community groups to purchase key village properties to ensure they are developed in the community's best interest. The Gabriola Local Trust Committee could develop enabling Land Use Designations for the village area to support rezoning applications that align with the ideas and principles of the Vision Plan.
4. **Pedestrian planning and improvements** – collaborate on a cross-agency effort to develop a plan and implementation strategy for developing a safe pedestrian pathway network throughout the village, and ensuring private development contributes to a connected, pedestrian-friendly environment. (See Big Ideas 1, 2, 3, 11, 13, and 14).
5. **A 'heart', a focal point public space** — initiate (the RDN) or support efforts by community groups to develop a Feasibility and Needs Study for purchasing and developing a central property for a mixed-use central public space. (See Big Idea 4).

16 Big Ideas

Many great ideas and comments were put forward by the community during the Village Vision workshops. At the 3 day Design Visioning Workshop, student/VVPC teams used these ideas and principles, as well input from the Image Preference Survey, to produce four Design Concepts for the village. The four Concepts were analyzed for common themes and goals (See Appendix D – Design Visioning Workshop Summary Report). These were further distilled into 16 Big Ideas, which were put out for community feedback in the Design Concepts Questionnaire. The following section discusses the feedback on the Big Ideas, related projects, and possible next steps.

Big Idea 1 – North Road and South Road Intersection Improvements

Concept - Redesign the North and South Road intersection to improve pedestrian, cyclist, and vehicular safety, and to create a "gateway" to the village.

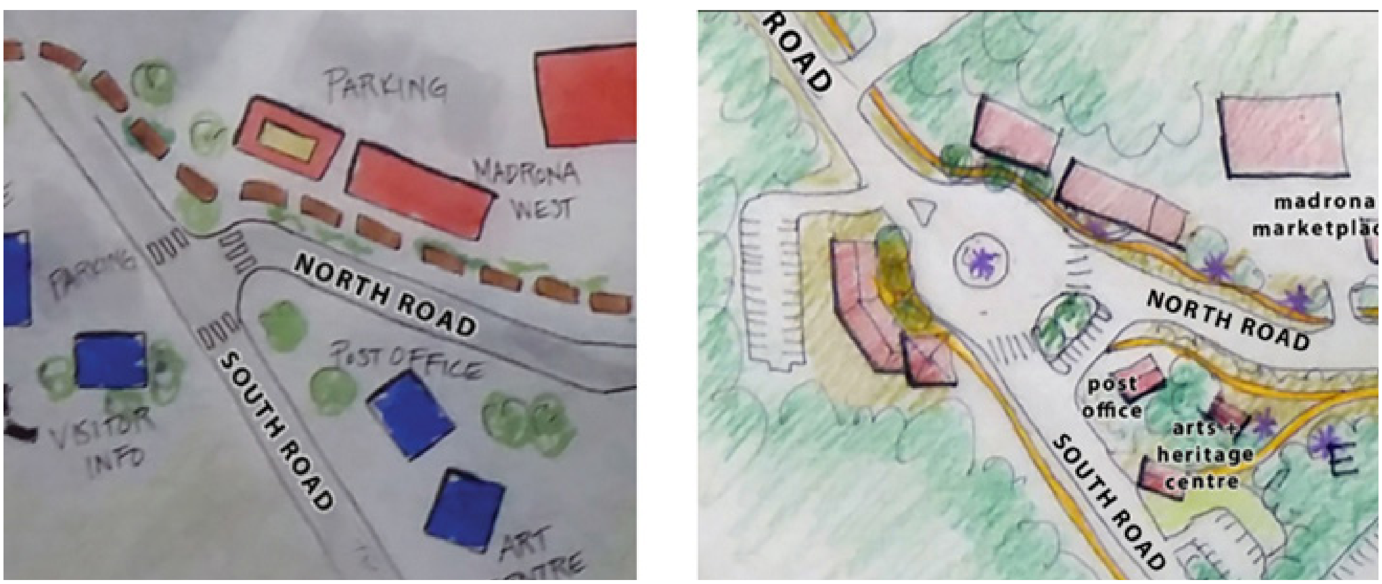


Figure 2 - Two of the Concepts for North/South Roads Intersection Improvements (T-intersection or a Traffic Circle)

Design Considerations – All four Design Visioning Workshop concepts recognized the importance of this intersection as a gateway and way-finding opportunity, as well as being currently dangerous for pedestrians, especially during the Saturday Market. Design ideas included a traffic circle, a T-intersection with a parklet, closure and re-routing of a portion of North Road to create a section of pedestrian street, signage, and a major public art piece. Another idea is to paint the whole intersection in an artistic pattern, indicating a broad pedestrian zone and providing a gateway feature. There is excess paving through the intersection, a wide right of way, and an underutilized grassed island on the Post Office property, so there are opportunities for reconfiguration. Additionally the adjacent land owners (post-office, Agricultural Hall Association, and Intrascape Developments) could be approached to negotiate small property line changes if required.

Community Support - 81% of Design Concept Questionnaire respondents said improvements to this intersection are extremely important (39%), or somewhat important (42%) to realizing the vision of a great, sustainable village. There was a wide variety of comments of support or concern. (See the full results on the Village Vision website for all comments).

Potential Related Projects – This concept is particularly connected to Big Idea 2 – North Road as “Main Street”, Big Idea 3 – Pedestrian Pathway System, Big Idea 6 – Visitor’s Centre at the Agi Hall site, and Big Idea 12 – Public Art Program, and further planning should consider these concepts in concert. Future efforts on the Village Way Trail could also consider if or how to accommodate future intersection improvements.

Possible Next Steps – A Traffic and Design Study would be required to determine the traffic engineering solution best suited for this intersection that also meets community design goals. A coordinated solution will likely require inter-agency coordination between MoTI, the RDN (Village Way Trail), and possibly the Islands Trust as the advocating agency. The Islands Trust could organize an initial workshop session between the three agencies, with senior traffic engineer and urban designer participation. Further detailed study and implementation planning should be added to MoTI project work plans and advocated for by the Islands Trust. Gabriola Land and Trails Trust (GaLTT) may also be interested in advocating for this project as a pedestrian safety improvement. Gabriola Arts Council should be invited to be involved in any associated gateway signage or public art project.

Big Idea 2 – Creating a Village Feel on North Road

Concept – Over time, make the village area portion of North Road more of pedestrian-friendly street, with a village character.

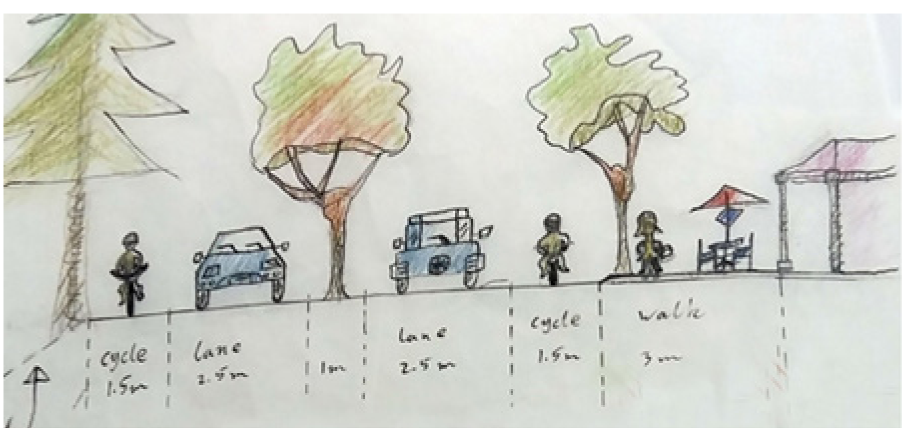


Figure 3 - Student sketch for North Road

Design Considerations – Ideas from the Design Concepts included: pedestrian walkways and crosswalks; traffic calming; street trees and landscaping; on-street parking; buildings that relate to the streetscape, with reduced setbacks, street oriented entries, walkways, landscaping, and seating; parking behind buildings; and special treatments at the intersections with Lochinvar Lane and South Road.

Community Support - 88% of Design Concepts Questionnaire respondents said North Road as "Main Street" improvements are extremely important (63%), or somewhat important (25%) to a great, sustainable village. There was a wide variety of comments with support or concern (see the full results on the Village Vision website for all comments). For some, this is the most important village improvement needed. Potential Related Projects – This broad concept relates to many other of the Big Ideas, some of which are more detailed strategies, such as Big Idea 3 – Pedestrian Pathway System, Big Idea 11 – Lighting, Big Idea 13 – Streetscape Landscaping, and Big Idea 14 – Pedestrian Engaging Village Buildings.

Possible Next Steps – Since this is a broad and long-range timeline idea, there are many possible paths for advancement. It would also likely involve efforts from all three of the primary public agencies with jurisdiction in the village core – the Islands Trust, the RDN, and MoTI.

The Islands Trust – The IT could consider hosting a workshop/charrette type process with the other agencies, design consultants, and community stakeholders, perhaps as part of a Village Area Neighbourhood Plan or Strategy, to create a coordinated multi-jurisdictional approach to North Road. Within the IT's jurisdiction, recent additions to the village area Development Permit guidelines were meant to encourage contributing design strategies in private development. The Islands Trust could analyze the results of applying these to the new Madrona Marketplace West, and consider how the process can be further improved. Aspects of the zoning bylaw could also be considered for adjacent properties, such as reducing front setbacks, or allowing permanent market structures.

MoTI – MoTI could consider reducing speed limits, implementing traffic calming, adding more crosswalks, and creating reduced setback standards for highways in rural villages, and should work with the Islands Trust on developing specific road cross-section standards for village areas within the Islands Trust.

The RDN – The RDN could consider establishing some sort of Village Place-making Service Area, which could work collaboratively with the Islands Trust land use planning and the Chamber of Commerce as the new coordinator of economic development services to provide more comprehensive village place-making planning, implementation, and maintenance.

Next steps for more detailed, related Big Ideas are addressed in following sections.

Big Idea 3 – Pedestrian Pathway System

Concept – Over time, create an interconnected, universally-accessible pedestrian pathway network throughout the village, linking all businesses and services, and extending to the ferry.

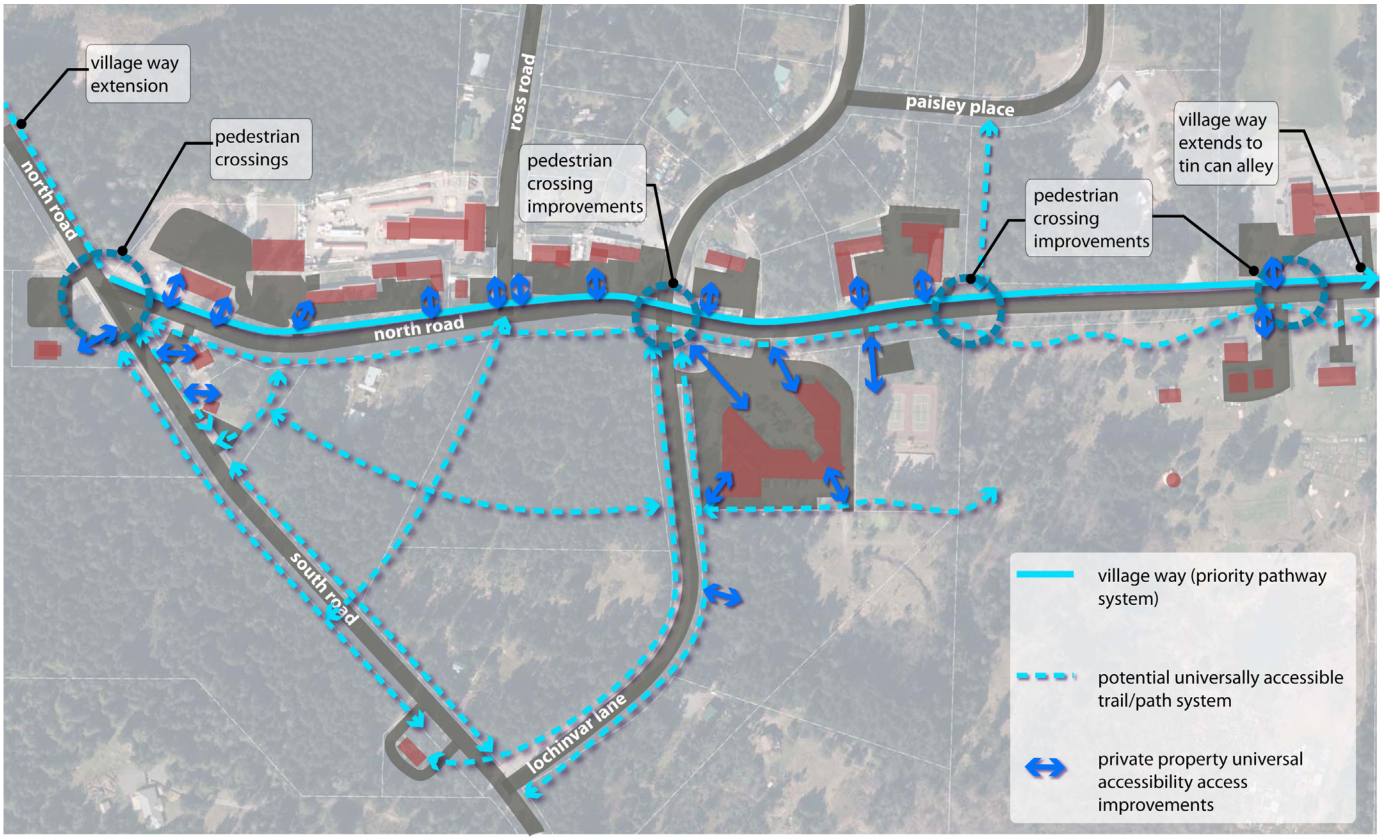


Figure 4 - One possible concept for an accessible pedestrian pathway network

Design Considerations – Some paths could be natural walking trails and others could designed more as people places, with gathering areas, landscaping, and interaction with storefronts. All should be wheelchair accessible, with gravel or paved surfaces, and ideally graded to 5% slope or less per universal accessibility standards.


Figure 5 - Accessible pathway system

Community Support - 92% of respondents said a village pathway system is extremely important (74%), or somewhat important (18%). This was the most supported Big Idea. There was a wide variety of comments with support or concern.

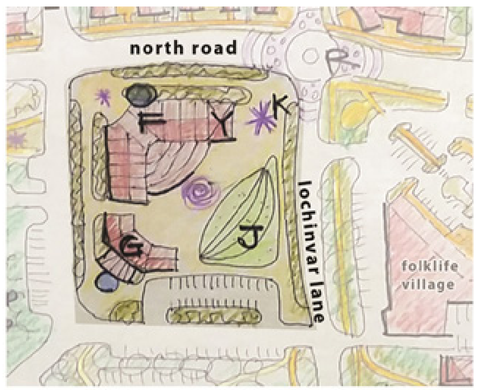
Potential Related Projects – This concept is associated with other Big Ideas, such as Big Idea 2 – North Road as Main Street. The Village Way trail will be a flagship implementation project, creating the primary spine for the system, and hopefully inspiring future branches and expansions.

Possible Next Steps – It is essential that our governing agencies respond to this community priority and take a more proactive and cooperative approach to facilitating pedestrian friendliness in the village. One suggestion is an interagency effort, facilitated by the Islands Trust and endorsed by MoTI and the RDN, to create a master plan for a village pathway system, perhaps as part of a broader Village Area Neighbourhood Plan or Strategy Plan effort. Standards should be set for universal accessibility. Private properties may provide part of the network. GaLTT could be a key stakeholder, as they may be able to facilitate and license privately owned segments of the system. The RDN could also consider establishing some sort of Village Place-making Service Area, which could work in concert with the Islands Trust land use planning and collaboratively with the new (to be determined) economic development agency, in more comprehensive village place-making planning, implementation, and maintenance.

Big Idea 4 – A Village Heart

Concept – Create a park or square that will be a vibrant, attractive, and distinctive public ‘heart’ for the village and the island, which could be used for events, possibly a re-located Farmer’s Market, and daily interactions at all times of the year.

CONCEPT A - THE COMMONS
Relocating the Farmer’s Market and a New Agricultural Hall at The Commons, enhancing it as a central community gathering place.



CONCEPT B - THE VILLAGE SQUARE
Village Square Park at the corner of Lochinvar Lane and North Road, including a Covered Market, a Community Hub (events building), and bandshell / amphitheatre.

CONCEPT C - THE VILLAGE CENTRE
Team C proposed a bold and multi-faceted idea of re-aligning a portion of North Road to create a pedestrian only street near South Road

CONCEPT D - THE MEETING PLACE
A Community Events Building and amphitheatre at the centre of the Lochinvar Triangle, linked by a Market Promenade to the Lochinvar Lane & North Road intersection.

Figure 6 - The four Design Visioning Workshop concepts for a village ‘heart’ gathering place

Design Considerations – Based on community comments (which mirror the recommendations from community and rural design researchers such as Christopher Alexander,Randall Arendt, and Kevin Lynch) these are the qualities that make a great focal gathering place, such as a village square or green:

- Comfortably host community celebration scale events.
- Be a distinct, compact place with a sense of enclosure, with a strong border creating a positive space as a clear centre (an outdoor ‘room’).
- The border should contain adjacent uses that generate lots of daily activity, such as a coffee shop, stores, or community services, activating the central space.
- Be at a visible crossroads in the community with lots of passerby foot traffic, and with attractive uses and elements to easily draw people in on a daily basis.
- Utilizes a durable, wheelchair accessible surface to accommodate and encourage lots of foot traffic.
- Include landscaping and trees, seating, playful elements, and public art.
- Has an event parking strategy.

Each of the four Design Visioning Workshop concepts had a different concept for where the heart could be located, and each also proposed converting some or all the Folklife Village central parking lot to a pedestrian plaza (see Big Idea 5 – Folklife Village Pedestrian Centre). Many of the concepts included an amphitheatre and band shell space. Some of the concepts included a mixed-use community building to help activate the space, possibly including elements such as a small coffee kiosk, a recreation/ gathering/ performance space, indoor-outdoor seating, bathrooms, market storage, or a shared office for island non-profits.

Size - Based on spaces currently used for events on the island (as well as recommendations by community design researchers such as Kevin Lynch and Jan Gehl), the event area of the space should probably be about 1500-2500 m2. For comparison, the existing Saturday Market outdoor area (not including parking or the Agricultural Hall) is about 890 m2. The Theatre Festival area in the Folklife Village parking lot is about 1200 sm. The central parking lot area of Folklife Village, which has been used for events such as Canada Day, is about 1350 sm. The planned event plaza at Huxley Park is about 310 square meters. The outdoor area used for the Salmon BBQ at the Community Hall is about 2000 square meters. The areas of The Commons used for the Fall Fair is about 2400 sm.

Event parking - An event parking strategy for a ‘heart’ should consider the needs of special events such as the Theatre Festival. The Theatre Festival tent holds ~290 people. Currently attendees park along the road, or in adjacent parking lots such as the elementary school (see Appendix B, Figure 8). If considering ‘Big Idea 6 – Moving the Saturday Market to the Heart’, the current Saturday Market has a ~40 spot parking lot, with additional informal parking along South Road (70+ vendors plus customers) and spill-over in Madrona Marketplace lots. Therefore, 125-150 designated off-road parking spots seems a reasonable number to plan for event parking, depending on the available shoulder parking or off-hours use of adjacent properties’ lots that could be expected for a given site option.

Community Support - 84% of respondents in the Design Concepts Questionnaire said a village heart is extremely important (45%), or somewhat important (39%) to creating great, sustainable village core.

There was a wide range of comments. Supportive comments focused on the need for the heart to be celebrational, vibrant, social, multi-use, and multi-generational. At the property/business stakeholder meetings, some business owners in Folklife Village particularly appreciated this idea, in part due to the current economic impacts of holding events in the Folklife Village parking lot and Lochinvar Lane. At the community group stakeholder meeting, the Gabriola Arts Council Executive Director also welcomed the idea of holding events in a truly public space. Concerns include redundancy with existing amenities (especially the Commons), supporting new businesses or impacting existing ones, proper scale, keeping a new place energized, parking, funding, and distraction from other priorities. Question 9 of the Design Concepts Questionnaire also asked responders to rank the four Design Visioning Workshop concepts according to which they would be most interested in pursuing. The 'Village Square' option (Concept B in Figure 6 above, the undeveloped private property at Lochinvar Lane and North Road) was the most popular first choice, with nearly twice the selection as the next most popular option. Figure 7 below shows one possible 'heart' concept for this important property[1].

Figure 7 - One possible 'heart' concept at the undeveloped Lochinvar Lane and North Road property

Potential Related Projects – This concept should be considered in conjunction with Big Idea 6 – Moving the Saturday Market to the heart, Big Idea 7 – Community Event Building, and Big Idea 8 – Recreation Centre, because these could be programs to activate the space. Big Idea 5 – Folklife Village Pedestrian

1
Some of the ideas generated throughout the process by community members involve the use of private land. Decisions about potential future development / redevelopment of private property would be up to private landowners and local government. Concepts presented here are not meant to prejudge or constrict, but to offer ideas.

Centre is associated as it also could play the role of a community heart. Big Idea 9- Visitor’s Centre is also related, as sale of the Agricultural Hall site for such a use (or similar) could facilitate funds to contribute to a Market Pavilion for the park/square.

Possible Next Steps - One strategy is for the Islands Trust to undertake broader community consultation, perhaps as part of a Village Area Neighbourhood Plan/Strategy Plan, to further gauge community interest, as well as to disseminate information on how such a project could be achieved. Another option is for the RDN to proactively explore near-term possibilities, such as purchase of the undeveloped site at Lochinvar Lane and North Road. Another option is for Village Vision, another community group, or current property owners to champion the creation of a village heart (or improvements to an existing space such as the Commons), and undertake further study and consultation. A study could include: a needs and feasibility study; a full cost analysis; an exploration of community partnerships (such as with the Agricultural Association to construct Market facilities and manage programming, or with GAC to consider including the Economusée, public art, and festival programming); further public consultation to determine if more detail study/efforts are of interest; and a preliminary concept plan. Having a concept plan for a village square type space strengthens grant applications when opportunities arise [2]. A Community Land Trust could also be explored for purchasing key properties for the heart and/or affordable housing and other community serving benefits. Potentially, an organization could investigate leveraging existing community property assets to purchase such properties. Potentially, the Gabriola Foundation, currently in formation stages, could also be involved in funding this central community celebration space.

Big Idea 5 – Folklife Village Pedestrian Centre

Concept – to convert some or all of the Folklife Village central parking lot to a pedestrian gathering space.

Figure 8 - Two of the Four Design Visioning Workshop Concepts for a Gathering Place at Folklife Village

Design Considerations – When the Folklife Village began its life as a pavilion at Expo 86, the centre was a gathering area/plaza. It is a naturally ideal central gathering place due to its sense of enclosure and

2
Examples include the B.C. Spirit Squares program, which provided 50% capital funding for outdoor public celebration spaces across B.C. in 2008, or the 2014 grant provided by Island Coastal Economic Trust to Lake Cowichan for their Town Square project. Depending on the included programming, the multi-faceted nature of the concept would likely hold appeal for many types of grants and partnerships, such as economic revitalization, tourism development, public gathering, arts and culture, pedestrian safety, food systems, or public health.

surrounding activating uses; it is what many Gabriolans think of as the current heart of the village – except it is a parking lot. A pedestrian centre here could take the form of a smaller plaza space, with about half of the current parking area converted, or a larger scale concept with alternative consideration of providing low-mobility access. Any parking space conversion will require consideration of ease of access for low-mobility users to the shops and services, and provision of replacement parking nearby.

Community Support - 72% of Design Concept Questionnaire respondents said a gathering place in the centre of Folklife Village was extremely important (40%), or somewhat important (32%) to realizing the vision of a great, sustainable village. Supportive comments included reference to this being a natural gathering area, as well as the need to make it more pedestrian friendly. Concerned comments included the need for sufficient and accessible parking for the businesses and services; the challenges of implementing given that it is privately owned space; and that such a main gathering space should be publicly owned. Folklife Village business owners at the stakeholder meetings also expressed concerns that moving parking would negatively impact the businesses.

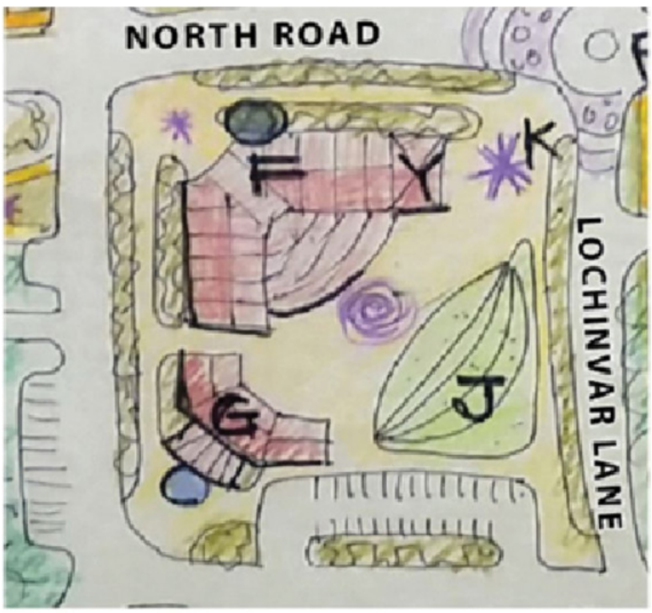
Potential Related Projects - Depending on the determined scale of a pedestrian centre, it may serve the need of an island "heart", and as such should be considered in concert with any further planning of Big Idea 4 – A Village Heart.

Possible Next Steps - Given that the mall is private property, the owner (the Jim Pattison Group) would likely require incentives/compensation to consider enabling such a public amenity. The Jim Pattison Group also purportedly owns the undeveloped commercially zoned property behind the Folklife Village. Granting additional development potential via a rezoning or amenity zoning application for the undeveloped lot is one possible way to facilitate private sector provision of the pedestrian centre on the Folklife Village property. The Islands Trust could add additional amenity zoning provisions to the Gabriola OCP (such as included in Salt Spring's OCP). Alternatively, the RDN could provide a grant in aid to a community group willing to negotiate a lease and management with the Pattison Group to implement and maintain a plaza. Further discussion and study would be needed to see if the concerns of retailers and low-mobility access could be addressed through design. One strategy could be a temporary pilot project plaza, using pop-up elements such as planters, movable seating, umbrellas, performance space, and art pieces to test out the impact.

Big Idea 6 – The Market at the Heart

Concept – To relocate the Saturday Market to the new "heart" public gathering space.

Design Considerations – The Saturday Market is a weekly community gathering that also attracts visitors from Vancouver Island and beyond. The existing Agricultural Hall site is prominent, convenient, and helps to activate neighboring businesses, however there is pent-up demand for additional space, safety and capacity issues with parking and circulation, and challenges for accessibility. Despite being part of the gateway area for the village, it is an empty gravel parking lot on most non-market days, even more so once the Agricultural Hall is removed as planned in the next few years. If a new central "heart" public gathering place was created, relocating the Market would help to activate the new space and mark it as an iconic, feature community place. It would also permit the possibility of converting the current site to a Visitor's Centre or other combination of uses that would mark the entrance to the village at all times of the year. Responses to the Image Preference Survey also supported the idea of a permanent Market Pavilion that would cover the vendors and allow for a longer season (See Appendix C – Image Preference Survey Summary Report). It would also provide a covered gathering space for park visitors during the week. To accommodate an expanded Market, the vendor, circulation, and gathering areas should be about 900-1000 square meters (equivalent to the existing area plus 20 vendors) as a rough guideline. Nearby parking should be provided. The Gabriola Land Use Bylaw requires a minimum of 1 stall per vendor. The Saturday Market coordinator estimates about 150 cars are parked at peak times on the site and nearby streets. Potentially shared parking with nearby sites could be negotiated. The site would also need permanent closed storage, bathrooms (and septic system), water, ideally a small coffee bar type kitchen with power, and a seating and busking/performance area.



Team B - Market Pavilion at the Village Square (F)

Team A - Covered Market and Agricultural Hall at The Commons

Figure 9 - Two of the Concepts for Relocating the Saturday Market to a Village 'Heart' Gathering Space

Design Considerations – The Saturday Market is a weekly community gathering that also attracts visitors from Vancouver Island and beyond. The existing Agricultural Hall site is prominent, convenient, and helps to activate neighboring businesses, however there is pent-up demand for additional space, safety and capacity issues with parking and circulation, and challenges for accessibility. Despite being part of the gateway area for the village, it is an empty gravel parking lot on most non-market days, even more so once the Agricultural Hall is removed as planned in the next few years. If a new central "heart" public gathering place was created, relocating the Market would help to activate the new space and mark it as an iconic, feature community place. It would also permit the possibility of converting the current site to a Visitor's Centre or other combination of uses that would mark the entrance to the village at all times of the year. Responses to the Image Preference Survey also supported the idea of a permanent Market Pavilion that would cover the vendors and allow for a longer season (See Appendix C – Image Preference Survey Summary Report). It would also provide a covered gathering space for park visitors during the week.

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Community Support - 85% of Design Concept Questionnaire respondents said having the Saturday Market at the Heart was extremely important (50%) or somewhat important (35%) to the vision of a great, sustainable village. Supportive comments included preferences for a central, attractive gathering area for the market, support for a covered market area, improved parking and pedestrian safety, and closer proximity to village businesses, or to move to the Commons. Concerns included it being a negative space when not used for the market, parking, and the need to focus on other issues. The Agricultural Hall Association has indicated they are open to the idea.

Potential Related Projects – This idea is connected to Big Idea 4- A Village Heart, as well as Big Idea 9 – Visitor's Centre. Obviously, the Agricultural Hall Association's strategic planning for their current site and building is also directly related.

Possible Next Steps – The Agricultural Hall Association is actively considering plans for their existing site. Recently, they determined the existing building no longer serves needs well enough to justify the upgrades and maintenance required. They are open to creative ideas for the Market's future. Ideally, planning for a village heart gathering space with an integrated market will advance before plans are solidified.

Big Idea 7 – A Community Events Building and Big Idea 8 – Recreation Centre

Concepts - Addition of a community gathering building and/or a recreation centre in the village core.

Team A -
Community Centre behind Folklife Village

Team B -
Community Hub (G) at the Village Square

Team C -
Community Centre in the Lochinvar triangle

Figure 10 - Three of the Design Visioning Workshop Concepts for a Community Events Building or Recreation Centre in the Village

Design Considerations – Given that the only larger-scale community gathering building in the village core, the Agricultural Hall, is planned for removal, each of the Design Visioning Workshop Concepts proposed a replacement building somewhere in the village core. Most of the four Design Concepts proposed a community gathering building as well as a recreation centre, and the Design Concepts Questionnaire asked these questions separately. However, the program for such buildings would likely overlap and could be achieved in one centre. The program could include open gathering space, adaptability as a performance space, shared office space for local community groups, indoor recreation program space, public washrooms, a meeting room, or storage for the market (if co-located at the village heart). As the primary community building in the core, it should be an iconic, activating space, with a presence in the village, and including outdoor gathering areas. It will require sufficient parking, but that should not detract from the building's contribution to the vibrancy and pedestrian-friendly nature of the village. It would be beneficial if it was located adjacent or within a village 'heart' central gathering square/green, to optimize vibrancy and allow for indoor/outdoor gathering events.

Community Support - 84% of Design Concept Questionnaire respondents said a Community Event Building in the village was extremely important (45%) or somewhat important (39%). Supportive comments included the need for a village event centre, performance centre, and a multi-use building. 66% said a Recreation Centre in the village was extremely important (30%) or somewhat important (36%). Supportive comments emphasized the need, especially for young families and seniors, and several suggested the EMCON site. Concerns for both buildings include: costs versus need; competition with the Community Hall or the Haven's auditorium; a multi-use building having poor acoustics; parking; scale; and over-developing the village.

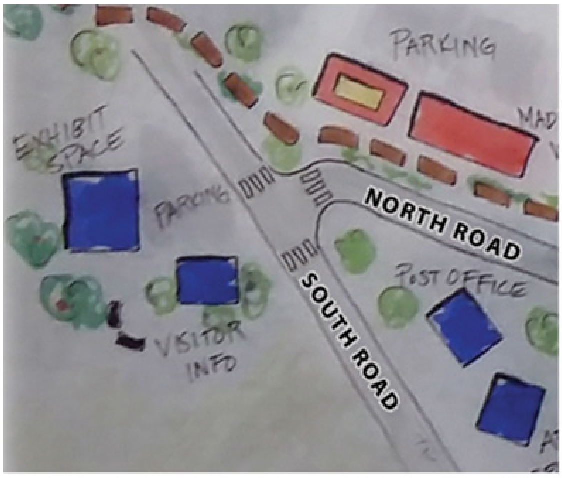
Potential Related Projects – Big Idea 7 and 8 should be considered together. They should also be considered for contribution to Big Idea 2 – North Road as 'Main Street', and Big Idea 4 – A Village Heart.

Possible Next Steps – In 2015, the RDN explored purchasing some of the EMCON properties in the village core for a recreation facility. Although they withdrew from the purchase contract, it indicates local government interest in some form of additional recreation facility in the village. The EMCON properties are in the village area, but are accessed through a residential area and are detached from physical or visual connection to the village core. Moving the EMCOM's facilities to their undeveloped properties and constructing a community facility with a presence on North Road would contribute to the vitality, sociability, and connectivity of the village. Alternative sites could also be explored by the RDN that better meet the guiding principles, or explored by the community through a Village Area Neighbourhood Plan or Strategy process led by the Islands Trust. The RDN could undertake a needs assessment and feasibility study for a community event and/or recreation facility in the village.

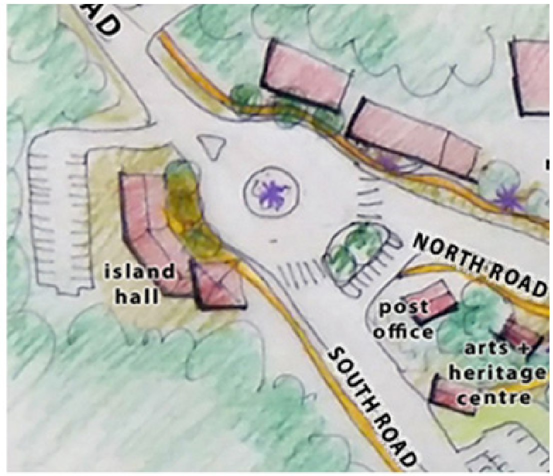
Big Idea 9 – Visitor's Centre and/or Island Hall

Concept – a Visitor's Centre or mixed-use centre near the North and South Roads intersection.

Design Considerations – A Visitor's Centre ideally has a strong presence at the entrance to a community. The current Visitor's Centre does not have an obvious presence and can be difficult to access, es-



Team A -
Visitor's Centre and Exhibit Hall



Team B -
Island Hall - Visitor's Centre, Island Trust, & Eco-education Centre

Figure 11 - Two of the Design Visioning Workshop Concepts for a Visitor's Centre at the Current Agricultural Hall Site

pecially by low-mobility users. Three of the four Design Visioning Workshop concepts showed a Visitor's Centre at the current Agricultural Hall site, assuming the Saturday Market is relocated to a new 'heart' park or square. It should be an iconic, west-coast building that helps create the gateway to the village and gives a taste of Gabriola culture. Some concepts combined the Centre with other uses, such as an Exhibit Hall run by GAC or the museum. One team combined the Visitor's Centre with the Islands Trust/RDN offices and an Eco-Education Centre into a central 'Island Hall' building, informing both visitors and islanders about sustainable life on the islands.

Community Support - 69% of Design Concept Questionnaire respondents said a Visitor's Centre at the Agi Hall site was extremely important (24%), or somewhat important (45%) to realizing the vision of a great, sustainable village. Supportive comments included: the need for a gateway; support for the "Island Hall" idea; improving accessibility; and having the Visitor's Centre on its own site (not favouring one development over another). Concerns included questioning the need for a gateway, duplicating services, architectural style, and maintaining easy access to the Islands Trust from all areas of the island.

Potential Related Projects – Realizing this idea at the Saturday Market site is likely reliant on Big Idea 6 – The Market at the Heart, and therefore Big Idea 4 – A Village Heart. Potentially it could be combined with the Saturday Market at the existing site. Another possible site could be at the 'heart' park/square itself.

Possible Next Steps – This concept would require the coordination of different projects, agencies (Islands Trust/RDN/Economic Development), and community groups (Chamber of Commerce, Agricultural Hall Association, and potentially GAC or the museum). The Chamber of Commerce could take the lead on exploring possibilities, or initiating more active collaboration, especially if the Agricultural Hall Association is interested in either relocating to a ‘heart’ type place, or partnering on a shared Visitor’ Centre / Market building on the current market site.

Big Idea 10 – Integrated Infrastructure Management – Village Area Plan

Concept – Undertake an integrated study looking at all aspects of the water cycle in the village area, including potable water, sewerage, drainage, and potential reclaimed water reuse, as a coordinated, sustainable system.

Design Considerations - Keeping the village area compact is beneficial for walkability, connectivity, and vibrancy. However, it can place stress on groundwater and sewerage carrying capacities. Generally, properties on the island address water, drainage, and sewerage needs and regulations on a site by site basis. There is also little regulatory oversight over on-going maintenance requirements or failing systems. Storm water is only regulated on a site by site basis, and only if a Development Permit is required. In response, several Design Visioning Workshop teams proposed developing an Integrated Infrastructure Management Area Plan for the village. This would look comprehensively at sustainable planning for water, storm water, and sewerage needs in the village. Systems may still be decentralized (site or cluster based), but might utilize a centralized management approach. This would allow for thinking that is more systems-based and area carrying capacity based. It would look for ways to reuse “waste” water or storm water, and better ensure oversight of proper functioning of the sewage systems and their relationship to water supply wells. Ideas explored at the workshop included reservoirs, small water systems, expanded rainwater harvesting, clustered sewage treatment, rain gardens for storm water treatment, reclaimed water reuse for village landscaping, and production of fertilizer for local farms.

Community Support - 93% of Design Questionnaire Respondents said this was extremely important (73%), or somewhat important (19%) to the vision of a great, sustainable village – the second most popular idea. Supporting comments included the importance of this to sustainability, and the necessity of this approach before any further development in the core. Several said this is the most important priority project. Concerns included the potential bureaucracy and funding required, as well as opposition to increasing density in the core.

Potential Related Projects – In some ways this project is independent of the other Big Ideas, but it also could affect them all. It would be an important foundational study to consider as part of any discussion about increasing density in the village area.

Possible Next Steps – The Islands Trust could undertake an Integrated Infrastructure Management Area Plan for the village as a project, working with specialist consultants. The Ministry of Health would be an important stakeholder agency, and potentially could take some sort of partnership role in initiative of such an effort.

Big Idea 11 – Lighting

Concept – To add pedestrian scaled, dark-sky friendly lighting along a pathway system in the village.

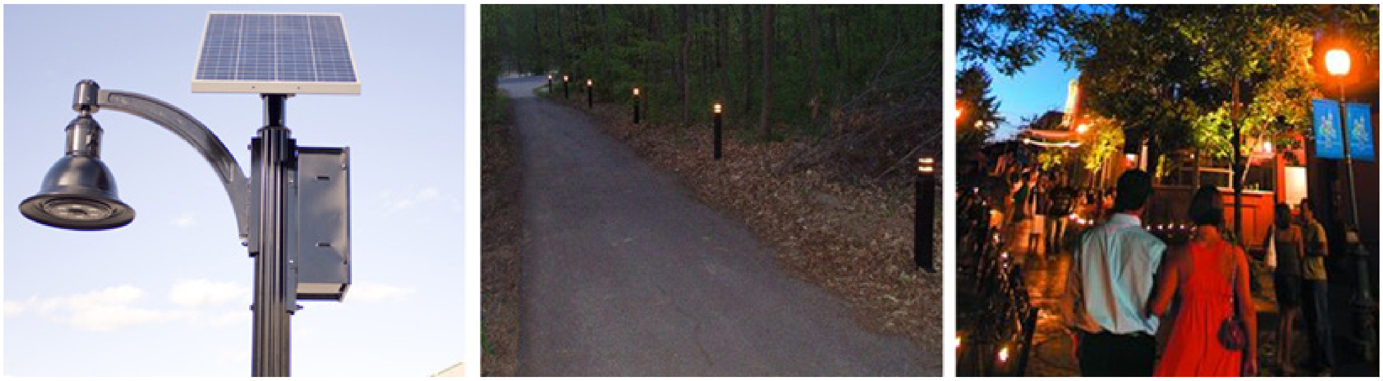
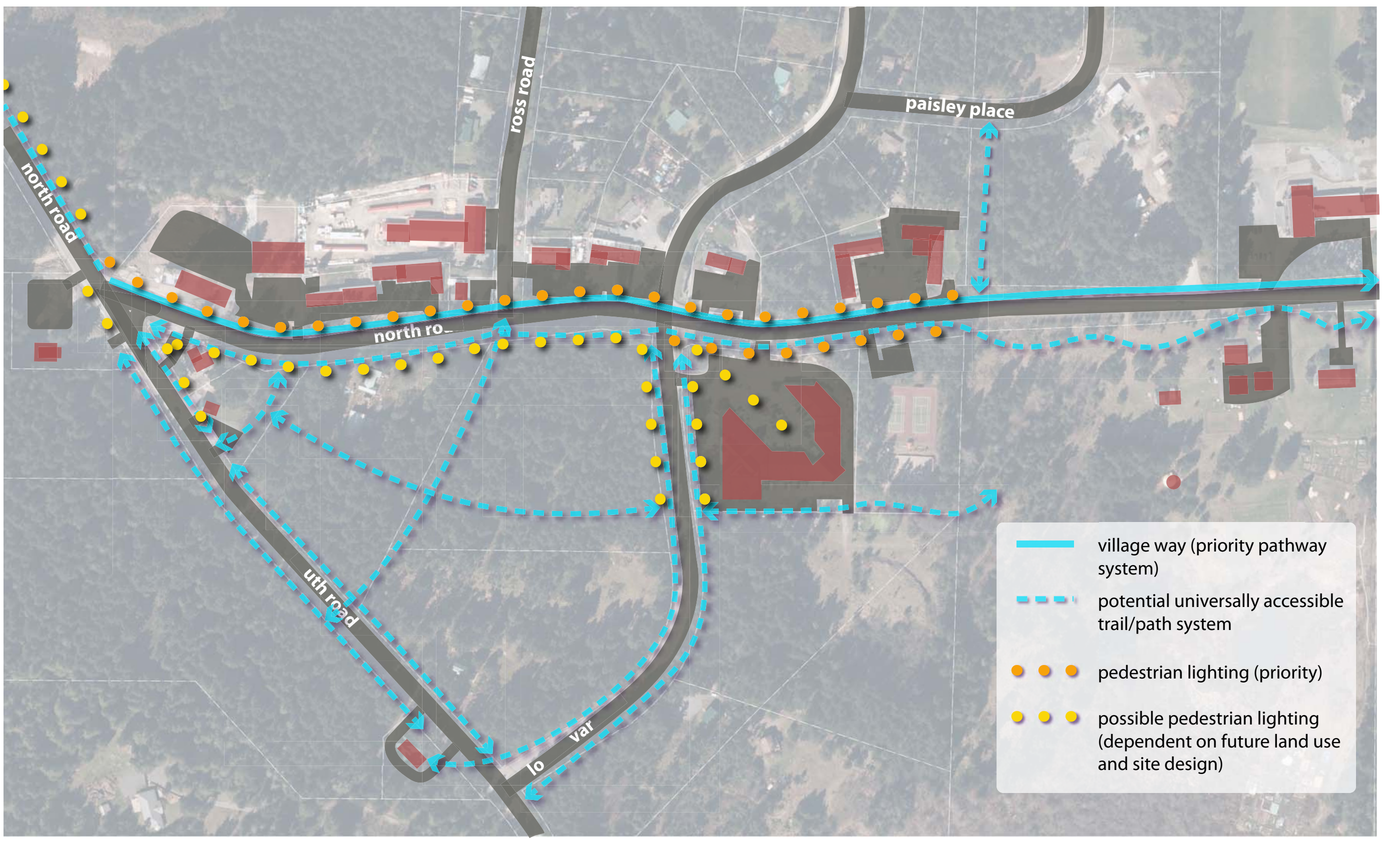


Figure 12 - Pedestrian lighting



Design Considerations – Pedestrian scaled lighting can encourage walking, increase safety and security, add a distinct character, highlight wayfinding, and contribute to evening vibrancy in the village area. It is usually in the form of smaller scale poles (~15 feet), bollards, or ground mounted. In order to protect Gabriola's dark sky and minimize off-site impacts, luminaires should be shielded, with light targeted on pedestrian paths. Simple but attractive fixture design can contribute to the character of an area, highlighting the public realm and the distinctiveness of the village area. The spacing of the luminaires should be enough to create continuity and safety, but not create an over-lit environment for the rural village setting. Energy efficiency of the lamps is another important consideration; solar fixtures are also possible.

Community Support - 83% of Design Concepts Questionnaire respondents said lighting was extremely important (39%) or somewhat important (44%) to realizing the vision of a great, sustainable village. Supportive comments emphasized the safety, dark-sky friendly, walkability and evening vibrancy contributions of lighting. Concerns included light pollution, maintaining a rural character, appropriate aesthetics of fixtures, and questions about the need. In the business and property owner stakeholder meetings, there was also expressed interest in pedestrian lighting, to add to evening vibrancy and support for extended hours.

Potential Related Projects – Pedestrian-scaled lighting is associated with Big Idea 3 – Pedestrian Pathway System, Big Idea 2 – North Road as 'Main Street', and should also be considered for a "heart" park/square, to facilitate evening use, safety and security of that primary social space.

Possible Next Steps – It is likely that pathway lighting would need to be planned, implemented, and managed by the RDN as a service area. The RDN currently provides 7 different rural street lighting local service areas throughout the Regional District, as cobra-head street lights attached to BC hydro poles, or as underground wired, free-standing ornamental streetlights. According to an engineering representative at the RDN, a License of Occupation is not required to locate the lights within the MOTI right-of-way. While the Questionnaire response to the concept of pedestrian lighting was largely positive, lighting is a strong trigger in the rural character debate, and broader consultation would be needed to determine if it is something broadly desired to eventually pursue for the village, perhaps best explored as part of a Village Area Plan process.

Big Idea 12 – Public Art Program

Concept – Expand public art presence in the village area.

Design Considerations – Public art can establish landmarks, enhance identity, elicit social engagement, express values, question assumptions, and inspire experiences from shock to delight in the village area landscape – a great place-making tool, especially for an island that promotes itself as the 'Isle of the Arts'. Concepts from in the Design Visioning Workshop included ideas such as a prominent installation as part of the North and South Road intersection gateway design, art walks, intersection art murals or crosswalks, sculpture gardens, and interactive play installations or community engagement pieces, as both temporary displays or permanent features. Creating good public art is an art in itself. Response to location is critical – a piece should enhance the purpose of a place, whether it is to boldly announce arrival and orient newcomers, encourage interaction among strangers, or inspire intimate contemplation. There should be engagement between the place and the art – a reciprocal conversation of place design and the piece – for example, the place should provide setting, seating, sun, shade, good maintenance, access, or other reasons to be in the space in order for the art to play its role. Art has a major role to play, but it does not create place on its own; it must be part of a holistic place-making strategy. There is a place for curated, commissioned pieces of bold professional artist expression, and there is also a place for community-engaged art, collaborative pieces between professional artists and community. There is also a role for temporary installations that can surprise and energize, as well as permanent features that act as landmarks or postcard moments that reflect a communities' identity. Practical considerations include safety, durability, maintenance, lighting, and vandalism.

Community Support - 76% of Design Concept Questionnaire respondents said a public art program was extremely important (35%), or somewhat important (41%) to realizing the vision of a great, sustainable village. Supportive comments talked of public art supporting the notion of the Isle of the Arts and adding flair and pride. Other comments supported the idea of interactive and multi-purpose art, art walks, performance-art spaces, and participatory, temporary art. Concerns expressed included: creating community agreement on art; maintenance and management needs; distracting drivers; and the need to focus on other aspects of village planning first.

Potential Related Projects – Public art can be part of most conversations on other Big Ideas – it can have a role to play in circulation, infrastructure, and almost any place design. Gabriola Arts Council (GAC) should be approached to explore possible opportunities whenever feasible.

Possible Next Steps – GAC's prominent village presence in their new home of the Arts and Heritage historic building is a place enhancing and village gateway opportunity in itself. Next steps in village area public art, whether a formal Public Art Program or more targeted and one-off initiatives could be led by GAC's strategic planning, but invited, encouraged, and respected by local government (including economic development) and other group's initiatives. There may be advantages to partnering with the RDN, perhaps via the establishment of a Village Revitalization Service Area, or economic development funding.

Big Idea 13 – Public Realm Landscaping

Concept – To enhance the public realm of the village with landscaping, whether that is preserved natural vegetation, integrated plantings within new developments, or streetscape plantings.

Figure 14 - Public realm landscaping concepts

Design Considerations – Gabriola is blessed with a beautiful natural landscape, which is foundational to the island and village's sense of identity. However, integration of healthy, verdant, place appropriate landscaping in village area public environments – commercial, community, streets, and institutional places – is currently hit and miss, even in the new developments. Well planned landscaping can offer sun or shade, storm water or septic treatment, space definition, screening or view framing, wayfinding, reflection of the wind and seasons, colour and beauty, safety buffers, and many other benefits in place design. It can help integrate the village area with the natural setting, and it can highlight the village as a distinct, special place within the island environment. It could include landscaping within the parking areas and public spaces or preserved natural spaces of commercial developments, parks and squares, seasonal displays, gateway features, or streetscapes. Particularly, in a water conscious community, drought-tolerant species are required; however, allowance should be made for 1-2 years of temporary establishment irrigation of new landscapes, to ensure they develop the root systems to thrive (even native species). Use of native species can contribute to habitat connectivity, sense of place, and low-maintenance needs, although there is a place for appropriate non-native species that meet sustainability criteria but provide a distinct design need – such as a highlighting colour or a particular form. Additionally, commercial, multi-family, and institutional development applications could require professional site surveys with locations of significant trees so site planning can consider preservation of such site features.

Community Support - 87% of Design Concepts Questionnaire respondents said streetscape landscaping was extremely important (53%) or somewhat important (33%) to realizing the vision of a great, sustainable village. Supportive comments included making walking in the village more appealing, increasing a sense of unity, a sense of welcome and attractiveness, the importance of sustainable water use, and using edibles and native plants. Concerns expressed included MoTI regulations, focusing on the natural environment, maintaining rural and undeveloped character, and costs.

Potential Related Projects – The Big Idea of streetscape landscaping should be considered in relation to Big Idea 3 – Pedestrian Pathway Network and Big Idea 2 – North Road as 'Main Street'. Improved landscaping should also be considered as part of public gathering places, whether publicly owned or private commercial developments. Big Idea 10 – 'Integrated Infrastructure Management Village Area Plan' may also offer sustainable solutions for irrigation.

Possible Next Steps – The RDN could consider establishing some sort of Village Place-making Service Area, which could work in concert with the Islands Trust land use planning and the new (to be determined) economic development agency, in more comprehensive village place-making planning, implementation, and maintenance. This could include working with community groups through an "Adopt-A-Garden" type initiative, as some municipalities have done to help create and maintain public landscapes. There are examples of Regional Districts (such as the Cowichan Valley Regional District) installing and maintaining landscaping within the MOTI right-of-way. Development Permit Area guidelines and landscape security bond process could also be improved to encourage better landscaping on commercial or multi-family development sites.

Big Idea 14 – Pedestrian-Engaging Village Buildings

Concept – Improve development approval regulations and process to encourage better building design that contributes to the village vibrancy, pedestrian-friendliness, attractiveness and sustainability.
Design Considerations – Village place-making through development can be a slow evolution, particularly on a Gulf Island, but that makes each development application a precious optimization opportunity. Building and site design is key to creating a pedestrian-engaging environment, and to realize good village place-making principles such as continuity, congruence, enclosure, charm, vernacular, and pedestrian scale. Recent changes to the village area Development Permit guidelines were meant to encourage contributing design strategies in private development. The Islands Trust could analyze the results of applying these to the new Madrona Marketplace West, and consider how the process can be further improved.

This should include considerations of: contextual responsiveness; consideration of height and massing; improved site surveys and landscape feature preservation; vertical or horizontal façade expression; setbacks; site grading, especially to universal accessibility standards (currently under regulated by both the Islands Trust Development Permit process and the RDN's Building Permit process); energy efficiency; circulation and physical connection to the street; orientation and expression of entries; roof forms; vernacular materials or design details; rhythm and proportions of openings; lot sizes, orientations, and coverages; side yards, and more. Some specific ideas highlighted during the Design Visioning Workshop included reducing setbacks, improved front landscaping, incorporating better public gathering space, eliminating parking between the street and building, better coordination in contributing to a public pathway system, and allowing a pedestrian-engaging presence for home-based businesses within the village area.

Community Support - 89% of Design Concept Questionnaire respondents said this was extremely important (62%) or somewhat important (27%) to realizing the vision of a great, sustainable village. For some, this is the most important village priority. Supportive comments included: the need to think long-term and opportunistically when existing development is improved; hiding parking; avoiding strip mall development; some on-street parking; and improving walkability. Concerns included maintaining easy access of parking to stores, especially for elderly and low-mobility users.

Potential Related Projects – This concept is associated with Big Idea 11 – public realm landscaping, as well as Big Idea 3 – pedestrian pathway system.

Possible Next Steps – The Islands Trust could hold an internal review of recent Form and Character Development Permits and how well the guidelines and approvals process is working to optimize place-making on the Gulf Islands. Updates to the DP guidelines could provide a more robust and useful framework for ensuring high quality place-making. Additionally, for key village development projects it may be worth bringing in an advisory consultant, perhaps contracted for on-call services, to assist in design review and negotiation, or try to ensure there is a planner in the Islands Trust system with such experience who can work with the local Island Planner. Alternatively, the Islands Trust's Local Planning Services group could focus one or more of their quarterly professional development days on Form and Character Development Permits, where community design consultants could provide additional training.

Revisions to the Land Use Bylaw to reduce front setback requirements are also recommended for consideration, in coordination with encouraging MoTI to reconsider their setback requirements in village settings.

Big Idea 15 – Multi-Family Mixed Use

Concept – Expand the potential for mixed use buildings, with multi-family housing above commercial ground floor uses.

Design Considerations – Many comments throughout the Village Vision process promoted mixed-used buildings (ground floor commercial, second story residential) to provide housing diversity, a more affordable housing option, walkability, and vibrancy. Second story units contribute 'eyes on the street' and workforce housing for commercial areas, and commercial uses provide easily accessible amenities for residents. Current commercial zoning permits mixed use in a limited way (one accessory dwelling per lot). However, most commercial developments have not implemented this housing. Per comments at the property/business owner stakeholder meeting, this is because of the economic infeasibility of the costs of increased building code requirements borne only by one unit, and the challenge of making a sole unit a welcoming environment. Mixed use may be feasible if the single allowed residences from several lots could be pooled or transferred to allow several residences on one lot.

Community Support - 75% of Design Concepts Questionnaire respondents supported the idea of multi-family mixed-use buildings in the village core. 14% supported it only if it did not increase overall density on the island. Supportive comments referred to the contribution of residential density to the vibrancy of the village, and the importance of increasing affordable housing options. Several comments emphasized the need for a sustainable water and wastewater approach for such projects to be supported. Concerns mentioned included the quality of design, parking, water and wastewater management, and avoiding residential in the core.

Potential Related Projects – This concept should be considered in concert with Big Idea 14 – pedestrian engaging village buildings, and Big Idea 16 – village area density.

Possible Next Steps – This would likely be an amendment to the rules associated with commercial zoning. The first questions to explore are ‘if’ or ‘how’ to enable such increases in density within the village core area. This is addressed further in Big Idea 16 – village area density.

Big Idea 16 – Village Area Density

Concept – To increase residential density within the village area.

Planning Considerations - While restricting population via “density” limitations is a hallmark tool that the Islands Trust uses in support of environmental and rural character protection, there was strong community support at the Village Vision workshops and surveys (see Appendix A, C, E) for increasing residential density in the village core. The stated reasons for support include that residential uses intermixed with amenities can enhance vibrancy, sociability, walkability, affordability, public health, and safety, and reduces greenhouse gas emissions when compared to more dispersed housing. It has also been argued that increasing density in the village area allows for the retention of low densities in the more rural parts of the island. Demand is high for more affordable and diverse housing options, particularly in support of social sustainability – providing workforce and family housing.

However, comments also stressed respect for the environmental and rural character carrying capacity of the islands – the primary reasons the Islands Trust was created in the first place. Sustainability of the island’s environments, culture, and character is foundational – many state that additional density could only be supported if it can be met within the island’s carrying capacity. What those carrying capacity limits are is largely based on conceptual science (depending on the resource), or subjective (such as rural character). However, some community members believe the sustainable limits have already been exceeded, or will be at existing build-out levels. Detailed studies and proposals would be needed to better objectively determine environmental limits at the site level and island level, and additional consultation and qualitative study required to determine appropriate rural character for additional density and housing options in the village area. Some factors to consider in further study are:

- Using a updated Gabriola Housing Needs Assessment Study, explore what types of housing and how many units are needed for long-term social and economic sustainability on the island;
- What requirements for septic and water systems that fit the carrying capacity of the site are technically, legally, and financially feasible at the densities considered. Consider a parallel or fore-runner study of an Integrated Infrastructure Management Village Area Plan.

Community Support – The Design Concepts Questionnaire provided multiple ideas for comment regarding increasing density in the village core:

- No change; retain existing regulations.
- Expanding allowable density bonus potential in exchange for community amenities such as affordable housing or parks.
- Expanding density bonus potential in the village area, up to a set maximum.
- Expanding density transfer options from more sensitive, rural, hazardous, or significant areas of the island.
- Allowing transfers of unused accessory dwelling potential.
- Only for Affordable Housing, as defined in the OCP.
- For mixed income housing, including lower cost ‘attainable’ housing options for those that may not meet the OCP’s Affordable housing requirements.
- Adding incentives or otherwise promoting the existing Density Bank.

In the Design Concepts Questionnaire responses, generally speaking, options for increasing density in the village core were preferred over the “no change, retain existing regulations” option (see Appendix E, or the full results version available on the project website). Several comments stated the need for more residential in the village to support its vibrancy. The option of expanding density transfer from more sensitive, rural, hazardous, or culturally / environmentally significant areas of the island to the village received the highest weighting. There was stronger support for adding mixed income housing, compared to Affordable Housing (as defined by the OCP) only. Some comments reinforced this point. Please see the full results for all comments, available on the project website.

Potential Related Projects – In many ways, most other Big Ideas could be related to the concept of adding additional density is the village core. For example, increased residences within walking distance of the core would compound the need for improved pedestrian safety, and thus for a pathway system and, potentially, pedestrian lighting.

Possible Next Steps – A potential future phase of the Gabriola Island Local Trust Committee’s Housing Options project could consider options for increasing attainable and diverse housing options on the island, once 2016 census data is released and a Housing Needs Assessment is completed.

Other Big Ideas

Many other ideas, big and small, for realizing the vision of a great and sustainable village have been captured in the summary reports of the Village Vision efforts. Here are some next step thoughts for a few of these:

Seniors progressive care housing – there are some strong voices advocating for housing and services to be hosted on Gabriola to aid in aging-in-place, within walking distance of village amenities, the clinic, and the ferry (see Appendix A – Community Discussion Summary) (also discussed at the March 4, 2017 Sustainable Gabriola Forum). This includes options from down-scaled homes through to assisted living, extended and respite care, and a hospice. Gabriolan physicians are in support of such services/facility, and community members who helped raise funds and coordinate the Medical Clinic construction are also interested. Potential community groups such as the Gabriola Health Care Foundation, the Gabriola Health and Wellness organization, or other community group could help facilitate the creation of a community owned facility, with medical staff provided by Island Health. There is a precedent model for a small hospice in Port Alberni, in a donated house, built with community raised funds, and staffed by Island Health (www.albernihospice.ca).

The importance of the Lochinvar Triangle – All of the Design Visioning Workshop concepts, as well as other community member concept plans[3], recognize the Lochinvar Triangle as a potential natural centre of the village. The central triangle between the post office, Arts and Heritage Hall, the museum, and Folklife Village is predominately zoned Large Rural Residential. The Islands Trust could explore proactively rezoning these parcels, as part of a Village Area Neighborhood Plan or Strategy. Another possibility to ensure that any future proposed rezoning is in the community's best interest is to secure some or all of the parcels under some form of community ownership, either by the RDN, or a collective model such as a Land Trust, or perhaps a partnership arrangement that might include other community groups or property owners. This could remove the land of these key village parcels from the imperatives of the capital market and place community-serving interests at the forefront.

Realignment of Ferry Queue to North Road – In 2016, the Gabriola Ferry Advisory Committee proposed a realignment of the ferry queue from Taylor Bay Road to up the hill of North Road. The proposal is primarily due to safety concerns but would also bring economic stimulus and vitality to the village. MoTI or BC ferries would need to undertake a traffic study to determine viability.

Ferry Hill Pathway – Notwithstanding the current issues between RDN and MOTI on implementing the Village Way trail, the eventual extension to the ferry terminal should undergo preliminary planning to optimize and inform interim projects along the route. The RDN and MOTI should collaborate on a preliminary plan, considering the existing road location within the right of way, drainage, topography, pedestrian road crossings and safety, rock outcroppings, tree locations, connections to the Village Way Trail and the ferry terminal. This effort could also be addressed in a Islands Trust, RDN, MOTI workshop about the village area section of North Road.

3 http://paulgrignon.netfirms.com/GabriolaTourMap/LockinvarPlan/map.html

Gateways – In addition to the North/South Road intersection, other points noted as gateways are the ferry terminal, and North Road at the Commons and Tin Can Alley. Further consideration at the ferry will require continued advocacy of the Ferry Advisory Committee. Other points along North Road could be considered as part of the Village Way trail project or a broader study of the road as 'Main Street'.

Housing options – In the workshops, and the Image Preference Survey, there were many comments in support of expanding housing options beyond only single family residential, including cohousing, co-ops, clustered housing, townhomes, eco-villages, tiny homes, and mixed-use. The Local Trust Committee will need to consider the appropriateness of expanding housing options, as well as how to facilitate provision, in Phase II of their Housing Options project. The People for Healthy Communities community group is also helping to build capacity with the Gabriola Housing Society, to help realize affordable housing projects on the island.

A new entity – There have been many suggestions throughout the Village Vision project for forming a Community Foundation, Land Trust, Village Association or similar entity which could build on the Village Vision effort. Conversations are already underway for a Community Fund, a endowment foundation that could fund village projects, and a new Co-op Society, which is exploring leveraging existing community owned assets, such as the Commons, to facilitate community projects.

Economic Development – There are great opportunities for the Chamber of Commerce (and/or the eventually decided long-term economic development service provider) to promote economic sustainability on the island through place-making efforts in the village. The Chamber is developing plans for building on the Economic Readiness Project and the current Commercial Demand Forecast, with ideas to promote local businesses and Gabriola tourism.

Prioritizing the Big Ideas

Conceptualizing a prioritization strategy is challenging because of the complexity of factors, such as potential time-sensitive land purchase opportunities, level of community and political support, capacity of responsible parties, potential symbiotic correlation with other projects, other island priorities, or funding grant criteria. The final questions of the Design Concepts Questionnaire asked the community for general prioritization feedback, based on how important each theme (circulation, parks, community buildings, housing, etc.) was to the core principle categories (functional, experiential, and social). Circulation, parks/gathering places, and infrastructure improvements were the seen as most important overall (see Appendix E – Design Concepts Questionnaire Summary Report). This largely corresponds with the 'Big Ideas' seen as most important to realizing the vision of a great, sustainable village. In the Tables below, each Big Idea is given a priority rating based on the above criteria and community input, but this is a general guideline only, and should be adjusted as opportunities arise and circumstances change.

Table 1 - Big Idea Summary Ranking

Big Idea Summary Ranking

Priority 1: Big Idea #2 – North Road as "Main Street" – more village quality
Big Idea #3 – Pedestrian Pathway System
Big Idea #4 – A Village Heart
Big Idea #10 – Integrated Infrastructure and Village Area Plan
Big Idea #16 – Village Area Density

Priority #2: Big Idea #1 – Improve intersection of North & South Road
Big Idea #6 – The Market at the Heart
Big Ideas #7 & #8 – Community Events Building and/or Recreation Centre
Big Idea #11 – Pedestrian Lighting
Big Idea #13 – Public Realm Landscaping
Big Idea #14 – Village Buildings That Engage Pedestrians
Big Idea # 15 –Multi-Family Mixed Use

Priority #3: Big Idea #5 – Folklife Village Pedestrian Centre
Big Idea #9 – Visitor Centre and Island Hall
Big Idea #12 Public Art Program

Big Idea Summary Table

Design or Policy Idea	Priority (1-3)	Responsible Jurisdictions & Related Groups	Associations	Possible Next Steps
Big Idea 1 North and South Road Intersection Improvements	2	Islands Trust MoTI RDN GaLTT, GAC, Agi Hall Assoc.	Big Idea 2 Big Idea 3 Big Idea 12 Village Way Trail	Interagency Workshop Traffic & Design Intersection Study
Big Idea 2 North Road as 'Main Street'	1	Islands Trust MoTI RDN Property owners	Big Idea 3 Big Idea 11 Big Idea 13 Big idea 14 Village Way Trail	DP guidelines and process review LUB amendments Interagency workshop Village Area Neighbourhood Plan or Strategy Village Place-making Service Area
Big Idea 3 Pedestrian Pathway System	1	Islands Trust MoTI RDN GaLTT, property owners	Big Idea 2 Big Idea 11 Big Idea 13 Village Way Trail	Interagency coordination on pathway Master Plan Village Area Neighbourhood Plan or Strategy DP guidelines Village Place-making Service Area

Design or Policy Idea	Priority (1-3)	Responsible Jurisdictions & Related Groups	Associations	Possible Next Steps
Big Idea 4 A Village Heart Timing should consider potential sale/ development of Lochnivar triangle parcels.	1	RDN Islands Trust Village Vision or other new champion community group, Agi Hall Assoc.	Big Idea 6 Big Idea 7 Big Idea 5 Big Idea 9	Village Area Neighbourhood Plan or Strategy RDN studies
Big Idea 5 Folklife Village Pedestrian Centre	3	Islands Trust RDN Village Vision or other new champion community group. Property owner.	Big Idea 4	Amenity zoning provisions RDN studies for a "Heart"
Big Idea 6 The Market at the Heart	2	RDN Islands Trust Agi Hall Assoc., The Commons, Village Vision or other new champion community group	Big Idea 4 Big Idea 9 Agi Hall site planning Islands Trust office location planning	RDN studies for a "Heart" Agi Hall Assoc. strategic planning
Big Idea 7 & 8 Community Events Building and/or Recreation Centre	2	RDN Islands Trust	Big Idea 2 Big Idea 4	RDN studies Village Area Neighbourhood Plan or Strategy
Big Idea 9 Visitor's Centre and Island Hall	3	Islands Trust RDN Agi Hall Assoc., Chamber of Commerce	Big Idea 6 Big Idea 4	Agi. Hall Assoc. strategic planning Chamber of Commerce studies
Big Idea 10 Integrated Infrastructure Management Village Area Plan	1	Islands Trust RDN MoTI	Related to most other ideas	Local Trust Committee project
Big Idea 11 Pedestrian lighting	2	RDN MoTI	Big Idea 2 Big Idea 3	RDN study Village Place-making Service Area
Big Idea 12 Public Art Program	3	GAC RDN		GAC strategic planning
Big Idea 13 Public Realm Landscaping	2	RDN Islands Trust MoTI Gabriola Garden Club or new group	Big Idea 3 Big Idea 2 Big Idea 10	Village Place-making Service Area Improve DP guidelines

Design or Policy Idea	Priority (1-3)	Responsible Jurisdictions & Related Groups	Associations	Possible Next Steps
Big Idea 14 Pedestrian engaging village buildings	2	Islands Trust Property owners	Big Idea 3 Big Idea 11	DP guidelines and process review LUB bylaw review
Big Idea 15 Multi-Family Mixed Use	2	Islands Trust	Big Idea 14 Big Idea 16	Islands Trust Housing Options Phase II studies
Big Idea 16 Village Area Density	1	Islands Trust Gabriola Housing Society, People for a Healthy Community	Indirectly or directly affects most other ideas	Islands Trust Housing Options Phase II studies

Part 4 – Conclusions and Next Steps

The sixteen big ideas encompass the gist of our recommendations. Figure 16 lays those out in order of priority as based on community feedback. Figure 17 lays those out in numerical order with an indication of which agencies/organizations are affected the most. Appendix 1 below spells out some recommendations sorted by agency/organization.

In reality, much of the responsibility for picking up these ideas lies with the Islands Trust. It is imperative that the Local Trust Committee pick up these recommendations, discuss them and promote them. The current trustees are coming to the end of their term. If they can frame some of the ideas in this report in a way that becomes the subject of discussion during the upcoming election campaign, that would be a great service to the community. After the election, then it is incumbent on the next Local Trust Committee to make comprehensive village planning the priority topic for next term. Pushing such an agenda forward will require pushing inter-agency cooperation between the Islands Trust, the RDN and MoTI.

Respectfully Submitted,

The Village Vision Planning Committee
(in alphabetical order)
Dianne Cornish
Dyan Dunsmoor-Farley
Steven Earle
John Peirce
Jim Ramsay
Megan Walker

and past members Michelle Benjamin, Christine Bletcher, Julie Sperber and Laura-Jean Kelly

Appendix 1 – Recommendations by Agency & Community Group

Islands Trust

Recommended Strategic Directions and Policies

1) Acknowledge and respond to the community interest and efforts in the Village Vision process, and the village's importance to the Policy Statement goal of sustaining healthy communities, by taking a stronger advocacy and leadership role in elevating sustainable place-making and community design values when considering village area issues. Trustee candidates for the 2018 election should state their position on this issue as part of their campaign platform.
2) Consider undertaking a Village Area Neighborhood Plan process to produce a Plan that can be adopted as a Schedule to the OCP. Alternatively, undertake this process as a Village Plan Strategy, which would not need to be adopted in the OCP, but could be endorsed by the agencies as guidance for follow-up efforts (such as OCP amendments). A Village Area Neighborhood Plan or Strategy could address such topics as:
    a) Improved inter-agency collaboration
    b) Further exploration of the Village Vision "Big Ideas", including confirmation of levels of community support, prioritization, and identification of implementation or enabling strategies.
    c) Explore potential proactive or enabling of rezoning of key village area properties, in light of the upcoming (June 2017) results of the Chamber of Commerce's current Commercial Demand Forecast study, and any Village Area Plan recommendations for strengthening the village's community design and land use structure.
    d) Follow-up or parallel efforts of the Housing Options Review Project, if the upcoming Housing Needs Assessment study determines that additional housing options are needed and are best targeted in the village core.
    e) Examine if expansion of the amenity zoning provisions of the OCP would benefit the community and be practical to implement.
    f) Consider options for improving the Form and Character Development Permit processes (see below).
    g) Consider coordinating an inter-agency planning effort for the village area portion of North Road, to develop a coordinated approach to enhancing the streetscape as the village "main street". This could include:
        i. The North/South Road intersection
        ii. Developing a collaborative solution for the Village Way trail, as part of a rural complete street.
        iii. A master plan for the Village Way extension connecting the village and the ferry.
        iv. Consider reducing the existing 6m front setback requirement of the village's commercial zones, to create a more pedestrian-oriented streetscape. This could also include negotiation with the Ministry of Transportation and Infrastructure to reduce their required 4.5m setback within the village area.
        v. And potentially, a village-wide pedestrian pathway system master plan

3) As an alternative to a Neighborhood Plan/Strategy, or as a phased approach, consider individual projects addressing the points listed under the Village Area Plan above.

4) Consider review and improvements to the Form and Character Development Permit processes, to result in more attractive, safe, environmentally responsible, accessible and enduring designs that contribute to sustainable village place-making.

   a) Consider what improvements to the processes could be done on an Islands Trust wide basis, such as building staff/organizational technical skills in form and character design review and negotiation.

   b) Consider clarifying, with more specific metrics, what is meant by rural character statements, such as "scale and character… is in keeping with the rural character of the island," reducing subjectivity in decision making, improving design, and providing developers with clearer standards.

   c) Consider expanding form and character development permit guidelines to better clarify required qualified professional expertise and site drawing submittal requirements. Improve landscape, building, site layout, and grading and drainage design metrics and standards. Consider specifics on details such as massing and modulation, fenestration, density of planting, landscaping standards and care, pedestrian connectivity and contextual responsiveness, solar orientation, activation of the street and public spaces, corner lot circumstances, universal accessibility standards and site grading, and weather protection for pedestrians. This exercise might benefit from professional community design consultant expertise.

   d) Consider contracting with a community design consultant to create a supplementary "Pattern Book" of community design guidelines. This would lend an additional level of designer expertise to the Development Permit system. The Pattern Book could potentially be an Islands Trust wide tool.

   e) Consider retaining a community design firm for as-needed development review services, to increase the level of expertise (and reduce the subjectivity) undertaking the review and thereby increasing the integrity of design.

   f) Additionally, consider delegation of approval authority to a qualified Islands Trust planner, who would coordinate and apply the advice of the community design firm on retainer. This would reduce further reduce the political subjectivity of design approvals.

   g) Improve regulatory oversite of site drainage design and site grading design for accessibility (to BC Building standards at a minimum), as this is currently not regulated by the RDN building permit process.

5) Consider undertaking an Age-Friendly Community Study, or review applicable precedent studies (such as Pender Island's) for specific policies and projects to study.

6) Consider Senior's Supportive Housing needs in the upcoming Needs Assessment, and if OCP policies can better facilitate such projects if there is a proven need and demand. Consider the full spectrum from smaller scaled homes, assisted living, extended care, and hospice care.

7) Review the Official Community Plan and Land Use Bylaw for policies that may be acting as barriers to the principles and vision statement proposed in the Village Vision Plan. These might include:

   a) OCP Section B.3.3.1 (b) – regarding the presence of home occupations in the village area. There may be certain parcels where home-based businesses could contribute to a more vibrant, activated village streetscape if encouraged to have a positive street presence.

b) OCP Section B.5.3.1 – to consider parking options that can act as buffers to pedestrian pathways, in coordination with MOTI requirements.

c) OCP Section B.5.4.3 – to more strongly discourage parking within the setback, to avoid a strip retail form of development.

d) OCP Section B.5.4.1 – to consider expanding possibilities for shared parking between parcels.

e) OCP Section 6.2.3 – to consider allowing well-designed, permanent structures for public markets.

f) Review if the OCP's definition of affordable housing as "housing that costs no more than 30% of a household's gross income applied to those households with incomes at or below 60% of the median household income for Gabriola Island" is appropriate. Given Gabriola's high population of retirees with relatively lower incomes, but significant assets such as mortgage free properties at retirement community market prices, this may be setting the income bar very low compared to land prices, making affordable housing projects financially infeasible to develop, and inaccessible to certain demographics in need.

g) Review if the area scope identified in the OCP for potential rezoning applications for multi-dwelling affordable housing is in alignment with the Village Vision Plan's vision and principles. (see Appendix B, Figure 3 and 7).

h) Reconsider OCP policies limiting density increases,
   - i. in light of the community feedback received in the Village Vision process (as well as the 2017 Sustainable Gabriola forum, and the LTC's Housing Options Review projects)
   - ii. In light of the LTC's Housing Options Review's upcoming Needs Assessment and further policy development.
   - iii. In light of potential upcoming revisions to Ministry of Health standards that would allow rainwater harvesting to be approved for multi-family and commercial potable use.
   - iv. Simplify the prescriptive policy language to a level appropriate for an OCP.
   - v. Consider having BC Housing do a policy review to consider if existing OCP policies are barriers to feasible affordable housing projects, and provide recommendations on how they might be revised to facilitate implemented projects, given the current government subsidy environment.
   - vi. Consider if increased amenity zoning provisions would benefit the community.
   - vii. Consider community input from the Village Vision process, academic research, and B.C. Non-Profit Housing Association's advice that affordable housing projects, especially in small communities, are best targeted to diverse demographics, including market rate units to subsidize affordable units.
   - viii. Explore expansion of Density Transfer and Density Bank policies. This could include:
     - (1) The possibility of transferring accessory residential dwelling potential;
     - (2) Mapping a boundary for a village development potential receiving area
     - (3) The ability for "donor" property owners to receive compensation or incentives for transferring development potential via rezoning or deposit into a Density Bank.
     - (4) Expanding the zones eligible for density transfer applications

Operational

1) Consider the future of the Islands Trust office location, in light of the Village Vision Plan's "Big Idea 9" – creating an "Island Hall" on the current Agricultural Hall site.
2) Consider placing a hold on receiving new development approval applications in the village area until the Village Vision recommendations have been reviewed, and next steps have been determined.

Advocacy

1) Consider working with the Ministry of Transportation and Infrastructure to amend the Letter of Agreement with the Islands Trust to include specific standards for village area streetscapes as rural "complete streets", that include safe, accessible routes for pedestrians as a priority, and consider enabling possible other improvements as discussed in the Village Vision Plan (such as landscaping, pedestrian lighting, site furnishings, or public art).
2) Consider further efforts to acquire the ability to implement a development cost charge bylaw for park purposes to generate funds for parkland acquisition and improvements.
3) Consider how to facilitate acquisition, rezoning, and/or improvements for a 'heart' – a focal, celebrational public space such as a village square or green (Big Idea 4)
4) Advocate for facilitating standards that would allow for safe rainwater harvesting for potable use in multi-family, commercial, and institutional settings.

Regional District of Nanaimo

Recommended Strategic Directions and Policies

1. Acknowledge and respond to the community interest and efforts in the Village Vision process, by taking a stronger advocacy and leadership role in elevating sustainable place-making and community design values, when considering village area issues that are within the existing or potential purview of the Regional District.
2. Consider a leadership or partnership role in purchasing, facilitating financing or insurance, and/or developing key properties in the village area, so they are re/developed in the community's best interest, not just per market forces.
3. Ensure existing and future improvement plans, such as the Village Way and Huxley Park improvements, consider how to respond to the vision statement, principles, and implementation ideas of the Village Vision Plan.
4. Consider the RDN's role in supporting, partnering, facilitating, or undertaking additional community consultation, feasibility studies, funding, implementation, or management of the Village Vision Plan's Big Ideas, including:
    a) North and South Rd. intersection improvements (Big Idea 1)
    b) North Rd. as "main street" (Big Idea 2)
    c) Village pedestrian pathway system (Big Idea 3)
    d) A village heart (Big Idea 4)
    e) Folklife Village pedestrian centre (Big Idea 5)
    f) The Saturday Market at the heart (Big Idea 6)
    g) Community Events Building / Recreation Centre (Big Idea 7 and 8)
    h) Integrated Infrastructure Management Village Area Plan (Big Idea 10)

i) Pedestrian lighting (Big Idea 11)
j) Public Art Program (Big Idea 12)

5. Consider establishment of a Village Service Area, which could flexibly address various desired community improvements in the village.
6. Consider undertaking an inter-agency (Islands Trust, RDN, and MOTI) Charrette and Master Plan to develop a coordinated approach to enhancing village streetscapes and pedestrian-friendliness. Topics could include:
   a) North Road as the village “Main Street” (including a collaboratively developed solution for the Village Way trail as part of a rural complete street).
   b) Improvements to the North/South Road intersection,
   c) A village-wide pedestrian pathway system master plan
   d) A master plan for the Village Way extension to the ferry, based on a site survey.
   e) Improvements to the Letter of Agreement between the Islands Trust and MoTI, to address the complete street needs of village area streetscapes.
7. Consider negotiating for a right of first refusal, to facilitate public or community group ownership, for key village area properties.
8. Consider developing a Parks, Trails, and/or Recreation Services Master Plan for Gabriola, in collaboration with the Islands Trust and key stakeholders such as GaLTT and the Gabriola Recreation Society, to set goals, objectives, priorities, and strategic initiatives, including for desired spaces such as a village ‘heart’ (Big Idea 4).

Operational

1. Discuss with the Islands Trust on how best to regulate site grading/accessibility design for commercial, institutional, and multi-family developments, seemingly a current gap between the Development Permit and Building Permit processes.
2. Consider creating a Partnerships Policy to clarify what types of partnerships are beneficial and approvable, as well as the evaluation, approval, and monitoring process.

Advocacy

1. Continue to advocate for facilitating standards that would allow for safe rainwater harvesting for potable use in multi-family, commercial, and institutional settings.

Ministry of Transportation and Infrastructure

1. Develop a plan of response to the community’s number one Village Vision priority of increasing pedestrian friendliness and safety in the village and down to the ferry. Recommendations:
   a) Develop street standards that reflect the pedestrian safety and place-making needs of rural villages. Work with the Islands Trust to incorporate this into the Letter of Agreement between MoTI and the Islands Trust.
   b) Develop standards, processes, and shared funding programs that allow for rural community Regional Districts to more efficiently and successfully collaborate with MoTI on rural village complete street improvements.

c) Work with other agencies and stakeholders on a Master Plan for pedestrian/ place-making/ complete street improvements in the village and down to the ferry, so repairs and other investments are optimized.
d) Consider next steps for Big Ideas 1, 2, and 3.

Community Groups

Village Vision Planning Committee

1. Investigate and support the formation of an appropriate organization to facilitate further investigation and implementation of the Village Vision Plan's ideas, advance village planning, promote the village, provide review comments to the LTC on village area development proposals, and coordinate future collective action. This group should include village area stakeholders such as business and property owners, residents, and community group leaders.

Gabriola Chamber of Commerce

1. The most urgent priority for Gabriola businesses is the lack of available housing for younger people who staff the shops and restaurants. The Chamber must continue to drive this message forward to the elected officials, particularly the Islands Trust.
2. The Community would do well to have a larger and more visible Visitor's Centre in a place of prominence in the village. The most likely locations would be on the site of the current Agi Hall or in the new "Village Heart" development. The Chamber cannot drive these location developments, but they need to be ready to become an active participant in the discussions when they begin.
3. The recently completed Commercial Demand Forecast study shows that Gabriola's retail space available is in relatively good balance with models of expected demand for our population. The Chamber needs to make sure that these data are available for anyone considering new development proposals so that the supply of retail space can be tuned to the perceived demand.
4. The RDN is working with the Chamber to development a new Economic Development Advisory Group to encourage and nurture a robust economy on Gabriola. This work will be contracted through the Chamber, but the effort will encompass the entire business community, not just those who are members of the Chamber. This new group will play a critical role in facilitating discussion on economic priorities between the RDN and other agencies., particularly the Islands Trust.

Gabriola Land and Trails Trust

1. Consider expanding the GaLTT mandate to include advocacy, licensing, planning or other actions on pedestrian improvements in the village area, such as traffic calming, pathways, or crosswalks.
2. Continue to push for neighbourhood connectivity in the island but most particularly in the village area.

Gabriola Arts Council

1. Consider the gateway and other public art concepts raised by the Village Vision process and how GAC could be further involved in facilitating village place-making.
2. Consider continued advocacy and exploration of potential partnerships that would facilitate place-making in the village.

3. Consider continued advocacy for a public celebrational space such as the village 'heart', that could better accommodate and showcase the Theatre Festival and other GAC organized events.

Agricultural Hall Association

1. Consider continual exploration and potentially advocacy for the creation of a village 'heart' (Big Ideas 4 and 6) if it could better accommodate the Saturday Market and advance the organization's mission.
2. Continue to consider ways pedestrian accessibility and traffic safety can be improved for the existing Saturday Market site.
3. Continue to consider ways the current site can be enhanced as a gateway to Gabriola's village area, and be an attractive, activated space throughout the week and year.
4. Continue to explore potential partnerships and grants as ways to advance the organization's mission.
5. Explore the creation of a covered pavilion to extend the market season (consider grants, or sale of the current site for funding sources).

Village Area Property and Business Owners

Make reasonable efforts to comply with the Village Vision recommendations when planning further developments in the village area. Some examples of this might include:

1. Provide input on the proposal to give North Road a "main street" feel (Big Idea 2) in terms of how that might affect business operations.
2. Make physical connections to parts of the proposed pedestrian pathway system as they are constructed (Big Idea 3).
3. Take steps towards combining densities to create mixed-use (residential/commercial) developments in the village area (Big Idea 15)

Gabriola Housing Society

The lack of available housing at reasonable cost is driving young families off the island. The Housing Society needs to continue its pressure on the Islands Trust planners and Local Trust Committee for real solutions to this issue. This is one group that can keep the housing issue front and centre during the discussions in the next election.

Gabriola Foundation / Community Fund

This group is just getting started under the auspices of the Nanaimo Foundation. One area that it could explore is whether there is a role to play in funding a body to hold land (e.g., parcels in the Lochinvar triangle) for the benefit of future community development.

Gabriola co-op organization

An organization focussed on promoting co-operatives is currently in formation on Gabriola. It is hoped that this group will take the relevant Village Vision recommendations into consideration when discussing co-operative ventures that will have a footprint in the village.

Gabriola Ferry Advisory Committee

The Ferry Advisory Committee is recommending relocation of the ferry vehicle line-up from its current location on Taylor Bay Road to North Road and South Road. Any such plans should be consistent with

Village Vision recommendations, including the gateway proposal (Big Idea 1), the pedestrian pathway system (Big Idea 3), the Visitor Centre at the current AGI site (Big Idea 9).

Appendices

(These are separate documents which can be found on the Village Vision website)

Appendix A – Community Discussion Summary

Appendix B – Site Analysis Summary

Appendix C – Image Preference Survey Summary Report (Full Results version also available on the project website with all community comments)

Appendix D – Design Visioning Workshop Summary Report

Appendix E – Design Concepts Questionnaire Summary Report (Full Results version also available on the project website with all community comments)

Appendix F – Stakeholder Meetings Summary

From: John Peirce [redacted]
Sent: Thursday, July 13, 2017 6:25 PM
To: Melanie Mamoser; Heather O'Sullivan; Laura Busheikin; Sonja Zupanec; Ann Kjerulf
Subject: Commercial Demand Forecast Reort

Please find attached for your summer reading pleasure the Commercial Demand Forecast report for Gabriola Island, commissioned by the Gabriola Island Chamber of Commerce through the Rural Dividend Program and recently received. Thank you for your supporting letter when we applied for this grant.

The bottom line is that the retail economy on Gabriola is doing fairly well in terms of a balance of supply of space and demand according to demographic models. We need more data on visitor head counts and spending patterns. Challenges facing businesses include the known suspects of lack of staff because of lack of housing, high ferry/shipping costs and extreme seasonality to the business climate on the island.

We expect that this report will provide a wealth of reliable baseline information which will assist the economic development plans that we have been working on with the RDN, as well as for the Village Vision long-term planning effort.

Speaking of Village Vision, we are working on our final report and will be submitting it to the September LTC meeting. We hope that it will act as a guiding reference for a serious look at village planning by the Islands Trust in the next term, done as much as possible in conjunction with the RDN and MOTI.

On behalf of. the Chamber and the Village Vision Planning Committee
John
John Peirce, P. Geo.

Namaste Farm
2100 South Road
Gabriola Island, BC V0R1X6
[redacted]

Gabriola Island Commercial Demand Forecast

For: Gabriola Chamber of Commerce

June 2017

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Executive Summary

DEFINITIONS

Retail businesses are businesses where customers walk into the commercial area to be served. Most businesses with storefronts or "public" offices can be considered retail. With that said, the aim of this research is to create an inventory not only of businesses but of all space available to retail users, and consequently space has been included in this inventory that would be appropriate for retail use, but is currently used for something else (most notably storage).

The four primary categories of retail are:

- Convenience retail, including grocery stores, food stores, pharmacies, convenience stores, liquor stores, and services. Services are included in this category because many services, such as banks, doctors, and hair salons are essentially "convenience" destinations
- Comparison retail, which sells large or expensive merchandise. Notably, art falls into this category of retail. Specifically, most of it falls into the jewellery and multimedia categories, depending on the type of art
- Restaurant & recreation, which includes restaurants, bars, theatres, and activity-related businesses.
- Automotive, including dealerships, auto parts and servicing, and gas stations.

In the process of creating an inventory of Gabriola's retail space, GPRA identified six distinct commercial areas, each with unique characteristics. Four of the six areas are contiguous and comprise Gabriola's Downtown. The six areas are defined as follows:

- Downtown areas:
  - **Madrona Marketplace**, including Arbutus Home Building Centre and Gabriola Wine Cellar
  - **Folklife Village**
  - **Gabriola Professional Centre**, including the two buildings on either side of the parking lot
  - **The Gas Station Block**, the "leftover" commercial area east of Madrona Marketplace and west of Gabriola Professional Centre
- Other areas:
  - **Twin Beaches Mall**
  - **Silva Bay.**

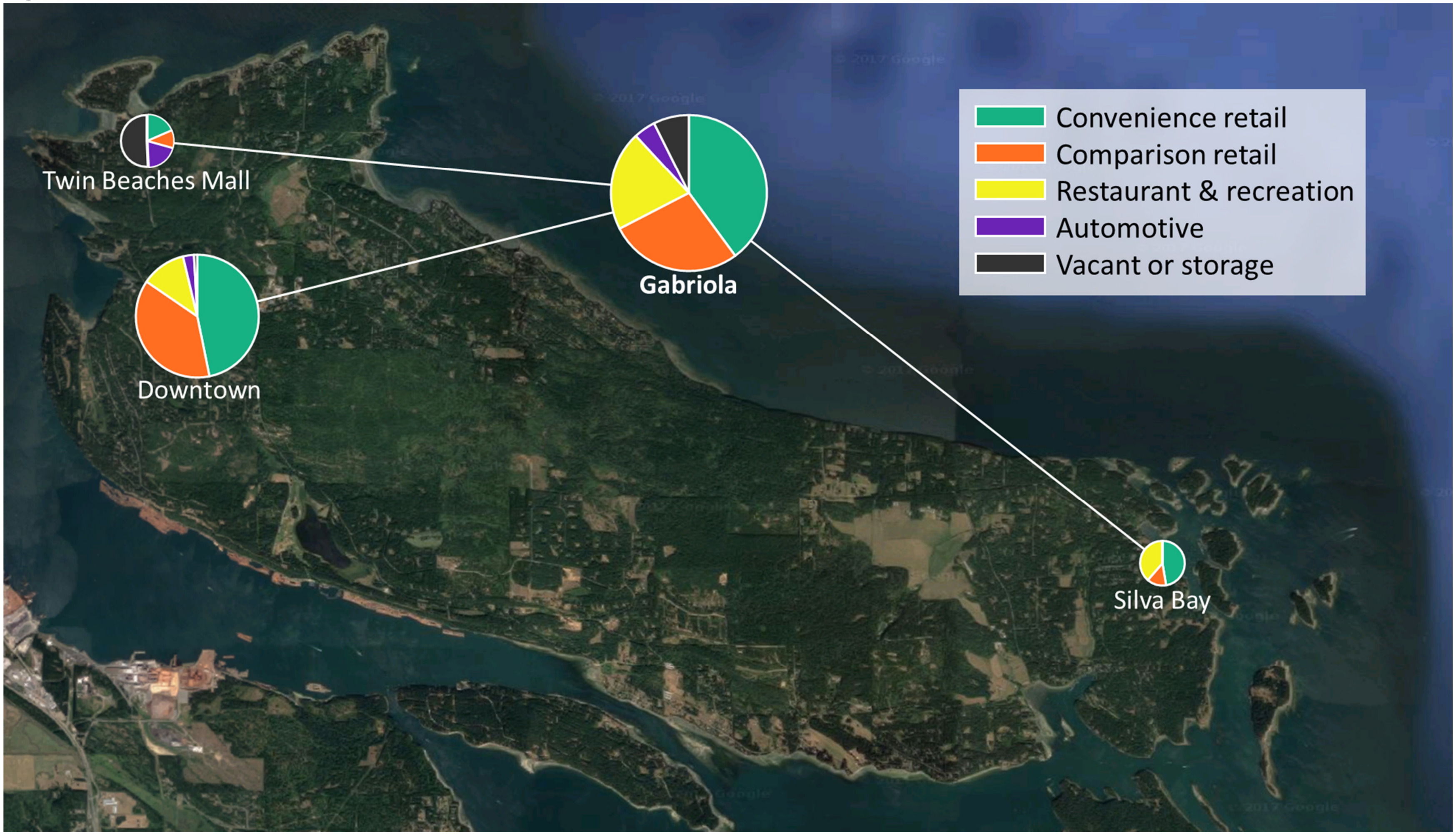
EXISTING RETAIL FLOOR SPACE

Table A: Gabriola retail floor space by type and location (ft^2)

Type	Madrona Marketplace	Folklife Village	Gabriola Professional Centre	Gas Station Block	DOWNTOWN TOTAL	Twin Beaches Mall	Silva Bay	Elsewhere	TOTAL
Grocery	1,755	14,473	767	0	**16,995**	0	0	0	16,995
Pharmacy	0	3,566	0	0	**3,566**	0	0	0	3,566
Liquor Store	1,362	825	0	1,969	**4,155**	0	1,935	0	6,091
Financial services	0	0	3,064	858	**3,922**	0	0	0	3,922
Health services	0	0	7,467	0	**7,467**	0	0	4,854	12,321
Other services	2,560	4,913	0	0	**7,473**	3,700	4,459	0	15,632
CONVENIENCE RETAIL TOTAL	5,677	23,777	11,298	2,827	43,578	3,700	6,328	4,854	58,526
Apparel	2,400	2,063	0	732	**6,130**	0	0	0	5,195
Cosmetics, health, bath, & beauty	1,275	0	1,205	0	**2,480**	0	0	0	2,480
Electronics & appliances	720	0	0	0	**720**	0	0	0	720
Footwear & accessories	0	147	935	122	**1,204**	0	0	0	1,204
Home furnishings	2,205	0	1,205	122	**3,532**	0	0	0	3,532
Home improvement	17,798	0	0	0	**17,798**	0	0	3,316	21,114
Jewellery & watches	945	762	0	61	**1,768**	0	0	0	1,768
Multimedia, books, & music	0	747	270	61	**1,078**	0	1,895	0	2,973
Sports & recreational goods	510	0	0	61	**571**	0	0	0	571
Pet goods, toys, & hobbies	0	0	0	1,705	**1,705**	0	0	0	1,705
COMPARISON RETAIL TOTAL	25,853	3,719	3,615	2,864	36,052	0	1,895	3,316	41,263
Food & beverage	4,625	1,992	0	2,128	**8,745**	0	4,331	12,444	25,520
Entertainment	0	0	0	0	**0**	2,160	0	0	2,160
Leisure	2,400	0	0	0	**2,400**	0	881	0	3,281
RESTAURANT & RECREATION TOTAL	7,025	1,992	0	2,128	11,145	2,160	5,212	12,444	30,960
Motor vehicles & parts dealers	0	0	0	0	**0**	0	0	0	0
Auto service	0	0	0	0	**0**	4,000	0	0	4,000
Gas station	0	0	0	2,773	**2,773**	0	0	0	2,773
AUTOMOTIVE TOTAL	0	0	0	2,773	2,773	4,000	0	0	6,773
Vacant	0	822	0	0	**822**	2,000	0	0	2,822
Storage[1]	0	0	0	0	**0**	8,140	0	0	8,140
VACANT & STORAGE TOTAL	0	822	0	0	822	10,140	0	0	10,962
TOTAL	38,555	30,309	14,913	10,593	94,370	20,000	13,501	20,614	148,485

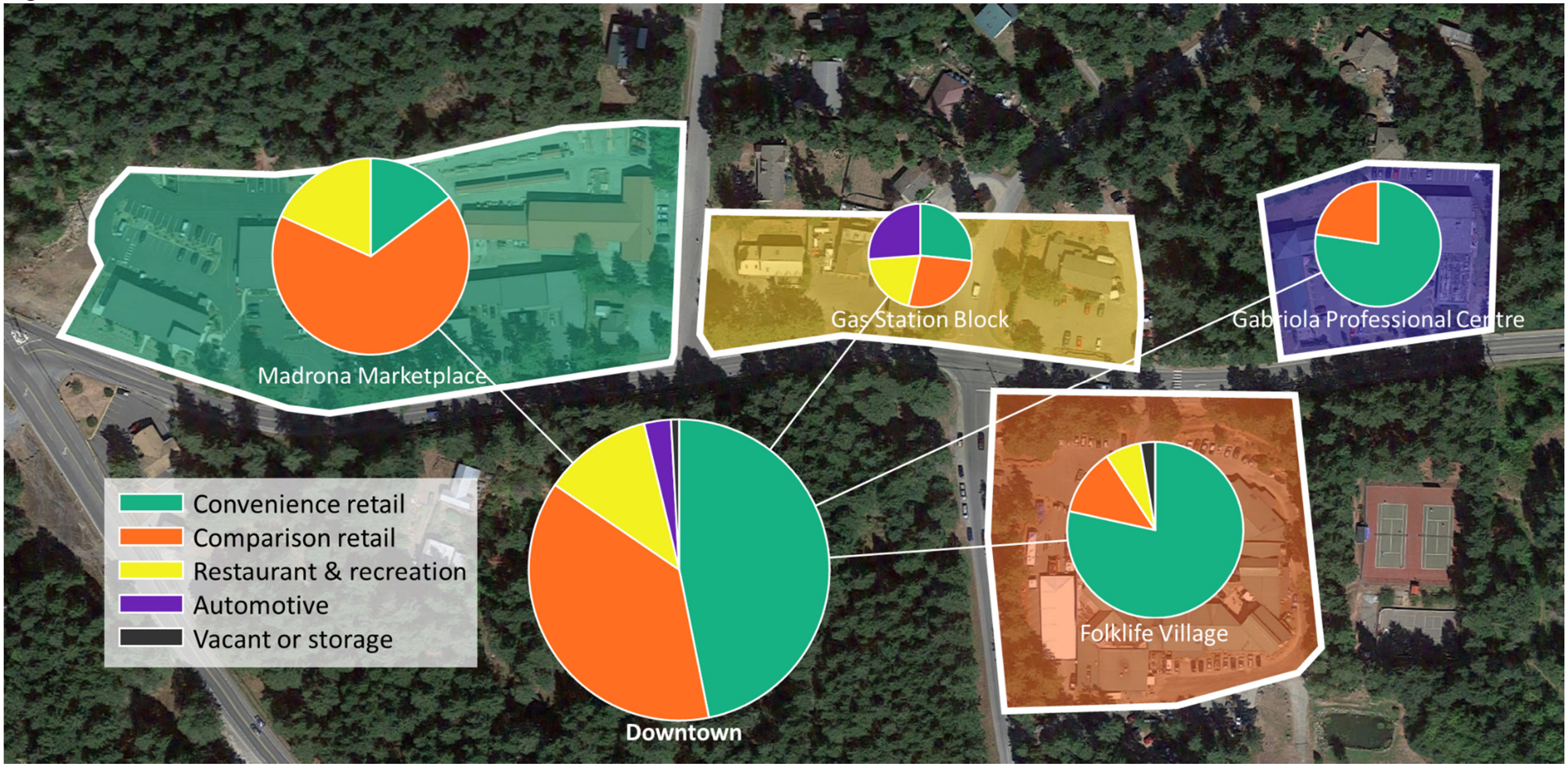
[1] Vacant retail space and retail space used for storage are grouped together here because both cases represent a lost opportunity, or space operating below its full potential. This is based on the assumption that although storage space may be needed on Gabriola, it should not occupy retail storefronts. Storage space that does not occupy retail storefronts, such as the storage space in the Gabriola Professional Centre, does not count towards this total.

Figure A: Location and retail content of Gabriola commercial areas[2]



[2] Note in this graphic, the pie chart areas are proportional to the corresponding floor space totals

Figure B: Location and retail content of Downtown commercial areas[3]



The distribution of retail categories within and between the six commercial areas defined here is described and analyzed in greater detail in Section 3: Health & Vitality Evaluation.

[3] Note in this graphic, the pie chart areas are proportional to the corresponding floor space totals

HEALTH AND VITALITY EVALUATION

On a scale of 1 to 5, GPRA has evaluated each of Gabriola's six commercial areas and the Island's retail market overall. The meaning of the 1 to 5 scale is defined in Table B.

Table B: Health & vitality scale

Score	Meaning
1	Extremely poor health & vitality
2	Poor health & vitality
3	Moderate health & vitality
4	Strong health & vitality
5	Extremely strong health & vitality

The results of this evaluation are discussed in detail throughout Section 3 and summarized in Table C:

Table C: Summary of health & vitality evaluation

Commercial area	Health & vitality score
Madrona Marketplace	5
Folklife Village	4
Gabriola Professional Centre	5
Gas Station Block	5
DOWNTOWN TOTAL	**4.5**
Twin Beaches Mall	2
Silva Bay	3
TOTAL	**4**

On the whole, Gabriola's retail market exhibits a mix of strengths and weaknesses. It is hindered by slow population growth, a shortage of labour, and the high cost of shipping, but it also boasts an impressively broad range of retail offerings, a robust inventory of commercial buildings old and new, and a loyal base of Gabriolan customers. The Island's healthy vacancy rate and the impressive speed with which Madrona Marketplace found tenants suggests that the retail market is healthy and prosperous. Almost all interviewed business owners expressed enthusiasm and positivity about the Island and their role in its economy.

GPRA gives Gabriola Island a score of **4 out of 5** for overall retail market health and vitality. It is an essentially healthy market with few signs of dysfunction and many signs of success. What difficulties do exist are limited primarily to particular commercial areas, as discussed below. Certain changes could be made to improve the Gabriola's retail market, particularly allowing a greater range of land uses on the Island.

EXISTING COMMERCIAL FLOOR SPACE DEMAND

Based on the methodology presented in Section 4.1, GPRA has estimated the demand for floor space of each retail type at present. This is shown, and compared to the existing inventory, below:

Table D: Estimate of present floor space demand

Type	Existing floor space (ft^2)	Supportable floor space (ft^2)	Oversupply / undersupply
Grocery	16,995	17,761	-4%
Pharmacy	3,566	3,588	-1%
Liquor Store	6,091	5,772	+6%
Financial services	3,922	3,678	+7%
Health services	12,321	11,521	+7%
Other services	15,632	15,139	+3%
CONVENIENCE RETAIL TOTAL	**58,526**	**57,459**	+2%
Apparel	5,195	5,143	+1%
Cosmetics, health, bath, & beauty	2,480	2,526	-2%
Electronics & appliances	720	662	+9%
Footwear & accessories	1,204	1,183	+2%
Home furnishings	3,532	3,663	-4%
Home improvement	21,114	14,841	**+42%**
Jewellery & watches	1,768	1,678	+5%
Multimedia, books, & music	2,973	2,896	+3%
Sports & recreational goods	571	559	+2%
Pet goods, toys, & hobbies	1,705	1,737	-2%
COMPARISON RETAIL TOTAL	**41,263**	**34,888**	+18%
Food & beverage	25,520	24,558	+4%
Entertainment	2,160	2,245	-4%
Leisure	3,281	3,263	+1%
RESTAURANT & RECREATION TOTAL	**30,960**	**30,066**	+3%
Motor vehicles & parts dealers	0	0	0%
Auto services	4,000	4,032	-1%
Gas station	2,773	2,625	+6%
AUTOMOTIVE TOTAL	**6,773**	**6,657**	+2%
TOTAL	**137,523**	**129,070**	**+7%**

Note that the supportable floor space is mostly within 10% of the existing floor space. However, GPRA has identified some areas of oversupply and undersupply.

Retail categories that exhibit oversupply include:

- Restaurants, cafés, and bars
- Home improvement.

The only retail category that exhibits undersupply is the entertainment sector. The question of whether creating more appropriate space could expand Gabriola's entertainment sector, or whether it is permanently limited by small population size (the Island is too small for a movie theatre, for example) may benefit from further research.

FUTURE COMMERCIAL FLOOR SPACE DEMAND

Based on the methodology presented in Section 4.2, GPRA has projected the demand for floor space of each retail type until 2037. This is shown, and compared to the existing inventory, below:

Table E: Projected supportable vs. existing floor space on Gabriola

Type	Existing floor space (ft²)	Supportable floor space (ft²) 2022	2027	2032	2037
Grocery	16,995	19,194	20,539	21,701	22,741
Pharmacy	3,566	3,619	3,651	3,667	3,692
Liquor Store	6,091	5,784	5,813	5,831	5,868
Financial services	3,922	3,797	3,904	3,983	4,063
Health services	12,321	11,721	11,910	12,030	12,169
Other services	15,632	15,301	15,466	15,555	15,678
CONVENIENCE RETAIL TOTAL	**58,526**	**59,415**	**61,283**	**62,766**	**64,210**
Apparel	5,195	5,436	5,707	5,937	6,139
Cosmetics, health, bath, & beauty	2,480	2,647	2,757	2,845	2,919
Electronics & appliances	720	671	680	685	688
Footwear & accessories	1,204	1,217	1,249	1,272	1,291
Home furnishings	3,532	3,806	3,937	4,038	4,123
Home improvement	21,114	15,673	16,440	17,075	17,629
Jewellery & watches	1,768	1,672	1,677	1,687	1,701
Multimedia, books, & music	2,973	2,958	3,023	3,080	3,135
Sports & recreational goods	571	617	673	724	771
Pet goods, toys, & hobbies	1,705	1,899	2,053	2,190	2,316
COMPARISON RETAIL TOTAL	**41,263**	**36,595**	**38,197**	**39,533**	**40,711**
Food & beverage	25,520	25,039	25,534	25,944	26,318
Entertainment	2,160	2,562	2,610	2,649	2,684
Leisure	3,281	3,399	3,523	3,620	3,702
RESTAURANT & RECREATION TOTAL	**30,960**	**31,000**	**31,668**	**32,213**	**32,704**
Motor vehicles & parts dealers	0	0	0	0	0
Auto services	4,000	4,460	4,876	5,254	5,606
Gas station	2,773	2,903	3,174	3,420	3,650
AUTOMOTIVE TOTAL	**6,773**	**7,364**	**8,050**	**8,674**	**9,256**
TOTAL	**137,523**	**134,374**	**139,198**	**143,187**	**146,881**

How this projected growth in demand might be met is described in more detail below. In general, GPRA recommends erring on the side of caution and expanding the Island's floor space inventory only slowly to allow existing businesses and residents to adapt.

In the next twenty years, GPRA anticipates that Gabriola will be able to support:

- Almost 6,000 ft^2 of additional grocery-type space, which may consist of a convenience store, small grocer, delicatessen, or bakery
- About 3,000 ft^2 of retail space offering a mix of comparison goods. Businesses selling a mix of product types are already a trend on Gabriola
- One small restaurant
- A yoga studio or bike rental shop
- About 1,600 ft^2 of additional auto-service space.

Gabriola benefits from a close-knit community of locally-owned small businesses that make up its unique commercial sector. GPRA strongly recommends that the Island continue to focus on locally-owned small businesses to maintain the community's vibrancy.

As for the location of new retail space, GPRA strongly recommends continuing to place any new retail development in the Downtown area, as this location has the best accessibility, the most traffic, and the pull of existing businesses to help new businesses attract customers. A likely location for new retail space would be the vacant lot across from Folklife Village. And indeed, commercial development on this site has been proposed.

Other than Downtown, Twin Beaches Mall might be the right location for expansion of the Island's auto-related services, and a small food store might be welcome in the Silva Bay area as this location lacks grocery uses. GPRA has not investigated the business case for either of these uses at these locations, so cannot comment on their viability.

DATA AVAILABILITY

Although GPRA has attempted to infer a visitor spending projection from the available data on ferry traffic trends, this stopgap approach is far inferior to using genuine data on visitor traffic and visitor spending. Future analyses would benefit if the Chamber could gather more detailed statistics regarding total visits, overnight stays, and visitor spending on Gabriola Island.

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1 Introduction

G. P. Rollo & Associates (GPRA) has been retained by the Gabriola Chamber of Commerce (the Chamber) to create a Commercial Demand Forecast for Gabriola Island (Gabriola or the Island) in order to assist the Chamber in understanding the likely development of Gabriola's retail market. To this end, GPRA has completed the following tasks:

- GPRA visited all of the Island's commercial areas and has produced an inventory of existing retail space, organized according to type, size, and location.
- GPRA has assessed the health and vitality of each of the Island's retail precincts as well as the Island's retail and service commercial market as a whole through a series of retailer and realtor interviews conducted primarily by phone.
- GPRA has estimated the current demand for retail space on Gabriola Island in order to identify any areas of oversupply or undersupply in the Island's retail market.
- GPRA has created a projection of demand for retail space on Gabriola Island from 2017 to 2037 in order to anticipate which kinds of retail might require additional space, how much space, and when.

2 Gabriola Commercial Inventory

This section presents GPRA's research on existing retail usage and supply on Gabriola Island.

2.1 Definition and Types of Retail

Retail businesses are businesses where customers walk into the commercial area to be served. This category of commerce *excludes*:

- Accommodation, including inns and bed & breakfasts
- Marinas
- Business services such as industrial equipment rental
- Care facilities
- Construction and trades
- Logistics operations such as shipping and storage
- Above-ground office space.

Most businesses with storefronts or "public" offices can be considered retail. With that said, the aim of this research is to create an inventory not only of businesses but of all space available to retail users, and consequently space has been included in this inventory that would be appropriate for retail use, but is currently used for something else (most notably storage).

The four primary categories of retail are:

- Convenience retail, including grocery stores, food stores, pharmacies, convenience stores, liquor stores, and services. Services are included in this category because many services, such as banks, doctors, and hair salons are essentially "convenience" destinations

- Comparison retail, which sells large or expensive merchandise. Notably, art falls into this category of retail. Specifically, most of it falls into the jewellery and multimedia categories, depending on the type of art.

- Restaurant & recreation, which includes restaurants, bars, theatres, and activity-related businesses.

- Automotive, including dealerships, auto parts and servicing, and gas stations.

2.2 Definition of Gabriola Commercial Areas

In the process of creating an inventory of Gabriola's retail space, GPRA identified six distinct commercial areas, each with unique characteristics. These six zones form the basis of the Health & Vitality Evaluation presented in Section 3 and function as the geographic variable used in GPRA's inventory. Four of the six areas are contiguous and comprise Gabriola's Downtown. The six areas are defined as follows:

- Downtown areas:
    - **Madrona Marketplace**, the commercial area located on the northwest corner of North Road and Ross Way. This area consists mostly of the Madrona Marketplace development to which it owes its name, but also includes the Arbutus Home Building Centre and Gabriola Wine Cellar. These older businesses are included in the commercial area due to their adjacency and typological similarity to Madrona Marketplace proper, as described in Section 3.3.
    - **Folklife Village**, the strip mall located on the southeast corner of North Road and Lockinvar Lane.
    - **Gabriola Professional Centre**, the strip mall located on the north side of North Road, across from Huxley Community Park. This area contains two buildings: 590 North Road (Gabriola Professional Centre proper) and 580 North Road. Although 580 North Road is not technically part of Gabriola Professional Centre, they are treated as a single commercial area in this analysis, and referred to by that name.
    - **The Gas Station Block**, the "leftover" commercial area east of Madrona Marketplace and west of Gabriola Professional Centre. It contains three buildings: 535, 545, and 560 North Road.
- Other areas:
    - **Twin Beaches Mall**, the strip mall located at southeast corner of Berry Point Road and Ricardo Road.
    - **Silva Bay,** the cluster of businesses centred on the Silva Bay Resort and Marina and Page's Resort and Marina at the Island's eastern end.

The six commercial areas are discussed in more detail in Section 3, and are mapped in Figures 1 & 2 on pg. 9 - 10.

2.3 Existing Retail Floor Space

GPRA has created an inventory of existing retail and service commercial space on Gabriola Island based on the following sources of data:

- The Chamber's catalogue of businesses
- A walking and driving inventory of the entire Island performed by GPRA
- Online sources such as Google Maps, Google Streetview, and business websites
- Leasing information sent from mall owners
- Interviews with local building managers and business owners.

Table 1 is a high-level summary of the inventory.

Table 2, pg. 5 presents the complete inventory of retail space on Gabriola Island, divided into the four primary categories as well as 22 secondary categories. It is an approximate estimation of currently used space, with vacant and storage space shown as separate items. The amount of space used in each retail category is indicated for Gabriola generally, and also for each of six commercial areas.

Table 3, pg. 6 shows each retail category's share of its commercial area, and Table 4, pg. 7 shows each commercial area's share of the Island's total floor space. Table 5, pg. 8 shows the number of businesses in each area in each category.

Figures 1 & 2 on pg. 9 - 10 indicate the locations, boundaries, and retail typology of the six commercial areas.

Table 1: High-level summary of Gabriola retail floor space (ft^2)[4]

Commercial Area	Convenience retail	Comparison retail	Restaurant & Recreation	Automotive	Vacant or storage[5]	TOTAL
Madrona Marketplace	5,677	25,853	7,025	0	0	**38,555**
Folklife Village	23,777	3,719	1,992	0	822	**30,309**
Gabriola Professional Centre	11,298	3,615	0	0	0	**14,913**
Gas Station Block	2,827	2,864	2,128	2,773	0	**10,593**
DOWNTOWN TOTAL	**43,578**	**36,052**	**11,145**	**2,773**	**822**	**94,370**
Twin Beaches Mall	3,700	0	2,160	4,000	10,140	**20,000**
Silva Bay	6,394	1,895	5,212	0	0	**13,501**
Elsewhere	4,854	3,316	12,444	0	0	**20,614**
TOTAL	**58,526**	**41,263**	**30,960**	**6,773**	**10,962**	**148,485**

[4] In cases where a business sells multiple categories of retail, its floor space is split between separate categories.

[5] Vacant retail space and retail space used for storage are grouped together here because both cases represent a lost opportunity, or space operating below its full potential. This is based on the assumption that although storage space may be needed on Gabriola, it should not occupy retail storefronts. Storage space that does not occupy retail storefronts, such as the storage space in the Gabriola Professional Centre, does not count towards this total.

Table 2: Gabriola retail floor space by type and location (ft²)

Type	Madrona Marketplace	Folklife Village	Gabriola Professional Centre	Gas Station Block	DOWNTOWN TOTAL	Twin Beaches Mall	Silva Bay	Elsewhere	TOTAL
Grocery	1,755	14,473	767	0	**16,995**	0	0	0	**16,995**
Pharmacy	0	3,566	0	0	**3,566**	0	0	0	**3,566**
Liquor Store	1,362	825	0	1,969	**4,155**	0	1,935	0	**6,091**
Financial services	0	0	3,064	858	**3,922**	0	0	0	**3,922**
Health services	0	0	7,467	0	**7,467**	0	0	4,854	**12,321**
Other services[6]	2,560	4,913	0	0	**7,473**	3,700	4,459	0	**15,632**
CONVENIENCE RETAIL TOTAL	**5,677**	**23,777**	**11,298**	**2,827**	**43,578**	**3,700**	**6,328**	**4,854**	**58,526**
Apparel	2,400	2,063	0	732	**6,130**	0	0	0	**5,195**
Cosmetics, health, bath, & beauty	1,275	0	1,205	0	**2,480**	0	0	0	**2,480**
Electronics & appliances	720	0	0	0	**720**	0	0	0	**720**
Footwear & accessories	0	147	935	122	**1,204**	0	0	0	**1,204**
Home furnishings	2,205	0	1,205	122	**3,532**	0	0	0	**3,532**
Home improvement	17,798	0	0	0	**17,798**	0	0	3,316	**21,114**
Jewellery & watches	945	762	0	61	**1,768**	0	0	0	**1,768**
Multimedia, books, & music	0	747	270	61	**1,078**	0	1,895	0	**2,973**
Sports & recreational goods	510	0	0	61	**571**	0	0	0	**571**
Pet goods, toys, & hobbies	0	0	0	1,705	**1,705**	0	0	0	**1,705**
COMPARISON RETAIL TOTAL	**25,853**	**3,719**	**3,615**	**2,864**	**36,052**	**0**	**1,895**	**3,316**	**41,263**
Food & beverage	4,625	1,992	0	2,128	**8,745**	0	4,331	12,444	**25,520**
Entertainment	0	0	0	0	**0**	2,160	0	0	**2,160**
Leisure	2,400	0	0	0	**2,400**	0	881	0	**3,281**
RESTAURANT & RECREATION TOTAL	**7,025**	**1,992**	**0**	**2,128**	**11,145**	**2,160**	**5,212**	**12,444**	**30,960**
Motor vehicles & parts dealers	0	0	0	0	**0**	0	0	0	**0**
Auto service	0	0	0	0	**0**	4,000	0	0	**4,000**
Gas station	0	0	0	2,773	**2,773**	0	0	0	**2,773**
AUTOMOTIVE TOTAL	**0**	**0**	**0**	**2,773**	**2,773**	**4,000**	**0**	**0**	**6,773**
Vacant	0	822	0	0	**822**	2,000	0	0	2,822
Storage	0	0	0	0	**0**	8,140	0	0	8,140
VACANT & STORAGE TOTAL	**0**	**822**	**0**	**0**	**822**	**10.140**	**0**	**0**	**10,962**
TOTAL	**38,555**	**30,309**	**14,913**	**10,593**	**94,370**	**20,000**	**13,501**	**20,614**	**148,485**

[6] The "other services" category is considered a type of comparison retail even though it sometimes includes specialist tenants who more closely resemble comparison retail or even non-retail businesses. The purpose of this categorization is to keep all services – financial, health, and other - in the same retail type.

Table 3: Retail categories by share of respective commercial area

Type	Madrona Marketplace	Folklife Village	Gabriola Professional Centre	Gas Station Block	DOWNTOWN TOTAL	Twin Beaches Mall	Silva Bay	Elsewhere	TOTAL
Grocery	5%	48%	5%	-	18%	-	-	-	11%
Pharmacy	-	12%	-	-	4%	-	-	-	2%
Liquor Store	4%	3%	-	19%	4%	-	14%	-	4%
Financial services	-	-	21%	8%	4%	-	-	-	3%
Health services	-	-	50%	-	8%	-	-	24%	8%
Other services	7%	16%	-	-	8%	19%	33%	-	11%
CONVENIENCE RETAIL TOTAL	15%	78%	76%	27%	46%	19%	47%	24%	39%
Apparel	6%	7%	-	7%	6%	-	-	-	3%
Cosmetics, health, bath, & beauty	3%	-	8%	-	3%	-	-	-	2%
Electronics & appliances	2%	-	-	-	1%	-	-	-	0%
Footwear & accessories	-	-	6%	1%	1%	-	-	-	1%
Home furnishings	6%	-	8%	1%	4%	-	-	-	2%
Home improvement	46%	-	-	-	19%	-	-	16%	14%
Jewellery & watches	2%	3%	-	1%	2%	-	-	-	1%
Multimedia, books, & music	-	2%	2%	1%	1%	-	14%	-	2%
Sports & recreational goods	1%	-	-	1%	1%	-	-	-	0%
Pet goods, toys, & hobbies	-	-	-	16%	2%	-	-	-	1%
COMPARISON RETAIL TOTAL	67%	12%	24%	27%	38%	-	14%	16%	28%
Food & beverage	12%	7%	-	20%	9%	-	32%	60%	17%
Entertainment	-	-	-	-	-	11%	-	-	1%
Leisure	6%	-	-	-	3%	-	7%	-	2%
RESTAURANT & RECREATION TOTAL	18%	7%	-	20%	12%	11%	39%	60%	21%
Motor vehicles & parts dealers	-	-	-	-	-	-	-	-	-
Auto service	-	-	-	-	-	20%	-	-	3%
Gas station	-	-	-	26%	3%	-	-	-	2%
AUTOMOTIVE TOTAL	-	-	-	26%	3%	20%	-	-	5%
Vacant	-	3%	-	-	1%	10%	-	-	2%
Storage	-	-	-	-	-	41%	-	-	5%
VACANT & STORAGE TOTAL	-	3%	-	-	1%	51%	-	-	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 3 shows how each commercial area is divided by retail type, so the columns sum to 100%. For example, Madrona Marketplace is 5% grocery and Downtown is 38% comparison retail. As a whole, the Island's retail floorspace is 7% vacant or storage.

Table 4: Commercial areas by share of retail category

Type	Madrona Marketplace	Folklife Village	Gabriola Professional Centre	Gas Station Block	DOWNTOWN TOTAL	Twin Beaches Mall	Silva Bay	Elsewhere	TOTAL
Grocery	10%	85%	5%	-	**100%**	-	-	-	100%
Pharmacy	-	100%	-	-	**100%**	-	-	-	100%
Liquor Store	22%	14%	-	32%	**68%**	-	32%	-	100%
Financial services	-	-	78%	22%	**100%**	-	-	-	100%
Health services	-	-	61%	-	**61%**	-	-	39%	100%
Other services	16%	31%	-	-	**48%**	24%	28%	-	100%
CONVENIENCE RETAIL TOTAL	**10%**	**41%**	**19%**	**5%**	**75%**	**6%**	**11%**	**8%**	**100%**
Apparel	46%	40%	-	14%	**100%**	-	-	-	100%
Cosmetics, health, bath, & beauty	51%	-	49%	-	**100%**	-	-	-	100%
Electronics & appliances	100%	-	-	-	**100%**	-	-	-	100%
Footwear & accessories	-	12%	78%	10%	**100%**	-	-	-	100%
Home furnishings	62%	-	34%	3%	**100%**	-	-	-	100%
Home improvement	84%	-	-	-	**84%**	-	-	16%	100%
Jewellery & watches	53%	43%	-	3%	**100%**	-	-	-	100%
Multimedia, books, & music	-	25%	9%	2%	**36%**	-	64%	-	100%
Sports & recreational goods	89%	-	-	11%	**100%**	-	-	-	100%
Pet goods, toys, & hobbies	-	-	-	100%	**100%**	-	-	-	100%
COMPARISON RETAIL TOTAL	**63%**	**9%**	**9%**	**7%**	**87%**	**-**	**5%**	**8%**	**100%**
Food & beverage	18%	8%	-	8%	**34%**	-	17%	49%	100%
Entertainment	-	-	-	-	**-**	100%	-	-	100%
Leisure	73%	-	-	-	**73%**	-	27%	-	100%
RESTAURANT & RECREATION TOTAL	**23%**	**6%**	**-**	**7%**	**36%**	**7%**	**17%**	**40%**	**100%**
Motor vehicles & parts dealers	-	-	-	-	**-**	-	-	-	-
Auto service	-	-	-	-	**-**	100%	-	-	100%
Gas station	-	-	-	100%	**100%**	-	-	-	100%
AUTOMOTIVE TOTAL	**-**	**-**	**-**	**41%**	**41%**	**59%**	**-**	**-**	**100%**
Vacant	-	29%	-	-	**29%**	71%	-	-	100%
Storage	-	-	-	-	**-**	100%	-	-	100%
VACANT & STORAGE TOTAL	**-**	**7%**	**-**	**-**	**7%**	**93%**	**-**	**-**	**100%**
TOTAL	**26%**	**20%**	**10%**	**7%**	**64%**	**13%**	**9%**	**14%**	**100%**

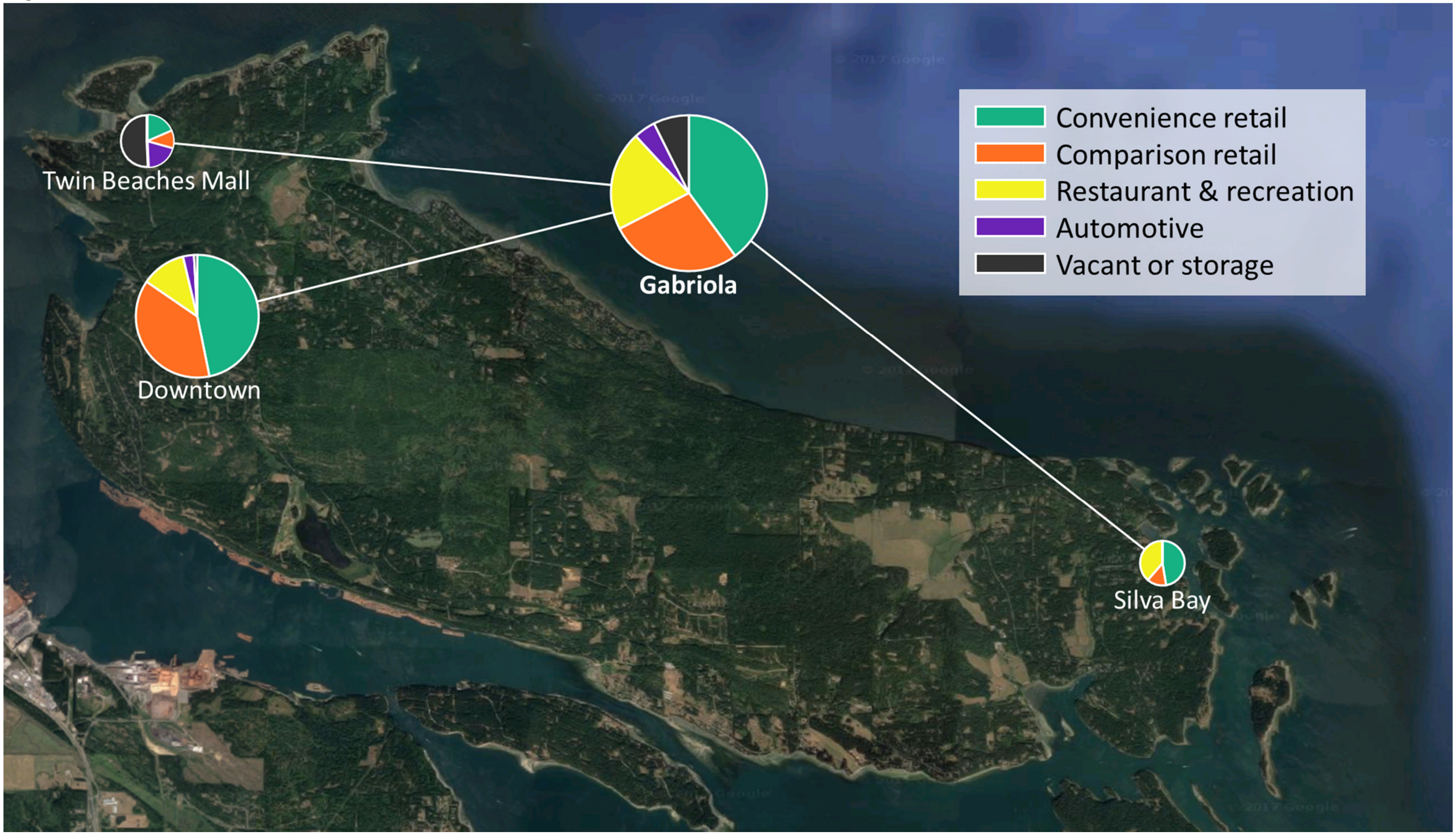
Table 4 shows how each retail type is divided by commercial area, so the rows sum to 100%. For example, Madrona Marketplace contains 10% of the Island's grocery floor space and Downtown contains 87% of the Island's comparison retail. Twin Beaches Mall contains 13% of the Island's total floor space.

Table 5: Gabriola retail businesses by type and location[7]

Type	Madrona Marketplace	Folklife Village	Gabriola Professional Centre	Gas Station Block	DOWNTOWN TOTAL	Twin Beaches Mall	Silva Bay	Elsewhere	TOTAL
Grocery	1	1	1	-	3	-	-	-	3
Pharmacy	-	1	-	-	1	-	-	-	1
Liquor Store	1	1	-	1	3	-	1	-	4
Financial services	-	-	2	1	3	-	-	-	3
Health services	-	-	6	-	6	-	-	4	10
Other services	5	3	-	-	8	5	1	-	14
CONVENIENCE RETAIL TOTAL	7	6	9	2	24	5	2	4	35
Apparel	2	2	-	1	5	-	-	-	5
Cosmetics, health, bath, & beauty	1	-	1	-	2	-	-	-	2
Electronics & appliances	1	-	-	-	1	-	-	-	1
Footwear & accessories	-	1	1	1	3	-	-	-	3
Home furnishings	2	-	1	1	4	-	-	-	4
Home improvement	2	-	-	-	2	-	-	2	4
Jewellery & watches	3	2	-	1	6	-	-	-	6
Multimedia, books, & music	-	1	1	1	3	-	2	-	5
Sports & recreational goods	1	-	-	1	2	-	-	-	2
Pet goods, toys, & hobbies	-	-	-	2	2	-	-	-	2
COMPARISON RETAIL TOTAL	6	2	2	2	12	-	2	2	16
Food & beverage	3	2	-	1	6	-	1	3	10
Entertainment	-	-	-	-	-	1	-	-	1
Leisure	1	-	-	-	1	-	1	-	2
RESTAURANT & RECREATION TOTAL	4	2	-	1	7	1	2	3	13
Motor vehicles & parts dealers	-	-	-	-	-	-	-	-	-
Auto service	-	-	-	-	-	2	-	-	2
Gas station	-	-	-	1	1	-	-	-	1
AUTOMOTIVE TOTAL	-	-	-	1	1	2	-	-	3
Vacant	-	1	-	-	1	1	-	-	2
Storage	-	-	-	-	-	1	-	-	1
VACANT & STORAGE TOTAL	-	1	-	-	1	2	-	-	3
TOTAL	15	10	11	6	42	10	5	9	66

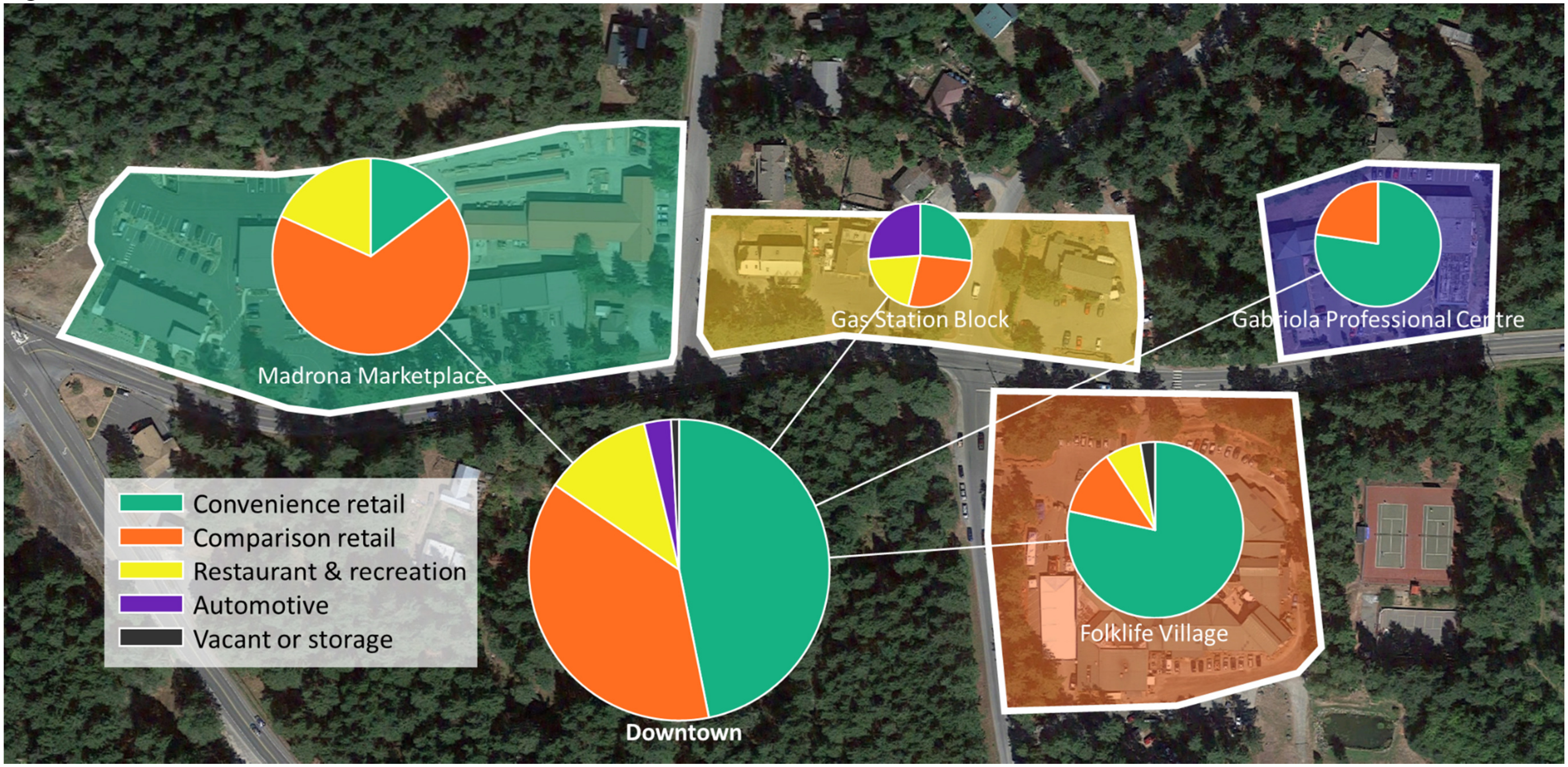
[7] Columns totals do not always equal the sum of column entries in Table 5 because some businesses fall into multiple categories.

Figure 1: Location and retail content of Gabriola commercial areas[8]



[8] Note in this graphic, the pie chart areas are proportional to the corresponding floor space totals

Figure 2: Location and retail content of Downtown commercial areas[9]



The distribution of retail categories within and between the six commercial areas defined here is described and analyzed in greater detail in Section 3: Health & Vitality Evaluation.

[9] Note in this graphic, the pie chart areas are proportional to the corresponding floor space totals

3 Health & Vitality Evaluation

This section discusses the distribution of retail space on Gabriola Island in more detail, and explores the unique strengths and weaknesses of each of the six commercial areas defined in Section 2 in order to evaluate their health and vitality as retail destinations. The analysis draws primarily on two sources of information:

- GPRA's in-person evaluation of all Island commercial areas, completed during the inventory process
- Phone interviews with 16 Island stakeholders representing a cross-section of retail types, locations, and sizes. GPRA spoke primarily with business owners and managers as well as one realtor familiar with the retail land market on Gabriola.

On a scale of 1 to 5, GPRA has evaluated each of Gabriola's six commercial areas and the Island's retail market overall. The meaning of the 1 to 5 scale is defined in Table 6.

Table 6: Health & vitality scale

Score	Meaning
1	Extremely poor health & vitality
2	Poor health & vitality
3	Moderate health & vitality
4	Strong health & vitality
5	Extremely strong health & vitality

The results of this evaluation are discussed in detail throughout Section 3 and summarized in Table 7:

Table 7: Summary of health & vitality evaluation

Commercial area	Health & vitality score
Madrona Marketplace	5
Folklife Village	4
Gabriola Professional Centre	5
Gas Station Block	5
DOWNTOWN TOTAL	**4.5**
Twin Beaches Mall	2
Silva Bay	3
TOTAL	**4**

3.1 Gabriola Retail Market

3.1.1 Gabriola Retail Types and Vacancy

For a community of only 4,033 residents[10], Gabriola Island offers a surprisingly broad mix of retail types in a robust inventory of buildings of various ages. As reported in Section 2.3, the Island contains about 148,000 ft^2 of retail space, made up of:

- Convenience retail: 59,000 ft^2, 39%
- Comparison retail: 41,000 ft^2, 28%
- Restaurants & recreation: 31,000 ft^2, 21%
- Automotive: 7,000 ft^2, 5%
- Vacant or storage space: 11,000 ft^2, 7%.

As mentioned on pg. 4, vacant retail space and retail space used for storage are grouped together here because both cases represent a lost opportunity, or space operating below its full potential. This is based on the assumption that although storage space may be needed on Gabriola, it should not occupy retail storefronts.

The most telling indicator of retail market health is vacancy, and at 7% vacancy or storage, Gabriola's retail market is within a healthy range (considered to be 5% - 8%).

According to the Gabriola Economic Readiness Report (2016), there were 606 businesses on the Island in 2016. GPRA's inventory reveals 64 businesses occupying retail space (including storage occupying retail space but excluding vacant units). Assuming that there are still 606 businesses on the Island, it follows that only 11% of Gabriola's businesses are occupying retail space.

[10] Source: Statistics Canada (2017). Census Profile, 2016 Census, Gabriola Island Trust Area, BC.

3.1.2 Gabriola Retail Market Strengths

When asked about Gabriola's strengths and weaknesses as a place to do business, stakeholders consistently mentioned that the Island is a tight-knit community characterized by customer loyalty, support for local businesses, and a high degree of communication between retailers and patrons. Business owners on Gabriola benefit from ongoing relationships with customers that create a reliable base of revenue and allow them to understand, monitor, and better serve their customers' changing needs. Although established businesses tend to benefit from the social interconnectedness of the small community, new business to Gabriola may struggle without research, community outreach, and prior knowledge of the Island's culture.

Business on Gabriola is extremely seasonal, not only because there are more visitors in the summer, but also due to seasonal residents[11]. Business owners report that customer volumes are acceptable from November to March and excellent from April to October.

Business owners and realtors also report that the retail market on Gabriola is improving, with more visitors in recent years than previously, possibly due to the weaker Canadian Dollar. The successful opening of Madrona Marketplace, which single-handedly increased the Island's commercial floor space by almost 20%, is further evidence of recent retail spending growth, especially in light of its limited negative impact on other Island commercial areas and the impressive speed of its full occupancy (further discussed in Section 3.3). One consequence of this improving retail market is rising commercial rents which allow better building maintenance (see Section 3.4 on Folklife Village) but also put pressure on businesses.

Several stakeholders mentioned that business licenses are not required on Gabriola, and that home-based businesses are encouraged and convenient. This is good news for any operations that might otherwise rent office space, but it is bad news for commercial landlords, especially at the lower end of the market (most notably Twin Beaches Mall, discussed in Section 3.7). On balance, GPRA notes that encouraging home businesses tends to reduce business costs and encourage business activity, ultimately supporting jobs and expanding the scope of available services on the Island.

[11] In line with the Census of Canada, GPRA defines a resident of Gabriola Island (a Gabriolan) as someone who resides (or in some cases whose spouse resides) on the Island more than in any other location (typically for more than half of a given year). Everyone else is considered a visitor. GPRA recognizes that a large group of visitors are seasonal residents whose spending differs considerably from tourists. GPRA has made an effort to distinguish between these groups as much as possible, but visitor data is unavailable.

3.1.3 Gabriola Retail Market Weaknesses

Gabriola has had a fairly static population of about 4,000 from 2006 to 2016 according to Census data. Slow residential growth means slow population growth, which leads to slow commercial spending growth. In other words, the Gabriola commercial market tends to grow slowly if at all, although it has undergone considerable growth in the last several years, as mentioned above. With slow population growth, many retail businesses on Gabriola are marginal and have limited opportunity for revenue growth. As the Island's retail market recently absorbed almost 25,000 ft^2 of floor space at Madrona Marketplace[12], it seems likely that no new space will be needed for some time.

Convenience retailers such as grocery stores, liquor stores, and hair salons tend to capture spending in their immediate neighbourhood, and this is especially true in small island communities. Gabriola's convenience retailers have nearly saturated the Island market, and consequently there is little opportunity for revenue growth in this retail sector without population growth on the Island.

Multiple interviewed stakeholders noted that many Gabriolans have lived on the Island for decades and are quite set in their routines. Customer habits can be slow to adjust, which can make it difficult for new retailers to gain customers. Gabriolans also prefer to drive as little as possible. For these reasons, any new commercial space built on the Island should be limited to the Island's two main commercial nodes, namely Downtown and Silva Bay.

Gabriola's large population of seniors[13] is a mixed blessing as this demographic typically has more disposable income but less mobility than younger groups. Gabriola's high average age (about 56 years old compared to 42 years old for British Columbia)[14] also contributes to a labour shortage on the Island, particularly with respect to the seasonal and temporary labour that many retailers need.

Unlike more populous Gulf Islands such as Salt Spring, Gabriola does not have the population to support a full range of retail and services on the Island. As such, all Island residents have to leave from time to time to address specific needs. And if people are leaving the Island for certain errands anyway (such as trips to Costco), they might as well do a significant amount of shopping in Nanaimo to take advantage of that City's better prices and greater selection while they are there. This could be ameliorated to some extent by expanding the scope of options on the Island, particularly in the comparison retail category (as likely occurred with Madrona Marketplace, discussed in

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[12] 25,000 ft^2 is the amount of new space at Madrona Marketplace. The 39,000 ft^2 references elsewhere in this report includes Arbutus Building Centre and Gabriola Wine Cellar which are not new but are in the Madrona Marketplace commercial area.

[13] Residents aged 65 and older made up 37.5% of Gabriola's population in 2016 compared to 18.3% of British Columbia's population.[14]

[14] Source: Statistics Canada (2017). Census Profile, 2016 Census, Gabriola Island Trust Area, BC.

Section 3.3), but there is no long-term solution without significant population growth on Gabriola.

Relatedly, the cost of shipping is a major barrier to Gabriola's retail trade. Moving goods to the Island by ferry is expensive, and this cost must be passed on to customers who may prefer to shop in Nanaimo, especially if they need to visit Vancouver Island anyway (as mentioned above). But on the other hand, many interviewed stakeholders were aware of Gabriolan customers who prefer to stay on the Island if they have the option, and will place special orders as required. Servicing equipment is also expensive for Gabriola's business community, also due to ferry costs.

Certain land uses and amenities are missing from Gabriola either through deliberate exclusion or due to the Island's small size. The greater variety of land uses and amenities that are available on the Island, the more types of business may succeed on the Island, and the more self-sufficient the Island's economic system will become. Items that were specifically mentioned by interviewed business owners include:

- **Visitor accommodation**, which tends to reach capacity in the summer
- **Seniors care facilities**, to allow more Gabriola residents to stay on the Island long-term
- **Garbage processing**, which would create jobs, save shipping costs, and move Gabriola towards a more sustainable approach
- **Light industrial zoning**, which would allow a greater range of businesses to operate on Gabriola, rather than forcing tradesmen to work out of their homes
- **Storage**, currently limited to Twin Beaches Mall and Gabriola Professional Centre
- **Multi-family or affordable housing**, to bring more and younger residents to Gabriola, which would have many positive effects on the retail trade.

3.1.4 Gabriola Retail Market Health & Vitality

On the whole, Gabriola's retail market exhibits a mix of strengths and weaknesses. It is hindered by slow population growth, a shortage of labour, and the high cost of shipping, but it also boasts an impressively broad range of retail offerings, a robust inventory of commercial buildings old and new, and a loyal base of Gabriolan customers. The Island's healthy vacancy rate and the impressive speed with which Madrona Marketplace found tenants suggests that the retail market is healthy and prosperous. Almost all interviewed business owners expressed enthusiasm and positivity about the Island and their role in its economy.

GPRA gives Gabriola Island a score of **4 out of 5** for overall retail market health and vitality. It is an essentially healthy market with few signs of dysfunction and many signs of success. What difficulties do exist are limited primarily to particular commercial areas, as discussed below. Certain changes could be made to improve the Gabriola's retail market, particularly allowing a greater range of land uses on the Island.

3.2 Downtown

The zone that GPRA calls "Downtown Gabriola" is the approximately 600 m of North Road between the intersection with South Road to the west and the Gabriola Commercial Centre to the east (see Figure 2, pg. 10). This section of North Road contains four distinct commercial areas (as defined in Section 2.2), which together contain more than 94,000 ft^2 of commercial floor space, or 64% of Gabriola's total space, including:

- Convenience retail: 44,000 ft^2, 46% of Downtown, 74% of Gabriola total
- Comparison retail: 36,000 ft^2, 38% of Downtown, 87% of Gabriola total
- Restaurants & recreation: 11,000 ft^2, 12% of Downtown, 36% of Gabriola total
- Automotive: 3,000 ft^2, 3% of Downtown, 41% of Gabriola total
- Vacant or storage space: 822 ft^2, 1% of Downtown, 7% of Gabriola total.

Downtown's vacancy rate of 1% (consisting of a single vacant commercial unit in Folklife Village) suggests that it is extremely popular. However, the vacant commercial unit in question has sat empty for more than two years, which suggests that there is no pressing shortage of space.

Interviewed retailers throughout Downtown agree that it is an ideal location for commercial space. Downtown businesses benefit from two locational effects:

1) Downtown is only 800 m from the ferry terminal, and is perfectly positioned to attract a huge share of spending from ferry passengers, both arriving and departing.

2) Because it contains almost two thirds of the Island's retail space including all of Gabriola's grocery space, its sole pharmacy, and its only financial services, Downtown is the obvious destination for most shopping trips for most people. If Gabriolans and visitors are travelling to Downtown anyway (for example to purchase groceries or go to the Credit Union), then they might as well meet their other shopping needs there as well. Consequently, given its present dominance, Downtown is the best location for any new business to open.

Downtown is the unrivalled core of Gabriola's retail market, and all retailers that GPRA interviewed expressed enthusiasm for the area. It is busy, visible, accessible, and receives a high level of traffic. The retailers that make up Downtown are complementary and balanced. The one missing element that GPRA has identified is a lack of pedestrian accessibility: Downtown would benefit from having more sidewalks connecting its four commercial areas, and also connecting Downtown to the ferry terminal so that pedestrians might more easily cross the 800 m of hilly terrain.

With its many strengths and few weaknesses, GPRA gives Downtown Gabriola a score of **4.5 out of 5** for overall retail market health and vitality.

3.3 Madrona Marketplace

Figure 3: Madrona Marketplace

Madrona Marketplace is the commercial area located on the northwest corner of North Road and Ross Way (see Figure 2, pg. 10). This area consists mostly of the Madrona Marketplace development to which it owes its name, but also includes the Arbutus Home Building Centre and Gabriola Wine Cellar. It is the largest of Gabriola's six identified commercial areas with almost 39,000 ft^2 of commercial space, which is more than 41% of Downtown's floor space, and about 26% of the Island's floor space, consisting of:

- Convenience retail: 6,000 ft^2, which is:
    - 15% of Madrona Marketplace
    - 6% of Downtown total floor space
    - 13% of Downtown convenience retail space
    - 4% of Gabriola total floor space
    - 10% of Gabriola total convenience retail space
- Comparison retail: 26,000 ft^2, which is:
    - 67% of Madrona Marketplace
    - 27% of Downtown total floor space
    - 72% of Downtown comparison retail space
    - 17% of Gabriola total floor space
    - 63% of Gabriola total comparison retail space
- Restaurants & recreation: 7,000 ft^2, which is:
    - 18% of Madrona Marketplace
    - 7% of Downtown total floor space
    - 63% of Downtown restaurant & recreation space
    - 5% of Gabriola total floor space
    - 23% of Gabriola restaurant & recreation space
- No automotive businesses
- No vacant or storage space.

Madrona Marketplace businesses and tenants are listed in Table 8.

Table 8: Madrona Marketplace businesses and tenants

Name	Primary type	Secondary type	Floor space (ft²)
Arbutus Home Building Centre	Comparison retail	Home improvement	12,678
Island Home & Garden	Comparison retail	Home improvement	5,120
		Home furnishings	1,800
		Electronics & appliances	720
		Apparel	360
Wishbone	Convenience retail	Grocery	1,755
	Comparison retail	Home furnishings	405
		Jewellery & watches	270
	Restaurant & recreation	Food & beverage	270
North Road Sports	Comparison retail	Apparel	2,040
		Sports & recreational goods	510
Gabriola Fitness Centre	Restaurant & recreation	Leisure	2,400
Mad Rona's Coffee Bar	Restaurant & recreation	Food & Beverage	2,350
Woodfire Restaurant & Catering	Restaurant & recreation	Food & Beverage	2,005
Nature Spirit Earth Market	Comparison retail	Cosmetics, health, bath, & beauty	1,275
		Jewellery & watches	225
Gabriola Wine Cellar	Convenience retail	Liquor store	1,362
Architrave Design Build Ltd.	Convenience retail	Other services	1,100
Paprika Studio & Gallery	Comparison retail	Jewellery & watches	450
Remax	Convenience retail	Other services	450
Gabriola Chamber of Commerce	Convenience retail	Other services	420
Brent G Hair Studio	Convenience retail	Other services	320
Gabriola Sounder Media Inc.	Convenience retail	Other services	270
TOTAL	15 businesses		38,555

With the exception of Arbutus Home Building Centre and Gabriola Wine Cellar, Madrona Marketplace is the newest commercial space on Gabriola Island and arguably the most desirable. The commercial area has no vacancy even though Madrona Marketplace proper has only been open for seven years (Phase 1) or two years (Phase 2). For a new commercial development in a small island community (one that single-handedly increased the Island's commercial space by almost 20%), this is a resounding success.

Madrona Marketplace businesses that GPRA interviewed uniformly echo this sentiment, noting that the buildings are of high quality, that the Marketplace is located in a highly accessible Downtown location, that there is sufficient parking, and that business is good. The one noted flaw in the area's design, as mentioned in Section 3.2, is a lack of sidewalks at street level.

According to a local realtor and to numerous interviewed retailers, the opening of Madrona Marketplace proper had a negative impact on Gabriola's other commercial areas for about two years, but the effect has not lasted. This impact is unsurprising since the development increased the Island's commercial floor space by almost 20%. If anything, it is surprising that the negative impact was so short-lived.

One possible explanation for Madrona Marketplace's rapid absorption and short-lived negative impact is that the development brought a greater variety of retail and restaurant options to the Island, enabling more people to make fewer trips to Nanaimo, and increasing the total share of resident spending captured on Gabriola. (In fact, this is the stated aim of Island Home & Garden). The overall impact of Madrona Marketplace can thus be viewed as a "positive sum", capturing more spending than it subtracts from other Gabriola commercial areas by adding overall spending to the Island.

A significant factor in Madrona Marketplace's success is that it mostly complements rather than competing with the Island's other commercial areas. Specifically, the Marketplace specializes in Comparison retail more than any of Gabriola's other commercial areas. This category makes up 67% of Madrona Marketplace compared to 28% of the Island overall, and Madrona Marketplace contains 63% of the Island's comparison retail but only 26% of its overall floorspace. This is a high degree of specialization.

It is worth noting that comparison retail – the category in which Madrona Marketplace has specialized – is also the commercial category most likely to see spending leakage in small communities like Gabriola. The focus on this category within Madrona Marketplace most likely addresses a gap that existed prior to its arrival, and accounts for the Marketplace's success as well as its positive sum impact on the Island – by expanding a category of retail that was underrepresented, the Marketplace increased total Island spending.

The Marketplace has a number of relatively small (but high-value) comparison retailers including North Road Sports, Nature Spirit Earth Market, Paprika Studio & Gallery, and (to some extent) Wishbone, but where it specializes particularly is in the home improvement sub-category of comparison retail; the commercial area has both of the Island's two largest home improvement stores (Arbutus Home Building Centre and Island Home & Garden) which together contain almost 21,000 ft^2 of space, which is impressive for a small island community. This is an excellent example of industry clustering, with two close competitors locating almost back-to-back in the best location for maximum market capture.

In summary, Madrona Marketplace is a highly successful, fully leased commercial area with relatively happy occupants that contributes to the Gabriola Island retail market by providing a particular kind of retail – comparison retail – not widely offered elsewhere on the Island. Like the rest of Downtown, it is also perfectly positioned for high traffic. GPRA gives Madrona Marketplace a score of **5 out of 5** for overall retail market health and vitality.

3.4 Folklife Village

Figure 4: Folklife Village

Folklife Village is the Expo-era strip mall located on the southeast corner of North Road and Lockinvar Lane (see Figure 2, pg. 10). It contains more than 30,000 ft^2 of commercial space, which is 32% of Downtown's floor space and 20% of the Island's floor space, consisting of:

- Convenience retail: 24,000 ft^2, which is:
  - 78% of Folklife Village
  - 25% of Downtown total floor space
  - 55% of Downtown convenience retail space
  - 16% of Gabriola total floor space
  - 41% of Gabriola total convenience retail space
- Comparison retail: 4,000 ft^2, which is:
  - 12% of Folklife Village
  - 4% of Downtown total floor space
  - 10% of Downtown comparison retail space
  - 3% of Gabriola total floor space
  - 9% of Gabriola total comparison retail space
- Restaurants & recreation: 2,000 ft^2, which is:
  - 7% of Folklife Village
  - 2% of Downtown total floor space
  - 18% of Downtown restaurant & recreation space
  - 1% of Gabriola total floor space
  - 6% of Gabriola restaurant & recreation space

- No automotive businesses
- Vacant and storage space: 822 ft², which is:
    - 3% of Folklife Village
    - 1% of Downtown total floor space
    - 100% of Downtown vacant or storage space
    - 1% of Gabriola total floor space
    - 7% of Gabriola total vacant or storage space.

Folklife Village businesses and tenants are listed in Table 9.

Table 9: Folklife Village businesses and tenants

Name	Primary type	Secondary type	Floor space (ft²)
Village Food Market	Convenience retail	Grocery	14,473
Island Pharmacy	Convenience retail	Pharmacy	3,566
The Hive	Comparison retail	Apparel	1,327
		Multimedia, books, & music	747
		Jewellery & watches	664
	Restaurant & recreation	Food & beverage	747
Vancouver Island Regional Library	Convenience retail	Other services	3,125
The Kitchen	Restaurant & recreation	Food & beverage	1,245
Gabriola Law Office	Convenience retail	Other services	1,037
The Wooden Hanger Clothing Company	Comparison retail	Apparel	736
		Footwear & accessories	147
		Jewellery & watches	98
Village Liquor Store	Convenience retail	Liquor store	825
Vacant space	Vacant or storage	Vacant	822
Royal LePage Realty	Convenience retail	Other services	751
TOTAL	**9 businesses + 1 vacant space**		**30,309**

In sharp contrast to Madrona Marketplace which specializes in comparison retail, Folklife Village is a convenience retail hub. Convenience retail makes up 78% of the Village's floor space compared to 39% of the Island's floor space, indicating significant specialization. Of Folklife Village's convenience retail locations there are a couple of small offices (considered a type of convenience retail) as well as one of the Island's three liquor stores, but the three largest and most important tenants in this category are the Island's only library, its only pharmacy, and its only grocery story, which together make up the lion's share of the development.

Compared to Madrona Marketplace, Folklife Village is older and less polished, but also better established and more central. As it contains the Island's only grocery store, pharmacy, and library (not to mention the Hive, one of the Island's few performance spaces), it is arguably the Island's commercial and community heart, and a necessary stop in most Island shopping trips. In addition to convenience retail, the Village contains a café (upstairs in the Hive), a restaurant, and a couple of clothing stores. Village tenants interviewed by GPRA agree that it is an ideal business location and receives a high volume of visitors and traffic.

Folklife Village was recently purchased by the Pattison Group. Interviewed tenants report that prior to this change in ownership, the strip mall was falling into disrepair from deferred maintenance and pedestrian safety was becoming an issue due to deteriorating walkways. Since purchasing the property, the Pattison Group has maintained and improved the building but has also increased rents and common area maintenance fees. Tenants that GPRA interviewed commented on the increased pressure this places on businesses, especially large tenants who pay a larger share of common area maintenance fees.

The recently increased cost of operating in Folklife Village might help explain the strip mall's 822 ft^2 vacant unit which has been empty for about two years. This is a little surprising given the Village's perfect location, excellent anchor tenants, and high volume of traffic, but it may be that with a surfeit of new space at Madrona Marketplace, and with increased rents to reflect increased maintenance, Folklife Village is less appealing to new businesses than it once was. Overall, the strip mall's vacancy rate of 3% is still considered low, and customer volume is as high as it ever has been, often exceeding the capacity of the Village's central parking lot.

Overall, Folklife Village serves a crucial role among Gabriola's commercial areas. It has several large and successful anchor tenants and a mix of smaller supporting tenants. It is successful enough to fill its parking lot, and its building maintenance has improved in recent years. Tenants are pleased with the location, although increased rents and the shortage of parking are sources of stress. GPRA gives Folklife Village a score of **4 out of 5** for overall retail market health and vitality.

3.5 Gabriola Professional Centre

Figure 5: Gabriola Professional Centre

Gabriola Professional Centre is the strip mall located on the north side of North Road, across from Huxley Community Park (see Figure 2, pg. 10). This area contains two buildings: 590 North Road (Gabriola Professional Centre proper) and 580 North Road. Although 580 North Road is not technically part of Gabriola Professional Centre, they are treated as a single commercial area in this analysis, and referred to by that name. It contains almost 15,000 ft^2 of commercial space, which is 16% of Downtown's floor space and 10% of the Island's floor space, consisting of:

- Convenience retail: 11,000 ft^2, which is:
  - 76% of Gabriola Professional Centrre
  - 12% of Downtown total floor space
  - 26% of Downtown convenience retail space
  - 8% of Gabriola total floor space
  - 19% of Gabriola total convenience retail space
- Comparison retail: 3,600 ft^2, which is:
  - 24% of Gabriola Professional Centre
  - 4% of Downtown total floor space
  - 10% of Downtown comparison retail space
  - 2% of Gabriola total floor space
  - 9% of Gabriola total comparison retail space
- No restaurant and recreation businesses
- No automotive businesses
- No vacant or storefront storage space.

Gabriola Professional Centre businesses and tenants are listed in Table 10.

Table 10: Gabriola Professional Centre businesses and tenants

Name	Primary type	Secondary type	Floor space (ft²)
Gabriola Health Centre *(6 tenants)*	Convenience retail	Health services	7,467
Colleen's Home & Fashion Centre	Comparison retail	Home furnishings	1,205
		Footwear & accessories	935
		Multimedia, books, & music	270
Coastal Community Credit Union	Convenience retail	Financial services	2,298
Gabriola Optical	Comparison retail	Cosmetics, health, bath, & beauty	1,205
Coastal Community Insurance Services	Convenience retail	Financial services	767
Island Meats & Deli	Convenience retail	Grocery	767
TOTAL	**11 businesses**		**14,913**

Gabriola Professional Centre is 76% convenience retail, indicating a degree of specialization similar to Folklife Village. But whereas the latter specializes in the grocery and pharmacy categories, the former specializes in services, specifically health services and financial services. The Professional Centre – living up to its name – contains about 78% of the Island's financial services floor space including the Island's only credit union (there are no banks on Gabriola) and its only insurance office (both affiliated with Coastal Community) and about 61% of the Island's rentable medical services floor space within the more than 7,500 ft² Gabriola Health Centre[15]. The Professional Centre is a destination not for daily trips but for weekly or monthly visits; this is reflected in its professional services focus and in its more specialized convenience and comparison retailers such as Gabriola Optical and Island Meats & Deli.

Professional Centre tenants that GPRA interviewed were uniformly enthusiastic about the location. Popular elements include its abundance of parking, its convenient proximity to the rest of Downtown, and its complementary tenant mix both internally and in relation to Folklife Village across the road. It is a successful strip mall with a defined specialization and no vacancy. GPRA gives it a score of **5 out of 5** for overall retail market health and vitality.

Note that Gabriola Professional Centre contains some storage space. Because it does not occupy retail storefront, GPRA does not consider it under-utilized space, but simply non-retail space that is not covered in this inventory.

[15] The remaining 22% of Gabriola's financial services floor space is used by K. D. Beausoleil & Company Chartered Professional Accounts in the Gas Station Block, and the remaining 39% of rentable health services floor space is located in the new Gabriola Medical Clinic on Church Street.

3.6 Gas Station Block

Figure 6: Gas Station Block

What GPRA calls the Gas Station Block is the "leftover" commercial area east of Madrona Marketplace and west of Gabriola Professional Centre (see Figure 2, pg. 10). It includes three buildings: 535, 545, and 560 North Road which contain about 10,600 ft^2 of commercial space, which is 11% of Downtown's floor space and 7% of the Island's floor space, consisting of:

- Convenience retail: 3,000 ft^2, which is:
    - 27% of the Gas Station Block
    - 3% of Downtown total floor space
    - 6% of Downtown convenience retail space
    - 2% of Gabriola total floor space
    - 5% of Gabriola total convenience retail space
- Comparison retail: 3,000 ft^2, which is:
    - 27% of the Gas Station Block
    - 3% of Downtown total floor space
    - 8% of Downtown comparison retail space
    - 2% of Gabriola total floor space
    - 8% of Gabriola total comparison retail space
- Restaurants & recreation: 2,000 ft^2, which is:
    - 20% of the Gas Station Block
    - 2% of Downtown total floor space
    - 19% of Downtown restaurant & recreation space
    - 1% of Gabriola total floor space
    - 7% of Gabriola restaurant & recreation space
- Automotive: 3,000 ft^2, which is:
    - 26% of the Gas Station Block
    - 3% of Downtown total floor space
    - 100% of Downtown automotive space
    - 2% of Gabriola total floor space
    - 41% of Gabriola automotive space
- No vacant or storage space.

Gas Station Block businesses and tenants are listed in Table 11.

Table 11: Gas Station Block businesses and tenants

Name	Primary type	Secondary type	Floor space (ft²)
Mid Island Co-op	Automotive	Gas Station	2,773
Robert's Place	Restaurant & recreation	Food & Beverage	2,128
BC Liquor Store	Convenience retail	Liquor Store	1,969
Raven Feed & Pet Supply	Comparison Retail	Pet goods, toys, & hobbies	1,644
The Gabe Shop	Comparison retail	Apparel	732
		Footwear & accessories	122
		Home furnishings	122
		Jewellery & watches	61
		Multimedia, books, & music	61
		Pet goods, toys, & hobbies	61
		Sports & recreational goods	61
K. D. Beausoleil & Company	Convenience retail	Financial services	858
TOTAL	6 businesses		10,593

Unlike Downtown's other three commercial areas, the Gas Station Block is almost perfectly balanced between the four categories of retail – each takes up 20% to 27% of the Block's floor space. It is home to Gabriola's only gas station, Gabriola's only pet food and supplies store, Gabriola's only thrift store, and the only Gabriola accountant with storefront space (although GPRA is certain that some accountants on Gabriola work from their homes). It also contains one of the Island's three liquor stores, and Downtown's largest full service restaurant (that is, excluding cafés such as Mad Rona's). This is an eclectic mix of businesses but they each offer something unique in Downtown Gabriola, and together form a successful commercial area.

For the most part, the Gas Station Block has attracted or retained businesses that benefit from the Downtown location, but require more space or cheaper rent than the area's several strip malls could provide. For example:

- The Mid-Island Co-op gas station requires extra space for car and truck maneuvers, gas tanks, and fueling area
- Raven Feed & Pet Supply requires warehouse-style space which is not provided elsewhere in Downtown Gabriola
- The Gabe Shop is a non-profit operation, and benefits from the cheaper rent in one of the Gas Station Block's older buildings.

The Block's mix of older buildings, more spacious properties, abundant parking, and Downtown location make it ideal for its current mix of business occupants. All of the business owners that GPRA interviewed expressed unreserved enthusiasm for the location, and its full occupancy suggests that it is functioning well. It might benefit from better sidewalks but overall GPRA gives it a score of **5 out of 5** for overall retail market health and vitality.

3.7 Twin Beaches Mall

Figure 7: Twin Beaches Mall

Twin Beaches Mall is the strip mall located at southeast corner of Berry Point Road and Ricardo Road (see Figure 1, pg. 9). It contains about 20,000 ft² of commercial space, which is 13% of the Island's floor space, consisting of:

- Convenience retail: 3,700 ft², 19% of Twin Beaches Mall, 6% of Gabriola total
- Restaurants & recreation: 2,200 ft², 11% of Twin Beaches Mall, 7% of Gabriola total
- Automotive: 4,000 ft², 20% of Twin Beaches Mall, 59% of Gabriola total
- Vacant or storage space: 10,000 ft², 51% of Twin Beaches Mall, 93% of Gabriola total
- No comparison retail.

Twin Beaches Mall businesses and tenants are listed in Table 12.

Table 12: Twin Beaches Mall businesses and tenants

Name	Primary type	Secondary type	Floor space (ft²)
Storage space	Vacant or storage	Storage	8,140
Gabriola Automotive	Automotive	Auto service	2,400
Hale Aloha Spa	Convenience retail	Other services	2,300
The Roxy	Restaurant & recreation	Entertainment	2,160
Vacant	Vacant or storage	Vacant	2,000
Body shop	Automotive	Auto service	1,600
Tinson Point Cuts	Convenience retail	Other services	600
Moonshine Studio[16]	Convenience retail	Other services	300
Studio Space[16]	Convenience retail	Other services	300
Pretty Devils Tattoo Studio	Convenience retail	Other services	200
TOTAL	**8 businesses, 1 vacant space, and storage**		**20,000**

Of the four strip malls on Gabriola Island, Twin Beaches Mall is the only one located outside of Downtown. Its main building was built in 1968, making it the oldest of the four

[16] Studio space in a strip mall is technically not retail, but it could be used as retail by the next tenant and is therefore included in the floor space inventory.

strip malls, and it was purchased by its current owner in the late 1990s. Although it has survived, it has not performed up to expectations and remains a challenged commercial area with 10% vacancy and more than 40% storage usage. Turnover is high, and a tenant that GPRA interviewed reports that in one recent winter they were the only non-storage occupant.

According to various accounts, Twin Beaches Mall has at various times contained a liquor store, a convenience store, and a credit union, all of which could be anchor tenants but all of which have left. Some businesses that remain are relatively successful such as Tinson Point Cuts and Gabriola Automotive, but for the most part businesses have had difficulty operating in this location. Although the Mall is located within walking distance of its namesake beaches, which would normally be a significant advantage, it simply lacks the centrality, accessibility, and critical commercial mass of Downtown Gabriola. This challenge has only grown in the last seven years as more and better space has opened in Madrona Marketplace.

Despite its overall difficulty, Twin Beaches has still established a commercial specialization in the automotive services sector as it contains the Island's only automotive garage as well as a separate auto body shop in the back of the strip mall building. Gabriolans are largely auto-dependent and demand for this use is unlikely to decline for the foreseeable future. What is more, auto-related uses are poorly matched to walkable downtown areas, making Twin Beaches an appropriate location for this type of commercial. Twin Beaches Mall is also the home of the Roxy, Gabriola's only dedicated entertainment destination, probably due to the location's affordable rent.

Twin Beaches Mall is largely used for storage. Although Gabriola does need some storage space, this use is poorly suited for storefronts, and tends to have a deadening effect on neighbouring retail as it does not stimulate traffic and creates unappealing "blind walls" with no windows or activity. Despite its several active tenants, Twin Beaches Mall suffers from a vicious cycle of low occupancy, storage use, and low demand. For these reasons, GPRA gives it a score of **2 out of 5** for overall retail market health and vitality.

3.8 Silva Bay

Figure 8: Silva Bay Restaurant, Pub, & Liquor Store

Unlike Gabriola's other commercial areas, which are mostly strip malls, the Silva Bay commercial area is a relatively dispersed zoned near Gabriola's eastern end (see Figure 1 on pg. 9). It is centred on two resort marinas (the Silva Bay Resort & Marina and Page's Resort & Marina) and is also home to an inn with attached second-floor office (the Silva Bay Inn). None of these uses are ground-floor retail and they are thus beyond the scope of this study, but the area does have a few retail and restaurant businesses containing about 13,500 ft^2 of commercial space altogether, which is about 9% of the Island's floor space, consisting of:

- Convenience retail: 6,000 ft^2, 47% of Silva Bay, 11% of Gabriola total
- Comparison retail: 2,000 ft^2, 14% of Silva Bay, 5% of Gabriola total
- Restaurants & recreation: 5,000 ft^2, 39% of Silva Bay, 17% of Gabriola total
- No automotive businesses
- No vacant or storage space.

Silva Bay retail & restaurant businesses and tenants are listed in Table 13.

Table 13: Silva Bay retail & restaurant businesses and tenants

Name	Primary type	Secondary type	Floor space (ft^2)
Silva Bay Pub, Restaurant, & Liquor Store	Restaurant & recreation	Food & beverage	4,331
	Convenience retail	Liquor store	1,935
Silva Bay Shipyard	Convenience retail	Other services	4,459
Pier Gallery Artists Collective	Comparison retail	Multimedia, books, & music	971
Page's Resort & Marina Bookstore	Comparison retail	Multimedia, books, & music	924
Dock 'n' Roll	Restaurant & recreation	Leisure	881
TOTAL	5 businesses		13,501

Because the Silva Bay commercial area is anchored by two resort marinas, it is the most seasonal of the Island's six commercial areas. This was commented upon by every Silva Bay business owner that GPRA interviewed. Most businesses in the area do not operate in the winter because customer traffic is so low, including the almost 4,500 ft^2 Silva Bay Pub, Restaurant, and Liquor Store. In the summer, Silva Bay's several businesses enjoy a captive market of resort visitors and boaters, but in the winter there is almost no business, making the year marginal overall.

Silva Bay lacks a grocery store, a year-round liquor store, and all non-boat-related services. As such, Silva Bay locals are required to travel Downtown for their basic needs, and Silva Bay consequently loses a great deal of their spending. In other words, this area lacks the commercial variety to maintain a customer base other than seasonal boaters. Increasing the offering of retail types in Silva Bay would potentially allow it to carve a trade area out of Gabriola's eastern portion, but most businesses would have a difficult time given the area's extreme seasonality.

Silva Bay seems to work well as a business location for some of its commercial occupants, especially the Silva Bay Shipyard boat repair shop and the Pier Gallery Artists Collective, but overall its businesses are marginal and its growth prospects are minimal. GPRA gives it a score of **3 out of 5** for overall retail market health and vitality.

3.9 Other businesses

Not all of Gabriola's commercial space is located within the six commercial areas defined above. There are seven other locations with retail or rentable space, which collectively contain about 21,000 ft^2 of space, which is 14% of the Island's floor space, consisting of:

- Convenience retail: 5,000 ft^2, 8% of Gabriola total
- Comparison retail: 3,000 ft^2, 8% of Gabriola total
- Restaurants & recreation: 12,000 ft^2, 40% of Gabriola total
- No automotive businesses
- No vacant or storage space.

Retail & restaurant businesses and tenants located outside of the six commercial areas are listed in Table 14.

Table 14: Retail businesses and tenants located outside commercial areas

Name	Primary type	Secondary type	Floor space (ft^2)
Surf Lodge & Pub	Restaurant & recreation	Food & beverage	8,528
Gabriola Medical Clinic *(4 tenants)*	Convenience retail	Health services	4,854
Skol Pub	Restaurant & recreation	Food & beverage	2,179
Gabriola Golf & Country Club	Restaurant & recreation	Food & beverage	1,737
Wild Rose Farm & Garden Centre	Comparison retail	Home improvement	1,727
Wheelbarrow Nursery	Comparison retail	Home improvement	1,589
TOTAL	**9 businesses**		**20,614**

Of the seven locations with rentable or commercial space outside of the six commercial areas, three are large restaurants or pubs (the Surf Lodge & Pub, the Skol Pub, and the Gabriola Golf & Country Club) and two are nurseries / garden centres (the Wild Rose Farm and the Wheelbarrow Nursery). The only other commercial location on the Island is the Gabriola Medical Clinic, which GPRA estimates to have almost 5,000 ft^2 of rentable space.

Note that although this retail comprises only 14% of the Island's space, it contains 40% of the Island's restaurant & recreation space. This is intuitive, since restaurants benefit from locating right next to the ferry terminal (like the Skol Pub) or in picturesque natural locations (like the Surf Lodge or the Golf & Country Club).

The Haven retreat near Twin Beaches is an important business worth mentioning. Although it is not retail space and therefore falls outside of the scope of this analysis, it is one of the largest Island employers, and probably the single largest source of visitors to Gabriola.

4 Commercial Demand Model

By combining the retail inventory presented in Section 2 with local demographic, sales performance, and spending data, GPRA has created a commercial demand model to identify existing areas of floor space oversupply and undersupply and to project future demand for new commercial floor space on Gabriola Island. This section describes the methodology and results of the commercial demand model.

4.1 Estimating Current Demand

4.1.1 Gabriola Population

To quantify the demand for commercial floor space on Gabriola Island, it is necessary to estimate and project the Island's population.

The Census of Canada is the main source of data on the Island's past population trends. Data from 1991 to 2016 is shown in Table 15.

Table 15: Past population growth on Gabriola Island[17]

Year	Gabriola population	Gabriola annual growth rate	BC annual growth rate
1991	2,635		
1996	3,480	5.7%	2.8%
2001	3,520	0.2%	1.0%
2006	4,050	2.8%	0.8%
2011	4,045	-0.0%	1.2%
2016	4,033	-0.0%	1.1%
Overall		1.7%	1.4%

The Census reports that Gabriola had about 2,635 residents in 1991, but the Island's population grew rapidly in the first half of the 90s, reaching 3,480 by 1996. Population growth in the second half of the 90s was much slower, reaching only about 3,520 residents in 2001 before picking up pace in the first half of the 00s and reaching 4,050 by 2006. Since 2006, Gabriola's population has remained basically constant, declining negligibly to 4,033 in 2016. This growth history is shown in Figure 9 below.

Between 1991 and 2016, Gabriola exhibited annual growth rates as high as 5.7% and as low as 0%, although the overall growth rate was 1.7% annually. British Columbia, on the other hand, exhibited annual growth rates as high as 2.8% and as low as 0.8%, with an overall growth rate of 1.4%. The province has grown at a rate of about 1% annually since 1996, but Gabriola has not significantly grown in population since about 2006.

In projecting Gabriola Island's population growth, one approach would be to extrapolate linearly from observed growth in the 1991 to 2016 period. This would mean

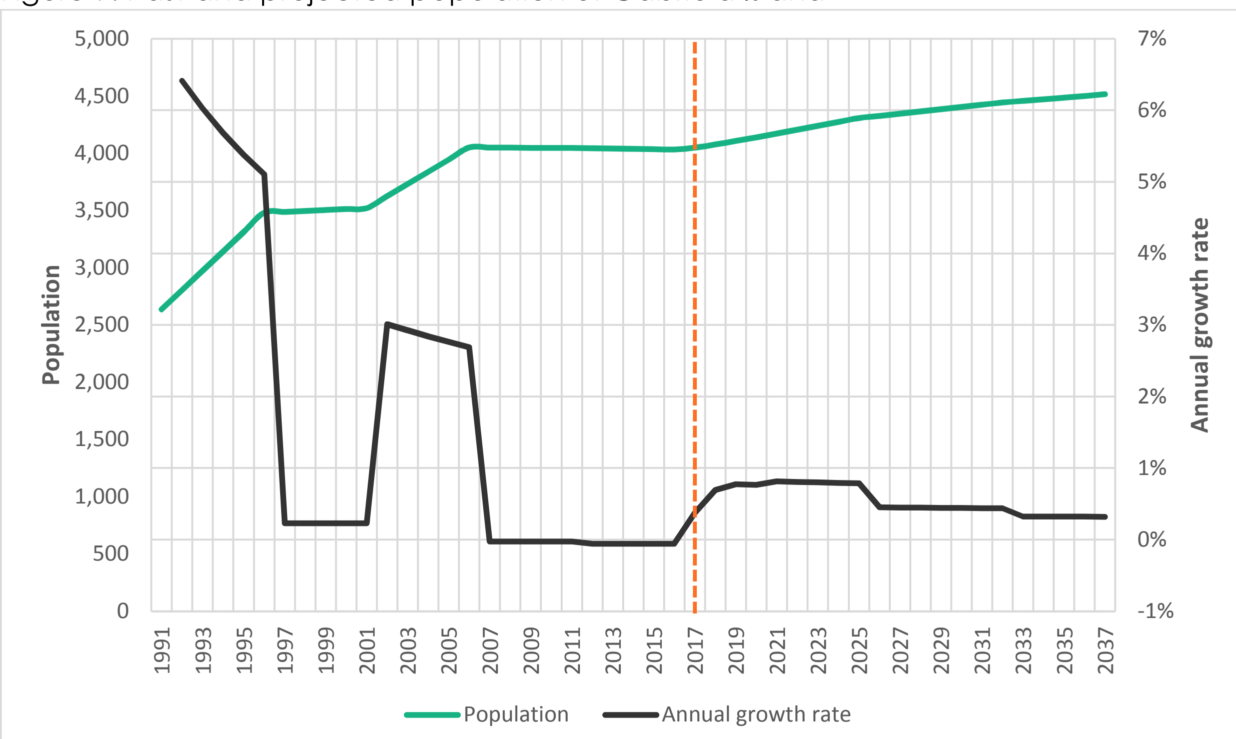
[17] Source: Statistics Canada (2017). Census Profile, 2016 Census, 2011 Census, 2006 Census, 2001 Census, 1996 Census, & 1991 Census, Gabriola Island Trust Area, BC.

adding 64 Gabriola residents per year, or a 1.2% - 1.6% annual growth rate over the next 20 years. The Island's 2037 population would be 5,382.[18]

Another approach in projecting population growth on Gabriola Island would be to adopt the projection of a third party, ideally a professional analytics company. Environics Analytics projects that Gabriola Island will grow from 4,077 residents in 2015 to 4,342 residents in 2025. Extrapolating to 2037 on this basis produces annual growth of 0.3% - 0.8% resulting in a 2037 population of 4,514.

GPRA believes that the Environics projection is more realistic than linearly extrapolating from the Census trend, as this option more closely matches the Island's recent years and would require less drastic policy change around residential density on the Island. For the commercial demand model, GPRA assumes the Environics projection is correct, with minor adjustments to blend with 2016 Census data. Past and projected Gabriola population is shown in Figure 9.

Figure 9: Past and projected population of Gabriola Island[19]



[18] This is a linear extrapolation: it assumes constant growth of 64 residents per year. It is not an exponential extrapolation which would assume a particular rate, for example 1.7% growth, every year. This latter approach would produce constantly accelerating population growth on the Island, which GPRA does not view as realistic.

[19] Source: Blended data from Statistics Canada (2017). Census Profile, 2016 Census, 2011 Census, 2006 Census, 2001 Census, 1996 Census, & 1991 Census, Gabriola Island Trust Area, BC. & Environic Analytics (2015).

Projected Gabriola population is shown in Table 16.

Table 16: Projected Gabriola population[20]

Year	Gabriola population	Annual growth rate
2017	4,048	0.0%
2022	4,206	0.8%
2027	4,346	0.7%
2032	4,443	0.4%
2037	4,514	0.3%
Overall		0.5%

4.1.2 Gabriola Resident Spending

Environics Analytics has estimated Gabriola's per capita annual household spending by type in 2015. It is assumed that Gabriola's per capita spending will increase linearly by 1% - 2% per year, and by 2037 will be about 44% higher than it was in 2015. The 2015 and 2037 estimates are shown in Table 17.

Table 17: Projected Gabriola per capita annual household spending by type

Type	2015	2037
Grocery	$3,134	$4,513
Pharmacy	$473	$681
Liquor Store	$525	$756
Financial Services	$183	$264
Health services	$406	$585
Other services	$807	$1,162
CONVENIENCE RETAIL TOTAL	**$5,528**	**$7,960**
Apparel	$962	$1,385
Cosmetics, health, bath, & beauty	$264	$380
Electronics & appliances	$495	$713
Footwear & accessories	$253	$364
Home furnishings	$435	$626
Home improvement	$661	$952
Jewellery & watches	$93	$134
Multimedia, books, & music	$258	$372
Sports & recreational goods	$186	$268
Pet goods, toys, & hobbies	$363	$523
COMPARISON RETAIL TOTAL	**$3,970**	**$5,717**
Food & beverage	$875	$1,260
Entertainment	$128	$184
Leisure	$279	$402
RESTAURANT & RECREATION TOTAL	**$1,282**	**$1,846**
Motor vehicles & parts dealers	$2,272	$3,272
Auto services	$1,277	$1,839
Gas station	$1,247	$1,796
AUTOMOTIVE TOTAL	**$4,796**	**$6,906**
TOTAL	**$15,576**	**$22,249**

[20] Source: Blended data from Statistics Canada (2017). Census Profile, 2016 Census, 2011 Census, 2006 Census, 2001 Census, 1996 Census, & 1991 Census, Gabriola Island Trust Area, BC. & Environic Analytics (2015).

Combining the per capita spending projection shown here with the Gabriola population projection shown in Figure 9 & Table 17, pg. 33 – 34 produces a projection of total Gabriola household spending, shown in Figure 10 and Table 18.

Figure 10: Projected total Gabriola Island annual household spending[21]

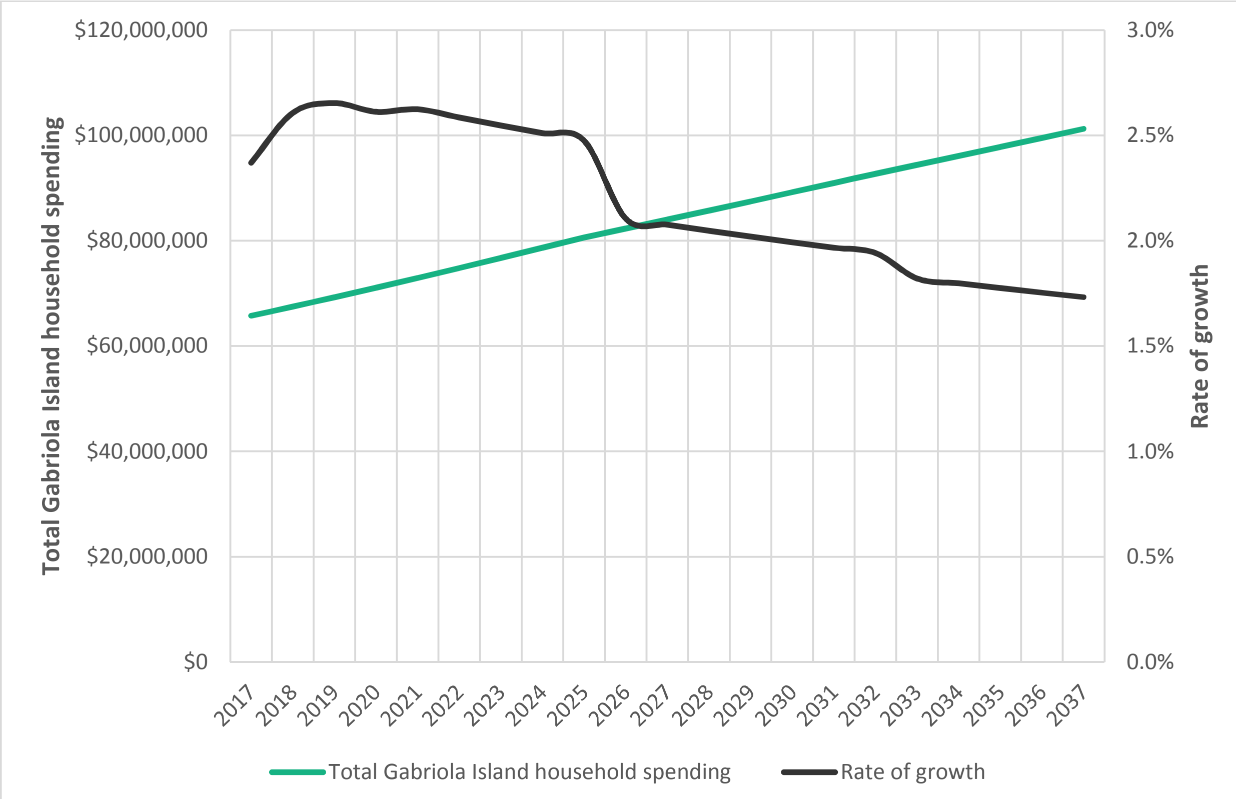


Table 18: Projected total Gabriola Island annual household spending[21]

Year	Gabriola population	Annual growth rate
2017	$65,760,446	2.2%
2022	$74,824,437	2.6%
2027	$84,008,583	2.3%
2032	$92,723,905	2.0%
2037	$101,254,293	1.8%
Overall		

Total household spending by Gabriola residents is estimated at less than $67 million per in 2017, and is projected to increase to more than $101 million in 2037. As shown in Figure 10, the rate of growth is expected to be nearly linear, although the next eight years are expected to see slightly more rapid growth in spending than the following twelve years, due mostly to more rapid population growth in the earlier period.

[21] Source: Blended data from Statistics Canada (2017). Census Profile, 2016 Census, 2011 Census, 2006 Census, 2001 Census, 1996 Census, & 1991 Census, Gabriola Island Trust Area, BC. & Environic Analytics (2015).

4.1.3 Visitor Spending

In addition to the population and spending estimates presented above, GPRA has made use of the following sources of information to estimate present demand for commercial floor space on Gabriola:

- The split of retail spending between Gabriola residents and visitors, as reported by local business owners in telephone interviews with GPRA
- The share of Gabriola resident household spending captured by Island businesses (rather than captured elsewhere, for example in Nanaimo), informed by stakeholder interviews and GPRA's experience in other projects
- The sales performance of commercial floor space on Gabriola, that is the total volume of sales required to support a given amount of floor space, informed by GPRA's experience in other projects.

A combination of industry standard statistics, stakeholder interviews, and triangulation between variables has allowed GPRA to estimate each of the above numbers for each sub-category of retail.

First of all, the split of retail spending between Gabriola residents and visitors (including both seasonal residents and tourists) varies by type of retail, by location on the Island, and by season. Based on stakeholder interviews, and averaging up to the whole Island and to the whole year, GPRA estimates the following spending split:

Table 19: Split of spending between residents and visitors by retail type (2017)

Type	Resident share	Visitor share
Grocery	80%	20%
Pharmacy	80%	20%
Liquor Store	65%	35%
Financial services	80%	20%
Health services	80%	20%
Other services	80%	20%
CONVENIENCE RETAIL TOTAL	**78%**	**22%**
Apparel	70%	30%
Cosmetics, health, bath, & beauty	80%	20%
Electronics & appliances	90%	10%
Footwear & accessories	80%	20%
Home furnishings	80%	20%
Home improvement	75%	25%
Jewellery & watches	35%	65%
Multimedia, books, & music	50%	50%
Sports & recreational goods	80%	20%
Pet goods, toys, & hobbies	80%	20%
COMPARISON RETAIL TOTAL	**71%**	**29%**
Food & beverage	60%	40%
Entertainment	60%	40%
Leisure	80%	20%
RESTAURANT & RECREATION TOTAL	**63%**	**27%**
Motor vehicles & parts dealers	N/A	N/A
Auto services	80%	20%
Gas station	80%	20%
AUTOMOTIVE TOTAL	**80%**	**20%**
TOTAL	**75%**	**25%**

Table 19 shows that in general, spending by Gabriola residents makes up the majority of spending on Gabriola Island in most categories of retail. Spending by residents makes up 70% - 90% of Island spending in most categories, with the exception of certain industries that are particularly tied to tourism, most notably food & beverage, entertainment, liquor stores, and jewellery. In these categories, resident spending makes up 35% - 65% of all spending.

4.1.4 Capture of Resident Spending

Secondly, the share of Gabriola residents' household spending captured by Island businesses rather than businesses outside of Gabriola varies by type of retail. GPRA estimates it as follows:

Table 20: Capture by Gabriola businesses of Gabriola residents' spending (2017)

Type	Capture rate
Grocery	70%
Pharmacy	75%
Liquor Store	75%
Financial services	60%
Health services	90%
Other services	70%
CONVENIENCE RETAIL TOTAL	**72%**
Apparel	40%
Cosmetics, health, bath, & beauty	40%
Electronics & appliances	20%
Footwear & accessories	40%
Home furnishings	40%
Home improvement	60%
Jewellery & watches	60%
Multimedia, books, & music	40%
Sports & recreational goods	40%
Pet goods, toys, & hobbies	50%
COMPARISON RETAIL TOTAL	**42%**
Food & beverage	60%
Entertainment	25%
Leisure	40%
RESTAURANT & RECREATION TOTAL	**52%**
Motor vehicles & parts dealers	0%
Auto services	45%
Gas station	30%
AUTOMOTIVE TOTAL	**20%**
TOTAL	**47%**

For example, Gabriola businesses capture 90% of Gabriola residents' spending on medical services, 70% of their spending on groceries, but none of their spending on motor vehicles & parts dealers (as no businesses of this type exist on Gabriola). Note that capture rats in the convenience retail categories are generally higher than in the comparison retail categories. This is as expected, since Gabriolans tend to leave the Island for larger and less frequent comparison retail purchases but stay on the Island for day-to-day grocery shopping, trips to the bank or doctor's office, etc. The capture rate for the food & beverage category is quite high at 60% since the Island offers many restaurant and bar options. The capture rate for leisure is also relatively high since there is a brand new and large fitness centre at Madrona Marketplace. The capture rate for the entertainment category is quite low at 25%, since Gabriola lacks much entertainment-related space. Overall, GPRA estimates that Gabriola businesses capture just less than half of Gabriola residents' household spending.

It is normal for capture rates to vary between retail types, and it is especially normal for comparison retail to capture less of residents' spending than convenience retail, but if any retail categories capture too small of a share of resident spending, this can indicate a gap in the market. This is discussed in more detail in Section 4.2.

4.1.5 Total Retail Spending on Gabriola

Combining the following estimates produces a total estimate of annual spending in 2017 captured by Gabriola's businesses:

- Total Gabriola population (Table 16, pg. 34)
- Per capita resident spending by type (Table 17, pg. 34)
- Split of spending between residents and visitors by type (Table 19, pg. 37)
- Capture by Gabriola businesses of Gabriola resident spending (Table 20, pg. 38).

The resulting estimate of 2017 spending in Gabriola's businesses is shown in Table 21:

Table 21: Estimated spending in Gabriola businesses by type (2017)

Type	Resident spending	Visitor spending	Total spending
Grocery	$9,235,722	$2,308,931	$11,544,653
Pharmacy	$1,521,140	$380,285	$1,901,425
Liquor Store	$1,688,369	$909,122	$2,597,490
Financial services	$470,814	$117,703	$588,517
Health services	$1,566,806	$391,701	$1,958,507
Other services	$2,422,246	$605,562	$3,027,808
CONVENIENCE RETAIL TOTAL	**$16,905,096**	**$4,713,303**	**$21,618,400**
Apparel	$1,619,977	$694,276	$2,314,253
Cosmetics, health, bath, & beauty	$444,568	$111,142	$555,709
Electronics & appliances	$416,782	$46,309	$463,091
Footwear & accessories	$426,044	$106,511	$532,555
Home furnishings	$732,526	$183,132	$915,658
Home improvement	$1,669,654	$556,551	$2,226,206
Jewellery & watches	$234,914	$436,268	$671,182
Multimedia, books, & music	$434,464	$434,464	$868,927
Sports & recreational goods	$313,218	$78,305	$391,523
Pet goods, toys, & hobbies	$764,100	$191,025	$955,126
COMPARISON RETAIL TOTAL	**$7,056,246**	**$2,837,982**	**$9,894,229**
Food & beverage	$2,210,208	$1,473,472	$3,683,680
Entertainment	$134,717	$89,812	$224,529
Leisure	$469,827	$117,457	$587,284
RESTAURANT & RECREATION TOTAL	**$2,814,753**	**$1,680,740**	**$4,495,493**
Motor vehicles & parts dealers	$0	$0	$0
Auto services	$2,419,231	$623,518	$3,024,038
Gas station	$1,574,931	$393,733	$1,968,664
AUTOMOTIVE TOTAL	**$3,994,162**	**$998,540**	**$4,992,702**
TOTAL	**$30,770,257**	**$10,230,566**	**$41,000,824**

GPRA estimates that about $41 million will be spent in 2017 at Gabriola's retail businesses, of which about $22 million goes to convenience retail, about $10 million goes to comparison retail, about $4.5 million goes to restaurants and recreation, and about $5 million goes to automotive-related retail. About 75% of spending on Gabriola is from residents ($31 million) and about 25% is from visitors ($10 million).

4.1.7 Floor Space Performance

The final step in estimating the demand for floor space is to convert spending totals into supportable floor areas. Through industry standard metrics and previous experience, GPRA knows the appropriate range for sales performance in each category. Triangulating with the information presented above produces the following estimates of Gabriola sales performance by category:

Table 22: Annual sales per ft^2 of floor space by retail type on Gabriola (2017)

Type	Annual $ per ft^2 supported
Grocery	$650
Pharmacy	$530
Liquor Store	$450
Financial services	$160
Health services	$170
Other services	$200
CONVENIENCE RETAIL TOTAL	**$376**
Apparel	$400
Cosmetics, health, bath, & beauty	$220
Electronics & appliances	$700
Footwear & accessories	$450
Home furnishings	$250
Home improvement	$150
Jewellery & watches	$400
Multimedia, books, & music	$300
Sports & recreational goods	$700
Pet goods, toys, & hobbies	$550
COMPARISON RETAIL TOTAL	**$284**
Food & beverage	$150
Entertainment	$100
Leisure	$180
RESTAURANT & RECREATION TOTAL	**$150**
Motor vehicles & parts dealers	$750
Auto services	$750
Gas station	$750
AUTOMOTIVE TOTAL	**$750**
TOTAL	**$318**

Table 22 shows that there is a wide range of sales performance among the different types of retail on Gabriola. Sales performance reflects the health of a retail sector (retail sectors with higher performance tend to be doing better) but it also reflects the cost of operation (businesses with more specialized equipment and labour tend to require greater sales per square foot of floor space). Given the cost of operation, it is unsurprising that businesses in the automotive category require greater sales per square foot, for instance.

Although it is normal for sales performance to vary between categories, overly high or overly low sales performance can indicate that there is too much or too little of a particular retail type in the area. This is discussed in more detail in Section 4.2.

With an estimate of 2017 spending by type (Table 17, pg. 34) and an estimate of floor space performance (Table 22), GPRA can estimate the current demand for retail space by category on Gabriola, and compare this to the existing inventory.

4.2 Current Retail Floor Space Needs

Based on the methodology presented in Section 4.1, GPRA has estimated the demand for floor space of each retail type at present. This is shown, and compared to the existing inventory, below:

Table 23: Estimate of present floor space demand

Type	Existing floor space (ft²)	Supportable floor space (ft²)	Oversupply / undersupply
Grocery	16,995	17,761	-4%
Pharmacy	3,566	3,588	-1%
Liquor Store	6,091	5,772	+6%
Financial services	3,922	3,678	+7%
Health services	12,321	11,521	+7%
Other services	15,632	15,139	+3%
CONVENIENCE RETAIL TOTAL	**58,526**	**57,459**	+2%
Apparel	5,195	5,143	+1%
Cosmetics, health, bath, & beauty	2,480	2,526	-2%
Electronics & appliances	720	662	+9%
Footwear & accessories	1,204	1,183	+2%
Home furnishings	3,532	3,663	-4%
Home improvement	21,114	14,841	**+42%**
Jewellery & watches	1,768	1,678	+5%
Multimedia, books, & music	2,973	2,896	+3%
Sports & recreational goods	571	559	+2%
Pet goods, toys, & hobbies	1,705	1,737	-2%
COMPARISON RETAIL TOTAL	**41,263**	**34,888**	+18%
Food & beverage	25,520	24,558	+4%
Entertainment	2,160	2,245	-4%
Leisure	3,281	3,263	+1%
RESTAURANT & RECREATION TOTAL	**30,960**	**30,066**	+3%
Motor vehicles & parts dealers	0	0	0%
Auto services	4,000	4,032	-1%
Gas station	2,773	2,625	+6%
AUTOMOTIVE TOTAL	**6,773**	**6,657**	+2%
TOTAL	**137,523**	**129,070**	**+7%**

Note that the supportable floor space is mostly within 10% of the existing floor space. This is by design: GPRA believes based on stakeholder interviews and the Island's healthy retail vacancy rate that the amount of floor space on Gabriola Island is basically well-matched to demand, and have estimated the floor space performance and capture rates of each retail type on this basis. However, in the home improvement category, the amount of space on Gabriola Island is too large to remain within the accepted range of floor space performance, indicating oversupply in this category. This is discussed below.

GPRA's commercial demand methodology relies on three "floating" variables, all of which are used to help determine the others. The variables in question have already been discussed, and they are floor space performance, resident spending capture rate, and current supportable floor space. Although GPRA does not know the precise value of each variable for each type of retail, we have inferred an appropriate range for each from industry standards, project experience, stakeholder interviews, and common sense.

For the most part, we have managed to estimate combinations of these three variables for each retail type that fall comfortably within the appropriate or logical range. These are the estimates presented throughout Section 4. In some cases, however, our calculations have indicated extremely low or high capture rates, extremely poor floor space performance, or extremely wide gaps between Gabriola's existing inventory and GPRA's estimate of supportable space. In other words, we have found some cases in which placing all three variables in the appropriate or logical range is impossible. This suggests that Gabriola is oversupplied or undersupplied in certain retail categories, as discussed below.

4.2.1 Oversupply of Retail Types

Food & beverage

Based on industry standards and related project experience, GPRA believes that a healthy food & beverage sector in a location like Gabriola should exhibit floor space performance of no less than about \$200 per year per square foot. But based on the existing supply of restaurant and beverage floor space (about 25,520 ft^2, see Table 23) and the current spending (estimated at about \$3.7 million in 2017), this would imply floor space performance of only about \$150 per year per square foot, which is very low. One or more of the following must be true:

- Restaurants, cafés, and bars capture a lot more than 60% of Gabriola residents' food and beverage spending (GPRA's current estimate, see Table 20, pg. 38), which GPRA judges to be unlikely based on Gabriolans frequent trips to restaurant-rich Nanaimo
- Restaurants that are only open for part of the year, such as the Silva Bay Pub, Restaurant, and Liquor Store, are bringing down the average annual performance. Needing to close restaurants for part of the year can be viewed as oversupply of restaurant space
- Food and beverage establishments on Gabriola are performing poorly on average, which suggests that the market is oversupplied[22]

[22] Note that this is on average. Within Gabriola's food and beverage sector, some establishments are doing better than others.

- The current supportable floor space is not approximately 25,000 ft^2 as estimated in Table 23, pg. 41, but rather much less, which would suggest that the market is oversupplied.

Interviews with multiple restaurant, bar, and café operators also support this conclusion since many of them report marginal businesses that have a hard time operating in the winter, have difficulty expanding their customer base, and are generally pushing the threshold of what this market can bear. In light of these findings and the possibilities listed above, GPRA believes it is likely that Gabriola's food and beverage market is oversupplied. No new food and beverage space is called for.

Home improvement

Gabriola has a surprising amount of retail space devoted to the home improvement sector. In particular, there is about 21,000 ft^2 of space in two separate but adjacent operations (Arbutus Home Building Centre and Island Home & Garden) as well as some plant nurseries throughout the Island. By GPRA's estimate, Gabriola should only support about 15,000 ft^2 of home improvement retail space, and that estimate is based on the very low performance assumption of $150 per ft^2 per year.

GPRA's estimate of supportable space of this type and Gabriola's existing inventory could also be brought closer together by assuming a much greater rate of resident spending capture than the 60% currently assumed, but this would not match the accounts of local stakeholders who report that many Gabriolans purchase their home improvement goods in Nanaimo. If anything, the 60% capture rate is somewhat generous. No new home improvement space is called for.

4.2.2 Undersupply of Retail Types

The only category of retail floor space in which Gabriola Island exhibits an undersupply is entertainment-related space, of which the only existing dedicated space is The Roxy at Twin Beaches Mall. Although there are performances at the Hive and occasionally at the Skol Pub, GPRA estimates that Island businesses only capture about 25% of Gabriola residents' spending in this category.

This is a very low rate of capture which might be increased with the introduction of better performance space, but it might also be an unavoidable consequence of Gabriola's small size – it might just not have the critical mass to support a larger entertainment sector.

The question of whether creating more appropriate space could expand Gabriola's entertainment sector, or whether it is permanently limited by small population size (the Island is too small for a movie theatre, for example) may benefit from further research.

4.3 Estimating Future Demand

Section 4.1 already discussed GPRA's projection of Gabriola's population and total household spending. This section explains in the rest of the methodology for projecting commercial floor space demand until 2037.

4.3.1 Future Visitor Spending

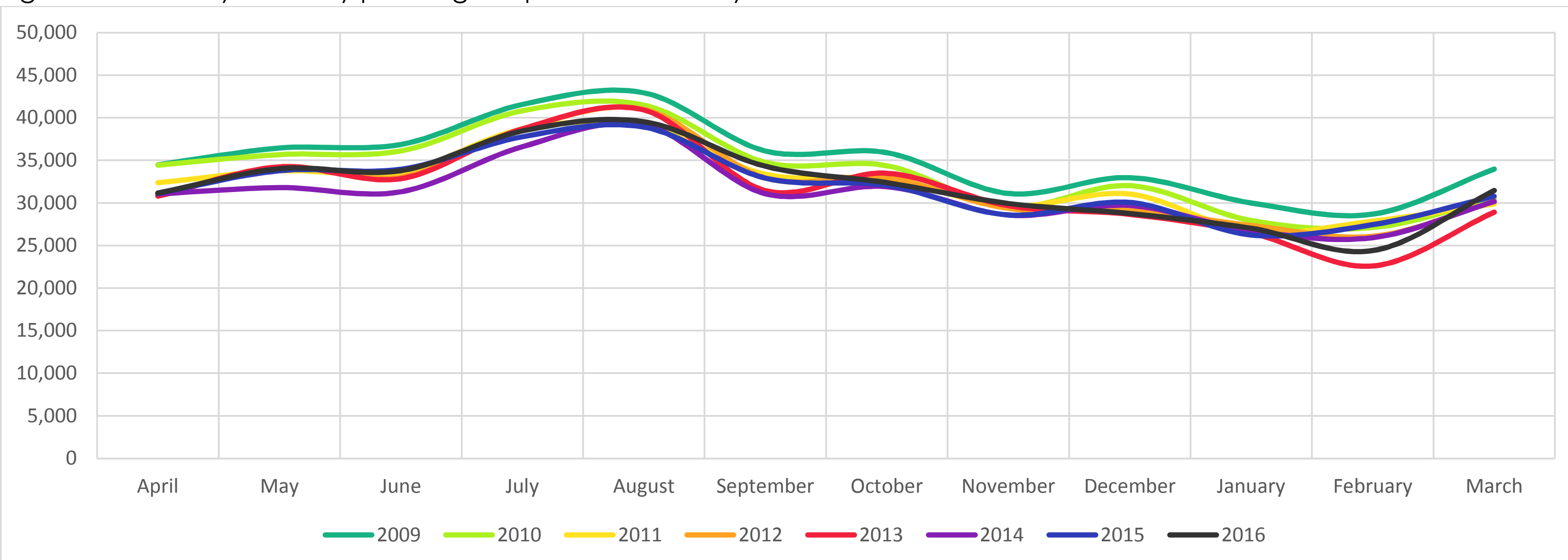
A certain share of commercial spending on Gabriola (GPRA estimates about 25% in 2017, see Table 20, pg. 38) comes from visitors (including both seasonal residents and tourists). Understanding how the number of and spending by visitors has changed in recent years and how it is expected to change in the future is an important element of GPRA's commercial demand model. Unfortunately, no data on visitors to Gabriola is available.

As a proxy for data on number of visitors or visitor spending, GPRA has made use of Gabriola Ferry trip data, which is available from April 2009 to March 2017 and shown in Table 24 and Figures 11 – 13 below.

Table 24: Monthly two-way passenger trips, Gabriola ferry[23]

Year	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
2009	34,473	36,452	36,875	41,563	42,933	36,100	35,900	31,107	32,967	29,995	28,685	33,981	421,029
2010	34,439	35,681	36,114	40,826	41,495	34,770	34,373	29,531	32,028	27,927	27,108	30,523	404,811
2011	32,382	33,776	33,631	38,659	39,091	33,377	32,821	29,661	31,038	26,581	27,858	29,876	388,748
2012	30,930	34,224	33,030	38,724	41,007	32,936	32,960	29,351	29,187	27,356	26,081	30,121	385,905
2013	30,794	34,246	32,856	38,702	40,916	31,450	33,487	29,665	28,657	26,451	22,594	28,913	378,727
2014	31,064	31,796	31,306	36,609	39,180	31,082	31,911	28,575	29,700	26,722	25,923	30,168	374,033
2015	31,152	33,793	33,965	37,774	38,918	32,915	32,065	28,588	30,055	26,240	27,444	30,786	383,691
2016	31,152	34,026	33,792	38,461	39,542	34,305	32,377	29,938	28,749	27,028	24,399	31,460	385,226
Average	32,048	34,249	33,946	38,914	40,385	33,367	33,237	29,552	30,297	27,287	26,261	30,728	390,271

Figure 11: Monthly two-way passenger trips, Gabriola ferry[23]



[23] Source: BC Ferries (2017). Traffic Statistics. Retrieved from http://www.bcferries.com/about/traffic.html
Note that due to data constraints, each "year" is defined as April to March. So, for example, February of 2017 falls into 2016 in Table 24 and Figures 11 - 13.

Figure 12: Annual two-way passenger trips, Gabriola ferry[24]

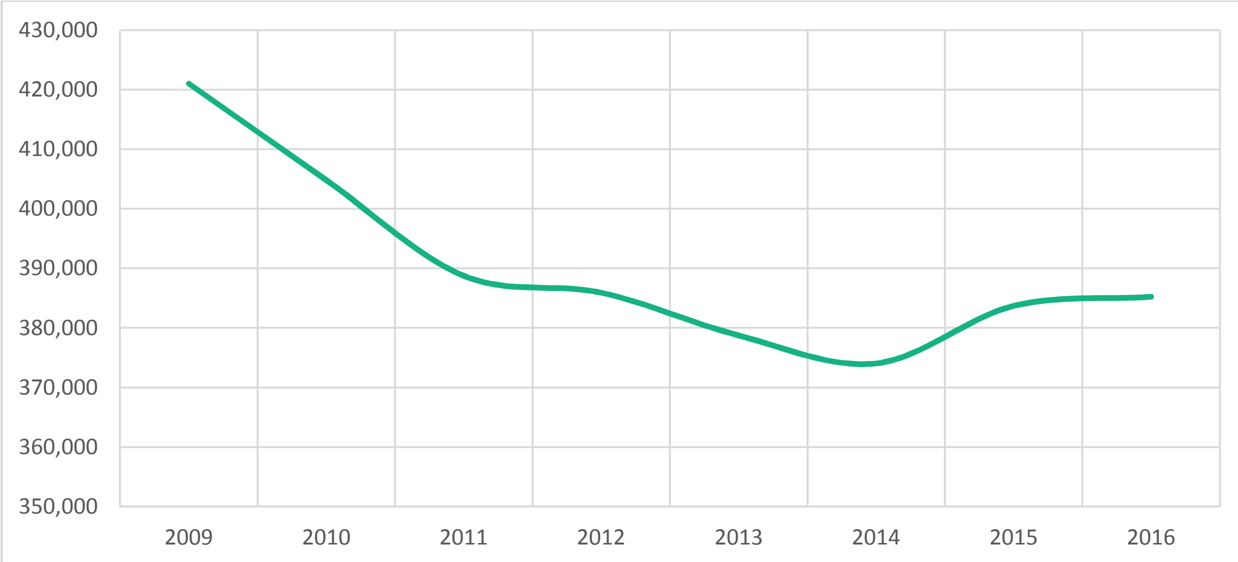


Figure 13: Average monthly two-way ferry passengers (April 2009 – March 2017)[24]

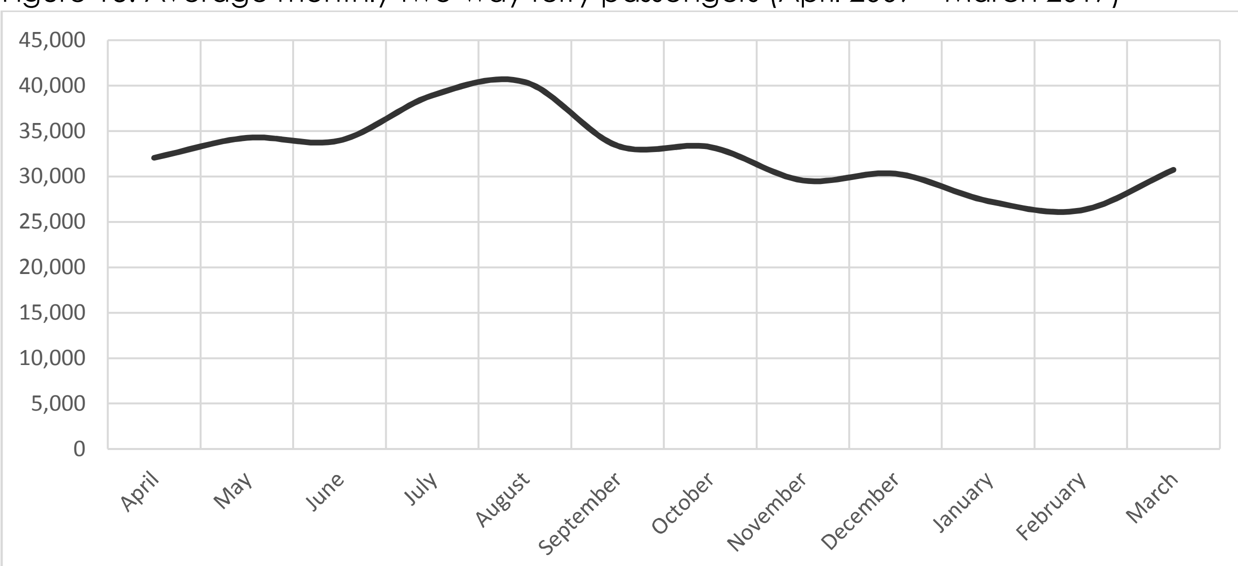


Table 24 and Figures 11 – 13 show that between April 2009 and March 2017, Gabriola ferry traffic has fluctuated between a high of almost 43,000 two-way trips in August 2009 and a low of less than 23,000 trips in February 2014. Traffic is typically highest in July and August (almost 39,000 and over 40,000 trips per month, respectively) and lowest in February (about 26,000 monthly trips).

From 2009 until 2014, ferry traffic declined every year. This was the period immediately following the Global Financial Crisis of 2008, in which many industries suffered,

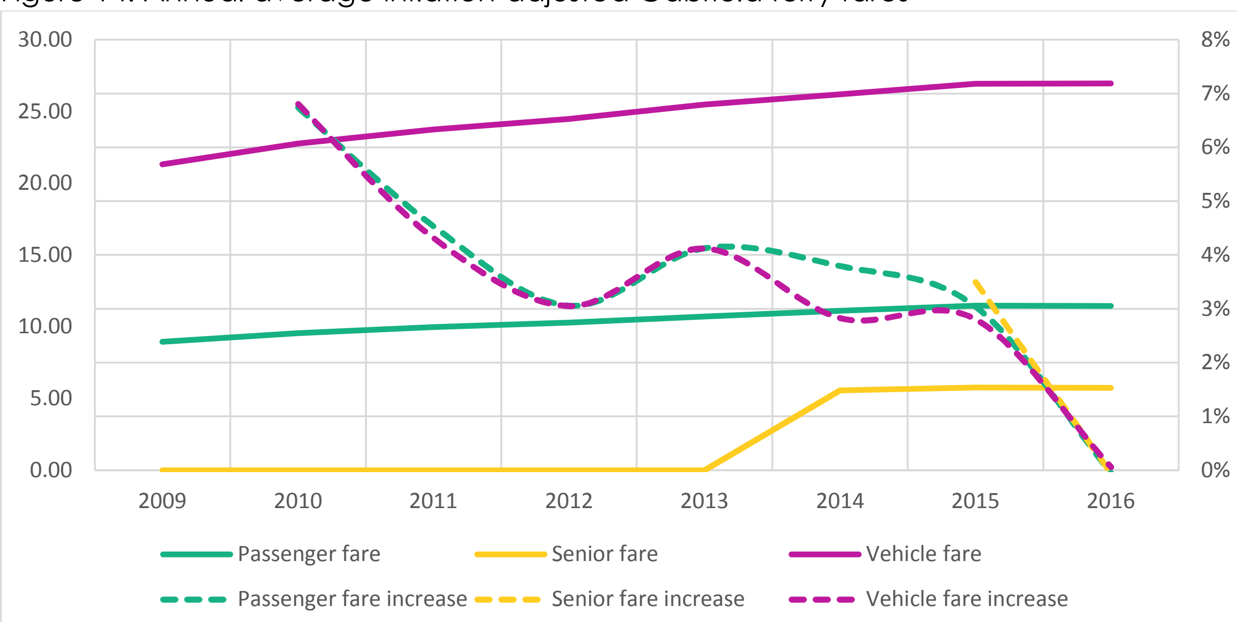
[24] Source: BC Ferries (2017). Traffic Statistics. Retrieved from http://www.bcferries.com/about/traffic.html
Note that due to data constraints, each "year" is defined as April to March. So, for example, February of 2017 falls into 2016 in Table 24 and Figures 11 - 13.

particularly tourism, which as a luxury sector is always sensitive to recessions. In general British Columbia's economy and particularly the economies of the province's islands remained depressed from about 2009 to 2013, so the trend observed here is not unexpected. Throughout this period, Gabriola ferry fares rose 3% - 7% faster than inflation, which would not have helped mitigate the decline in trips. This is shown in Table 25 and Figure 14.

Table 25: Annual average inflation-adjusted Gabriola ferry fares[25]

Year	Passenger fare		Senior fare		Vehicle fare	
	Fare	Annual increase	Fare	Annual increase	Fare	Annual increase
2009	$8.94		$0		$21.31	
2010	$9.55	7%	$0	-	$22.76	7%
2011	$9.98	5%	$0	-	$23.74	4%
2012	$10.29	3%	$0	-	$24.47	3%
2013	$10.71	4%	$0	-	$25.48	4%
2014	$11.12	4%	$5.56	-	$26.20	3%
2015	$11.46	3%	$5.75	3%	$26.93	3%
2016	$11.45	0%	$5.75	0%	$26.95	0%
Average		**4%**		**2%**		**3%**

Figure 14: Annual average inflation-adjusted Gabriola ferry fares[25]



[25] Source: BC Ferries (2017). Fares Archive. Retrieved from http://www.bcferries.com/travel_planning/fares/archive.html
Note that fares have sometimes been adjusted multiple times per year. Numbers here represent the weighted average of the given year's fares, with "years" starting in April and ending in March, just like Table 24 and Figure 11 – 13 above. Note also that these fares are adjusted for BC-specific inflation, and are listed in 2016 dollars. The fare increase shown is therefore net of inflation.

Since reaching a nadir of trips in 2014, ferry traffic to Gabriola has increased continuously. April 2016 – March 2017 was the highest-volume 12-month period since April 2012 – March 2013, and March 2017 in particular was the best March since 2009. It appears that ferry traffic to Gabriola is well on its way to recovery from the post-2008 slump.

To project ferry traffic in the future, GPRA assumes that the currently observed recovery will continue apace. We assume that it will take ten years for ferry traffic to return from the 2014 low point to the 2009 high point, meaning that there will be about 421,000 two-way ferry trips in 2024 just as there were in 2009. From there, GPRA assumes that growth in ferry traffic will continue at about 1% per year, reaching over 479,000 trips in 2037. Although a ferry has limited capacity and cannot accommodate endlessly more traffic, BC Ferries may increase the frequency of sailings if demand requires. Projected growth in ferry traffic is shown in Figure 15 and Table 26.

Figure 15: Past and projected annual two-way ferry trips, Gabriola Ferry[26]

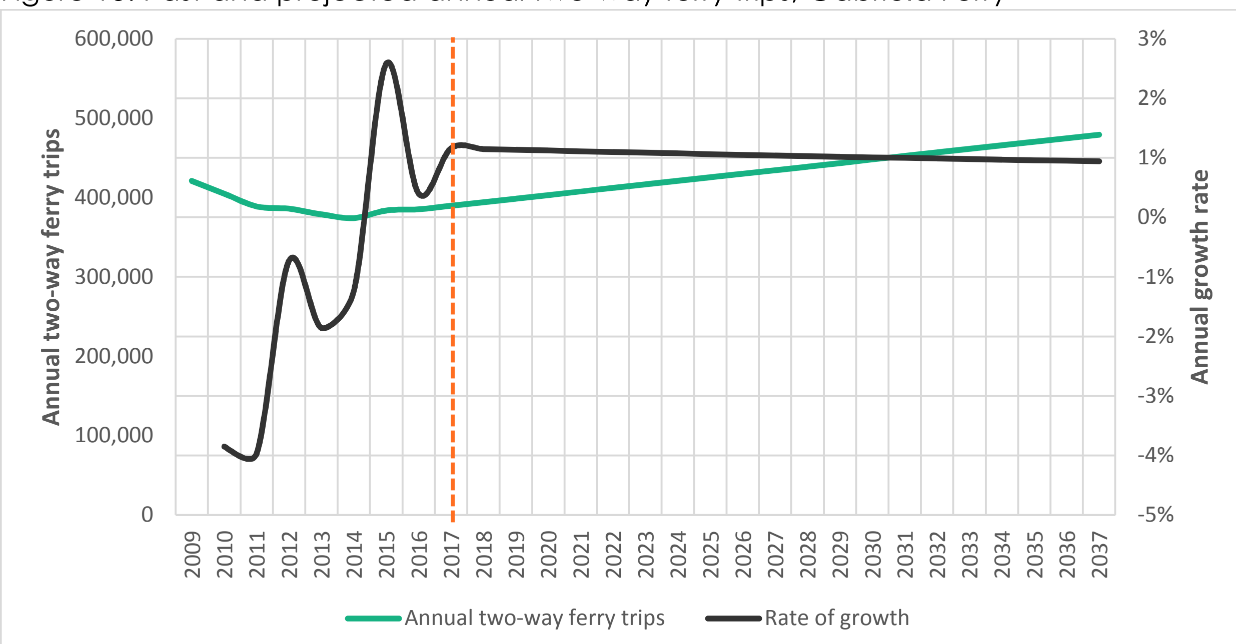


Table 26: Projected annual two-way ferry trips, Gabriola ferry[26]

Year	Annual two-way ferry trips	Annual growth rate
2017	389,701	0.2%
2022	416,553	1.1%
2027	434,405	1.1%
2032	456,831	1.0%
2037	479,208	1.0%
Overall		1.0%

[26] Source: BC Ferries (2017). Traffic Statistics. Retrieved from http://www.bcferries.com/about/traffic.html
Note that due to data constraints, each "year" is defined as April to March. So, for example, February of 2017 falls into 2016.

Ferry volume data is not the same as visitor spending data, but it is the only type of visitor spending on Gabriola for which reliable data is available. It is also the primary method of access to Gabriola for visitors (excluding private boats and chartered sea-planes), so GPRA expects that ferry traffic is positively correlated with the number of visitors to Gabriola. As such, GPRA uses this ferry traffic projection as the main proxy for annual visitors to the Island in the commercial demand model.

As shown in Table 21, pg. 39, GPRA estimates that 2017 spending by visitors at Gabriola retail businesses will be about $10 million. GPRA also estimates that two-way ferry trips will total about 390,000. That produces per-trip visitor spending of about $26. GPRA does not mean to imply that the average ferry passenger spends $26 on retail per trip to Gabriola. Gabriola residents using the ferry to leave the island are also included in this trip count, so the average per-trip spending by visitors may be much higher. Rather, the aim of this calculation is to establish a baseline to connect growth in general visitor traffic to growth in visitor spending going forward. GPRA assumes that as ferry traffic increases over the next twenty years (Figure 15), total visitor traffic to Gabriola will increase, and visitor spending will also increase. It is assumed that Gabriola's total visitor spending per two-way ferry trip will increase linearly by 1% - 2% per year, just like per capita resident spending, and by 2037 will be about 38% higher than it is in 2017. The 2017 and 2037 estimates are shown in Table 27.

Table 27: Projected visitor spending per two-way ferry trip

Type	2017	2037
Grocery	$5.92	$8.20
Pharmacy	$0.98	$1.35
Liquor Store	$2.33	$3.23
Financial services	$0.64	$0.88
Health services	$0.67	$0.93
Other services	$1.33	$1.84
CONVENIENCE RETAIL TOTAL	**$11.87**	**$16.44**
Apparel	$1.78	$2.47
Cosmetics, health, bath, & beauty	$0.29	$0.39
Electronics & appliances	$0.12	$0.16
Footwear & accessories	$0.27	$0.38
Home furnishings	$0.47	$0.65
Home improvement	$1.43	$1.98
Jewellery & watches	$1.12	$1.55
Multimedia, books, & music	$1.11	$1.54
Sports & recreational goods	$0.20	$0.28
Pet goods, toys, & hobbies	$0.49	$0.68
COMPARISON RETAIL TOTAL	**$7.28**	**$10.08**
Food & beverage	$3.78	$5.24
Entertainment	$0.23	$0.32
Leisure	$0.30	$0.42
RESTAURANT & RECREATION TOTAL	**$4.31**	**$5.97**
Motor vehicles & parts dealers	$0	$0
Auto services	$1.55	$2.15
Gas station	$1.01	$1.40
AUTOMOTIVE TOTAL	**$2.56**	**$3.55**
TOTAL	**$26.03**	**$36.04**

4.3.2 Future Gabriola Resident Spending

Combining the following projections produces a total projection of annual spending over the next twenty years captured by Gabriola's businesses:

- Total Gabriola population (Table 16, pg. 34)
- Per capita resident spending by type (Table 17, pg. 34)
- Capture by Gabriola businesses of Gabriola resident spending (Table 20, pg. 38)
- Projected annual two-way ferry trips (Table 26, pg. 48)
- Projected visitor spending per two-way ferry trip (Table 27, pg. 49)

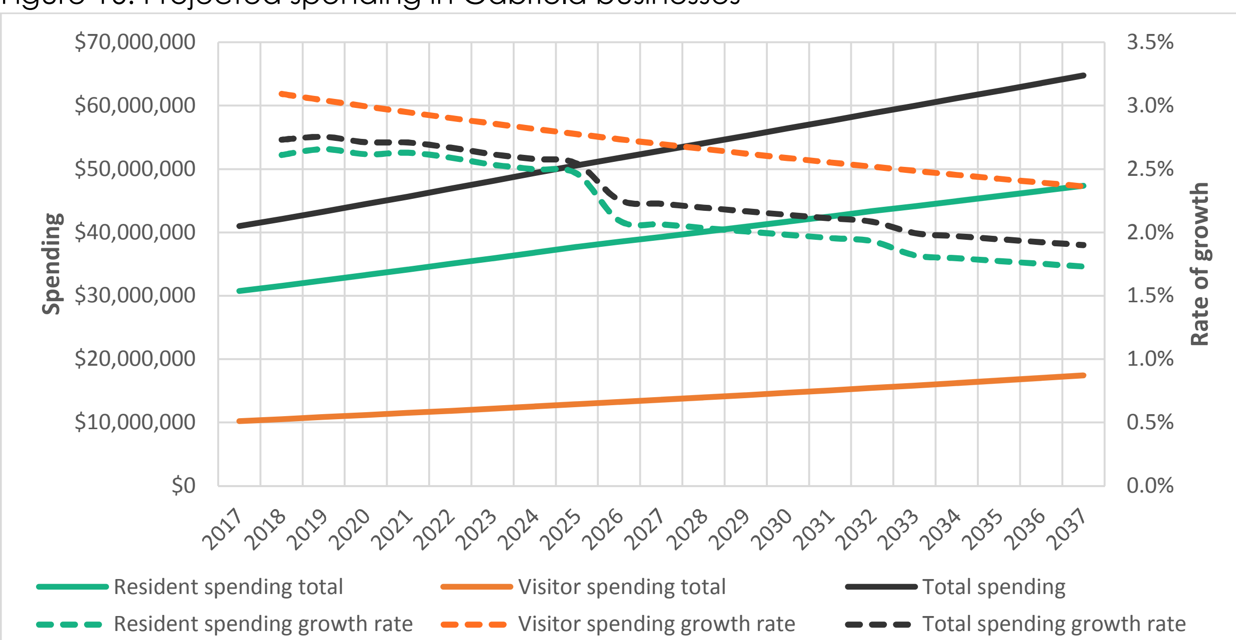
Note that GPRA assumes that Gabriola's entertainment sector will succeed in capturing a greater share of resident spending in this category, increasing its capture rate from 25% at present to 30% in 2022. We assume the entertainment capture rate will remain at 30% afterwards. All other capture rates are projected to remain at their current levels from 2017 until 2037 (see Table 20, pg. 38).

The resulting projection of spending in Gabriola's businesses is shown in Table 28 and Figure 16.

Table 28: Projected spending in Gabriola businesses

Year	Resident spending	Visitor spending	Total spending
2017	$30,770,257	$10,230,566	$41,000,824
2022	$35,020,834	$11,858,196	$46,879,030
2027	$39,297,297	$13,598,794	$52,896,091
2032	$43,351,224	$15,452,361	$58,803,584
2037	$47,339,437	$17,418,896	$64,758,333

Figure 16: Projected spending in Gabriola businesses



From 2017 to 2037, both resident spending and visitor spending in Gabriola's businesses is expected to grow roughly linearly. Resident spending is expected to grow from about $31 million in 2017 to over $47 million in 2037, at an annual rate of 1.6% - 2.6%. Visitor spending is expected to grow from about $10 million in 2017 to over $17 million in 2037.

4.3.3 Future Floor Space Performance

Floor space performance (annual sales per square foot of floor space) tends to increase over time simply as a result of inflation. It also tends to improve as business improves, or as a sector of retail shifts from marginal to more secure.

GPRA has projected the increase of floor space performance for each type of retail on Gabriola. Current retail performance has been compared to industry standards, and Gabriola retail sectors that fall short are projected to increase their performance more than those that do not. This reflects the fact that growth in some sectors will require additional floor space, whereas growth in other sectors will simply make existing floor space more viable.

Floor space performance is projected to increase linearly from 2017 to 2037. The 2017 and 2037 floor space performance projections are shown in Table 29.

Table 29: Annual sales per square foot of floor space by retail type on Gabriola

Type	2017	2037	Annual increase
Grocery	$650	$800	1.0%
Pharmacy	$530	$800	2.1%
Liquor Store	$450	$700	2.2%
Financial services	$160	$225	1.7%
Health services	$170	$250	1.9%
Other services	$200	$300	2.0%
CONVENIENCE RETAIL TOTAL	**$376**	**$528**	**1.7%**
Apparel	$400	$600	1.4%
Cosmetics, health, bath, & beauty	$220	$300	1.6%
Electronics & appliances	$700	$1,050	2.0%
Footwear & accessories	$450	$650	1.9%
Home furnishings	$250	$350	1.7%
Home improvement	$150	$200	1.4%
Jewellery & watches	$400	$650	2.5%
Multimedia, books, & music	$300	$450	2.0%
Sports & recreational goods	$700	$800	0.7%
Pet goods, toys, & hobbies	$550	$650	0.8%
COMPARISON RETAIL TOTAL	**$284**	**$386**	**1.6%**
Food & beverage	$150	$225	1.4%
Entertainment	$100	$150	2.0%
Leisure	$180	$250	1.7%
RESTAURANT & RECREATION TOTAL	**$150**	**$222**	**2.0%**
Motor vehicles & parts dealers	$750	$850	0.6%
Auto services	$750	$850	0.6%
Gas station	$750	$850	0.6%
AUTOMOTIVE TOTAL	**$750**	**$850**	**0.6%**
TOTAL	**$318**	**$441**	**1.7%**

Retail types on Gabriola that are expected to improve their floor space performance fastest as they catch up with industry standards, rather than requiring a large amount of new space include:

- Jewellery & watches
- Liquor stores
- Pharmacy.

Retail types that are expected to improve their floor space performance the slowest, as they already meet or exceed industry standards, and therefore will require more new space include:

- Automotive-type retailers
- Sports & recreational goods
- Pet goods, toys, and hobbies.

With a projection of spending (Table 28, pg. 50) and a projection of floor space performance (Table 29, pg. 51), GPRA can project the future demand for retail space by category on Gabriola, and compare this to the existing inventory.

4.4 Future Retail Floor Space Needs

Based on the methodology presented in Section 4.2, GPRA has projected the demand for floor space of each retail type until 2037. This is shown, and compared to the existing inventory, below:

Table 30: Projected supportable vs. existing floor space on Gabriola

Type	Existing floor space (ft²)	Supportable floor space (ft²)			
		2022	2027	2032	2037
Grocery	16,995	19,194	20,539	21,701	22,741
Pharmacy	3,566	3,619	3,651	3,667	3,692
Liquor Store	6,091	5,784	5,813	5,831	5,868
Financial services	3,922	3,797	3,904	3,983	4,063
Health services	12,321	11,721	11,910	12,030	12,169
Other services	15,632	15,301	15,466	15,555	15,678
CONVENIENCE RETAIL TOTAL	**58,526**	**59,415**	**61,283**	**62,766**	**64,210**
Apparel	5,195	5,436	5,707	5,937	6,139
Cosmetics, health, bath, & beauty	2,480	2,647	2,757	2,845	2,919
Electronics & appliances	720	671	680	685	688
Footwear & accessories	1,204	1,217	1,249	1,272	1,291
Home furnishings	3,532	3,806	3,937	4,038	4,123
Home improvement	21,114	15,673	16,440	17,075	17,629
Jewellery & watches	1,768	1,672	1,677	1,687	1,701
Multimedia, books, & music	2,973	2,958	3,023	3,080	3,135
Sports & recreational goods	571	617	673	724	771
Pet goods, toys, & hobbies	1,705	1,899	2,053	2,190	2,316
COMPARISON RETAIL TOTAL	**41,263**	**36,595**	**38,197**	**39,533**	**40,711**
Food & beverage	25,520	25,039	25,534	25,944	26,318
Entertainment	2,160	2,562	2,610	2,649	2,684
Leisure	3,281	3,399	3,523	3,620	3,702
RESTAURANT & RECREATION TOTAL	**30,960**	**31,000**	**31,668**	**32,213**	**32,704**
Motor vehicles & parts dealers	0	0	0	0	0
Auto services	4,000	4,460	4,876	5,254	5,606
Gas station	2,773	2,903	3,174	3,420	3,650
AUTOMOTIVE TOTAL	**6,773**	**7,364**	**8,050**	**8,674**	**9,256**
TOTAL	**137,523**	**134,374**	**139,198**	**143,187**	**146,881**

How this projected growth in demand might be met is described in more detail below. In general, GPRA recommends erring on the side of caution and expanding the Island's floor space inventory only slowly to allow existing businesses and residents to adapt.

4.4.1 Convenience Retail

Gabriola Island is well-served in the convenience retail category, primarily by Folklife Village and the Gabriola Professional Centre. For the next twenty years, the only type of convenience retail expected to require additional space is the grocery category.

The grocery category includes not only grocery stores, but also delicatessens, bakeries, specialty food stores. In addition to the 17,000 ft^2 or so that already exists, Gabriola could support about 2,000 ft^2 of grocery space by 2022, 3,500 ft^2 by 2027, 5,000 ft^2, or almost 6,000 ft^2 by 2037. So depending on the timing of the new building, this could consist of a convenience store in the next ten years, a convenience store and bakery in the next ten to fifteen years, or even a small grocery store in the fifteen to twenty year time frame.

4.4.2 Comparison Retail

Gabriola Island is also well-served in the comparison retail category, primarily by Madrona Marketplace. Small expansions of many comparison retail categories will be called for in the next 15 years, although no single category will be in great enough demand to merit its own dedicated retailer. Instead, successful new businesses should offer a range of product types. Indeed, this is already the trend on Gabriola, with the following businesses offering multiple types of comparison goods:

- The Hive
    - Apparel
    - Jewellery & watches
    - Multimedia, books, & music
- The Wooden Hanger Clothing Company
    - Apparel
    - Footwear & accessories
    - Jewellery & watches
- Colleen's Home & Fashion Centre
    - Footwear & accessories
    - Home furnishings
    - Multimedia, books, & music
- Island Home & Garden
    - Apparel
    - Electronics & appliances
    - Home furnishings
    - Home improvement
- Wishbone
    - Home furnishings
    - Jewellery & watches.

Because the range of products that will be called for is diverse, but the total required floor space will be relatively small, GPRA recommends that new businesses in the comparison retail category continue this strategy of offering a range of product types. Of this type of business, an additional 900 ft^2 could be supported by 2022, 1,700 ft^2 by 2027, 2,400 ft^2 by 2032, and about 3,000 ft^2 by 2037. This could be rolled out in the form of several small expansions, or one large expansion.

4.4.3 Restaurant & Recreation

Very little new space is called for in this category in the next twenty years, but by 2037 Gabriola Island could support one more small restaurant (about 800 ft^2), and one more business in the leisure category, possibly a yoga studio or a bike rental shop.

GPRA's projection that more leisure space will be needed is complicated by the fact that the Island has six home-based yoga studios. By 2037 a yoga studio in commercial space might be called for. Alternatively, calling only for a bike rental shop might be the simplest interpretation of this number.

4.4.4 Auto-related

By 2037, GPRA anticipates that Gabriola will be able to support about 1,600 ft^2 of additional auto-service space. This could be another repair or modifications shop. The ideal location for such an expansion would be Twin Beaches Mall, which is already specializing in this category of business.

4.4.5 Tenants and Siting

Gabriola benefits from a close-knit community of locally-owned small businesses that make up its unique commercial sector. GPRA strongly recommends that the Island continue to focus on locally-owned small businesses to maintain the community's vibrancy.

As for the location of new retail space, GPRA strongly recommends continuing to place any new retail development in the Downtown area, as this location has the best accessibility, the most traffic, and the pull of existing businesses to help new businesses attract customers. A likely location for new retail space would be the vacant lot across from Folklife Village. And indeed, commercial development on this site has been proposed.

Other than Downtown, Twin Beaches Mall might be the right location for expansion of the Island's auto-related services, and a small food store might be welcome in the Silva Bay area as this location lacks grocery uses. GPRA has not investigated the business case for either of these uses at these locations, so cannot comment on their viability.

5 Conclusion

Gabriola's retail market exhibits a mix of strengths and weaknesses. It is hindered by slow population growth, a shortage of labour, and the high cost of shipping, but it also boasts an impressively broad range of retail offerings, a robust inventory of commercial buildings old and new, and a loyal base of Gabriolan customers. The Island's healthy vacancy rate of 7% and the impressive speed with which Madrona Marketplace found tenants suggests that the retail market is healthy and prosperous. Almost all interviewed business owners expressed enthusiasm and positivity about the Island and their role in its economy.

GPRA believes that Gabriola Island's retail market has strong vitality. It is an essentially healthy market with few signs of dysfunction and many signs of success. What difficulties do exist are limited primarily to particular commercial areas, as discussed in Section 3. Certain changes could be made to improve the Gabriola's retail market, particularly allowing a greater range of land uses on the Island.

Retail categories that exhibit oversupply include:

- Restaurants, cafés, and bars
- Home improvement.

The only retail category that exhibits undersupply is the entertainment sector. The question of whether creating more appropriate space could expand Gabriola's entertainment sector, or whether it is permanently limited by small population size (the Island is too small for a movie theatre, for example) may benefit from further research.

In the next twenty years, GPRA anticipates that Gabriola will be able to support:

- Almost 6,000 ft^2 of additional grocery-type space, which may consist of a convenience store, small grocer, delicatessen, or bakery
- About 3,000 ft^2 of retail space offering a mix of comparison goods. Businesses selling a mix of product types are already a trend on Gabriola
- One small restaurant
- A yoga studio or bike rental shop
- About 1,600 ft^2 of additional auto-service space.

The timing and siting of these expansions is discussed in Section 4.4.

Although GPRA has attempted to infer a visitor spending projection from the available data on ferry traffic trends, this stopgap approach is far inferior to using genuine data on visitor traffic and visitor spending. Future analyses would benefit if the Chamber could gather more detailed statistics regarding total visits, overnight stays, and visitor spending on Gabriola Island.

Islands Trust

LTC EXP SUMMARY REPORT F2018

Invoices posted to Month ending June 2017

620 Gabriola	Invoices posted to Month ending June 2017	Budget	Spent	Balance
65000-620	LTC "Trustee Expenses"	1,500.00	316.70	1,183.30
LTC Local				
65200-620	LTC - Local Exp - LTC Meeting Expenses	4,750.00	1,001.17	3,748.83
65210-620	LTC - Local Exp - APC Meeting Expenses	600.00	104.00	496.00
65220-620	LTC - Local Exp - Communications	1,250.00	0.00	1,250.00
65230-620	LTC - Local Exp - Special Projects	1,000.00	0.00	1,000.00
TOTAL LTC Local Expense		7,600.00	1,105.17	6,494.83
Projects				
73001-620-4063	Gabriola First Nations Relations	1,000.00	0.00	1,000.00
73001-620-4064	Gabriola Housing Options Review	2,500.00	1,868.98	631.02
73001-620-4080	Gabriola Housing Needs Assessment	5,000.00	0.00	5,000.00
TOTAL Project Expenses		8,500.00	1,868.98	6,631.02

Islands Trust

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Invoices posted to Month ending July 2017

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65000-620	LTC "Trustee Expenses"	1,500.00	316.70	1,183.30
LTC Local				
65200-620	LTC - Local Exp - LTC Meeting Expenses	4,750.00	1,354.27	3,395.73
65210-620	LTC - Local Exp - APC Meeting Expenses	600.00	294.00	306.00
65220-620	LTC - Local Exp - Communications	1,250.00	0.00	1,250.00
65230-620	LTC - Local Exp - Special Projects	1,000.00	0.00	1,000.00
TOTAL LTC Local Expense		7,600.00	1,648.27	5,951.73
Projects				
73001-620-4063	Gabriola First Nations Relations	1,000.00	0.00	1,000.00
73001-620-4064	Gabriola Housing Options Review	2,500.00	1,868.98	631.02
73001-620-4080	Gabriola Housing Needs Assessment	5,000.00	0.00	5,000.00
TOTAL Project Expenses		8,500.00	1,868.98	6,631.02