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REAL ESTATE APPRAISERS AND CONSULTANTS

RETAIL DEMAND STUDY:
WELLINGTON WEST BIA
OTTAWA, ON

Prepared for:

Wellington West BIA

Prepared by:

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I. EXECUTIVE SUMMARY

On behalf of Wellington West Business Improvement Area (WWBIA), this study has been carried out by Shore-Tanner & Associates. Its ultimate purpose is to determine the scope of market demand for new, additional retail and service businesses, and to prepare a Retail Action Plan for its future.

The main findings of the **first phase** of this study are summarized below, followed by more detailed substantiation in the main body of the report and its appendices.

A. Subject Site

The Subject Site is the WWBIA in the inner west area of the City of Ottawa, and it consists of the communities of Hintonburg and Wellington Village. It is well served by the existing OC Transpo public transit, ample vehicular access, and by the planned Light Rail Transit which is scheduled to begin service to Bayview and Tunny's stations in 2019. An additional station is also planned for Gladstone Avenue near Preston Street in the next five years.

WWBIA has been experiencing major renovations, redevelopments, and gentrifications in the last 5-10 years, and these trends are expected to be continuing for the next 10 years or more. **As a commercial district, WWBIA is in a strong and growing position in terms of the performance, improvements, and expansion of its businesses based on this study's findings.**

B. Major Socio-Demographic Findings

1. The population of the nearby area (called Primary Trade Area or PTA) is estimated at 17,700 at year-end 2017, and projected to increase annually by 1,030 or 5.8% on average, to 28,000 by 2027 (Table 3.1).
2. For the entire Trade Area, the 2017 population is estimated at 86,600 and expected to increase by an average of 3,040 or 3.5% annually, to 117,000.
3. Economists and planners generally consider an average annual population growth of 1.0% to be economically healthy. The Trade Area's recent and expected future growth is therefore quite high; this growth is due to gentrification and also to the

8,416 housing units which are currently under construction, planned, or proposed (Table 3.2).

4. In 2011, the number of the residents who were working within or outside the Trade Area was 41,125 (Table 3.3). Of these residents, 62.8% were working in the economic engine jobs (Table 3.4).
5. The number of jobs (employees) within the Trade Area, however, was 65,242 (Table 3.5), of whom 57.0% worked in the economic engine jobs (Table 3.6).
6. In 2011-2012, therefore, a minimum of 24,117 of the people who worked within the Trade Area lived outside (this number is quite likely to be higher now).
7. **The existing and future retail businesses in the Trade Area, therefore, benefit from the spending of employees as well as the residents of the Trade Area (and also tourists due to the proximity of Preston Street).**
8. The City of Ottawa incomes are generally among the top three in Canada, and the Trade Area residents' incomes are not far behind as demonstrated in Table 3.7 (for the Trade Area, which consists of parts of several census tracks, the 2016 income data are not yet available):

Area	**2011**	**2016**
Trade Area:		
• Average Household Income	$95,774	N.A.
• Median Household Income	$73,683	N.A.
• % with over $80,000	46.2%	N.A.
City of Ottawa:		
• Average Household Income	$96,815	$106,259
• Median Household Income	$79,634	$85,981
• % with over $80,000	49.8%	53.7%

9. The WWBIA consists of the communities of Hintonburg and Wellington Village. The boundaries of these communities are close to the boundaries of a few census tracks and their population growth from 2011-2016 was marginal (Table 4.1):

Community	Total Population		Average Annual Change: 2011-2016	
	2011	2016	Numeric	%
WWBIA East (Hintonburg Area)	9,041	9,282	48	0.53
WWBIA West (Wellington Village Area)	10,695	10,997	60	0.57
Total	**19,736**	**20,279**	**109**	**0.55**

10. Due to the developments within the WWBIA in Table 3.2, population growth since 2016 has been higher since 2016, and expected to increase much more rapidly in the coming months and years.

11. The WWBIA is ethnically quite diverse, and residents' mother tongues are as follows (Table 4.2):

    - English 74.5%
    - French 10.0%
    - All Others 15.5%

    The top three of the other languages after English and French are Chinese, Arabic and Spanish.

12. Household sizes in the WWBIA are small (average of 1.92 persons), and 7.8 in 10 of all households in this area consist of only one or two persons (Table 4.3). The dominance of the single and two-person households, furthermore, is expected to continue, and become even more prominent in the next 10 years and beyond.

13. The overall median household income in the WWBIA was $73,984 in 2016, and we believe it is significantly higher now due to the continued gentrification of the area.

14. **At a median income of $91,744 in 2016, the northern part of the Wellington Village (i.e., north of Wellington West St.), which is close to the area of an individual census track, is the most affluent part of the WWBIA.**

15. In 2016, the proportion of households with annual income of $80,000 or more was 47.0%, and quite likely over 50.0% now.

C. Major Findings On Existing Businesses

1. The grand total of the BIA business members is 533, including 250 retail and service businesses at street levels with a total floor space of 484,850 sq. ft. (Appendix B).
2. By the two parts of the BIA, the corresponding numbers are (Table 6.1):

WWBIA East of Holland Ave.	161 Businesses	312,650 sq. ft.
WWBIA West of Holland Ave.	89 Businesses	172,200 sq. ft.

3. A total of 12 of the 250 stores with combined floor space of 21,500 sq. ft. were vacant, resulting in a vacancy rate of 4.4% which is well within the industry range of 4% to 8%.
4. The top five business types in terms of occupied floor space in the WWBIA are:

Restaurants/Eateries	**44**	**80,500 sq. ft.**
Fashion	**24**	**40,800 sq. ft.**
Specialty Retail	**19**	**39,500 sq. ft.**
Home Improvement	**14**	**33,600 sq. ft.**
Beauty Salons	**22**	**30,600 sq. ft.**

In the **second phase** of this study, the figures in Appendix B would be analyzed in detail along with estimates of spending by the residents, employees, and tourists within and near the Trade Area of the 250 businesses. The results of these steps would be **the identification of how many, what types, and when additional businesses would be market viable in the WWBIA**, the steps necessary to attract them, and more generally how to further improve the commercial sector. As always, one of the key improvements in any retail area is to encourage its residents and employees to shop locally. Property values also generally increase in areas with vibrant, successful, main street type businesses.

II. Subject Site and Environs

A. Subject Site

The Subject Site is the Wellington West Business Improvement Area (WWBIA).

It is a long stretch of land in the inner west area of the City of Ottawa. To the north, it is bounded by Ladouceur, Scott and Spencer Streets, to the east by the O-Train Trillium Line east of Bayswater Avenue, to the south by Laurier Street, Gladstone Avenue, Highway 417, and Byron Avenue, and to the west by Island Park Drive.

Wellington Street West is the main commercial roadway, followed by Holland Avenue, Gladstone Avenue, and Parkdale Avenue. The entire BIA area is well served by the OC Transpo bus system. Highway 417 is a 6-8-lane Provincial Highway, and has entrance-exit ramps at Bronson Avenue, Parkdale Avenue and Island Park Drive, which provide ample vehicular access to the BIA from east, south and west. The Sir John A. Macdonald Parkway and Scott Street provide access to the BIA from the north.

In the last 5-10 years, Hintonburg Community (in the eastern part of the BIA), and Wellington Village (in the western part of the BIA) have been undergoing major renovations and gentrification. A large number of residential towers have been built, and more are planned or proposed. The BIA is also close to Tunney's Pasture, which is a major government node with approximately 11,000 of Federal employees now, and more in the next few years as the area goes through proposed major renovations and expansions. **In terms of population, employment, visibility, exposure, and access by pedestrians, public transit, and vehicular access, the WWBIA is in an advantageous position for further commercial developments, with strong and growing popularity, in our view.**

B. Environs

Within and near WWBIA, there are many unique, special and noteworthy facilities which point to its attractiveness.

The Bayview LRT station and the City Centre are two of such developments. The Plant Recreation Centre, Plouffe Park, and Preston Street, which is a major restaurant and tourism destination, are within or close to this BIA. At Gladstone Avenue just west of Preston Street is the well-established and popular performance theatre called The Gladstone Theatre. The well-known and popular Great Canadian Theatre Company (GCTC) is also on Wellington Street West at Holland Avenue.

A new LRT station has been planned on Gladstone Avenue near Preston Street, and one at Preston near Somerset Street West for a total of three stations near the WWBIA. **From the perspectives of vehicular, public transit and pedestrian visibility, community diversity, existing market base and future growth potential, therefore, the WWBIA is in a superior location for commercial businesses and additional developments, in our view.**

III. SOCIO-DEMOGRAPHIC ANALYSIS

A. Trade Area

Based on the retail industry standards and practices, capture, market or trade area is one from which customers can be attracted for the purchase of the goods and services offered by the area's businesses. Primary Trade Area (PTA) typically provides at least 50% of the total sales of the businesses within. The rest of the area(s) which provide the balance of the total sales is called Secondary Trade Area (STA). There can also be Tertiary Trade Areas (TTA) for businesses which attract/capture at least 10% of their total sales from outside the PTA and STA combined.

Based on field research, our knowledge of the area, and past studies, we have defined the following as the effective Trade Area[1] for the recommended businesses on the Subject Site:

1. **Primary Trade Area (PTA): Bound by the Ottawa River to the north, O-Train Trillium Line to the east, the Queensway to the south, and Island Park Dr. to the west.**
2. Secondary Trade Area A (STAA): Bound by the Ottawa River to the north, Bronson Ave. to the east, the Queensway to the south, and Churchill Avenue to the west (excluding the PTA).
3. Secondary Trade Area B (STAB): Bound by the Queensway to the north, Bronson Avenue to the east, Carling Avenue to the south, and Churchill Avenue to the west (excluding PTA and STAA).

The above trade areas have been defined partially based on our knowledge, field research, and other retail studies close to the WWBIA (e.g., Westboro Village BIA). Another factor in the delineation of these areas is information from a number of business owners through the WWBIA Executive Director. As we understand, a large number of the WWBIA businesses have indicated that many of their customers live or work in areas south of the Queensway to as far as Carling Avenue. A shoppers' intercept survey, a community telephone survey, and interviews with a selected number of the WWBIA

[1] The WWBIA area is, of course, smaller than this Trade Area (which is quite normal).

business owners would provide the needed basis to determine the exact trade area. These research tasks have been proposed for the second phase of this study.

Trade Areas are, of course, not rigid, and change based on developments, transportation, jobs, tourism, etc. What we have defined is reasonable for the recommended retail and office developments on the Subject Site. However, a somewhat smaller or an even larger Trade Area may also be valid for the purposes of this study.

A number of the existing businesses in the WWBIA (e.g., The Bagel Shop, GCTC Theatre and The Table Restaurant) already attract customers from a much larger area than the current WWBIA. As developments continue within, and to some extent outside the defined Trade Area, many of the existing and future businesses in the WWBIA will attract more customers from outside both the WWBIA and the defined Trade Area. This is a fortunate and welcome characteristic of the WWBIA. For this reason, the defined Trade Area is much larger than the combination of Hintonburg and Wellington Village. The various socio-demographic and retail analyses in this report are based on the defined Trade Area. Due to the interest of the WWBIA in the demographics of its own area, we have also included the relevant information for Hintonburg and Wellington Village areas **(we have used census tracks whose areas approximate the areas of each of these two communities since their own boundaries do not coincide with any census track or other areas for which data are available).**

B. Total Population

The total population of the Trade Area was 84,265 in mid-2016, consisting of (Table 3.1):

1. PTA	17,400
2. STAA	27,980
3. STAB	38,885

With its largest portion of the total population, the STAB provides a major submarket for the WWBIA businesses.

C. Estimated Population Growth

The Trade Area has been in the process of gentrification and growth in about the last 10 years. These trends generally continue to increase and become stronger, and can be expected to last 30-40 years before arriving at their stability phase.[2]

A large number of residential and commercial developments have been completed in the last 10 years and are now occupied within and near the Trade Area. **As shown in Table 3.2, there are at least 16 major residential developments, with a total of up to 8,416 units, under construction, pre-selling, planned or proposed, within and near the Trade Area.** When developed and fully occupied, they could add up to a minimum of 14,000 more residents to the Primary and Secondary Trade Area A's total population. Additionally, there will be some net natural growth[3] from the existing population.

Based on these facts and expected continued trends, we estimate the following future total populations (Table 3.1):

1. **Total Trade Area population of 86,600 in 2017 consisting of up to 17,700 in the PTA, 29,300 in the STAA, and 39,600 in the STAB.**
2. Average annual population increase of 3,040 or 3.5% in the Trade Area from 86,600 in 2017 to 117,000 in 2027.
3. Average annual population growth of 1,030 or 5.8% in the PTA, from 17,700 in 2017 to 28,000 in 2027. The PTA's growth rate of 5.8% is the largest within the Trade Area.

D. Mother Tongues

The Primary and Secondary Trade Areas are also becoming more diversified in terms of mother tongues and ethnicity of its residents. In 2011,[4] the distribution of the mother tongues of the **Primary Trade Area** residents was:

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2 Westboro and Glebe are two examples in this regard.

3 The difference between the number of births and mortalities.

4 Mother tongue, population by age groups, and household income distribution data for individual communities within the City of Ottawa are not yet available from the 2016 census.

English	28,895	75.9%
French	3,220	8.5%
All Others	5,950	15.6
• Chinese	675	1.78
• Italian	550	1.45
• Arabic	475	1.25

As of mid-2018, we expect the proportion of those **whose mother tongue is a language other than English or French to be higher than in 2011.**

E. Population by Major Age Groups:

The age distribution of the Trade Area residents in 2011 was as follows:

• Under 19	7,475	18.9%
• 20-39	10,705	27.0%
• 40-59	12,155	30.7%
• 60-74	5,765	14.6%
• 75 & older	3,495	8.8%
Total	**39,595**	**100.0**
Median Age (years)	42.8	–

The under-19-year-olds mostly stay with their parents, the 20-39-year-olds often live in rental apartments, and those in the 40-59-year-old age range are typically in families, or in the process of family formation, tending to buy their housing units. The young seniors (i.e., 60-74-year-olds), as well as older seniors (75 & older) may live in their owned housing, rental housing or retirement homes, depending on age, health, family status, lifestyle preferences, assets and income. The majority of all of the developments listed in Table 3.2 are mid- or high-rise condominium or rental apartment towers. **Therefore, we expect the largest growth in population in the Trade Area to be new residents in the age groups 25-65 in the next 10 years. On a per capita basis, these residents spend more at retail and service businesses, are more likely to work, especially in office-**

based jobs, and thus have higher incomes than the overall average per capita for the entire Trade Area residents.

F. Households by Size

The distribution of households by size in the Trade Area was as follows in 2011:

• Single Person	7,850	41.9%
• Two Persons	5,950	31.8%
• Three Persons	2,215	11.8%
• Four or More Persons	2,710	14.5%
Total	**18,725**	**100.0**

G. Household Size Trends

The Trade Area is within the Inner West part of the City of Ottawa, and is highly urbanized in terms of the comparative density and types of residential and commercial developments. Within just about all urban parts of Ottawa, the overall average household sizes have been on a declining course (this is also the case in most cities in Canada).

The following is a sample of various areas and their overall average household sizes:

Area	**Average Household Size (Persons)**		
	2011	**2016**	**% Change**
Primary & Secondary Trade Areas	2.11	2.09	-0.95
Ottawa Central Area	1.64	1.59	-3.05
Greater Downtown Ottawa	1.89	1.86	-1.59
Kanata-Stittsville	2.91	2.67	-8.25
Barrhaven	3.05	2.70	-11.47
Orleans	2.87	2.59	-9.76
City of Ottawa	2.50	2.36	-5.60
Province of Ontario	2.59	2.60	+0.39

As noted, in all of the above areas, except for the Province of Ontario, the overall average household sizes declined from 2011 to 2016. The largest decline was 11.47% in Barrhaven, from 3.05 to 2.70 persons.

During the next 10 years, we expect further growth in the number and proportions of the single and two-person households, and declines in the larger households in the Trade Area. This trend can actually turn out to be positive for the retail and service industries since income and thus spending of individuals in small households are often higher than the overall average per capita5 in the community.

H. Labour Force

A total of 41,125 of the Trade Area residents worked within or outside this area in 2011 (more recent data are not yet available). Their occupational categories are shown in Table 3.3.

In the National Capital Region, the main engines of the economy are Government, Health & Education, High Technology, and Hospitality. As demonstrated in Table 3.4, almost 6.3 in 10 of the working residents of the Trade Area (62.8%) worked in Ottawa's economic engine industries in 2011, and this percentage is believed to be about the same now as well.

I. Employment in the Trade Area

While 41,125 of the Trade Area residents were working within or outside this area in 2011, the number of employees (i.e., jobs) in the Trade Area was 65,242 in 2011-2012. 6 The industries these employees were working within are shown in Table 3.5. The number of jobs/employees in Ottawa's economic engine industries within the Trade Area is presented in Table 3.6. **As demonstrated, 57.0% or 5.7 in 10 of the jobs in the Trade Area were in the economic engine industries.**

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[5] For example, a family of four with an annual income of $100,000 (i.e., $25,000 per member) typically needs one refrigerator, one set of furniture, and may go to restaurants once a week. A two-person household with an even lower annual income of $80,000 (i.e., $40,000 per member) also needs one refrigerator, one set of furniture, and likely to eat out several times per week. Therefore, an additional population of 1,000 in 500 two-person households, as an example, will be better than the same 1,000 in 250 four-person households, for the retail industry.

[6] The last publicly available employment survey by the City of Ottawa.

A comparison of Tables 3.4 and 3.6 shows that there were many more jobs in the Trade Area than the number of its working residents. If we assume that all 41,125 working residents of the Trade Area worked within this area, we have to conclude that 65,242 less 41,125 or at least 24,117 of the people who worked in the Trade Area lived outside and commuted there every day.

In summary, the Trade Area's population has been experiencing high rates of growth, its future population growth prospects are also quite favourable, the majority of the Trade Area's labour force work in the economic engine industries, and most of the jobs there are also in the same industries. These characteristics, in turn, are excellent for the retail industry in general, and for the recommended retail and office businesses on the Subject Site in particular.

J. Income

Income is, of course, the most important factor regarding retail spending. In Table 3.7, we have presented the Trade Area's household income distribution in 2011 (again, more recent data are not yet available).

It should first be mentioned that Ottawa's household incomes are often among the top three in Canada. In 2011, the median household income in Ottawa was $79,634 and in 2016 it was $85,981.

As noted in Table 3.7, incomes in the Trade Area were not far behind Ottawa's in 2011, and we expect the difference between Ottawa's and the Trade Area's incomes in 2016 have been further reduced. **In any case, 4.6 in 10 of the Trade Area's households, and 5 in 10 of Ottawa's had household incomes of over $80,000, and these percentages are significantly higher now** (Ottawa's had increased from 49.8% in 2011 to 53.7% in 2016).

Another indicator of affluence is home ownership. In the Trade Area 55.9% of all dwelling units were owner-occupied in 2011 (67.3% in Ottawa), and slightly higher now. **The combination of population growth, high-paying jobs, and high incomes in the Trade Area point, in turn, to strong and growing demand for retail products and services.** The challenge for the WWBIA businesses, furthermore, is to increase their market shares from the spending of the entire Trade Area residents and employees.

Table 3.1
Total Population of Trade Area

Year	Primary Trade Area[1]	Secondary Trade Area[2] A	Secondary Trade Area B	Total Trade Area
2016 (actual)	17,400	27,980	38,885	84,265
2017	17,700	29,300	39,600	86,600
2020	19,000	31,000	42,000	92,000
2022	21,500	33,500	43,650	98,650
2027	28,000	40,000	49,000	117,000
Average Annual Change: 2017-2027				
Numeric	1,030	1,070	940	3,040
%	5.8	3.6	2.4	3.5

Notes:

[1] Primary Trade Area: Bound by the **Ottawa River** to the north, **O-Train Trillium Line** to the east, the Queensway to the south, and **Island Park Dr.** to the west.

[2] Secondary Trade Area A: Bound by the Ottawa River to the north, **Bronson Avenue** to the east, the **Queensway** to the south, and **Churchill Avenue** to the west (excluding the PTA).

[3] Secondary Trade Area B: Bound by the **Queensway** to the north, **Bronson Avenue** to the east, **Carling Avenue** to the south, and **Churchill Avenue** to the west (excluding the PTA and the STAA).

Source: Shore-Tanner & Associates based on Statistics Canada's 2016 census, expected new residential developments and net natural population growth.

Table 3.2
Current, Planned and Proposed Residential Developments Within and Close to the WWBIA

Developer	Address	Name	Units	Status
Claridge	505 Preston	Icon	322	U/C[1]
Mizrahi	1451 Wellington W.	Residence on Island Park	93	Pre-selling
Richcraft	255 Bay	The Bowery	211	U/C
Ottawa Community Housing Corporation	Gladstone Village[2]	None Yet	4,400	Proposed
Ashcroft	101 Champagne	None Yet	252	Proposed
Ashcroft	114 Richmond	Q South	120	Proposed
Bridgeport	319 McRae	None Yet	126	Proposed
Brigil	111 Parkdale	None Yet	232	Proposed
Charlesfort	855 Carling	None Yet	260	Proposed
Charlesfort	Gladstone & Lyon	The Pullman	18	Proposed
Claridge	175 Richmond	None Yet	227	Proposed
Claridge	LeBreton Flats	LeBreton III, IV, and V	1,650	Proposed
Lamb	192 Bronson	None Yet	208	Proposed
Richcraft	845 Carling	None Yet	1,120	Proposed
Starwood	500 Preston	SoHo Italia	291	Proposed
Tamarack	93-105 Norman	None Yet	112	Proposed
Tega	233 Armstrong	Attika	230	Proposed
Uniform	335 Roosevelt	None Yet	194	Proposed
Trinity	900 Albert St	Trinity Station	1,400	Proposed
Domicile	989 Somerset St. West	None Yet	127	Proposed
Total (rounded)			**11,600**	

Notes:

[1] U/C: Under Construction

[2] A maximum total of 3,200 in the Gladstone Village, and 1,200 in the Rochester Commons (the final numbers of approved units may be lower).

[3] The above are the known proposed developments and their exact timing is not known.

[4] There are other proposed developments in the conceptual stages, such as Trinity's near the City Centre. The exact unit numbers and timing of them are not yet known.

[5] The BIA and its surrounding areas as a whole have been experiencing gentrification and growth in recent years. With the current LRT line under construction, and its proposed second phase, we expect more development sites, more and faster developments to take place within the BIA and its nearby areas.

[6] The above are not all within, but close enough to increase sales in the defined Trade Area.

[7] There are other residential developments in western parts of Ottawa under construction or proposed. Their residents make up additional market segments of the WWBIA businesses.

Source: Shore-Tanner & Associates.

Table 3.3
Trade Area Labour Force by Occupation: 2011

Occupations	Number	% of Total
Primary Industries[1]	115	0.3
Utilities	135	0.3
Construction	1,745	4.2
Manufacturing	1,325	3.2
Retail Trade	4,837	11.8
Transportation & Warehousing	880	2.1
Information & Culture	1,305	3.2
FIRE[2]	1,965	4.8
Professional & Scientific	4,430	10.8
Administrative & Support	1,595	3.9
Education	3,215	7.8
Health Care & Social Services	4,250	10.3
Arts, Entertainment & Recreation	785	1.9
Accommodation & Food Services	2,775	6.7
Government (all levels)	9,760	23.7
Other	2,000	4.9
Total	**41,125**	**100.0**

Notes:

[1] Agriculture, Fishing, Mining and Forestry

[2] Finance, Insurance and Real Estate

Source: Shore-Tanner & Associates based on Statistics Canada's census data.

Table 3.4 Trade Area Labour Force by Economic Engine Occupation: 2011		
Occupations	**Number**	**% of Total**
A. Economic Engine Category		
Governments (all levels)	9,760	23.7
Health & Education	7,465	18.1
Hospitality	4,865	11.8
High Technology	3,740	9.1
Subtotal A	**25,830**	**62.8**
B. All Other Occupations	**15,295**	**37,191**
Total	**41,125**	**100.0**

In any given area, the residents' occupations to not change much in 5 to 10 years. The percentages in the above as well as in Table 3.3 are therefore, believed to be also valid in 2017, with minor percentage differences.

Source: Shore-Tanner & Associates based on Statistics Canada's census data.

Table 3.5 Employment in the Trade Area: 2012		
Occupations	**Number**	**% of Total**
Primary Industries[1]	23	Neg.
Utilities	178	0.3
Construction	3,327	5.1
Manufacturing	2,305	3.5
Retail Trade	8,138	12.5
Transportation & Warehousing	945	1.4
Information & Culture	1,435	2.2
FIRE[2]	2,674	4.1
Professional & Scientific	5,715	8.8
Administrative & Support	3,968	6.1
Education	5,409	8.3
Health Care & Social Services	7,560	11.6
Arts, Entertainment & Recreation	635	1.0
Accommodation & Food Services	3,332	5.1
Government (all levels)	15,692	24.1
Other	3,906	6.0
Total	**65,242**	**100.0**

Source: Shore-Tanner & Associates based on the City of Ottawa's Employment Survey of 2012 (more recent data are not available).

Table 3.6
Economic Engine Jobs in the Trade Area: 2012

Industries	Jobs	% of Total
A. Economic Engine Category		
Governments (all levels)	15,692	24.1
Health & Education	12,969	19.9
High Technology	5,213	8.0
Hospitality	3,332	5.4
Subtotal A	**37,206**	**57.0**
B. All Other Occupations	**28,036**	**43.0**
Total	**65,242**	**100.0**

In 2011-2012, a minimum of 24,117 of those who worked in the Trade Area (i.e., 65,242 less 41,125) lived outside and commuted there on a daily basis. These 24,117 are a large additional submarket for the local retail and service businesses.

Source: Shore-Tanner & Associates based on the City of Ottawa's Employment Survey of 2012 (more recent data are not available).

Table 3.7
Trade Area Household Income Distribution: 2011

Income Class ($)	Number	% of Total
Under $40,000	8,995	26.7
40,000-59,999	5,130	15.2
60,000-79,999	4,292	12.7
80,000-99,999	3,645	10.8
100,000-124,999	3,370	10.0
125,000-149,999	2,360	7.0
150,000 and over	5,948	17.6
Total	**33,740**	**100.0**
Average ($)	90,719	–
Median ($)	70,726	–
Over $80,000	15,323	45.4
Average Per Capita ($)	36,433	–
City of Ottawa	**2011**	**2016**
Average Household ($)	96,815	N.A.
Average Per Capita	38,726	N.A.
Median Household ($)	79,634	85,981
Over $80,000	175,785 (49.8%)	200,855 (53.7%)

It should also be noted that in the Trade Area, 55.9%, and in the City of Ottawa as a whole, 67.3% of all housing units were owner-occupied in 2011, and likely slightly higher in late 2017.

Source: Shore-Tanner & Associates based on Statistics Canada's census data.

IV. Socio-Demographic Information: WWBIA

In this chapter we have provided the available socio-demographic information for the neighbourhoods within the WWBIA (which is smaller than the Trade Area). The main neighbourhoods/communities in the WWBIA are Hintonburg and Wellington Village.[7] The key findings for these communities are presented in Tables 4.1-4.4, and further described below.

A. Total Population

1. The total population of Hintonburg area increased by 48 persons or 0.53% annually, from 9,041 in 2011 to 9,282 in 2016 (Table 4.1).
2. Population growth was slightly higher in Wellington Village area as it increased by 60 persons or 0.57% annually from 10,695 in 2011 to 10,997 in 2016.
3. **The area, which is somewhat larger than the WWBIA, had a total (rounded) population of 20,300 in 2016.**

B. Mother Tongues

The WWBIA is ethnically diverse. As shown in Table 4.2:

1. English is the mother tongue of 74.5% of the residents.
2. French is the mother tongue of 10.0% of the residents.
3. All other languages are mother tongues of 15.5% of the residents.
4. Hintonburg north of Wellington West St. has the highest percentage of residents (22.1% or 1.0 in 4.5 residents) whose mother tongue is a language other than English or French.
5. The top five mother tongues in the WWBIA after English and French are:

• Chinese	210	or 1.07%
• Arabic	165	or 0.84%

[7] The boundaries of the WWBIA and Statistics Canada's Census tracts do not coincide. The total area of Census tracts 43-46 is larger than the WWBIA area. The overall demographic characteristics, however, are similar in both areas.

- Spanish 115 or 0.59%
- Vietnamese 55 or 0.28%
- Somali 55 or 0.28%

C. Households By Size

1. The overall average household sizes in the WWBIA were between 1.69 and 2.58 persons in 2016 (Table 4.3).
2. By household size, the number of households in the four neighbourhoods combined were:

• Single Person Households	4,565	or 44.3% of the total
• Two Person Households	3,455	or 33.5% of the total
• Four Persons or Larger Households	1,205	or 11.7% of the total
• Three Person Households	1,075	or 10.4% of the total

3. **The single and two-person households combined made up 7.8 in 10 of all households. Furthermore, their number and proportion of the total area expected to increase at much higher rates than households with three or more persons.**

D. Incomes

1. It should first be mentioned that incomes in Ottawa are often among the top three in Canada.

2. In the WWBIA, the household incomes can be grouped into the following three classes (Table 4.4):

• Low Income (under $40,000)	2,625 Households	or 25.5% of the total
• Middle Income ($40,000-$99,999)	3,920 Households	or 38.1% of the total
• High Income ($100,000 & Over)	3,755 Households	or 36.4% of the total

3. Median household incomes are generally a good representation of households' level of affluence. For parts of the Trade Area (whose boundaries approximate those of three census tracks), the 2016 median household incomes were (Table 4.4):

• Wellington West (north of Wellington West St.)	$91,744
• Hintonburg (south of Wellington West St.)	$67,994
• Hintonburg (north of Wellington West St.)	$52,352
• The Above Three Areas Combined	**$73,984**
• City of Ottawa	$85,981

It should be noted that, as the residential projects in Table 3.2 get developed, the Trade Area's population, level of affluence, and a number of other socio-demographic characteristics of the four neighbourhoods will further improve.

Table 4.1 Total Population				
Area	**2011**	**2016**	**Average Annual Change: 2011-2016**	
			No.	**%**
A. WWBIA East	**9,041**	**9,282**	**48**	**0.53**
1. Hintonburg Area: Census Tract 43	4,192	4,432	48	1.13
2. Hintonburg Area: Census Tract 46	4,847	4,850	Negligible	Negligible
B. WWBIA West	**10,695**	**10,997**	**60**	**0.57**
1. Wellington Village: Census Tract 44	2,564	2,547	Negligible	Negligible
2. Wellington Village: Census Tract 45	8,135	8,450	63	0.77
C. Total WWBIA[1]	**19,736**	**20,279**	**109**	**0.55**

[1] The Census Tract areas are somewhat different from the BIA area, and overall larger (the Census Tract and the BIA boundaries do not coincide exactly).

Source: Shore-Tanner & Associates based on Statistics Canada's census data.

Table 4.2 Residents' Mother Tongues: 2016							
Area	**English**		**French**		**Other**		**Top 3 Other**
	No.	**%**	**No.**	**%**	**No.**	**%**	
Hintonburg Area							
• South	3,225	77.4	420	10.0	515	12.4	Chinese (145), Italian (60), German (50)
• North	3,115	66.1	560	11.9	1,040	22.1	Vietnamese (55), Somali (55), Arabic (50)
Wellington Village							
• South	2,115	84.9	175	7.0	205	8.2	Spanish (115), Chinese (65), Arabic (40)
• North	6,110	74.7	805	9.8	1,265	15.4	Arabic (75)
Total[1]	**14,565**	**74.5**	**1,960**	**10.0**	**3,025**	**15.5**	

[1] From a total of 19,550 single responses. Also, north and south are with respect to Wellington West St. in Tables 4.2-4.4

Source: Shore-Tanner & Associates based on Statistics Canada's census data.

Table 4.3 Households By Size: 2016										
Area	**Single Person**		**Two Persons**		**Three Persons**		**Four or More**		**Total**	**Average Size (Persons)**
	No.	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**		
Hintonburg Area										
• South	985	44.5	755	34.1	230	10.4	245	11.1	2,215	1.89
• North	1,575	55.1	890	31.1	250	8.7	145	5.1	2,860	1.69
Wellington Village										
• South	225	22.6	360	36.2	145	14.6	265	26.6	995	2.58
• North	1,780	42.1	1,450	34.3	450	10.6	550	13.0	4,230	1.92
Total[1]	**4,565**	**44.3**	**3,455**	**33.5**	**1,075**	**10.4**	**1,205**	**11.7**	**10,300**	**1.92**

Note: A total of 8,020 or 77.9% of all households (i.e., 7.8 in 10) consisted of only one or two persons in the above neighbourhoods combined in 2016.

Source: Shore-Tanner & Associates based on Statistics Canada's census data.

Table 4.4
Household Income Distribution: 2016

Income Class ($)	Hintonburg Area				Wellington Village				Total	
	South		North		South		North			
	No.	%	No.	%	No.	%	No.	%	No.	%
Under 40,000	600	27.1	1,165	40.7	95	9.5	765	18.1	2,625	25.5
40,000-59,999	365	16.5	455	15.9	100	10.0	495	11.7	1,415	13.7
60,000-79,999	335	15.1	400	14.0	110	11.1	565	13.3	1,410	13.7
80,000-99,999	220	9.9	315	11.0	90	9.0	470	11.1	1,095	10.6
100,000 & over	695	31.4	525	18.3	600	60.3	1,935	45.7	3,755	36.4
Total	**2,215**	**100.0**	**2,860**	**100.0**	**995**	**100.0**	**4,200**	**100.0**	**10,300**	**100.0**
100,000-124,999	230	10.4	195	6.8	135	13.6	460	10.9	1,020	9.9
125,000-149,999	160	7.2	130	4.5	110	11.1	380	9.0	780	7.6
150,000 & over	305	13.8	200	7.0	355	35.7	1,095	25.9	1,955	19.0
Median ($)		67,994		52,352	Not Available			91,744		73,984
Average ($)		83,579		63,374	Not Available			129,089		98,057

Source: Shore-Tanner & Associates based on Statistics Canada's census data.

V. RETAIL MARKET TRENDS

This section presents a number of major trends and changes in shopping habits, patterns, and new retail facilities. While our recommended businesses for the Gladstone Village are mostly for the day to day local and convenience shopping, the knowledge of the retail industry trends provides additional understanding for this ever-changing and highly competitive industry.

A. Retail Stores

A number of new types of shopping facilities, most of which have their origins in the U.S., were introduced into the Canadian market in the late 1990s. The major new shopping facilities in this regard are:

1. **Box Stores:** Costco, Walmart, and The Home Depot fall into this category. These are often referred to as big-box stores, since they are typically larger than 100,000 sq. ft. There are also medium-sized box stores, such as Winner's (clothing), Staples (office products), and Globo shoes, which are typically between 20,000 to 50,000 sq. ft.;
2. **Large Format Stores** such as Canadian Tire and the Great Canadian Super Stores. These are mostly new versions of the same stores, but significantly larger (often between 70,000 to 150,000 sq. ft.), offering a much wider assortment of products and services;
3. **Dollar Stores** which are typically between 1,000 to 5,000 sq. ft., specializing in mostly low-cost imports priced at up to $5.00 per item (e.g., Dollarama, A Buck or Two, The Dollar Store);
4. **Power Centres** are typically between 200,000 to 1,000,000 sq. ft., consist of a variety of box and traditional stores in open malls, with each store having its own pad and parking in front to the extent possible;
5. **Specialty Stores** such as Starbucks (coffee shop), Mountain Equipment Coop (outdoors store), Lululemon (Yoga wear), Sassy Beads (jewellery, craft), and Brio (shoes, clothing, accessories);

6. De-Malling

Another recent trend in the retail industry is the conversion of old and small enclosed shopping malls into open, uncovered shopping centres (referred to as de-malling). Malls which are over 20 years old and up to about 300,000 sq. ft. in size are usually targets for being de-malled. A de-malled shopping centre is less costly to operate since there are no indoor areas to be heated, cooled, cleaned or supervised. As well, the corridors and other public spaces are converted to leasable floor space.

7. Store Enlargements

Another significant trend in the retail industry is the enlargement of existing stores at the same or a new location. Large stores are in a much better position than small and medium-sized stores to offer one-stop-shopping opportunities. Many supermarkets, hardware, furniture, electronics, department, and home improvement stores have in recent years expanded their size in the same or a new location within the National Capital Region. In some other cases, new stores from the same chain are built much larger.

8. Walmart Supercentres

In the early 2000s, the Walmart chain stores finally won the right to offer food products at their stores. Called Supercentres, these new Walmart stores have the equivalent of a 50,000 sq. ft. supermarket within them, including produce, fresh meat, deli, dairy, as well as general merchandise (i.e., canned and boxed food products). The food section is usually on one side of these huge stores, and clothing, furniture, and other non-food products on the other side.

At these stores, the cost of food and other products are generally lower, but more importantly, perceived to be lower due to effective advertising, than at competitive stores.

9. Recent Entries Into the Ottawa Market

In September 2013, several (American) Target stores were opened in Ottawa in previously Zellers stores, and more were planned. Soon after, however, they were all closed down and to this date, some of them are still vacant. An H&M store was opened in Bayshore Shopping Centre in October 2013 and more since then elsewhere in Ottawa.

In February 2012, a Marshall's department store was opened in the Train Yards Shopping Centre, there are four of them now in Ottawa, and more are planned to open. In November 2011, the new and expanded IKEA store at approximately 410,000 sq. ft. was opened in Pinecrest Centre. In early 2011, a Forever 21 store was opened at the Rideau Centre. Since then, it has expanded and attracted a large number of luxury stores such as Michael Kors, Tiffany &Co., and Kate Spade.

A Whole Foods Supermarket and a large number of other retail and restaurants have opened at Lansdowne Park as part of its major redevelopment plan since 2014. Nordstrom, Topman, Simons and a few other American and European stores have also come to Ottawa in the last five years.

In addition to these new facilities, new methods of conducting business have been created. Purchasing through the Internet is one example. Twinning is another example which makes it possible for two businesses to complement each other, while saving on insurance, utilities, taxes, staff, and other costs. Examples in this regard include Chapter's book stores and Starbucks, Walmart and McDonald's restaurants, The Home Depot and Harvey's restaurants. **Online shopping has been growing very rapidly in the last five years, and expected to grow further from its estimated total market share of approximately 6% of total spending in Ottawa.**

B. Reasons For Success of the New Store Types

There are many reasons for the introduction and successful operation of these new stores, as well as the new merchandising formats. Chief among these are:

1. Population growth, affluence, and especially ethnic and economic diversity, create demand for new products, services, and methods of buying and selling.
2. Many retail markets in Canada including in Ottawa are considered to be still offering a limited variety of shopping facilities with primarily average quality products at above average prices. Choices at discount/value, as well as at upscale/high-quality ends of the shopping spectrum in particular, are still limited.
3. Power centres and stand-alone box stores have lower operating costs (e.g., little or no common-area charges compared to enclosed malls), provide ample parking situated very close to their entrances, offer one-stop-shopping opportunities, their

prices are and/or are perceived to be lower than conventional stores, and they are very successful at selling large quantities of products.

4. For a wide variety of economic, demographic, and lifestyle reasons, many people seem to prefer shopping at these large, new-format and specialty stores.

C. Present Shopping Patterns and Habits

Based on knowledge, experience, observations, and **hundreds** of consumer research surveys, we believe that shopping patterns and habits are solidifying, as follows:

1. Power centres, big-box and other discount-oriented shopping facilities are here to stay. Their main advantages are real and/or perceived value, choice, and large quantities. Shoppers tend to go to these stores about once a month, and for the specific and pre-determined purpose of actual shopping (for household and/or office products), rather than browsing, window shopping, socializing or just passing time. Typically, they prepare a list of what they want to buy ahead of time, follow it through, buy and bring home large quantities of products.

   This type of shopping is rather arduous, especially for older people, those who do not have or wish to spend lots of time for shopping, and those who are affluent enough for whom discount/value is not that important. The amount of time, planning, and the energy required are the main reasons why shopping at these facilities is generally infrequent (although there are customers from all socio-economic classes who only or mostly shop at these stores).

2. **Shopping at regional, community shopping centres, and especially in downtown and on other pedestrian-friendly streets such as Bank Street, is often for fashion, specialty products and services, meeting, dining, socializing, entertainment and cultural activities.** There is frequently comparison-shopping, browsing, and cross-shopping at these facilities, especially during holidays and for special occasions (birthdays, anniversaries, etc.). Trips to these facilities do not necessarily always result in purchases due to the entertainment/socializing/dining factors, and also for purposes of comparison shopping. **Thus, the fun and multi-purpose functions of these trips, combined with the far more diverse, attractive, and comfortable atmospheres of these facilities, attract shoppers there more frequently than power centres and big-box stores do.**

3. Shopping at **highway commercial** facilities is also destination oriented and closer in function to shopping at power centres and big-box stores, than to shopping at regional and community shopping centres, or on main streets. Furniture, electronics, appliances, automotive, box stores, restaurants, and other services often dominate highway commercial strips. Shoppers typically go to these establishments for specific products and/or services, based on pre-determined shopping plan. While there may be comparison shopping, there is usually no window-shopping, socializing, browsing, or cross-shopping. Other than for restaurants, banks, gasoline, and other services, shopping at highway commercial stores is infrequent (furniture, electronics, appliances, and major auto repairs are normally needed less than once a year by most households).

4. The retail industry is dynamic and rapidly evolving. Shoppers demand choice, variety, convenience, value, and fun. In a healthy market, there is a balance between the traditional main street retail stores, suburban shopping centres, and the new and emerging retail facilities as described above.

5. **In the competitive environment of today, maintaining market share, and especially increasing it, is a major challenge for all shopping facilities and districts, requiring new thinking and approaches to merchandising and customer relationship. Targeted use of social media, online services, better understanding of the retail market trends, more awareness of competition from shopping centres and districts, and better recognition of the needs, preferences, and desires of the Trade Area residents are among the key elements of new thinking and approaches, which have to be considered for and by the WWBIA businesses.**

VI. EXISTING BUSINESSES

A. Scope of Research

The WWBIA area fronts on a large number of streets. The vast majority of the businesses in this area are located along Wellington West Street. The rest are scattered on other east-west as well as north-south streets.

In the months of April and May, we walked and/or drove through all of the streets within the BIA area, identified the street block locations, names, and types of the businesses, and visually[8] estimated their sizes. By street names and blocks, the results of the field research have been presented in Appendix B.

B. Number of Businesses

In total, there are 533 businesses of all kinds in the WWBIA. The number of the retail and service businesses at street levels in this BIA is 250, with a total size of approximately 484,850 sq. ft. The distribution of these businesses in the two parts of the WWBIA is as follows:

Area	No. of Businesses	Total Area (sq. ft.)
East of Holland Ave.	161	312,650
West of Holland Ave.	89	172,200
Total	250	484,850

Included in Appendix A and above are a number of businesses which are not strictly in the category of retail or services, such as medical and other offices, and a couple of commercial day-cares/kids' amusement establishments. As well, some of the commercial buildings within the WWBIA are small and dated, and it was not clear whether or not they had any tenants on the days of our visits. It is thus possible that a few of such

[8] Other than a few large stores, actual store areas are not available to the public, and are generally protected by landlords. For 12 BIAs, and many other retail districts, we have provided visually estimated sizes, and within up to 10% either way, these estimates have been correct.

businesses may have not been identified. As well, we have identified any and all commercial businesses we could identify, and therefore, it is also possible that some of them may not be members of the BIA. Their identification and inclusion in this study is nevertheless valid since they serve the same markets as the BIA business members.

Some of these 250 businesses attract customers from across the National Capital Region and possibly beyond (e.g., the Bagel Shop). There are also a number of specialty retail and service businesses (e.g., Simply Raw Juice Bar, Mostly Danish). The majority of the rest are neighbourhood and community-oriented businesses for the daily, weekly, and special occasion shopping of the residents and employees in the PTA, STAA, and STAB.

VII. Retail Industry Common Practices and Metrics[9]

The retail industry is dynamic, competitive, and continuously evolving due to changes in consumer behaviour. In this chapter, we have identified a number of industry standards, then described major components of a comprehensive retail market research project and their expected benefits.

A. Vacancy Rates

In a successful and dynamic retail district, including shopping centres, the overall industry average vacancy rate is between 4% and 8%. Less than 4% for a long time generally represents overcrowding, high sales volumes but also lower customer service, potential for theft, and the need for additional labour. It also encourages landlords to increase rental rates, as well as replacing long-term and/or independent tenants with chain stores, too many of which diminish the ambiance of the retail area.

Long-lasting vacancy rates over 8% reduce the attractiveness of the retail area, lower sales volumes to the point of store closures, which make matters worse. Landlords are generally slow to reduce rents, if at all, in this situation. As well, to continue to have some income, they sometimes rent the vacant stores to weak-performing and/or undesirable, or simply the wrong types of businesses.

Too many vacant stores and/or marginal or undesirable businesses, in turn, lower retail store rents, but also lower residential and other property values.

B. Store Mix

1. Retail facilities (main streets, shopping centres, highway commercials, downtowns, etc.) have their own market base and individual characteristics. As a general rule and observation, retail businesses selling physical products should represent at least 60% of the total floor space, and service businesses (beauty salons, dry cleaning,

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[9] These and a number of other such metrics cannot be found in textbooks or other formal documents. Over time, they have become accepted as points of reference in the retail market industry.

restaurants) the balance. This mix has generally proven to be the best in terms of customer attraction.[10]

2. Another important store mix is related to chain versus independent businesses. Chain stores account for the majority of businesses in shopping centres and commercial highways, and independents are dominant in downtowns and other main streets. Shopping centre landlords generally prefer chain stores, but also realize that independent and specialty businesses make their centres far more attractive. It is, however, rare for shopping centres to have more than about 20% of their total floor space occupied by independent businesses. Chain stores are also very important for the success of downtowns and main-street retail. In order to add, rather than to subtract the attractiveness of downtown districts and main-street retail, however, chain stores should be in a minority, and not occupy more than up to 30% of the total floor space. It should, however, be mentioned that in successful main-street and downtown retail districts, it is increasingly becoming more difficult to keep the number of chain stores limited.

3. Another challenge for the retail industry is the big-box versus small stores. Until a few years ago, mid and large box stores (i.e., up to approximately 25,000 sq. ft., and over 50,000 sq. ft. respectively) used to locate in suburban malls, and highway commercial locations. Based on demand and consumer trends, however, many of the box store businesses have been opening box stores in downtowns, or main-street retail areas. The impacts of box stores in downtowns or main-streets can be positive or negative depending on many factors. Since the vast majority of box stores are chain businesses, and since chain businesses can better afford high rents than small/independent businesses, they may displace the small/independent ones. There are, however, situations where the entry of a box store into a main-street or downtown has actually increased sales for all existing businesses by attracting more customers to the area.

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[10] There are, of course, legitimate variations, such as a high-rise office towers whose businesses are mostly service-oriented, especially food service establishments.

C. Ranges of Annual Sales Per Sq. Ft.

Average annual sales per sq. ft. (also called productivity rates) are one of the most important factors in the retail industry. For any specific type of business (e.g., women's clothing), the range of sales per sq. ft. can vary significantly based on location, competition, affluence and life-style of residents, employees, tourists, and brand names. For most businesses, however, the range of sales per sq. ft. is much narrower than for the exceptionally high or poor performing businesses.

Based on actual sales of over 500 businesses, mostly in Ottawa, we estimate[11] the overall average annual sales per sq. ft. presented in Table 7.1.

There have also been numerous occasions when managers of shopping centres, individual and/or chain businesses have publicly disclosed their sales data in retail publications, the Ottawa Citizen, radio or television. The following is a sample of these reported sales:

• Rideau Centre	over $1,000 per sq. ft.
• Bayshore	$800 per sq. ft.
• St. Laurent	$750 per sq. ft.
• Costco	over $1,000 per sq. ft.
• Walmart	over $400 per sq. ft.

D. Description of Comprehensive Retail Market Studies

These studies are carried out for the purposes of maintaining existing businesses, recruiting new or replacement businesses, targeted advertising, and general promotions, by shopping centres, main-street retail, and BIA managements. In certain circumstances, they are also commissioned for an individual existing or proposed chain or box store.

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[11] Barry Nabatian, the author of this report, has carried out studies for 12 BIAs in Ottawa (up to 3 for some of them). In each case, he has interviewed 30 or more business owners, many of whom have disclosed their actual sales to him, on a confidential basis. He has also carried out market studies for many shopping centres, including those in high-rise offices, and obtained actual sales data. At Ontario Municipal Board hearings regarding retail market conflicts, all sides have to provide actual sales data in many cases. Barry Nabatian has participated in more than 25 such hearings, and has had access to many actual business sales data.

The main components of these studies are typically as follows:

1. Identification of Primary, Secondary and sometimes, Tertiary trade areas.
2. Identification of socio-demographic characteristics of the residents, labour force, employment, and tourists in/related to each trade area.
3. Identification of the location, name, type, and size of the existing businesses in the Primary, and sometimes also in the Secondary trade area(s).
4. Telephone interviews with residents of each trade area.
5. Shoppers' intercept surveys.
6. In-person and confidential interviews with business, and property owners in the Primary trade area.
7. Detailed analysis of the findings in 1-6 above.
8. Development of recommendations, including Retail Action Plans.
9. Presentation, discussions, and finalization of task no. 8 above, together with the management, business owners, and property owners in the Primary trade area.
10. Presentation of the results of task no. 9 above to municipalities (often Planning, Economic, and Transportation departments, and/or Councils), the Ontario Municipal Board, or other relevant municipal or provincial authorities.

E. Purposes of the Study Components

The main purpose and final results of each of the D.1-D.10 components above are briefly as follows:

1. The trade area delineation identifies the geographic area from which retail sales are generated. It is determined by a combination of travel times, travel distance, the telephone, and the shopper surveys.
2. The socio-demographic tasks identify the number of residents by age, mother tongue, occupation, income, and other specified characteristics. The number of employees in trade areas who live outside, tourists, and any other significant number of shoppers who do not live there (e.g., students) are also identified.

3. Business identification is a crucial task and is best carried out by actual field research, including observation, measurements, description of store products, atmosphere, and overall impressions.
4. The telephone survey identifies where the trade area residents shop, what they purchase, how much they spend, and what their impressions/opinions are regarding existing businesses in the Primary Trade Area. The results are also used to estimate market shares of the businesses within trade areas.
5. The shoppers' intercept survey provides more specific information regarding what customers buy, their likes and dislikes, where they live, the mode of transportation they use to come to the businesses in the Primary Trade Area, how many businesses they shopped at, whether and what products they could not find, on the day of interview, and other important input.
6. Interviews with business owners provide detailed and confidential information regarding their operations, customers, real and perceived challenges, suggestions for the improvement of their own, and the nearby businesses, actual sales (in some cases), whether they plan to expand their business in-place or elsewhere, what types of promotions, including social media, they use, and other such crucial input. This task provides in-depth understanding of the strengths and weaknesses of the existing businesses, and contributes to the calculation of market shares.
7. The analyses of tasks 1-6 above are extensive and complicated. Their end results include the following:
   a) Market shares by type of business (e.g., furniture, clothing).
   b) Which businesses are too many, weak, unsupportable, etc.
   c) Which existing, and new businesses should be expanded/attracted and why.
   d) What improvements are needed by customers (parking, store hours, security, physical store and/or area improvements, product quality, prices, etc.)
   e) What and where the most competitive businesses are, and why.
   f) What the current trends are in the retail industry, and what can be expected in this regard in the near and mid-term future.
   g) What management, property owners, business owners, and the municipality should do to improve and expand the retail area (shopping centres, main-streets, downtown, etc.).

h) Development of a Retail Action Plan which would identify what actions business owners, property owners, retail managers, and municipalities should undertake to first protect, and second to increase the market shares, prosperity, and longevity of the retail area.

Table 7.1
Most Common Store Sizes and Their Average Annual Sales in Ottawa

Store Type	Approximate Size (sq. ft.)[1]	Sales Per sq. ft. ($)[2]
Supermarket	30,000-60,000	450-700
Specialty Food Stores	3,000-5,000	400-600
Convenience/Corner Stores	1,000-2,500	300-400
Bear, Wine & Liquor	2,000-6,000	600-1,400
Pharmacy[3]	1,500-10,000	1,000-2,000
Women's Clothing	1,500-2,000	300-500
Men's Clothing	1,500-2,000	350-600
Unisex Clothing & Accessories	1,500-2,000	250-400
Jewellery	1,000-2,500	400-700
Shoe Stores	1,000-3,000	300-500
Sporting Goods	2,500-8,000	600-1,000
Books & Flowers	1,000-2,000	250-400
Music	1,500-2,500	250-350
Appliances	3,000-15,000	400-700
Furniture	3,000-15,000	175-300
Furnishings	1,000-3,000	350-450
Hardware	2,000-10,000	400-700
Lumber & Building Supplies	25,000-100,000	150-250
Home Improvement	2,000-5,000	300-500
Electronics	2,000-15,000	500-1,500
General Merchandise	5,000-20,000	200-350
Department Stores	30,000-100,000	225-300
Auto Dealerships	5,000-25,000	1,000-2,500
Used Automobiles	2,000-5,000	800-1,500
Auto Repair Shops	1,500-3,000	350-450
Auto Parts	2,000-4,000	800-1,400
Gasoline Stations	10,000-50,000 land	Total Sales[4]
Gifts & Specialty Stores	1,000-2,500	200-400
Consignment Shops	1,000-2,500	100-200
Pet Stores	1,500-3,000	250-400
Table Service Restaurants	1,500-4,000	350-500
Coffee Shops	1,000-2,000	450-700
Fast Food Chains	1,000-3,000	500-800
Dry Cleaning Stores	300-1,000	175-250
Barbers & Beauty Salons	1,000-3,000	250-400
Other Personal Services	500-4,000	250-350

[1] There is a wide range of sizes for all of the stores in this table; what is presented refers to the majority of stores in the Ottawa area.

[2] Depending on location and many other factors, sales per sq. ft. can be much wider than shown in this table which refers to sales at most of Ottawa stores. Also, the range of the sales per sq. ft. in this table applies to stores of all sizes combined (i.e., $450 as well as $700 may refer to a supermarket as small as 30,000 sq. ft. or smaller, to as large as 60,000 sq. ft. or larger).

[3] Sales per sq. ft. for non-drug products in pharmacies is often between $250 and $350 per year.

[4] Between $2.5 and $4 million per year, without car wash.

Source: Shore-Tanner & Associates

APPENDIX A

List of the Existing Businesses in the BIA: May 2018			
Street and Business Names	**Between**	**Size (sq. ft.)**	**Type**
1. Somerset Street West	**Somerset Street West Bayswater-Breezehill**		
• Dollarama		15,000	General Merchandise
• Lemon Grass		1,500	Restaurant
• Takaki		2,000	Automotive
• Crossfit Bytown		2,000	Fitness
• Vacant		1,500	Vacant
• Hintonburg Dental		1,500	Medical Office
• Grafik Visuals		2,000	Specialty Retail (Signs)
• Ottawa Pole Fitness		2,000	Fitness
• Hintonburger		2,000	Restaurant
• District Realty		5,000	Realty Office
• OICC Cancer Centre		2,500	Medical Office
• Nalfiq		1,300	Office
Somerset Street West	**Somerset Street West Bayswater-Spadina**		
• Iron North Studio		2,000	Fitness
• Direnzo		3,000	Automotive
• Tinseltown (X-mas Gifts)		2,000	Specialty Retail
• Marie Antoinette & Co.		1,500	Furnishings
• Malenka Originals		1,500	Furnishings
• The Gray Whale		1,500	Barber Shop
• June's Gifts		1,200	Specialty Retail
• Ember Salon		2,000	Beauty Salon
• Mattress City Plus		3,000	Furniture
2. Breezehill Street	**Somerset Street West South of Somerset**		
• CompuCorps		3,000	Electronic Repairs
• Divine Dharma Meditation		1,000	Wellness
• Actek Auto		2,500	Automotive
• Ming Auto		5,000	Automotive
• Japan Auto		3,000	Automotive

List of the Existing Businesses in the BIA: May 2018, continued			
Street and Business Names	**Between**	**Size (sq. ft.)**	**Type**
3. Bayswater Avenue	**Bayswater Avenue** **Laurel –Wellington W.** No Businesses		
4. Laurel Street	**Laurel Street** **O-Train-Irving** No Businesses		
5. Gladstone Avenue	**Gladstone Avenue** **Irving-Parkdale**		
• Kit Kat		1,000	Convenience
• B&N Transmission		3,000	Automotive
• Jim Dickens		2,500	Automotive
• Max Auto		3,000	Automotive
6. Melrose Avenue	**Melrose Avenue** **Gladstone-Wellington W.** No Businesses		
7. Sherbrooke Avenue	**Sherbrooke Avenue** **Gladstone-Wellington W.**		
• The Brook		800	Barber Shop
8. Parkdale Avenue	**Parkdale Avenue** **Highway 417-Spencer**		
• Canada Post		5,000	Post Office
• The Carleton		2,500	Restaurant
• Royale One		800	Nails
• Vacant		1,500	Vacant
9. Byron Avenue	**Byron Avenue** **Holland-Island Park** No Businesses		
10. Picadilly Avenue	**Picadilly Avenue** **Island Park-Spencer** No Businesses		
11. Mayfair Avenue	**Mayfair Avenue** **Island Park-Spencer** No Businesses		
12. Western Avenue	**Western Avenue** **Wellington W-Spencer** No Businesses		
13. Scott Street	**Scott Street** **Hamilton-Pinehurst**		
• Pinehurst Auto		1,000	Automotive

List of the Existing Businesses in the BIA: May 2018, continued			
Street and Business Names	**Between**	**Size (sq. ft.)**	**Type**
14. Holland Avenue	**Holland Avenue Spencer-Highway 417**		
• GoldForm		1,000	Jewellery
• Kimberley Optical		1,000	Optical
• Pho Van Van (Vietnamese)		1,500	Restaurant
• Hearing Life		2,000	Hearing Products
• Dash of Sass		1,500	Beauty Salon
• Foundations Chiropractic		1,500	Medical Office
• Bee Hive Studio		1,000	Kids Recreation Services/Care
• Yards Unlimited		1,000	Landscaping Office
• Foolish Chicken		2,000	Restaurant
• Istanbuouli Shawarma		1,000	Restaurant
• The Bowl		1,000	Restaurant
• The Soca (Spanish)		1,500	Restaurant
• Allium		2,000	Restaurant
• Vacant		1,500	Vacant
• Anna Thai Cuisine		1,500	Restaurant
• Wave hair Salon		1,300	Beauty Salon
• Procare		1,500	Childcare
• Canvas		1,800	Restaurant
• The Car Clinic		2,000	Automotive
15. Wellington Avenue West	**Wellington Avenue West Bayswater-Garland**		
• Autobebox		2,000	Automotive
• Auto Strada		1,500	Automotive
• Vacant (formerly Suzy Q)		1,500	Vacant
Wellington Avenue West	**Wellington Avenue West Garland-Irving**		
• Makerhouse Co.		2,000	Furnishing
• Vacant (formerly Smoke Signalz)		1,200	Vacant
• LCBO		4,000	Liquor
• Mattress City Plus		4,000	Furniture
• Le Style		1,200	Tailor
• #1 Chinese		1,200	Restaurant
• Simply Raw		1,000	Juice Bar

List of the Existing Businesses in the BIA: May 2018, continued

Street and Business Names	Between	Size (sq. ft.)	Type
Wellington Avenue West	**Wellington Ave W Irving-Fairmont**		
• Little Mac's		700	Take-Out Restaurant
• Le Moulin La Fayette		2,000	Café (coming soon)
• Emerson Auto Centre		0 (just land)	Automotive
• Trove		1,400	Women's Clothing (Consignment)
• Mostly Danish		5,000	Furniture
• The Hintonburg Hair House		1,500	Beauty Salon
• Launder Majestic		2,000	Laundromat
• Wellington Eater		2,000	Restaurant
• The Hair Salon		1,500	Beauty Salon
• 10 Fourteen		2,500	Restaurant Bar
• Fabrications		2,000	Notions & Fabric
• The Hintonburg Public House		2,000	Restaurant Bar
• Bridgehead		2,000	Coffee Shop
• Forbes Beauty Co.		1,500	Beauty Salon
• Circle K		1,500	Convenience
• QPIXXX		2,000	Adult Store
• The Third		1,800	Restaurant
• Café My House		1,600	Coffee Shop
• Ministry of Coffee		1,800	Coffee Shop
• Tacolot		300	Take-Out Restaurant
Wellington Avenue West	**Wellington Ave W Fairmont-Merton**		
• Hintonburg Market		1,200	Grocery
• Vacant		5,000	Vacant
Wellington Avenue West	**Wellington Ave W Merton-Melrose & Pinhey**		
• Pharmasave		2,500	Pharmacy
• Subway		1,700	Fast Food
• Bread By Us		1,500	Coffee Shop
• Feline Café		1,500	Coffee Shop
• Mint Hair Studio		1,000	Beauty Salon
• The Flava Factory		1,200	Specialty Shoes
• Wabi Sabi		2,000	Notions & Fabric
• The Mobile Lawyer		600	Office
• La Bonita		2,000	Restaurant
• Morris Men's Wear		2,000	Men's Clothing
• Takahashi Do Jo		3,000	Martial Arts
• Healing House		1,500	Nutrition & Acupuncture

List of the Existing Businesses in the BIA: May 2018, continued			
Street and Business Names	**Between**	**Size (sq. ft.)**	**Type**
Wellington Avenue West	**Wellington Ave W Pinhey-Sherbrooke**		
• GT Express (Giant Tiger)		5,000	General Merchandise
• Bar Laurel		1,500	Restaurant
• Springroll House (Vietnamese)		2,000	Restaurant
• Audio Video Centre		1,500	CDs, Films, DVDs
• Elmdale Tavern		2,000	Restaurant Bar
Wellington Avenue West	**Wellington Ave W Sherbrooke-Stirling**		
• The Record Centre		2,000	Music Store
• Aljazeera		2,000	Grocery
• Carabon Food & Drink		2,500	Restaurant Bar
• Wellington Seafood		800	Specialty Food
• Amanecer Fashions		1,500	Women's Clothing
• Uproar Interiors		1,500	Furniture
• Wellington Barber		1,000	Barber Shop
• Wellington Cleaners		2,500	Cleaning and Postal Services
Wellington Avenue West	**Wellington Ave W Stirling-Rosemount/ Carruthers**		
• National Access Cannabis		1,000	Weed Store
• Fab Baby Gear		1,600	Children's Clothing
• Tallow		1,500	Women's Clothing
• Oresta Apothecary		1,500	Pharmacy
• Guru's		800	Restaurant
• Motion By Design		1,300	Fitness
• The Baby Shoppe		1,300	Nursing Mothers' Store
• Blue Panda Realty		1,200	Office
• Bambuu		800	Gifts
• Vacant		2,000	Vacant
NU Grocery		2,000	Grocery
• Stella Luna		2,000	Coffee Shop, Ice Cream
The above 5 stores are in a new residential tower			

List of the Existing Businesses in the BIA: May 2018, continued			
Street and Business Names	**Between**	**Size (sq. ft.)**	**Type**
Wellington Avenue West	**Wellington Ave W Carruthers-Parkdale**		
• RBC		4,000	Bank
• Mino Market		1,500	Convenience
• Vacant		1,000	Vacant
• First Choice Lock Smith		1,500	Locks & Repair Services
• Designtrend Interiors		1,200	Office
• Envolta Tax Services		800	Office
• J. R. Perry Electronics		800	Electronics
• Maple Care Physio		1,500	Medical Office
• Kickboxing		3,000	Martial Arts
• Ly Denture		1,200	Medical
Wellington Avenue West	**Wellington Ave W Parkdale-Hamilton**		
• Rexall		3,000	Pharmacy
• World of Maps		2,500	Maps & Travel Guides
• Petro Canada		50	Gas Station
• Euphoria		1,500	Beauty Salon
Wellington Avenue West	**Wellington Ave W Hamilton-Hinton**		
• Bourke's Ignition		3,000	Automotive
• Pizza Pizza		1,500	Fast Food
• Free Form Fitness		2,500	Fitness
• Vacant		1,500	Vacant
• Vacant		1,500	Vacant
• The Cake Shop		1,500	Specialty Food
• The Pho Shack (Vietnamese)		1,200	Restaurant
• Global Pet Foods		1,500	Pet Supplies
• West Park Bowling		3,000	Bowling
• Fil's		1,500	Restaurant Bar
• Daniel O'Connell's Irish Pub		2,000	Pub/Bar
• Anthony's Pizza		2,000	Restaurant
• Absinthe		2,500	Restaurant
• Desjardins		2,500	Bank

List of the Existing Businesses in the BIA: May 2018, continued			
Street and Business Names	**Between**	**Size (sq. ft.)**	**Type**
Wellington Avenue West	**Wellington Ave W Hinton-Holland**		
• Royal Oak		2,500	Restaurant Bar
• Pet Valu		2,000	Pet Supplies
• Money Market		1,200	Financial
• Wellington Drugs		1,200	Pharmacy
• Wellington Medical Clinic		1,200	Medical Office
• GCTC		7,000	Theatre
• Home Hardware		4,000	Hardware
• Lotus Born Wellness Centre		1,500	Wellness Services
• The Table (Vegetarian)		2,500	Restaurant
Total Number of Businesses (Wellington from Bayswater to Holland, Northern and Southern Boundaries of the WWBIA)	**161**	**312,650**	
Wellington Avenue West	**Wellington Ave W Holland-Huron**		
• TD		3,000	Bank
• Vacant		2,000	Vacant
• Hair Fellas		1,300	Barber Shop
• The Wood on Wellington		1,500	Restaurant
• BM)		2,000	Bank
• Barlu Puls		2,000	Restaurant
• Hintonburg Potter		2,000	Pottery
• Fab Baby Gear		4,000	Kids Furniture
• Dioguardi's Law		1,500	Law Office
• Wild Willy Flowers		1,500	Flowers
• Kindred Shop		1,500	Women's Clothing
Wellington Avenue West	**Wellington Ave W Huron-Harmer**		
• Thyme & Again		2,500	Restaurant
• Cell Doctor		800	Phone Repair
• Rama Convenience		1,200	Convenience
• On Edge Studio		1,500	Beauty Salon
• Siam Bistro (Thai)		1,500	Restaurant
• Colore Nails		1,500	Beauty Salon
• The Dry Cleaning Co.		1,500	Dry Cleaning
• Max's		1,500	Shoes
• CompAcc Tax Services		1,200	Financial Office
• Clothes By Muriel Dombret		2,000	Women's Clothing

List of the Existing Businesses in the BIA: May 2018, continued			
Street and Business Names	**Between**	**Size (sq. ft.)**	**Type**
Wellington Avenue West	**Wellington Ave W Harmer-Caroline**		
• Flock Boutique		1,800	Gifts (Hand Made)
• St. Vincent de Paul		4,000	General Merchandise
Wellington Avenue West	**Wellington Ave W Caroline-Julian**		
• The Therapies		2,500	Medical Office
• Bridgehead		2,000	Coffee Shop
• Wheelhouse		1,000	Fitness
• Studio Me		1,200	Beauty Salon
• Revelle Bridal		1,200	Women's Clothing
• Allegro		1,200	Women's Clothing
• Emulsify		900	Specialty Food
• JV Studio		1,500	Beauty Salon
• Victoire Boutique		2,000	Women's Clothing
• Twiss & Weber		2,000	Women's Clothing
• Bloomfield Flowers		2,000	Flowers
• Hair Committee		1,500	Beauty Salon
Wellington Avenue West	**Wellington Ave W Julian-Warren**		
• Cube Gallery		2,000	Gallery
• Fresh Air Experience		2,000	Sporting Goods
• Petit Bill's Bistro		2,000	Restaurant
• Second Glance		1,600	General Merchandise
• Kulu		1,200	Jewellery
• Blueprint Home		3,000	Furniture
• Sandy's Soft Serve		800	Ice Cream
• Little Jo Berry's		1,000	Coffee Shop
• Won Ton House (Chinese)		2,500	Restaurant
• Smokavana		1,000	Smoke/Vape Shop
• Legends Barber		500	Barber Shop
• Sushi Umi (Japanese)		500	Restaurant
• Hillary Cleaners		2,500	Cleaner

List of the Existing Businesses in the BIA: May 2018, continued			
Street and Business Names	**Between**	**Size (sq. ft.)**	**Type**
Wellington Avenue West	**Wellington Ave W Warren-Clarendon**		
• Terra 20		2,500	Gifts (health & beauty)
• Watson's Pharmacy		1,200	Pharmacy
• Ottawa Bagel Shop		3,000	Specialty Foods
• Strawberry Blonde Bakery		1,500	Bakery
• Herb & Spice		2,500	Specialty Foods
• Parma Ravioli		3,000	Specialty Foods
• Macarons		1,000	Pastry Shop
• The Wellington Gastropub		1,500	Restaurant
Wellington Avenue West	**Wellington Ave W Clarendon-Ross**		
• Orbis Consulting		1,500	Office
• Massage Addict		1,500	Health Services
• Agave Grill		1,500	Restaurant
• Saslove's Meat Market		1,500	Specialty Foods
• Supply & Demand		1,500	Restaurant
• Arc of Life		1,500	Office
• Wine Rack		2,000	Liquor Store
• Viens Avec Moi		1,200	Women's Clothing
Wellington Avenue West	**Wellington Ave W Ross-Hampton**		
• Wellington Dental Care		2,000	Medical Office
• Capital City Luggage		2,500	Luggage, Travel Products
• Cruise Ship Centre		1,200	Travel Agency
• Lauzon Music		3,500	Musical Instruments
Wellington Avenue West	**Wellington Ave W Hampton-Gilchrist**		
• Ed's Auto		2,000	Automotive
Wellington Avenue West	**Wellington Ave W Gilchrist-Granville**		
• Nicastro Food Shop		2,200	Specialty Foods
• John's		2,000	Restaurant
Wellington Avenue West	**Wellington Ave W Granville-Western**		
•Valamode		1,300	Vintage Clothing
• Red Salon		1,300	Beauty Salon
• D & J Auto		50	Automotive
• Caffe Mio (Italian)		1,500	Restaurant
• Stofa		2,000	Restaurant

List of the Existing Businesses in the BIA: May 2018, continued			
Street and Business Names	**Between**	**Size (sq. ft.)**	**Type**
Wellington Avenue West	**Wellington Ave W Western-Carleton**		
• Duss Brothers BMW		2,000	Automotive
• The Wellington Diner		2,000	Restaurant
• Island Park Dental		2,000	Medical Office
• Metro		8,000	Supermarket
• Barre Fitness		3,000	Fitness
• Renu Massage & Spa		3,000	Beauty Salon
(Barre and Renu are in a new residential tower).		1,200	Pharmacy
Wellington Avenue West	**Wellington Ave W Carleton-Island Park**		
• Chesterfield's Gastro		1,000	Restaurant
• Engel & Volker		2,000	Real Estate Office
• AMH Style & Mocktail		4,000	Clothing (Consignment)
• Rowat Insurance		1,500	Office
• Esso Station		50	Gas Station
• Bella's Italian Restaurant		1,500	Restaurant
Total Number of Businesses (Wellington West from Holland to Island Park, Northern and Southern Boundaries of WWBIA)	**89**	**172,200**	
Grand Total BIA	**250**	**484,850**	

Source: Shore-Tanner & Associates based on field research and visual estimations.

COMPANY PROFILE: MARKET RESEARCH DIVISION

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Our principals and most of staff have each been working in the National Capital Region for over 30 years. We have provided consulting services to the municipalities in the capital area, most local developers, many independent businesses, developers in other Ontario and Quebec municipalities, the Federal Government, as well as interprovincial and national organizations, such as **Metro Richelieu**, **Canadian Wood Council, Canada Lands Company, and Canada Border Services Agency**.

SERVICES PROVIDED BY OUR MARKET RESEARCH DIVISION

Public Consultations
Focus Group Research
Executive Interviews
Consumer Surveys
Mystery Shopping
OMB Services

Sales Forecasting
Financial Analysis
Feasibility Analysis
Economic Studies
Strategic Studies
Business Plan Development

SAMPLE OF PRIVATE SECTOR CLIENTS

Business Community
Ottawa Congress Centre (now Shaw)
Metro Richelieu (Montreal)
Panera Bread (U.S.A.)

High Technology Companies
Corel Corporation
JDS Uniphase
Cognos (now IBM)

Developers
GreatWise (Toronto)
DCR Phoenix Homes
Junic Homes (Gatineau)

Retail Sector
Rideau Centre
Glebe BIA
Sparks Street BIA

Legal Firms
Gowlings
Soloway-Wright
GIBSONS LLP

Professional Groups
FoTenn Planning
SamCon Inc. (Montreal)
Colliza Architects

SAMPLE OF PUBLIC SECTOR CLIENTS

Municipalities of Ottawa, Clarence-Rockland, Carleton Place, Arnprior, Gananoque, and Brockville; Infrastructure ON, Salvation Army, University of Ottawa, Carleton University.NCC.

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Specialty Overview

Barry Nabatian specializes in consulting regarding demand, feasibility, impact, and financial viability studies; retail, economic, tourism, amusement markets, and business plan developments; consumer research, lifestyle trends and impact of social change on residential, commercial and industrial markets. He is an urban economist and a financial advisor with over 40 years of experience serving a wide variety of private, public and non-profit organizations in Ontario, Quebec, and elsewhere in Canada. He has appeared before the Ontario Municipal Board (OMB), and Assessment Review Board as an expert witness dozens of times regarding various real estate, Official Plans, property taxes and assessment matters. He is frequently interviewed by various media on real estate developments, economics and social trends.