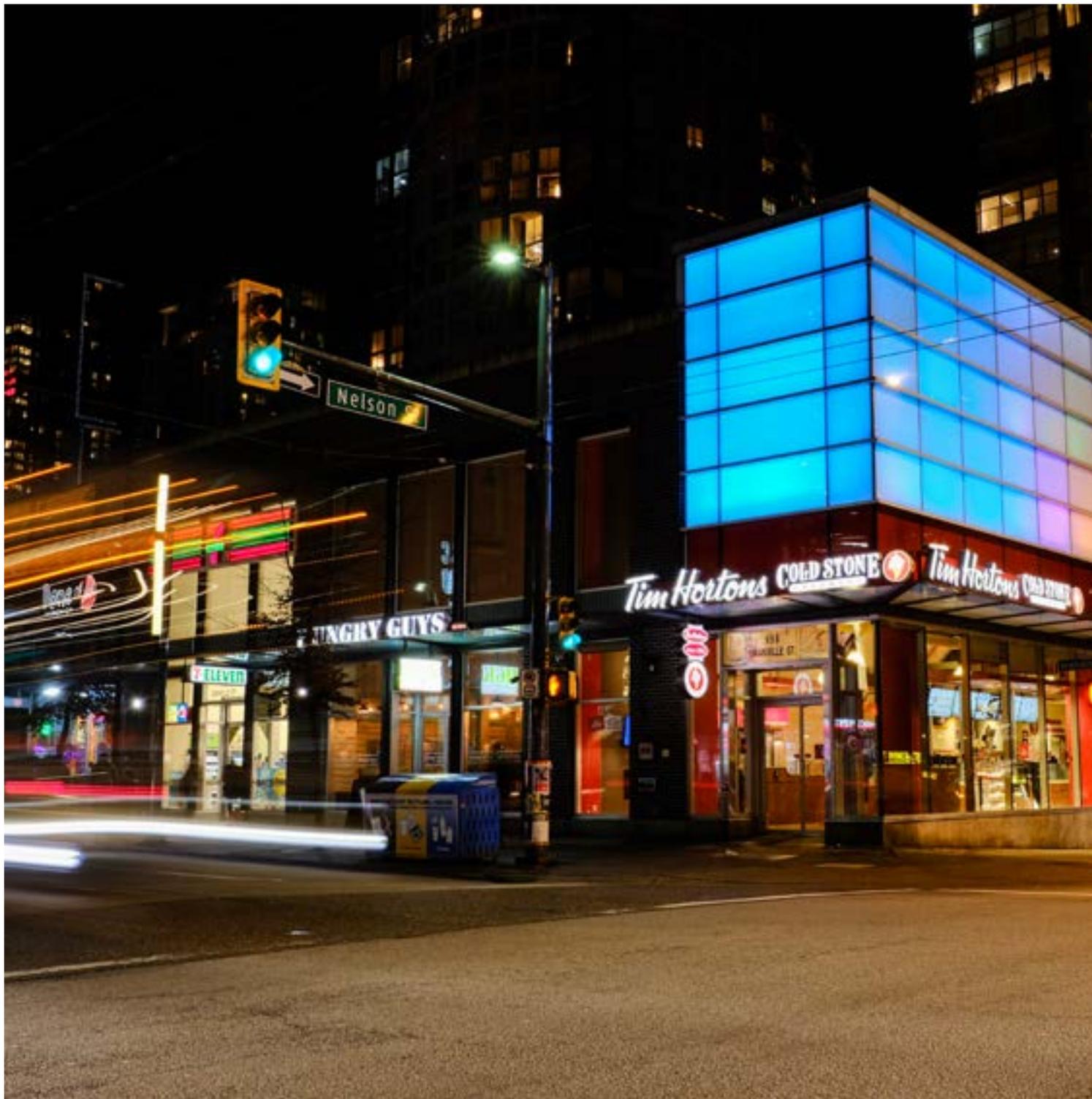


THEN AND NOW:

AN ANALYSIS OF DOWNTOWN RETAIL

PART 2 - FOOD & BEVERAGE



FEBRUARY 2020

WE ARE DOWNTOWN VANCOUVER

The Downtown Vancouver Business Improvement Association (DVBIA) supports, promotes and represents the shared interests of 7,000 businesses and property owners in the central 90-block area of Vancouver's downtown core.

We focus on priorities voiced by our members: programs and services in the areas of advocacy, accessibility, cleanliness, beautification, business support, marketing and mobility. We represent our members' shared goals, drive creative solutions forward and take meaningful action to constantly improve the downtown Vancouver experience.

We operate strategically at the intersection of downtown businesses, local policy-makers, non-profit organizations and all the people who make up Vancouver's diverse neighbourhood communities.

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INTRODUCTION

Food and beverage retail is an essential part of any downtown. The mix of restaurants, lunch spots, coffee shops and bars collectively curates a cultural experience that defines an area.

Although the types of food and beverages remain relatively constant over time, the ways in which we experience eating and drinking continue to evolve. Technology has changed the way we order food, whether it be from a mobile delivery app or touch-screen kiosk. An increased consciousness of where our food is from and sustainable best practices have influenced where and what we eat.

Food and beverage retail is not without its challenges. The sector is very competitive. It requires operators to have large amounts of capital to enter the market, and with no guarantee of success. Further, the sector is experiencing worker shortages due to increasing costs of living, shifts in worker demographics and barriers to work permits. Rising operating costs such as rent, the Employer Health Tax and fresh ingredients, impact the ability of some retailers to run a profitable business. According to the British Columbia Restaurant and Food Services Association's report on Metro Vancouver's restaurant labour shortage, food and beverage retail operate on very thin margins – generally between three and five per cent. Faced with these challenges, retailers are developing innovative eating and drinking concepts that are changing downtown's food and beverage retailscape.

The purpose of this report is to quantify and benchmark food and beverage retail within the DVBIA's catchment. The report also aims to tell a story about the social and cultural influences that have shaped downtown's food scene. By analysing business license data, we can identify trends, better understand the retail mix, and make policy and business recruitment recommendations to ensure our downtown core remains a vibrant destination to eat, shop and play.

This is the second of two downtown retail reports. The focus of the first report is on non-edible goods and services; it can be found at dtvan.ca.

TERMINOLOGY

Quick-Service:

Restaurants where patrons pay prior to receiving their food and are not attended to by a server.

Full-Service:

Restaurants where patrons sit and eat meals that are served on location while being attended to by a server.

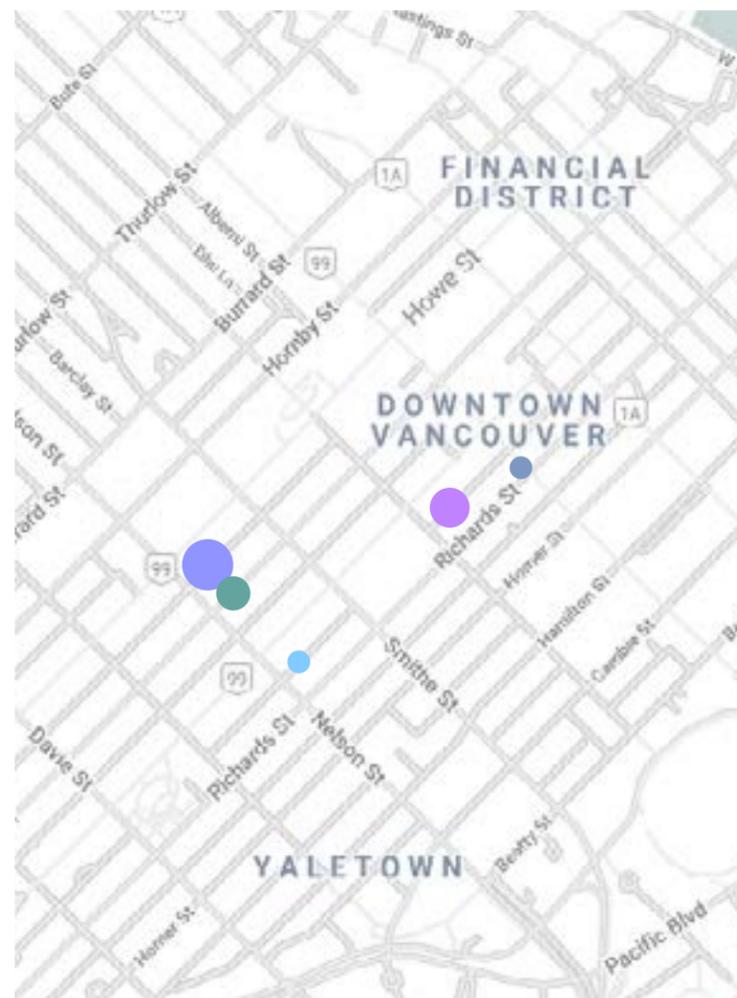
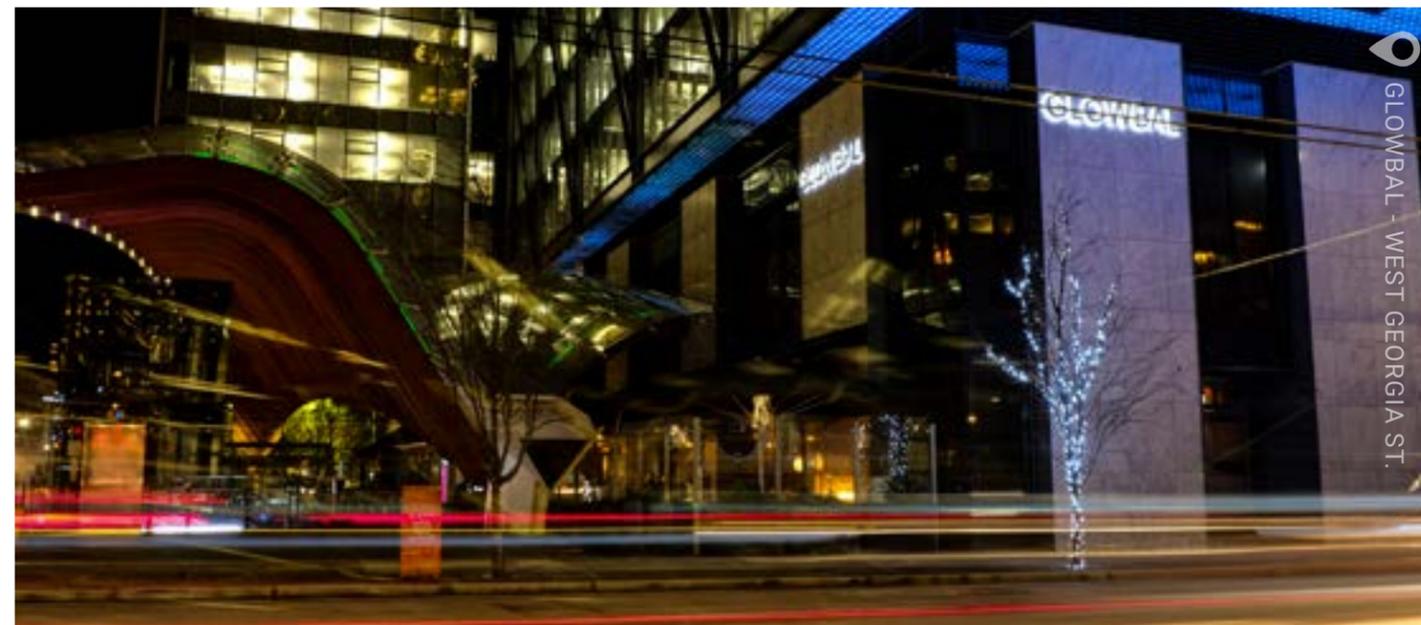
Retail Dealer:

Businesses that primarily sell packaged edible goods like groceries, alcohol, and vitamins/supplements.

Liquor Primary:

Businesses that primarily serve alcohol.

EMERGING FOOD NODES



Then: White Spot (closed 2012) and parkade
Now: Glowbal Restaurant (opened 2015) and Nosh Café (opened 2015)

Then: Parkade
Now: Jinya Ramen (opened 2017), Tractor (opened 2017), Buro coffee (opened 2019), and Vitasave (opened 2019)

Then: Surface parking lot
Now: Mixed-use condo development with Uncle Fatih's Pizza (opened 2016), and Heirs Pears (opened 2018)

Then: Urban Behaviour Outlet (closed 2009)
 Area redeveloped in 2011
Now: 7-Eleven (opened 2012), Tim Horton's (opened 2013) and Hungry Guys Kitchen (opened 2016)

Then: RBC Banking branch and surface parking lot
Now: Railtown Café (opened 2016), Freshii (opened 2017), Johnny Rockets (opened 2017), and Pallet Coffee Roasters (opened 2019)

METHOD

The growth, attrition, and retail mix within the DVBIA catchment were analyzed. The study period was between 2012 - 2018; however, we do highlight some notable 2019 openings. Results were then compared to key trends that shaped the global and regional food and beverage retail economy. The analysis is limited to the DVBIA's catchment, and thus excludes areas such as Gastown, the West End and Robson Street west of Burrard Street (1000 to 1900 blocks).

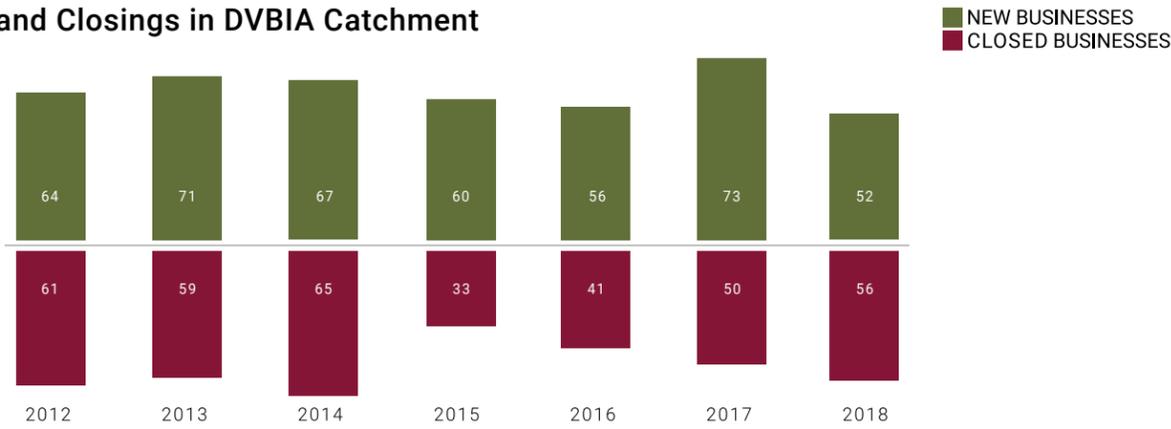
Data sources include the City of Vancouver's business license data¹ in addition to business information from Yelp, Google Places, Facebook, the Better Business Bureau of Mainland B.C. and media articles. The city's business license data was cross-referenced with Yelp and Google Places to identify any variance. The data set was then updated accordingly. Information from the Better Business Bureau, Facebook, Google Places, and media articles were used to confirm the year a business opened and/or closed. The data set's license types were then reclassified based on more defined business categories, and sub-categories were developed to increase the data's granularity. To enhance the reliability of the results, spot checks were performed, and, in some cases, businesses were contacted to confirm information.



¹The City of Vancouver Business license data was initially analyzed to identify limitations. Limitations include broad license type categories (the City of Vancouver began to classify business sub-types in 2016), duplicate businesses, missing businesses, incorrect opening dates, and businesses listed as closed when they are currently open. Limitations are due to changes in business ownership, mailing address and possible data entry errors.



Annual Openings and Closings in DVBIA Catchment



FOOD & BEVERAGE SUMMARY

2012-2018 Annual Average Growth Rate: 1.5%

Businesses operating for 10 years or more: ~39%

Between 2012 and 2018, food and beverage retail experienced a **net gain of 71 businesses**. Around **43 per cent of closed businesses** operated for three years or less. Downtown's food and beverage sub-sectors based on the number of active businesses are: 1) quick-service restaurants, 2) full-service restaurants, 3) retail dealers and 4) liquor primary establishments.

According to Restaurant Canada's 2019 foodservice operations report, operating revenues increased nationally by 31 per cent between 2012 and 2017; however, operating expenses also grew by 31 per cent. In Canada, cost of sales and labour are said to be the sector's two largest expenses.

Notable closures include liquor primary establishments like the **Boss Night Club** at 1326 Richards Street and **Doolin's Irish Pub** at Granville and Nelson Streets. Both establishments closed in 2012. Further, casual dining full-service restaurants like **White Spot** at 580 West Georgia Street and **Stackhouse Burger Bar** at 1224 Granville Street closed in 2012 and 2017, respectively.

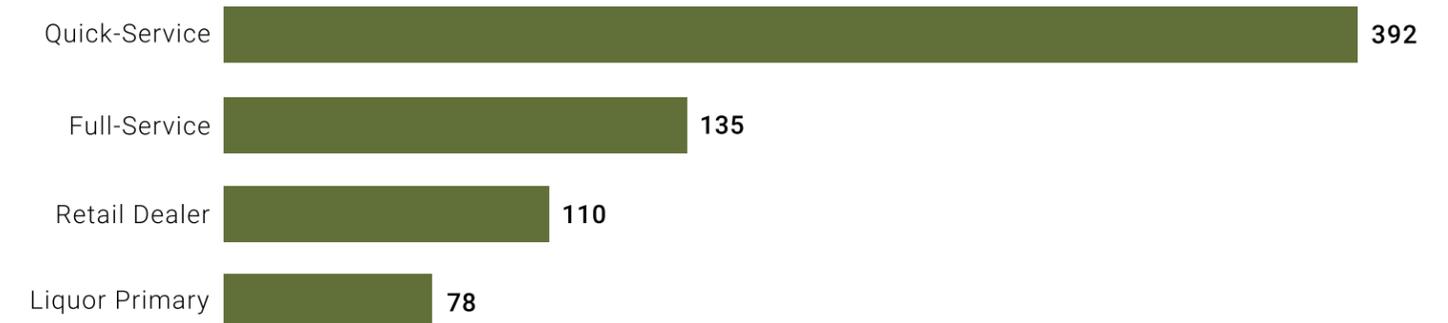
Although there were **365 closures** from 2012 to 2018, most vacant spaces were filled, and new spaces were created through development. Between 2015 and 2018 there was a period of revitalization. During this time, downtown experienced a rapid increase in fast-casual dining – an intermediate concept between fast-food and casual dining. The relatively new trend greatly contributed to the food and beverage sector's overall growth. **Around a third** of food and beverage businesses (excluding liquor stores) have liquor licenses, and around **40 per cent** of these businesses are chains – most of which are quick-service.

Relocations include **Miku** from 1055 West Hastings Street (current location of **Chewies Steam & Oyster Bar**) to 200 Granville Street in 2013, **Giardino's Restaurant** from the heritage home known as the "Yellow House" on 1387 Hornby Street to 1228 Hornby Street in 2015, and **Italian Kitchen** from 1037 Alberni Street to 860 Burrard Street in 2017.

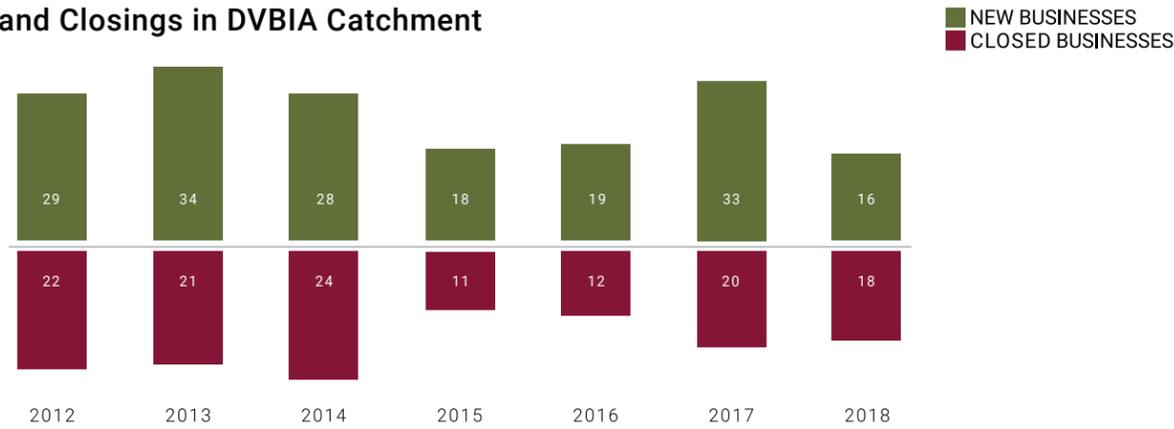
Nordstrom's 2015 grand opening included the addition of three food and drink establishments: **Ebar**, **Bistro Verde**, and **Habitant**; while **Holt Renfrew's** expansion saw the opening of a **Ladurée** tearoom in 2017 and **Colette Grand Café** in 2018.



FOOD & BEVERAGE SUB-SECTORS BASED ON NUMBER OF ACTIVE BUSINESSES



Annual Openings and Closings in DVBIA Catchment



FAST-FOOD/FAST-CASUAL

2012-2018 Annual Average Growth Rate: 3.3%

Businesses operating for 10 years or more: ~18%

Fast-food and fast-casual restaurants experienced a **net gain of 49** businesses between 2012 and 2018 – the fastest-growing quick-service segment. Around **38 per cent of closed businesses** operated for three years or less. Most quick-service restaurants are **fast-casual** and cater to the lunch crowd. Quick-service restaurants are predominantly chains like **McDonald’s, A&W** and **Subway**; however, between 2015 and 2018, local fast-casual chains emerged, such as **SMAK, Tractor,** and **Railtown Café.**

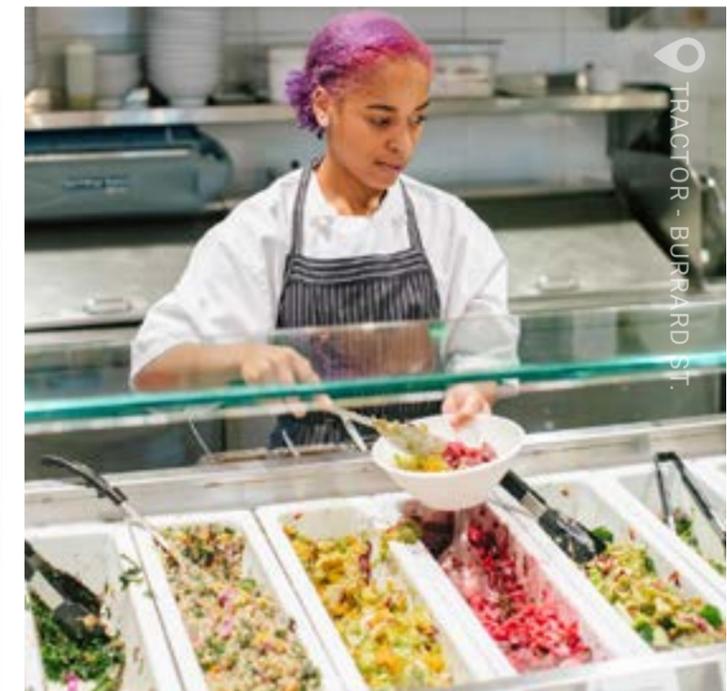
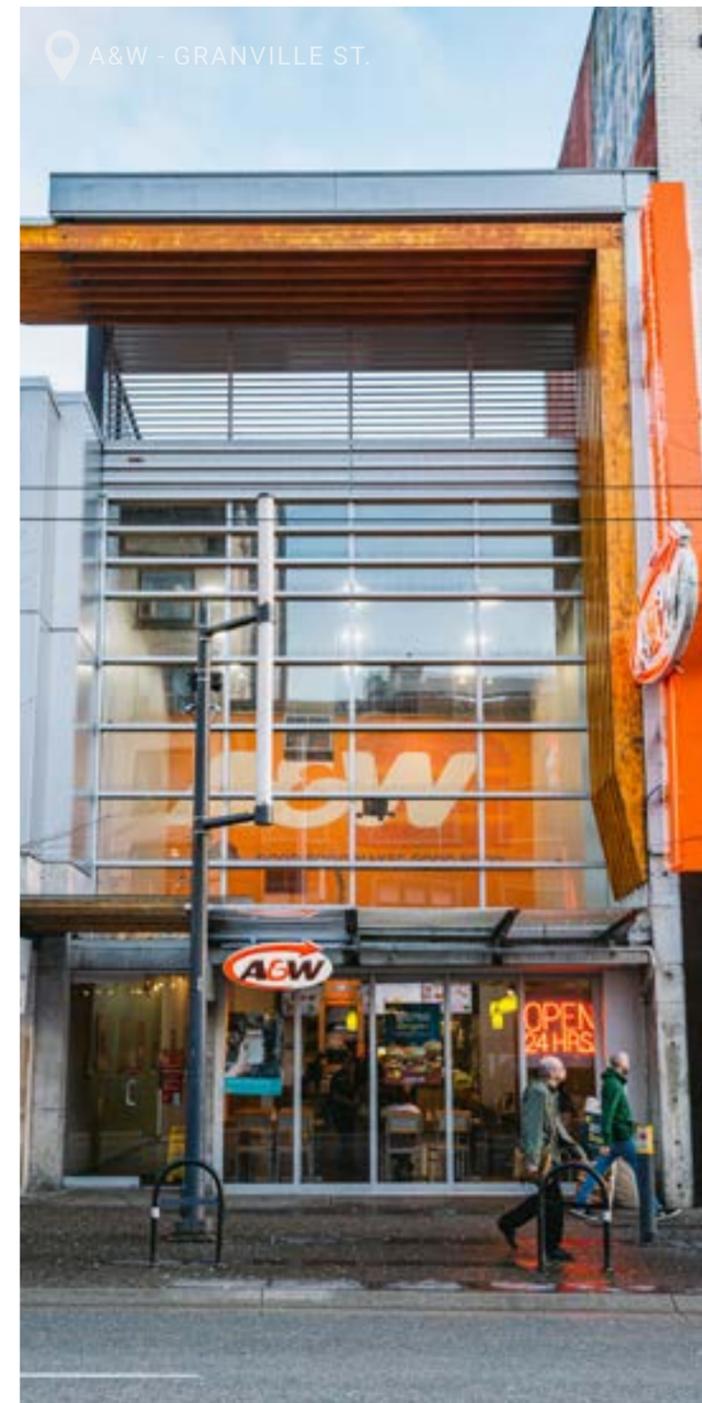
Noteworthy closures include **Bread Garden’s Urban Café** at 855 Davie Street in 2013 and 889 West Pender Street in 2014, and **Steamrollers** at 586 Hornby Street in 2017 – which has since closed all Vancouver locations.

Openings include **Chipotle** at 818 Howe Street in 2013 (formerly **Urban Barn**), **Tractor** at 547 Robson Street in 2017 (prior to the completion of TELUS Garden, this was a parkade), and Railtown Café, **Freshii** and **Johnny Rockets** at Howe and Nelson street in 2017 (formerly a surface parking lot and an RBC branch building).

According to Aaron Allen & Associates, quick-service restaurants are capturing a larger share of Canada’s foodservice industry. The rise of fast-casual coincided with the emergence of poke bowls. In 2017, **nine** poke bowl restaurants opened. Poke bowls are a Hawaiian food concept that consist of raw fish and a variety of fresh ingredients. Fast-casual is driven by millennials who desire fresh, and healthy food from restaurants that engage in sustainable practices. The fast-casual craze has not gone unnoticed by major fast-food chains like McDonald’s and A&W. In 2018, McDonald’s announced it was removing artificial preservatives from its burgers, and A&W launched the **Beyond Meat** burger.

Third-party mobile delivery apps like **Foodora** and **Uber Eats** have transformed quick-service. Although they can contribute to a restaurant’s bottom line, delivery commissions can be steep. In North America, online ordering has given rise to seatless, virtual restaurants.

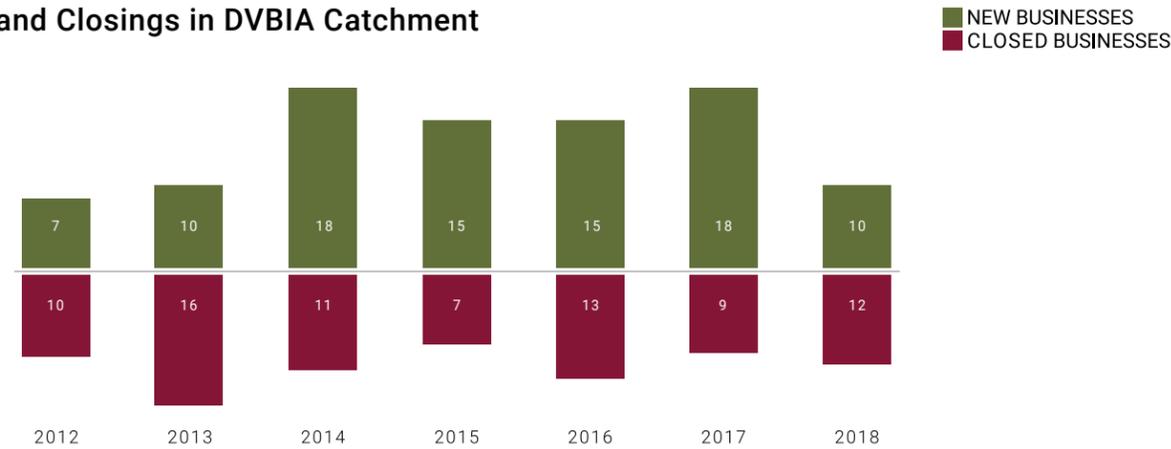
Another trend is the emergence of liquor sales at fast-casual restaurants such as Tractor and Railtown Café. Alcohol sales are not a main revenue generator; however, they allow fast-casual restaurants to differentiate themselves and attract evening customers. Expanding trends in fast-food include all-day breakfast and 24-hour service, e.g., McDonald’s, Subway and A&W.



TOP THREE CATEGORIES BASED ON NUMBER OF ACTIVE BUSINESSES



Annual Openings and Closings in DVBIA Catchment



☕ COFFEE, BAKERIES & DESSERTS

📈 2012-2018 Annual Average Growth Rate: **2.1%**

🕒 Businesses operating for 10 years or more: **~39%**

Coffee shops and bakeries/desserts experienced a **net gain of eight** businesses between 2012 and 2018. Around **41 per cent of closed businesses** operated for three years or less. Most growth is attributed to coffee shops. The majority are large chains like **Starbucks** and **Tim Hortons**; however, there was a spike in artisan coffee shops such as **49th Parallel**, **Elysian Coffee** and **Incognito Coffee** beginning in 2015. Vancouver-based **Blenz Coffee** is the third largest coffee chain operating downtown behind Starbucks and Tim Hortons.

Closures include **Moonpennies Coffee** at 1102 West Pender Street in 2017, **Juan de Fuca Coffee** at 1185 West Georgia Street in 2018 (now occupied by a **Freshii** and **Bonus Bakery & Coffee**), and the **Croissanterie La Marseillaise** on 1138 Granville Street in 2018 (now a **Domino's Pizza**).

Noteworthy openings include Vancouver-based **JJ Bean** at 353 Burrard Street in 2013 and 1188 Alberni Street in 2016, Starbucks Reserve at 702 West Pender Street in 2018 (currently Vancouver's largest Starbucks location)

and **Matchstick** at 1328 Richards Street in 2018 (prior to the completion of the Peter Wall condo development it was **Boss** nightclub), and **Honolulu Coffee** at 888 Nelson Street in 2016.

Artisan coffee shops such as **Quantum Coffee** are increasingly popular. They offer curated experiences using a variety of brews and brewing techniques like manual pour-overs, siphon pots and nitrogen-infused coffees. Sustainability is one of the largest trends in coffee. Many coffee shops eliminated plastic straws – even before the City of Vancouver's straw ban – and advertise the use of ethically-sourced beans and local roasters in addition to offering discounts for bringing your own mug. In response to the rise of independent artisan coffee shops, major chains like Starbucks' Reserve brand have invested in large upscale roasteries that offer different brewing methods and more exotic coffee blends.

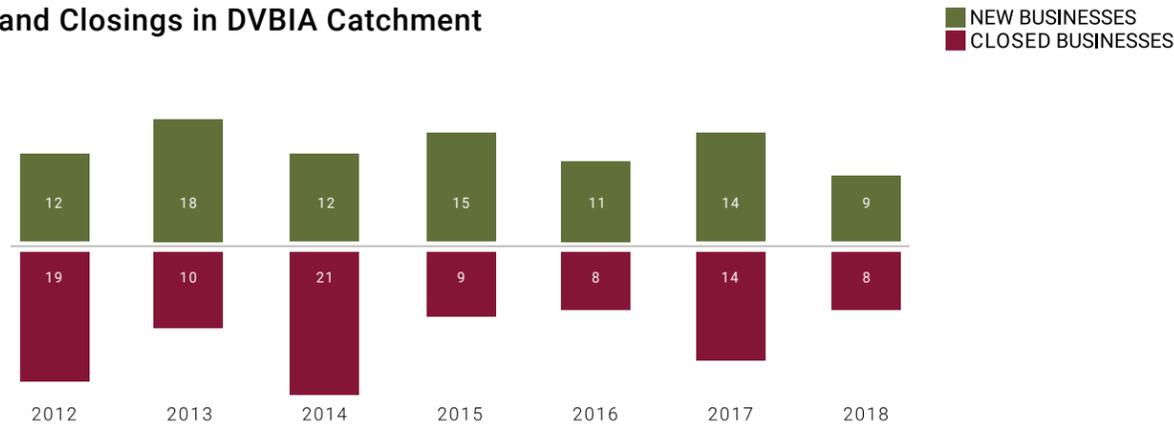
Another noteworthy trend is coffee drinks made with milk alternatives such as soy, almond, cashew and oat milk. Similar to fast-casual restaurants, coffee shops like the **Nosherie**, **Sciúé Italian Bakery Caffé** and Starbucks Reserve serve alcohol. Alcohol sales allow coffee shops to extend business hours and attract late-afternoon customers.



TOP THREE CATEGORIES BASED ON NUMBER OF ACTIVE BUSINESSES



Annual Openings and Closings in DVBIA Catchment



FULL-SERVICE RESTAURANTS

2012-2018 Annual Average Growth Rate: 0.5%

Businesses operating for 10 years or more: ~36%

Full-service restaurants experienced a net gain of two businesses between 2012 and 2018. Around 38 per cent of closed businesses operated for three years or less.

The growth rate is not necessarily a negative indicator. Industry experts say that upscale restaurants are expressing interest in finding downtown locations; however, physical constraints and design issues (e.g., ventilation, adequate ceiling height and space for pick-up and supply deliveries) are a barrier to entry. The majority of restaurants are casual dining, while premium/fine dining account for a third of full-service restaurants.

Closures include the **Shore Club** at 688 Dunsmuir Street in 2012 – which is now the **Keg** – the **Fish Shack** at 1026 Granville Street in 2018 and the **Elbow Room** at 560 Davie Street in 2018 - which closed to make way for a new housing redevelopment.

Notable openings include **Boston Pizza** at 869 Hornby Street in 2015 (formerly **Tokyo John's Sushi**).

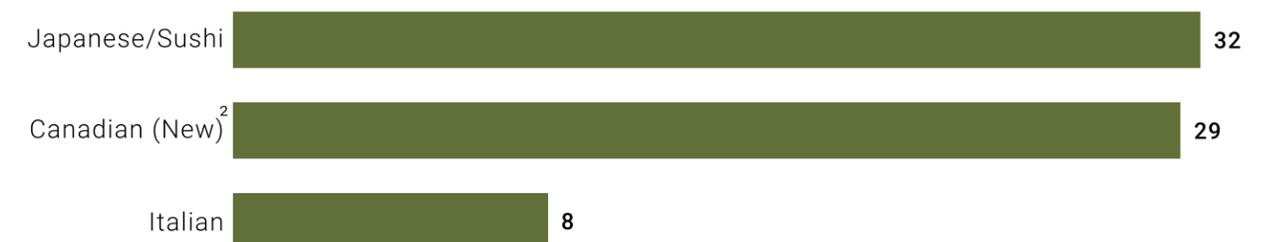
Nightingale at 1017 West Hastings Street in 2016 –

acclaimed chef David Hawsworth's third downtown restaurant, and **Burgoo** at 1100 Burrard Street in 2017 (formerly a **7-Eleven**). Another notable opening is **perse Social Corner** at 819 Homer Street in 2016 (formerly **Subeez Café**). It is also home to **Water & Flower** a pizzeria, **Rosalinda** a tapas and charcuterie bar, and **Illy Café**.

According to Justason Market Intelligence's 2019 survey of nearly 1,000 Metro Vancouver residents, downtown's culinary scene remains one of the major draws for visitations. Full-service restaurant growth is led by premium casual. The premium casual dining experience has strong roots in western Canada. Several successful chains were launched in Vancouver before spreading east. Premium casual dining is popular among millennials who desire an elevated contemporary atmosphere – generally with a patio – with “polished” servers and a diverse menu of locally-sourced ingredients in addition to a larger drink selection with signature cocktails, craft beers and premium wines. **Earls** and **Joey Restaurants** – the late Leroy (Bus) Fuller's innovative concepts – are considered pioneers of premium casual. Fuller's sons are also majority owners of **Cactus Club**. For the purpose of this report, restaurants like **Glowbal** and **Homer Street Café and Bar** are included in the premium casual category.



TOP THREE CATEGORIES BASED ON NUMBER OF ACTIVE BUSINESSES



² The Canadian (new) food type is generally found at premium-casual restaurants like Earls. The menu consists of classics like pizza and burgers, in addition to variations of ethnic inspired dishes like noodles, rice bowls and plant-based meals.

Annual Openings and Closings in DVBIA Catchment



RETAIL DEALER

2012-2018 Annual Average Growth Rate: **1.9%**

Businesses operating for 10 years or more: **~46%**

Retail dealers experienced a **net gain of 13** businesses between 2012 and 2018. **Eight** pharmacies and **two** grocery stores opened during this period. Around **47 per cent of closed businesses** operated for three years or less. Most retail dealers are convenience stores, such as **7-Eleven** and **International News**. Although downtown’s **Urban Fare** locations opened prior to the study period, they are notable examples of a “grocerant” – a concept that encompasses dining areas and a variety of ready-to-eat meals. **Meinhart Fine Foods**, which opened at Dunsmuir and Granville in 2015, is example of a “grab & go” urban market.

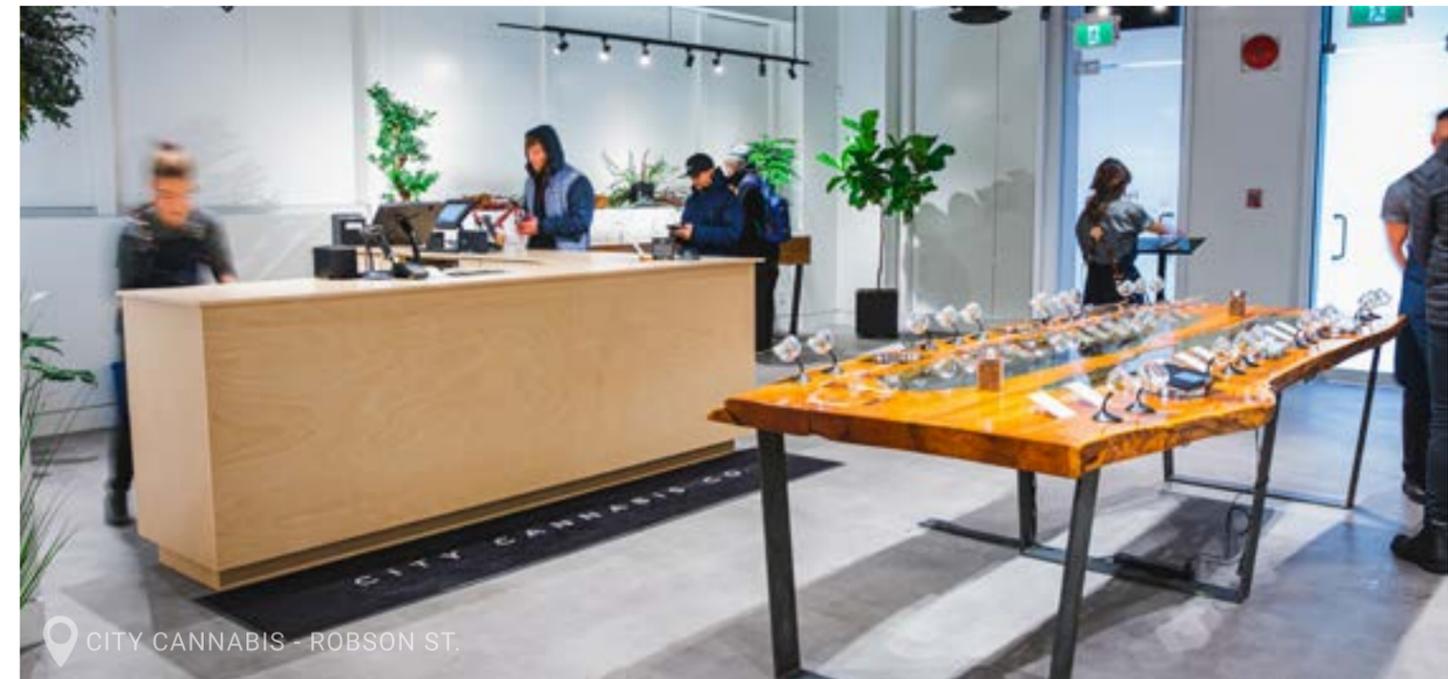
Noteworthy closures include **Okanagan Estate Wine Cellar** at 674 Granville Street in 2012, **DJ’s Groceries** at 575 West Pender Street in 2014, and multiple cannabis retailers such as **604 Medicinals**, the **Green Room**, **Van City Weed** and **Weeds** between 2016 and 2018.

Openings include **Farm to Table Market** at 1312 Richards Street in 2018 (an independent grocer that sources local produce), **Body Energy Club** at 428

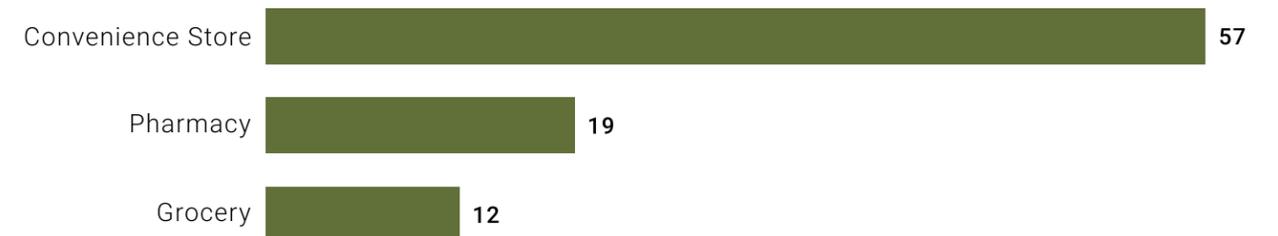
Robson Street in 2013 and 1131 West Georgia Street in 2016 (a vitamin and supplement retailer that also sells food at its West Georgia location) and **Rexall Pharmacy** at 1055 West Georgia and 499 Granville streets in 2016.

Prior to the legalization of cannabis, there were up to **five** downtown cannabis dispensaries. In 2018, the BC Supreme Court ordered cannabis dispensaries to shut down unless they had a provincial operating license in addition to a municipal development permit and business license (the latter required by the City of Vancouver since 2016). Most downtown cannabis dispensaries subsequently closed. In 2019, **City Cannabis** opened one of downtown’s first legal cannabis stores now located at 651 Robson Street.

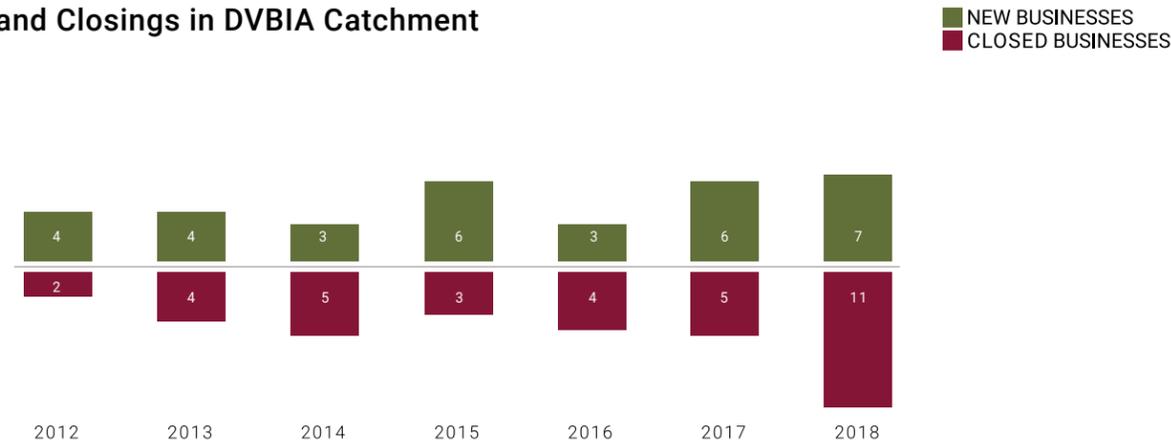
The popularity of e-cigarettes and vaping increased in 2018 with the advent of new vaping technologies, an increase in flavoured products, and the enactment of the Tobacco and Vaping Products Act – which allows adults to legally purchase nicotine vape products. Vaping and e-cigarettes were seen as a way to wean people off traditional cigarettes; however in 2019, there were media reports of vaping-related illnesses. Between 2015 and 2018, **six** retailers with “vape” in their business name opened. During this period, convenience stores also started to carry more e-cigarette and vaping products.



TOP THREE CATEGORIES BASED ON NUMBER OF ACTIVE BUSINESSES



Annual Openings and Closings in DVBIA Catchment



LIQUOR PRIMARY

2012-2018 Annual Average Growth Rate: **-0.2%**

Businesses operating for 10 years or more: **~57%**

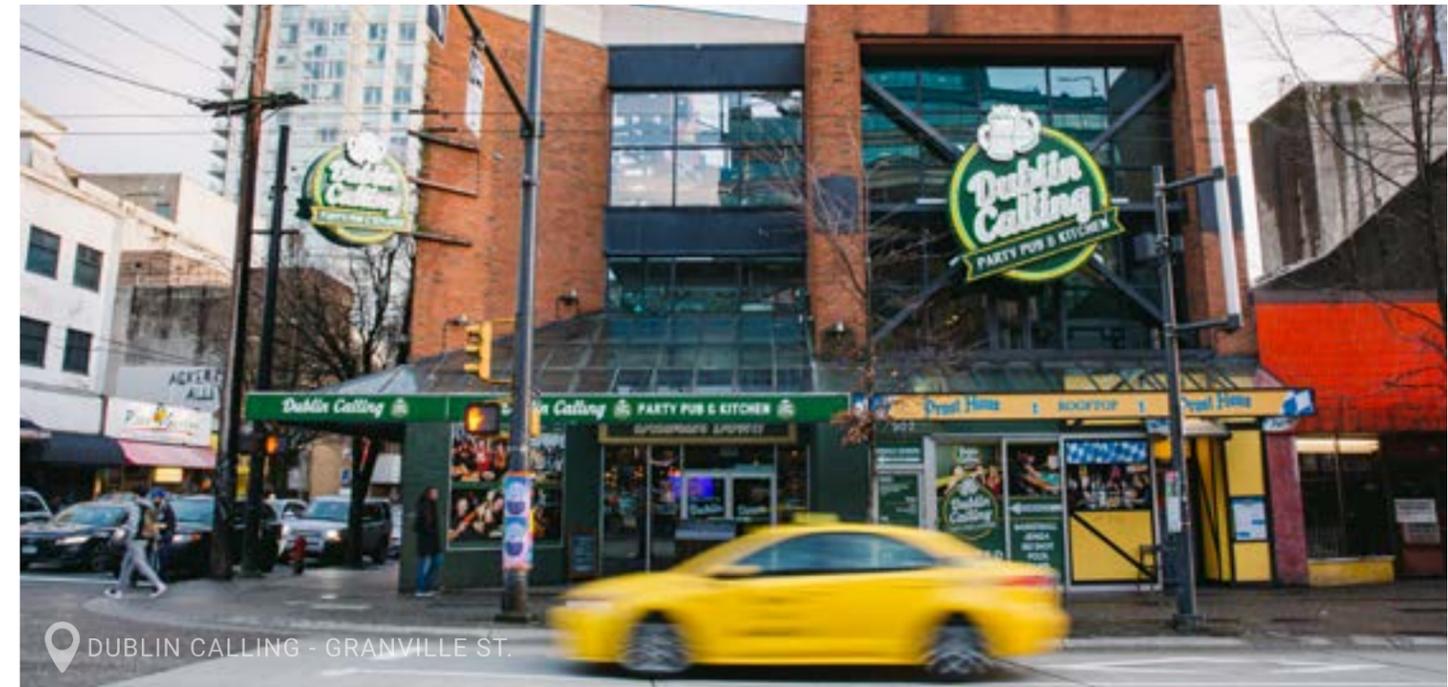
Liquor primary establishments experienced a net loss of one business between 2012 and 2018. Around 50 per cent of closed businesses operated for three years or less. The majority of liquor primary establishments are pubs or cocktail lounges. The Granville Entertainment District is well-known for its nightlife; however, within the past decade, nightclubs have gradually shut their doors. Liquor primary establishments are mostly concentrated in the Granville Entertainment District and Central Business District, away from residential areas, due to noise bylaws and physical space constraints.

Closures include **Pop Opera** at 686 West Hastings Street in 2013, which became the **Odyssey** nightclub in 2015, and has since closed becoming **Teaveer Bubble Tea**. **Joseph Richards Boutique Nightclub** closed at 1082 Granville Street in 2017 and is now **Donnellan's Irish Pub**. **Caprice Nightclub** at 965 Granville Street closed in 2018, making room for **The Colony**, a multi-floor bar with arcade games, ping-pong tables and a bocce court.

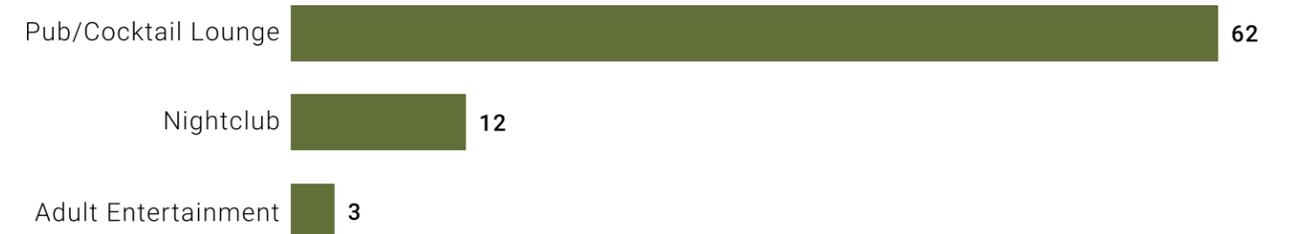
Noteworthy openings include **One Under** at 476 Granville

Street in 2014, a pub featuring six golf simulators, **Dublin Calling Pub** at 670 Smithe Street in 2017, and **Sneeki Tiki** at 1100 Granville street in 2018, a pacific islander themed cocktail lounge that serves exotic drinks and hosts live music.

Nightclub closures are not exclusive to Vancouver. Since the 2010s, nightclubs have increasingly shuttered across North America and the United Kingdom. According to ULI/Lachman Associates, this trend is largely attributed to aging millennials who do not frequent nightclubs as often as Generation X during the discotheque era. Millennials are increasingly choosing pubs and restaurants over nightclubs for a night out. From a business perspective, pubs make more economic sense. They can operate longer hours, seven days a week, whereas nightclubs are generally open Fridays and Saturdays for relatively short hours. Today's pubs appeal to a wider demographic by offering happy hours, craft beer selections, refined menus, arcades, and special events like trivia nights. Capitalizing on the shift from nightclubs to an elevated pub experience is Cineplex's **Rec Room**. It is scheduled to open at 855 Granville in 2021. Half the space will be an arcade and the remainder will be for dining and live entertainment.



TOP THREE CATEGORIES BASED ON NUMBER OF ACTIVE BUSINESSES

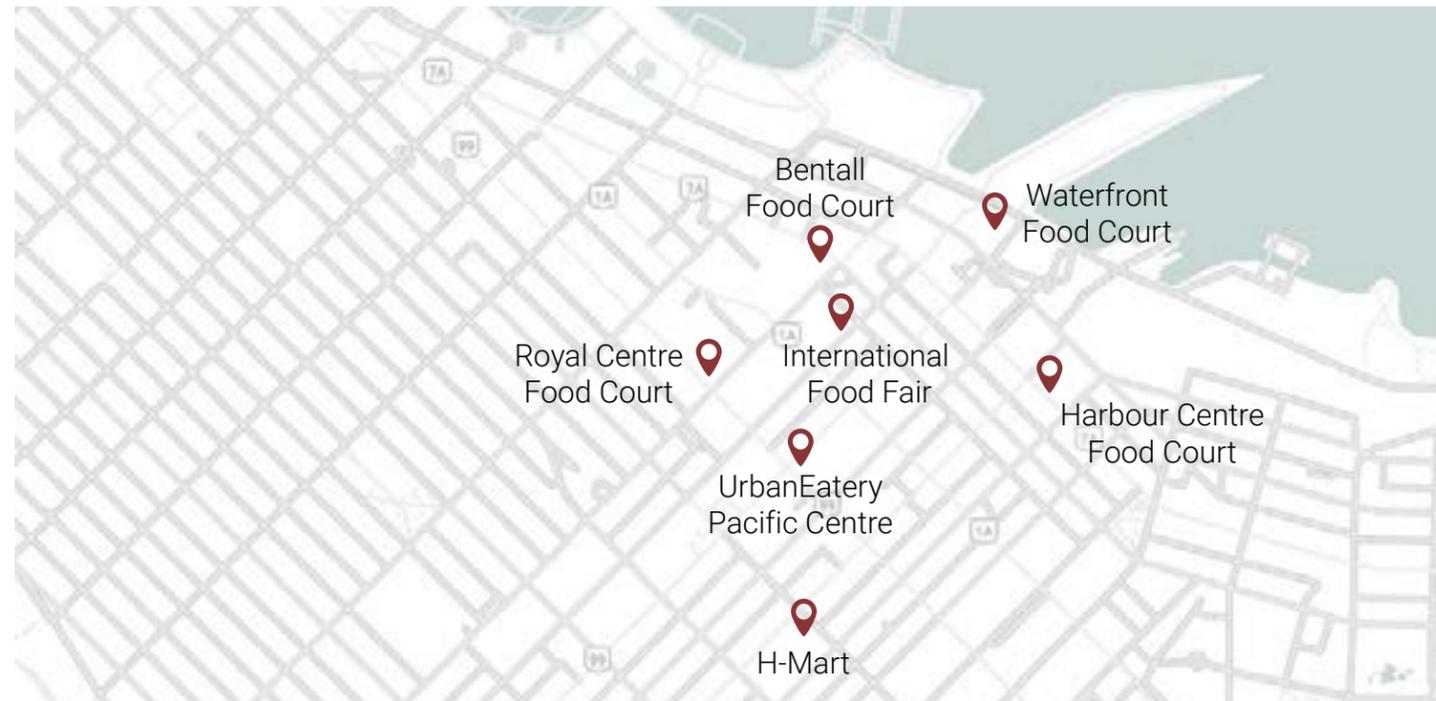


FOOD COURTS & FOOD TRUCKS

Downtown has a selection of food courts that cater to shoppers and the weekday lunch crowd. Food courts include: **Bentall Centre** at 505 Burrard Street; **H-Mart**, a Korean supermarket chain at 590 Robson Street; **Harbour Centre** at 555 West Hastings Street; **International Food Fair**, which is mostly occupied by independent ethnic food vendors at 530 Hornby Street; **Royal Centre** at Georgia and Burrard streets; **Waterfront Centre** at 900 Canada Place Way; and **Urban Eatery** in CF Pacific Centre.

In 2014, the Harbour Centre food court underwent a multi-million dollar renovation. The food court’s space expanded to 17,500 square-feet and is able to accommodate 600 seated patrons. CF Pacific Centre renovated its food court, the Urban Eatery, in 2017, offering guests an elevated culinary experience with healthier food options and a contemporary dining environment. The transformed space offers a rejuvenated look, including newly-renovated washrooms, and more welcoming communal and private seating. New modern fixtures brighten up the area to create an inspiring ambiance. Healthier dining options include **Hula Poke**, **Living Foods** and **La Prep**.

Downtown also has a variety of food trucks³. Approximately **20** rotating food trucks operate downtown on any given day. Prior to the City of Vancouver’s 2010 expanded food truck program, food trucks were mainly hot dog, ice cream and popcorn vendors. The purpose of the 2010 program was to add diversity and variety to the street food scene. Today, food trucks range from **Disco Cheetah’s** Korean fusion to Indian from **Vij’s Railway Express**. **Street Food City**, downtown’s annual food truck festival, is hosted on the Vancouver Art Gallery’s North Plaza (renamed **ᓃxw’áenəq Xwtl’e7énk Square**). The festival came back for its 9th year in 2020.



³ Food trucks opening, closings and food types are excluded from this report’s findings.



JAPANESE FOOD

Japanese food is downtown's top food category based on the number of active businesses – making up about **13 per cent** of downtown's quick-service and full-service restaurants. In 2014, Vancouver Sun journalist Douglas Todd dubbed Vancouver "the Sushi Capital of North America". Industry experts claim that the majority of Vancouver's sushi outlets are run by ethnic Chinese or Korean owners. Approximately **one per cent** of Vancouver's total population is of Japanese descent.

To appreciate the legacy of Japanese food, it is important to understand the history of Vancouver's Japanese population. In the late 19th century, the first wave of Japanese immigrants, known as the Nikkei, arrived in Vancouver and settled in the Powell street area which became known as Japantown. By the 1920s, over 500 Japanese businesses thrived in the area thanks to a rising Nikkei middle class; however, by the 1930s, many buildings fell into disrepair due to new industrial rezoning, which made it difficult for tenants to borrow money for improvements. Consequently, second generation Japanese Canadians saw Japantown as a "ghetto" and left to move into middle-class neighbourhoods.

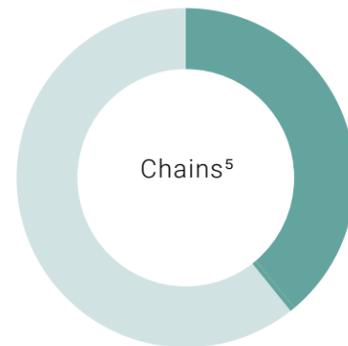
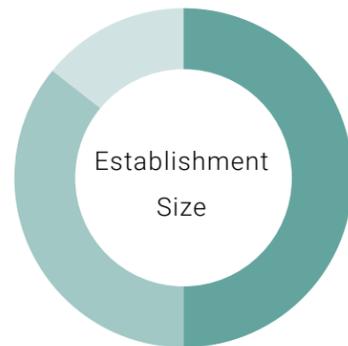
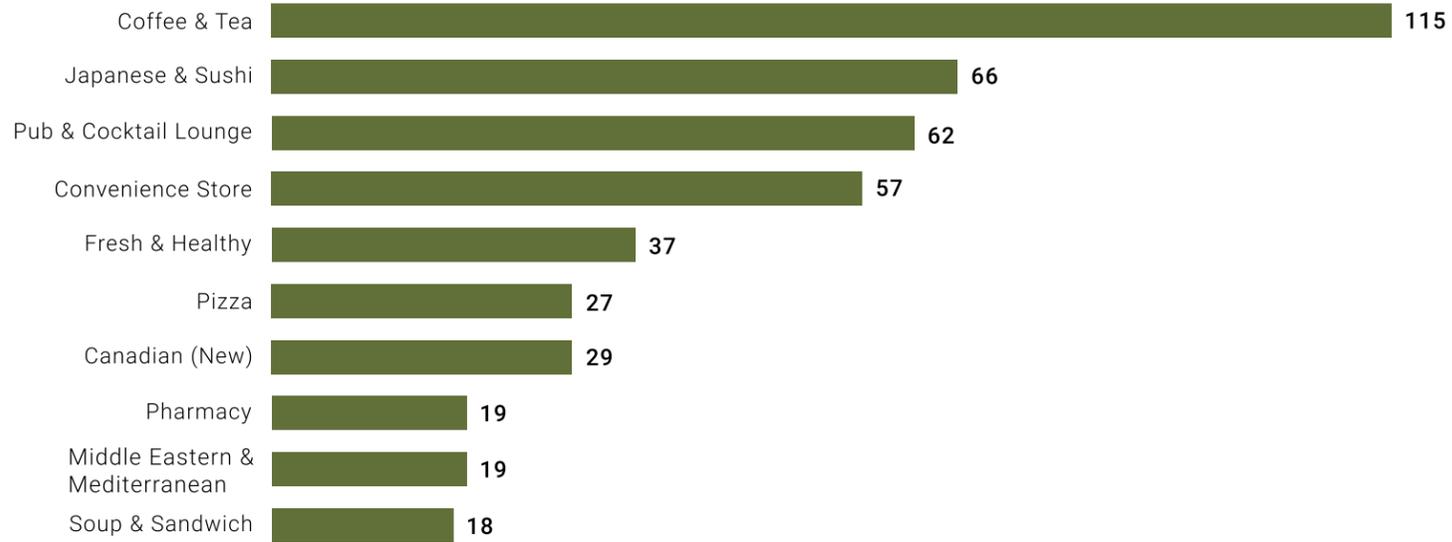
World War II was a turning point for Japanese Canadians living in Vancouver. Widespread xenophobia after the Japanese attack on Pearl Harbour resulted in the federal government ordering the removal and internment of all Japanese Canadians living along BC's coast. Vancouver's entire Japanese community was sent to camps in the West Kootenays, and Japanese businesses were expropriated and sold at less than half their value. Japanese Canadians were interred until 1949, after which many returned to Japan.

A second wave of Japanese immigration occurred in the 1960s when immigration laws relaxed. This new wave was a catalyst for Vancouver's Japanese food scene. The first Vancouver sushi restaurant, **Aki Restaurant**, opened at 374 Powell Street in 1963. Then, in 1971, Hidekazu Tojo moved to Vancouver to open a Japanese restaurant; however, most Vancouverites at the time had an aversion to raw fish and seaweed. His solution was to hide the seaweed underneath a layer of rice, use crab instead of raw fish, and add avocado.

The dish was initially known as the "Tojo Maki" but is widely popularized as the "California Roll" – an homage to the avocado's place of origin. Tojo is also credited with the creation of the "BC Roll" – rolled with barbecued salmon skin and cucumber. Both rolls are common staples found at most downtown Japanese restaurants. In 2016, Tojo was honoured with the title of Japanese Cuisine Goodwill Ambassador by the Japanese Ministry of Agriculture, Forestry and Fisheries. Today, there are around **66** downtown Japanese restaurants with a variety of specialty dishes ranging from sushi and ramen to izakaya and gyozas.



TOP TEN FOOD & BEVERAGE CATEGORIES⁴



- 16+ Seats
- Less than 16 seats
- Retail Dealer
- Liquor License
- No Liquor License
- Chains
- Independent

	Average Annual Growth Rates	% Businesses Operating 10+ years	% Chains
Total Food & Beverage⁶	1.5%	39%	40%
Full-Service	0.5%	36%	20%
Fast-food & Fast-Casual (Quick-Service)	3.3%	18%	65%
Coffee, Bakeries & Desserts (Quick-Service)	2.1%	39%	59%
Retail Dealer	1.9%	46%	43%
Liquor Primary	-0.2%	57%	11%

⁴ Based on number of active businesses.
⁵ Organization operating four or more outlets in the same industry class.
⁶ Data in this table reflects businesses in the DVBA catchment from 2012 to 2018.





CINEMA PUBLIC HOUSE - GRANVILLE ST.

SOURCES

Aaron Allen & Associates
 Better Business Bureau
 BC Restaurant & Food Services Association
 Business in Vancouver
 Business Insider
 CBC News
 City of Vancouver
 Coffee Association of Canada
 Convenience Industry Council of Canada
 Daily Hive – Dished
 Food Bloggers of Canada
 Globe & Mail
 Google Places
 Justason Market Intelligence
 NDP Group
 Nikkei National Museum & Cultural Centre
 NUVO Magazine
 Restaurants Canada
 Scout Magazine – Restaurant Graveyard
 ULI/Lachman Associates
 Vancouver Heritage Foundation
 Vancouver Magazine
 Vancouver Sun
 Yelp

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TECHNICAL NOTES

All data presented in this report is based on the best data at the time of development. The results may differ from estimates produced in other studies. The data was obtained from reliable sources; however, it is not guaranteed by the DVBA or any of its contributing partners.



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