



THE CORPORATION OF
THE CITY OF ST. THOMAS

Retail Market Study

DILLON CONSULTING

and W. Scott Morgan & Associates

Final Report, 2016

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Executive Summary

Introduction

Dillon Consulting Limited (Dillon) and W. Scott Morgan & Associates Limited have been retained by the City of St. Thomas to conduct an updated retail market study. Retail/commercial provides the necessary services and amenities that support the community. A retail market study is an important tool used by municipalities to strategically plan retail commercial lands while managing supply and demand to ensure residents and visitors to the city have access to a range of goods and services.

The St. Thomas retail market continues to evolve, as some sectors continue to achieve success, while others are faced with significant challenges. Keeping a close eye on St. Thomas' retail market supply and demand is prudent to inform policy, support decision making and guide investment. Dillon and Scott Morgan undertook retail market studies for St. Thomas in 2000 and 2007. This study updates the previous analysis based on the City's population and employment projections to 2031 and seeks to analyse the ability of the City's commercial policy framework to support the health of its retail market, while identifying the evolving retail market trends that may affect St. Thomas. The study undertook an analysis of the market inventory, growth projections, estimated expenditure and land demand to determine the findings and recommendations regarding the City of St. Thomas' commercial structure and policies, as outlined in the City's Official Plan.

Findings

For the St. Thomas retail market supply, the following observations were made:

- St. Thomas has a total of 2.46 million square feet of retail commercial space. Since the 2007 study, this is a 15% increase overall and a growth in services and supermarkets, but a decline in a number of categories (largely due to vacancies in Elgin Mall).
- These updated projections have been negatively affected by an aging population, decreases in household size, declines in per capita household incomes, closure of the Zellers department store space in Elgin Mall, and increased competition from London and elsewhere, particularly in the apparel and accessories, home furnishings, and most non-department store non-food store retail (NFSR) categories where gaps still exist in the provision of such space in St. Thomas.
- These factors have combined to yield an almost three-fold increase in the vacancy rate over the period 2000 to 2015 (i.e. from 114,000 ft² to 313,000 ft², which is 12.7% of the total supply).
- St. Thomas' remaining anchor stores (after the loss of Sears and Zellers at Elgin Mall) include Wal-Mart, Canadian Tire, TSC Store, Home Hardware/Building Center, Rona, the Real Canadian Super Store, other supermarkets, three Shoppers Drug Marts, and the Galaxy Theatre. The interaction of these anchor stores has established a new retail commercial equilibrium whereby the market is neither under-stored nor over-stored in the 2015 base year.

For the St. Thomas retail market demand, the following observations were made:

- The retail market demand analysis considered a number of market trends, including the changing retail formats, blurring of retail types, consolidation of retail brands and impacts of e-commerce on the retail landscape.
- Based on the combined residual demands by 2031, plus additional warranted space for local office space, financial institutional space, and personal and other services space by 2031, a theoretical land requirement of between 19 acres (rounded) and 23 acres (rounded) is generated at 30% and 25% respectively based on a combined demand for 250,000 square feet by 2031.
- Given that these calculations do not account for uptake of existing vacant supply (313,000 ft^2), and unbuilt and partially built-out designated land, it will be important to consider these factors as well as the possibility of store relocations, infilling, intensification, redevelopment of existing sites, industrial conversions, and municipal economic incentives in any discussion of new anchor stores or new commercial land-use designations.

Recommendations

The following strategy is recommended for the City of St. Thomas based on the outcome of the retail market analysis:

1. Build on the City's existing commercial structure
2. Update retail commercial trends and other contextual information in the OP policies
3. Focus retail investment in the downtown core commercial district
4. Encourage revitalization of the Elgin Mall
5. Leverage the City's existing assets
6. Improve pedestrian connections in the downtown and to key destinations

Policy directions and opportunities for improvement have been organized around the City's existing commercial policy structure. Staff will be preparing an official plan amendment to implement these policy directions as part of the next steps of this assignment.

<u>Node 1: Office/Professional</u>

- **Additional land use permissions**: Lands designated Office/Professional are intended to be predominantly for office use. The current policy permissions include medium and high density residential uses with some site specific restrictions and a site specific retail commercial permission for lands on the north side of Curtis Street. Additional permissions for personal care and other service commercial uses where ancillary to the primary office use would support the intent of this designation, while providing for additional amenities. These ancillary uses should be limited to 15-20% of the gross floor area of the primary use.

<u>Node 2: Talbot West</u>

- **Encourage residential development and intensification**: In order to bring additional people into the downtown, residential development should be encouraged within the Talbot West area. In addition to the medium and high density residential uses permitted along Talbot Street, to support a range of built form and accommodation

options, the City might consider permitting lower density options such as townhouse residential development on properties fronting Curtis and Centre Street.

- **Discourage auto-oriented uses**: The Talbot West area currently has a number of auto-oriented uses which impact the pedestrian realm, walkability and profile of this area. These sites should be encouraged to redevelop for residential intensification and tourism development. To support this through policy, the Official Plan could make specific reference to these uses being discouraged.
- **Incentives and urban design guidelines:** In addition to the policy changes to encourage residential development and intensification while discouraging auto-oriented uses, the City should review the Community Improvement Plan (CIP) incentive programs and design guidelines for the Talbot West area. A review of the CIP incentive programs and design guidelines should include stakeholder engagement to confirm the unique needs of the land developers to establish a variety of tools that suit the local redevelopment needs.

Node 3: Talbot Central

- **Leverage municipal government assets**: There are a number of municipal government assets within the Talbot Central area including the municipal offices, library, and police station. These provide an opportunity for the City to implement improvements that will have an overall positive impact to the district. The City should define the municipal government block in policy and seek opportunities to introduce community facilities and public realm and streetscape improvements to support this community node. One opportunity is on the police station site, as this use is being relocated to the Caso Crossings former railway lands. This provides an opportunity to redevelop the site for community use including active and passive recreational uses.
- **Continue to restrict first floor to retail**: In order to support a vibrant downtown core and activate the street, the Official Plan and zoning for Talbot Central requires that commercial and/or office use must be provided on the ground floor level of new or existing buildings adjacent to Talbot Street. This requirement should be maintained.
- **Incentives and urban design guidelines:** In addition to the policy and regulation changes identified above, the City should review its Community Improvement Plan (CIP) incentive programs and design guidelines for the Talbot Central area to encourage private space improvements. A review of the incentive programs and design guidelines should include stakeholder engagement to confirm the unique needs of the land developers to establish a variety of tools that suit the local redevelopment needs.
- **Permit retail serving industrial uses**: One trend in industrial and retail businesses is the development of business-to-business industrial establishing a new retail function. Some examples of this are craft breweries and wholesale bakeries, which function as a light industrial operation with a significant retail function. These uses require specific planning considerations due to their unique needs. Generally, these uses may be most appropriate in Talbot East, however the City of St. Thomas could also consider specific permissions for these uses within the Talbot Central designation, where the use would have an active street-oriented retail use that would help enliven the right of way and frontage along Talbot Street.

Node 4: Talbot East

- **Improve easterly gateway function to the downtown:** Talbot East functions as the easterly gateway to the downtown. Through streetscaping, signage and pedestrian realm improvements this gateway could be improved. The Official Plan should outline policies to improve its function as a gateway.
- **Maintain its focus on auto-oriented, space-extensive uses while they continue to be in demand**: The Official Plan policies recognize the need for auto-oriented, space extensive uses within the City of St. Thomas, and have guided this retail development to the Talbot East area. While there continues to be a demand for these uses, providing clear direction for the location of uses is beneficial to support the commercial structure.
- **Leverage improved connectivity of Caso Crossings developments and Talbot Street:** The City has completed a new road extension that connects Talbot Street with Wellington Street to provide access to the new Police Services facility (Caso Crossings). This provides better access and connectivity from to the Timken Centre and between the downtown and Wellington Street for pedestrians, transit users and vehicles. This connection should be identified within the Official Plan and appropriate policies be established to improve active transportation connections through this area. The Secondary Commercial policies for the adjacent commercial lands should also be reviewed to recognize the improved access and viability of these lands to accommodate commercial development.
- **Permit retail serving industrial uses**: The City of St. Thomas should consider specific permissions for business-to-business industrial uses within the Talbot East designation, where land extensive and high traffic uses are currently permitted.

Node 5: Secondary Commercial

- **Proactively attract hotel/motel use:** The City of St. Thomas is limited in short term accommodation options. Short term accommodations provide opportunities for direct and indirect economic benefits to the community including increased retail expenditures from visitors. The Secondary Commercial designation permits hotel/motel uses and the policies should specifically recognize this gap in the existing services.
- **Permit retail serving industrial uses**: In addition to the Talbot East designation, the City of St. Thomas should consider specific permissions for business-to-business industrial uses with significant retail functions within the Secondary Commercial designation.

Node 6: Minor Commercial

- **Maintain existing locations and support new uses where planned as part of a block plan of subdivision**: The existing minor commercial lands provide neighbourhood level services that support the day-to-day service needs of the surrounding community. Retail trends to larger scale and clustered retail have resulted in challenges in accommodating these small scale establishments. New minor commercial uses should only be designated as part of a large block plan of subdivision for new areas of development to serve their neighbouring local population. These uses should only be

permitted where they do not impact the larger retail market, and the City should consider maximum GFA's and control these uses through the City's zoning by-law.

Node 7: Highway Commercial

- **Recognize servicing status and limitations**: Lands within the Highway Commercial designation have development limitations due to lack of municipal servicing. The policy should be updated to reflect these limitations to development.

Node 8: Industrial

- **Maintain employment focus**: Lands within the Industrial designation are intended to provide for employment opportunities and industrial growth and should maintain for this function. Non-employment uses should be restricted or limited to ensure land use compatibility issues are managed.
- **Transitional uses**: Where lands are along the periphery of an employment area, transitional uses may be appropriate such as light industrial and commercial uses to act as a buffer between industrial and residential uses. The policies should consider transitional uses within these locations.
- **Limit retail and commercial uses to supportive uses**: The Official Plan policies for lands designated Industrial permit retail and wholesale businesses, provided the businesses do not conflict with the long term use of the surrounding land for industrial purposes or the commercial facilities in the Downtown or Major Commercial areas. Recent trends in employment land planning continue to reinforce the need for supportive retail uses in industrial areas to provide services for employees. These retail and commercial uses should be limited to those ancillary to and serving the employment with a maximum gross floor area (GFA) of 15% of the total GFA. The limitation should not permit stand alone retail uses.

Node 9: Major Commercial

- **Proactively consult with landowner to define a long term vision for the Elgin Mall**: The City should proactively work with the landowner of the Elgin Mall to identify a preferred long term vision to revitalize the site. The revitalization of the site should maintain a retail and service commercial function to support surrounding residential community, while considering mixed use redevelopment opportunities.

Node 10: Power Centre

Based on the retail market analysis and as this area is built-out, there are no policy refinements that have been identified at this time. The St. Thomas Official Plan policies should be used to guide any redevelopment or expansions within the Power Centre designation.

Table of Contents

1.0 Introduction 1

1.1 Purpose 2
1.2 Approach 3
1.3 Locational Context 4
1.4 Structure of Report 4

2.0 Policy Context 5

2.1 Provincial 5
2.1.1 Provincial Policy Statement, 2014 5
2.2 City of St Thomas 5
2.2.1 Official Plan 5
2.2.2 Policy Recommendations from Past Retail Studies 6

3.0 Market Characteristics 9

3.1 Trade Area 9
3.2 Population 9
3.3 Household Income and Expenditures 13
3.4 Demographics and Retail Market Trends 13

4.0 Existing Retail Supply 16

4.1 St. Thomas Retail Nodes 16
4.2 2015 Floorspace Inventory 18
4.2.1 Food-Store Retail 21
4.2.2 Non-food-store Retail 22
4.2.3 Home Improvement & Liquor/Beer/Wine 22
4.2.4 Services 22

5.0 Projected Retail Demand 23

5.1 Trade Area Expenditure Potential 23
5.1.1 Linear Regression Model 23
5.1.2 Non-food Store Retail 23
5.1.3 Home Improvement 24
5.1.4 Food Store Retail 24
5.1.5 Liquor/Beer/Wine 25
5.1.6 Restaurant 25
5.2 Market Demand and Residual Space 26
5.2.1 Non-food Store Retail 26

5.2.1.1 Department Store (NFSR) 26
5.2.1.2 Non-food Store Retail (excluding department stores) 28
5.2.1.3 HAAS/TBA (e.g. Canadian Tire) 31
5.2.2 Home Improvement 32
5.2.3 Food Store Retail 33
5.2.3.1 Supermarket/Grocery Store (FSR) 33
5.2.3.2 Specialty Food 36
5.2.4 Restaurant 37
5.2.5 Liquor/ Beer/ Wine 38
5.2.6 Services 39

6.0 Conclusions and Recommendations 41

6.1 Retail Market Study Residual Demand and Conclusions 41
6.1.1 Accounting for e-commerce 41
6.1.2 Residual Demand 42
6.1.3 Conclusions 45

List of Figures

2-1 Land Use Designations
3-1 Primary and Secondary Trade Areas
4-1 St. Thomas' Existing Retail Nodes

List of Tables

3-1 St. Thomas Trade Area Population Projections (Unadjusted)
3-2 St. Thomas Trade Area Population Projections (Adjusted)
4-1 2015 Floorspace Inventory
4-2 2000-2-15 Floorspace Inventory
4-3 2015 Vacancy Rates by Node
5-1 St. Thomas Trade Area "NFSR" (GAFO/DRUG) Expenditure Potential
5-2 St. Thomas Trade Area "HI" (Home Improvement) Expenditure Potential
5-3 St. Thomas Trade Area "FSR" (Food Store Retail) Expenditure Potential
5-4 St. Thomas Trade Area Liquor/Beer/Wine Expenditure Potential
5-5 St. Thomas Trade Area Restaurant Expenditure Potential
5-6 St. Thomas Trade Area Department Store NFSR (GAFO/DRUG) Demands & Residual Space

5-7 St. Thomas Trade Area Non-Department Store NFSR (GAFO/DRUG) Demands & Residual Space

5-8 St. Thomas Trade Area NFSR (GAFO/DRUG) Combined Impacts

5-9 St. Thomas Trade Area HAAS/TBA (including Canadian Tire) Residual Demands

5-10 St. Thomas Trade Area Home Improvement Demands & Residual Space

5-11 St. Thomas Trade Area Supermarket Demands & Residual Space

5-12 St. Thomas Trade Area Supermarket/Grocery Store Directional Impacts

5-13 St. Thomas Trade Area Specialty Food Demands & Residual Space

5-14 St. Thomas Trade Area Restaurant Demands & Residual Space

5-15 St. Thomas Trade Area Liquor/Beer/Wine Demands & Residual Space

5-16 St. Thomas Trade Area per Capita Space Ratios and Warranted Space Based on Cumulative Population Growth

5-17 Total Retail & Selected Commercial Residual Demands & "Other Warranted Space"

6-1 Estimated Impact of E-Commerce by Retail Category, 2015-2031

6-2 St. Thomas Trade Area Summary Demands & Residual Space

6-3 Comparison of Square Footage Demands and Potential Supply

Appendices

A1 Income/ Expenditure Indexing Methodology (Regression Analysis)

A2 2014 Estimates of Ontario Retail Sales by Trade Group

A3 St. Thomas Trade Area – Income and Expenditure Indexes

A4 Trade Area FSR, GAFO+DRUG, HI, HAAS/TBA and L/B/W Expenditure Levels

A5 Population and Inventory Longitudinal Comparisons

B1 St. Thomas Retail and Service Floorspace 2015 Inventory

C1 Draft St. Thomas Official Plan Commercial Policies Amendment

Acronyms

FSR:	Food Store Retail (formerly FCTM or Food & Convenience Type Merchandise)
NFSR:	Non-Food Store Retail (formerly DSTM or Department Store Type Merchandise)
GAFO:	General Merchandise / Apparel / Furnishings / Other Retail
HAAS:	Home and Auto Supply
TBA:	Tires, Batteries & Accessories
HI:	Home Improvement (formerly HIRM or Home Improvement Related Merchandise)
GLA:	Gross Leasable Area
CBD:	Central Business District
CPR:	Commercial Policy Review
SBM:	Services to Business Management
FIRE:	Finance, Insurance and Real Estate

1.0 Introduction

Dillon Consulting Limited (Dillon) and W. Scott Morgan & Associates Limited have been retained by the City of St. Thomas to conduct an updated retail market study. Retail/commercial provides the necessary services and amenities that support the community. A retail market study is an important tool used by municipalities to strategically plan retail commercial lands while managing supply and demand to ensure residents and visitors to the city have access to a range of goods and services.

Historically the City of St. Thomas has been very proactive in monitoring the City's retail/commercial land supply and demand. Dating back to 2000, the City has undertaken detailed retail market studies to track the evolution of supply and demand, adjust its land use planning framework to leverage trends and guide future retail development to meet the changing needs of the community. This has positioned the City well in adapting land use designations and directing policy in a manner responsive to change.

As the City continues to evolve, this attention to retail commercial trends remains a priority of the City. The City has experienced strong population growth (8.6% between 2001 and 2006 and 5% between 2006 and 2011) and projects continued growth for the next 20-25 years. This study has been undertaken to update the retail market analyses previously undertaken by Dillon and Scott Morgan for the City of St. Thomas:

- January 2000 study entitled "Retail Market Demand Analysis, Regional Commercial Systems Study, City of St. Thomas and the Municipality of Central Elgin, Customer Intercept Surveys, Consumer Telephone Survey, and Projections of Residual Market Demands";
- June 2007 study entitled "Regional Commercial Systems Study, City of St. Thomas and the Municipality of Central Elgin, License Place Surveys, Consumer Telephone Survey & Updated Projections of Residual Market Demands";
- June 2009 study entitled "Industrial Commercial Conversion Study Market Overview, City of St. Thomas" and April 2009 study entitled "Industrial Commercial Conversion Study Market Overview, City of St. Thomas, Updated Projections of Residual Market Demands".

The St. Thomas retail market continues to evolve, as some sectors continue to achieve success, while others are faced with significant challenges. Keeping a close eye on St. Thomas' retail market supply and demand is prudent to inform policy, support decision making and guide investment.

This study is based on the City's population and employment projections to 2031 and seeks to analyse the ability of the City's commercial policy framework to support the health of its retail market, while identifying the evolving retail market trends that may affect St. Thomas.

1.1 Purpose

The purpose of this market study is to:

- Identify the amount of retail development that would be required to serve the future population of the City of St. Thomas and its trade area to the year 2031 by confirming the supply, the defined geographic boundaries of the trade area, reviewing retail and demographic trends, estimating future demand, and projecting commercial land requirements;
- Guide where future retail/commercial development should occur within the City to 2031;
- Recommend appropriate retail formats for St. Thomas;
- Recommend policy directions to assist Council and staff in their review of retail/commercial development applications and Official Plan improvements; and,
- Recommend policy directions to revitalize underperforming commercial areas.



1.2 Approach

The approach utilized for this Retail Market Study is outlined below:

- **Establish the commercial policy context:** A review of the applicable provincial and municipal commercial policy context relevant to the City of St. Thomas retail market was reviewed and summarized.
- **Delineate trade area**: This study adopts the same primary and secondary trade areas as in the previous St. Thomas market studies. A consistent trade area permits longitudinal comparisons to be made of population growth forecasts, retail/commercial floorspace inventories, and per capita household income levels.
- **Establish growth projections**: The trade area population projections to 2031 were established by utilizing Statistics Canada data and Lapointe Consulting's St. Thomas and Elgin County Population, Housing and Employment Projections, 2011-2036.
- **Review and assess market trends**: A discussion is provided on the demographic and retail market trends anticipated to affect St. Thomas, such as the aging population and reduced household size, the changing format of department stores, blurring of retail types and eCommerce. This information is useful as a guideline to plan for long term growth.
- **Inventory existing retail commercial and service commercial space (supply)**: An inventory was prepared of all retail/commercial floor space in St. Thomas to identify the current amount of space available and assess the range of uses currently serving the St. Thomas trade area.
- **Establish the projected expenditures and residual space demands**: Based on the historic and projected population growth, Statistics Canada Retail Trade data, and per capita household income levels of Trade Area residents, the future amounts of residual retail space that could be supported in the St. Thomas trade area to 2031 were projected. The calculations of residual square footages test the "ease of entry" of new space into the market. The residuals indicate the timing and amount of new space that can enter the market without transferring sales away from existing facilities. Residuals are conservative demand-side references for providing a balanced commercial supply within St. Thomas' commercial hierarchy. The future residual space estimates netted out the existing supply. In addition to the residual retail space analyses, demands for additional service commercial uses in St. Thomas going out to 2031 were forecasted based on per capita space benchmarks.
- **Estimate St. Thomas' retail/commercial land requirements**: Based on the results of the retail and service space demand analysis and various development coverage ratios, a forecast of future retail commercial space requirements was prepared.
- **Recommend improvements to St. Thomas' commercial policies**: Based on the review of the commercial policies and the St. Thomas retail/commercial land requirements, the report recommends appropriate retail formats for St. Thomas, policy directions to support Council and staff in decision-making around future retail/commercial development applications, overall commercial policy improvements and policy directions to revitalize underperforming commercial sites.

1.3 Locational Context

The City of St. Thomas is a single tier municipality located in southwestern Ontario, south of the City of London within the geographic boundary of Elgin County. The area of primary concern for this study is the City of St. Thomas, and in particular, those lands designated 'commercial' in the City of St. Thomas Official Plan, Office Consolidated March 2015.

1.4 Structure of Report

This report is organized into six main sections:

- Section 1 introduces the project and describes the purpose, approach and locational context for this study;
- Section 2 presents the Provincial and local commercial policy context;
- Section 3 describes St. Thomas' retail market characteristics including the historic and projected population and employment, household income levels and some of the macro-economic trends influencing the retail market in St. Thomas;
- Section 4 outlines the existing retail inventory;
- Section 5 presents the projected retail demand; while,
- Section 6 outlines the conclusions and recommendation of this study including policy directions.



2.0 Policy Context

Land use planning in Ontario is undertaken within the context of provincial legislation and policy guidelines, as well as municipal official plans. This section provides an overview of the land use planning legislation, guidelines, policies and plans which provide direction for the management of retail commercial land uses in St. Thomas.

2.1 Provincial

2.1.1 Provincial Policy Statement, 2014

The *Provincial Policy Statement, 2014* (PPS) provides policy direction on matters of provincial interest with regard to land use planning. Specifically, the PPS provides a policy framework through which the development and management of land is regulated. The document's statutory powers stem from the authority of the *Planning Act* and the document has been in force since April 30, 2014. Under the *Act*, local planning decisions shall be "consistent" with the PPS and shall "conform" to provincial plans (*Planning Act, RSO 1990,* c P.13, s.3(5)(a-b)).

Section 1 of the PPS outlines a general policy framework designed to promote strong, livable communities, requiring municipalities to:

- Provide for an appropriate mix and range of employment, including industrial and commercial;
- Promote economic development and competitiveness;
- Provide an appropriate range and mix of employment types to meet long-term needs; and,
- Provide opportunities for the development of a diversified economic base.

Several specific policy directives are relevant to the classification and management of commercial lands. The PPS frames 'healthy, livable and safe communities' as including an appropriate range and mix of employment uses, including commercial uses (PPS, s.1.1.1). The PPS requires that municipalities promote economic development and competitiveness by encouraging compact, mixed-use development that incorporates compatible employment uses to support livable communities (PPS, s. 1.3.1.c). The PPS also requires that municipalities promote long-term economic prosperity through maintaining and enhancing the vitality and viability of downtowns and main streets (PPS, s.1.7.1).

As the PPS sets high level policy direction for land use planning, the City's Official Plan policies relating to the management and development of commercial and retail land uses should flow from this overarching set of directions.

2.2 City of St Thomas

2.2.1 Official Plan

The city's current approach to commercial planning, as reflected in its Official Plan, focuses major commercial uses around the City's Downtown (Talbot West, Talbot Central and Talbot

East), the Major Commercial area (Elgin Mall) and the Power Centre Commercial area at Talbot Street and First Avenue. The City's commercial structure includes a Secondary Commercial area at Wellington Road and First Avenue and various Minor Commercial areas which function as neighbourhood commercial uses. In addition, three Highway Commercial areas have been identified to cater to the traveling public, with one located in the east end (in proximity to Talbot Street), one to the northwest (Sunset Drive/Edgeware Road) and the third in the northeast part of the City (Canada Way/Ron McNeil Line). The land use designations highlighting the commercial structure has been presented on **Figure 2-1**.

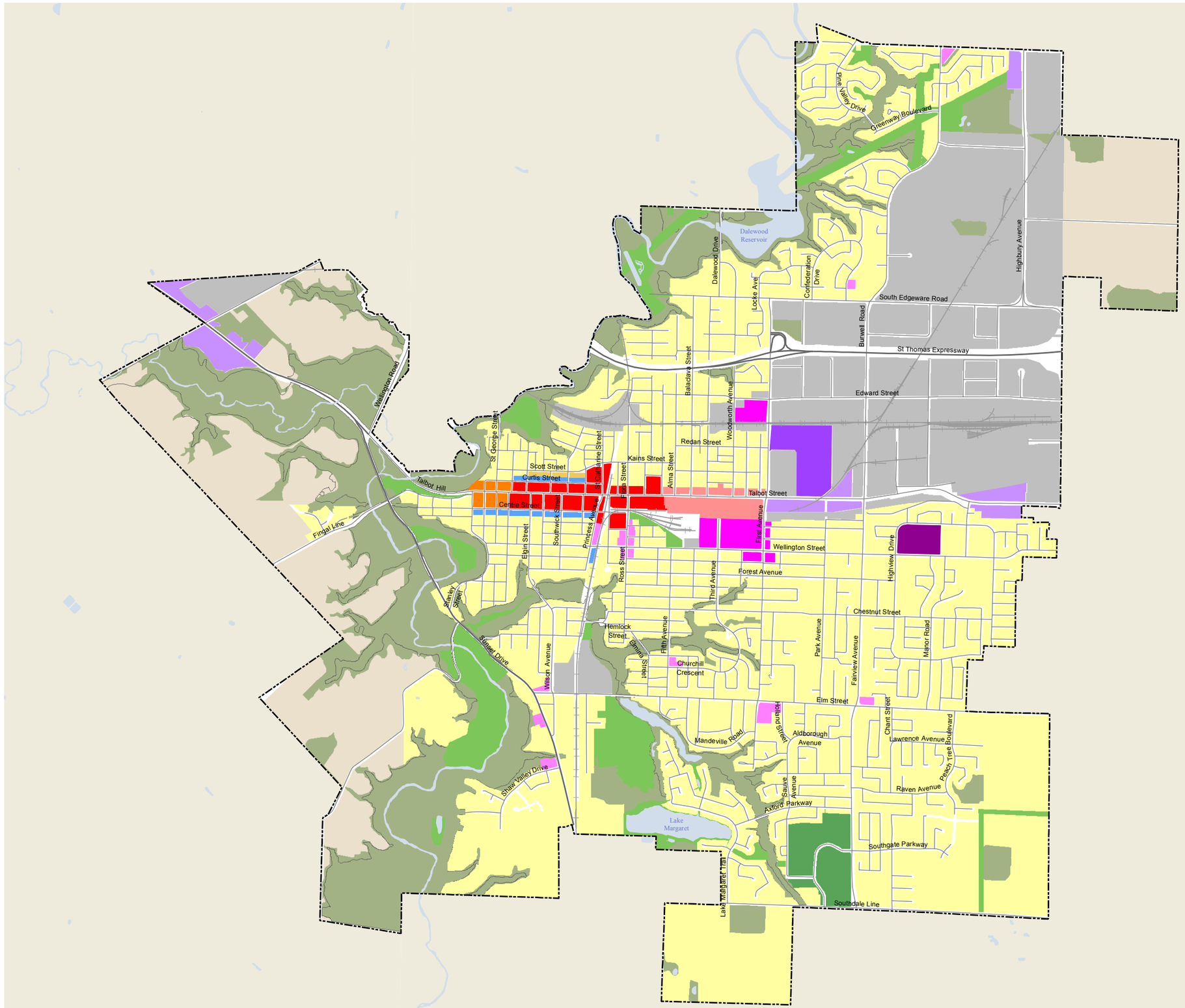
2.2.2 Policy Recommendations from Past Retail Studies

The January 2000 study entitled "Retail Market Demand Analysis, Regional Commercial Systems Study, City of St. Thomas and the Municipality of Central Elgin, Customer Intercept Surveys, Consumer Telephone Survey, and Projections of Residual Market Demands" evaluated the City of St. Thomas and the Municipality of Central Elgin's future retail commercial space needs and the adequacy of the commercial hierarchy to meet those needs. The adequacy of the commercial hierarchy was analyzed in terms of function, distribution, and support for different types of retail/commercial uses. That study was a prelude for reviewing official plan policies for accommodating future retail/commercial development within either municipality. The January 2000 study recommended the expansion of the commercial hierarchy to accommodate new format retailers in a new power centre designation in St. Thomas, and incremental expansions mostly within the supermarket sector in the Villages of Port Stanley and Belmont, and tourist oriented retail in the Hamlet of Sparta.

The June 2007 study entitled "Regional Commercial Systems Study, City of St. Thomas and the Municipality of Central Elgin, License Place Surveys, Consumer Telephone Survey & Updated Projections of Residual Market Demands" re-tested the market conditions in St. Thomas and Central Elgin after the power centre was built. Taking the pulse of the market in 2007 led to the conclusion that no new commercial designations were needed in the medium and longer term (to 2021). Rather, incremental expansion through natural phasing was the most reasonable land use option that would allow the commercial hierarchy to further mature. Because most of the important anchor stores were in place by then (e.g. Wal-Mart and the relocated and expanded Real Canadian Superstore and Canadian Tire, and the closure/replacement of the small prototype Sears store with the Galaxy Cinema), any new anchor tenancies were not expected to have an appreciable effect on the distribution of the future retail/commercial space beyond the current designations in St. Thomas and Central Elgin.

The June 2009 study entitled "Industrial Commercial Conversion Study, Market Overview, City of St. Thomas, Updated Projections of Residual Market Demands" evaluated a number of industrial nodes for their potential to convert industrial to commercial uses. The June 2009 study used the consumer telephone survey results from the June 2007 study (as does this 2016 study update). The June 2009 study also provided longitudinal comparisons of the local capture rates that St. Thomas retailers obtain from Primary and Secondary Trade Area residents.

Compared to the survey in the January 2000 study, the survey in the 2007 study found that after the power centre was developed, certain local capture rates (i.e. local market shares captured from all parts of St. Thomas' trading geography) have declined over the intervening period, notably:



CITY OF ST. THOMAS
RETAIL STUDY

LAND USE DESIGNATIONS
FIGURE 2-1

- HIGHWAY
- ROAD
- RAIL LINE
- WATERBODY
- ST. THOMAS BOUNDARY

COMMERCIAL DESIGNATIONS

- TALBOT CENTRAL
- TALBOT WEST
- TALBOT EAST
- POWER CENTRE
- MAJOR COMMERCIAL
- SECONDARY COMMERCIAL
- HIGHWAY COMMERCIAL
- MINOR COMMERCIAL

OTHER DESIGNATIONS

- RURAL AREA
- RESIDENTIAL
- DOWNTOWN RESIDENTIAL
- OFFICE PROFESSIONAL
- ED-REC COMLEX
- OPEN SPACE
- NATURAL HERITAGE
- INDUSTRIAL
- NATURAL HAZARD

0 250 500 1,000 m

N W E S

MAP DRAWING INFORMATION:
DATA PROVIDED BY MNR, CITY OF ST. THOMAS

MAP CREATED BY: PFM
MAP CHECKED BY: JG
MAP PROJECTION: NAD 1983 UTM Zone 17N

G:\GIS\104135 - Niagara Nodes and Corridors\Mapping\
Figure 2-1 Land Use Designations.mxd

DILLON CONSULTING

PROJECT: 152192
STATUS: DRAFT
DATE: 08/24/11

- Drugs / Personal Care (down to 80.1% in 2007 from 96.9% in 2000),
- Specialty Food (down to 79.7% from 88.2%),
- Shoe Stores (down to 67.0% from 78.1%),
- Family Wear / Unisex (down to 28.8% from 32.4%),
- Children's Wear (down to 0% from 7.3%),
- Garden Centre / Nursery (down to 56.6% from 85.8%),
- Sporting Goods / Art/Craft (down to 46.0% from 72.8%),
- Book / Card (down to 29.3% from 57.8%),
- Electronics / Computer (down to 25.9% from 34.1%),
- Toy/Hobby (down to 10.0% from 29.9%),
- Camera / Photo Supply (down to 6.2% from 91.1%), and
- China / Kitchenware/Bath/Linen (down to 0% from 45.3%).

Compared to the 2000 survey, the 2007 survey found that certain local capture rates obtained from Secondary Zone residents have also declined, notably:

- Specialty Food (down to 14.4% in 2007 from 61.7% in 2000),
- Shoe Stores (down to 31.3% from 54.7%),
- Children's Wear (down to 0% from 12.3%), and
- Lighting / Carpet / Other Interior Décor (down to 21.3% from 46.8%),
- Sporting Goods / Art / Craft (down to 35.7% from 48.8%),
- Jewellery / Gift / Novelties (down to 13.7% from 78.4%),
- Furniture / Appliances (down to 8.5% from 14.2%),
- Electronics / Computer (down to 0.6% from 30.5%),
- Toy / Hobby (down to 0% from 12.5%),
- China / Kitchenware/Bath/Linen (down to 0% from 44.3%)

These findings support the general proposition that for Primary and Secondary Zone residents, the apparel and accessories, home furnishings, and other specialty NFSR spending categories present the greatest prospects recovering some of the outflow (i.e. recapturing some of the expenditures spent outside of St. Thomas), particularly from London, which is the major destination for this outflow in virtually all featured spending categories.

Marginalized local capture rates by St. Thomas retailers are evident in certain spending categories, notably Art Gallery/Artist's Supply, Children's Wear, and China/Kitchenware/Bath/Linen for Primary and Secondary residents, and Musical Instrument/Supply, and Toy/Hobby for Secondary Zone residents.

The key implication is that opportunities exist for increased penetrations of both the Primary and Secondary Zones, particularly in the apparel and accessories, home furnishings, and most non-department store NFSR categories where gaps still exist in the provision of such space in St. Thomas.

3.0 Market Characteristics

The following section describes the key market characteristics that form the foundational elements of this market study.

3.1 Trade Area

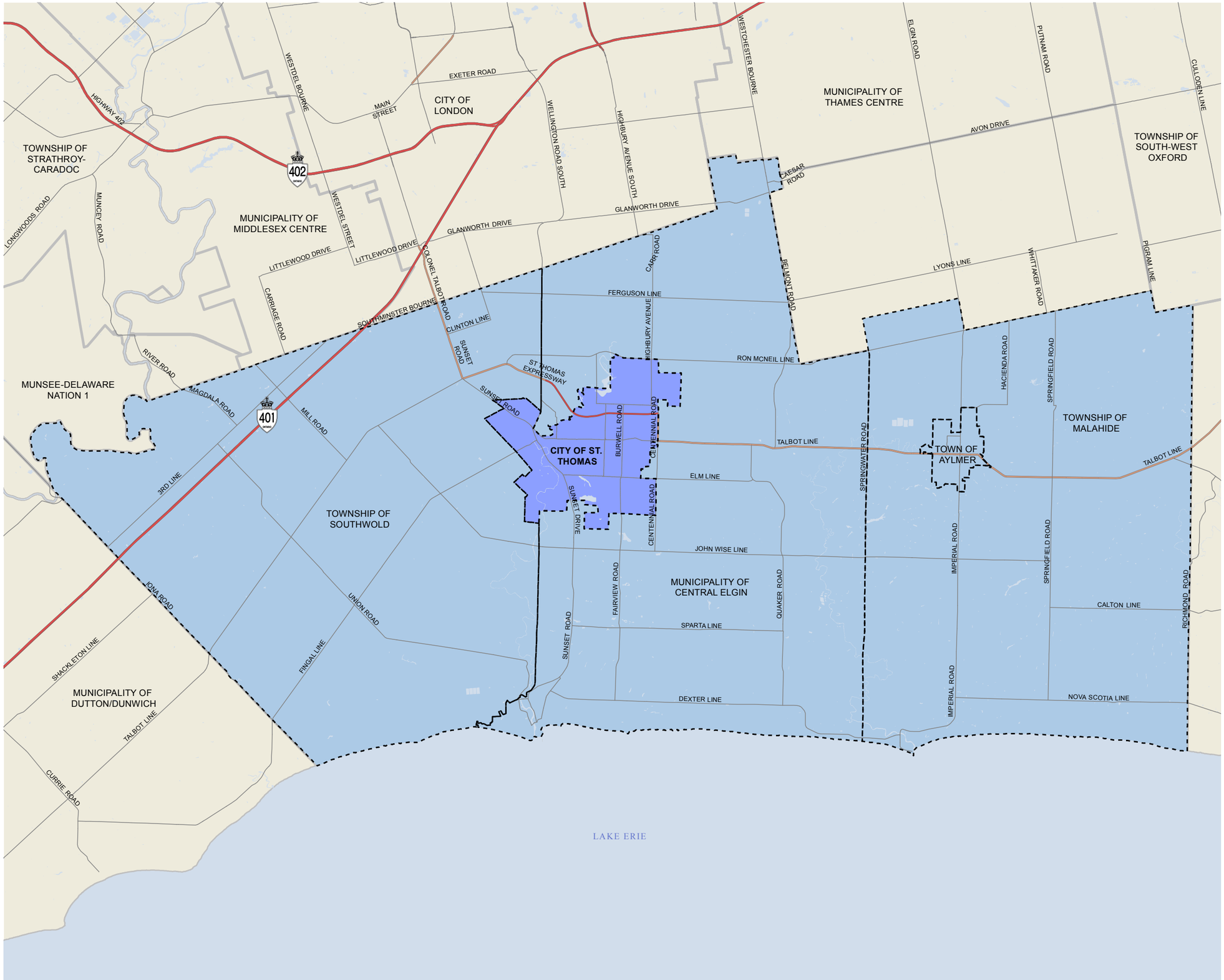
A trade area represents a geographic area from which retailers would normally expect to derive the majority of their customers. Retail market studies usually delineate primary and secondary trade areas or zones. The primary trade area is typically representative of the geographic area where 55-70% of the customers and/or spending originate, while the secondary trade area represents a further 15-20%.

The trade area delineated in the January 2000, June 2007 and June 2009 Market Overviews for St. Thomas was based on customer intercept surveys and consumer telephone surveys obtained in 1999 and 2006. To facilitate comparisons, the Trade Area in this report remains unchanged from that defined in the previous studies. The Primary Trade area includes the City of St. Thomas in its entirety, while the Secondary Trade area consists of the Municipality of Central Elgin (former Yarmouth Township and Villages of Port Stanley and Belmont) as well as Southwold Township to the west and Malahide Township and the Town of Aylmer to the east, as depicted on **Figure 3-1**.

3.2 Population

Between 2001 and 2011, the population of St. Thomas grew by 14.05%, from 33,326 people in 2001 to 37,905 by 2011. The absolute growth of St. Thomas exceeded that of Ontario in percentage terms (14.05% vs. 12.64% during the same period) as well as in the rate of annual growth (1.32% per year vs. 1.20% per year). In comparison, the Secondary Zone area experienced marginal growth over the same period, growing by 2.29% from 32,782 in 2001 to 33,534 by 2011 (0.23% per year).

Table 3-1 details the historical and projected population growth estimated for the City of St. Thomas (Primary Zone) and the municipalities within the Secondary Zone, unadjusted for the census undercount. These values incorporate data from published population projection studies.



CITY OF ST. THOMAS
RETAIL STUDY

PRIMARY AND SECONDARY TRADE AREAS
FIGURE 3-1

- FREEWAY
- HIGHWAY
- ARTERIAL ROAD
- PRIMARY TRADE ZONE
- SECONDARY TRADE ZONE
- WATERBODY
- CENSUS SUBDIVISIONS
- MUNICIPAL BOUNDARIES

0 1 2 4 km

N W E S

MAP DRAWING INFORMATION:
DATA PROVIDED BY MNR, CITY OF ST. THOMAS

MAP CREATED BY: PFM
MAP CHECKED BY: JG
MAP PROJECTION: NAD 1983 UTM Zone 17N

G:\GIS\104135 - Niagara Nodes and Corridors\Mapping\
Figure 3-1 Primary and Secondary Trade Areas.mxd

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PROJECT: 152192
STATUS: DRAFT
DATE: 08/24/11

Table 3-1: St. Thomas Trade Area Population Projections (Unadjusted)

ST. THOMAS TRADE AREA	2001	2006	2011	2015†	2016	2021	2026	2031
Primary Zone *								
St. Thomas (Medium Growth Scenario) **								
Population Projection	33,236	36,110	37,905	39,073	39,365	41,586	44,035	46,413
Cumulative Growth					292	2,513	4,962	7,340
Average Annual Growth (%)					0.7%	1.1%	1.2%	1.2%
Average Annual Growth (#)					292	419	451	459
Secondary Zone *								
Southwold Twp.	4,487	4,724	4,494	4,558	4,574	4,684	4,799	4,889
Malahide Twp.	8,809	8,828	9,146	9,276	9,309	9,533	9,767	9,951
Aylmer	7,126	7,069	7,151	7,253	7,278	7,454	7,637	7,780
Central Elgin (Medium Growth Scenario) ***	12,360	12,723	12,743	13,173	13,280	13,964	14,585	15,272
Subtotal Secondary Zone	32,782	33,344	33,534	34,260	34,441	35,635	36,788	37,892
Cumulative Growth					181	1,375	2,528	3,632
Average Annual Growth (%)					0.5%	0.7%	0.7%	0.7%
Average Annual Growth (#)					181	229	230	227
Trade Area								
Population Projection	**66,018**	**69,454**	**71,439**	**73,333**	**73,806**	**77,221**	**80,823**	**84,305**
Cumulative Growth					**473**	**3,888**	**7,490**	**10,972**
Average Annual Growth (%)					**0.6%**	**0.9%**	**0.9%**	**0.9%**
Average Annual Growth (#)					**473**	**648**	**681**	**686**

** Population values for 2001, 2006 and 2011 sourced using Statistics Canada GeoSuite 2001 and GeoSuite 2011*

*** Medium Growth population Scenario, St. Thomas, 2011 to 2036, Lapointe Consulting, April 13, 2015, Table 31, P. 46.*

**** Medium Growth population Scenario, Central Elgin, 2011 to 2036, Lapointe Consulting, April 23, 2015, Table 31, P.41*

† 2015 data based on pro-rated 2011 to 2016 data

Note: Population projection values are not adjusted for Census under-count for Ontario (per Annual Demographic Statistics, Cat.91-213).

Table 3-2 details the historical and projected population growth values for St. Thomas and the Secondary Zone after they have been adjusted for the estimated census undercount. These values represent the best estimates of population, and are used to compute sales and space demand in the study. St. Thomas is estimated to have a population of 40,135 for the study's base year (2015), while the Secondary Zone is estimated to have a total population of 35,195.

Table 3-2: St. Thomas Trade Area Population Projections (Adjusted)

ST. THOMAS TRADE AREA:	2006	2011	2015	2016	2021	2026	2031
Primary Zone - St. Thomas							
Adjusted Population Projection @ 3.83% *	37,490						
Adjusted Population Projection @ 2.72% **		38,935	40,135	40,435	42,720	45,235	47,675
Cumulative Growth				300	2,585	5,100	7,540
Average Annual Growth (%)				0.7%	1.1%	1.2%	1.2%
Average Annual Growth (#)				300	431	464	471
Secondary Zone							
Adjusted Population Projection @ 3.83% *	34,620						
Adjusted Population Projection @ 2.72 % **		34,445	35,195	35,380	36,605	37,790	38,925
Cumulative Growth				185	1,410	2,595	3,730
Average Annual Growth (%)				0.5%	0.7%	0.7%	0.7%
Average Annual Growth (#)				185	235	236	233
Trade Area							
Adjusted Population Projection	**72,110**	**73,380**	**75,330**	**75,815**	**79,325**	**83,025**	**86,600**
Cumulative Growth				**485**	**3,995**	**7,695**	**11,270**
Average Annual Growth (%)				**0.6%**	**0.9%**	**0.9%**	**0.9%**
Average Annual Growth (#)				**485**	**666**	**700**	**704**

** ELGIN CENSUS UNDERCOUNT in 2006 in Statistics Canada Cat. #91-214-X (Feb 26, 2014):*	*(88,616-85,351)/85,351 =*	*3.83%*
*** ELGIN CENSUS UNDERCOUNT in 2011 in Statistics Canada Cat. #91-214-X (Feb 26, 2014):*	*(89,843-87,461)/87,461 =*	*2.72%*
Note: Adjusted population projection values are rounded to the nearest 5		

It is estimated that the City of St. Thomas will add an additional 7,540 residents over the next 16 years, growing at a rate of 1.174% per year to a population of 47,675 by 2031. In comparison, it is estimated that the municipalities in the Secondary Zone will add an additional 3,730 residents in the same time period, growing at a slower rate of 0.662% per year.

Compared to population projections included in previous retail studies, the projection values used in this study reflect slightly lower levels of growth than what had been assumed over the

past 15 years. A comparison of the current and previous population projections is provided in **Appendix A-5**.

3.3 Household Income and Expenditures

Household incomes are noticeably lower in St. Thomas than the provincial average. As of 2015, average annual household income in the City of St. Thomas (the Primary Zone) was estimated to be $73,270, 21.4% lower than the provincial average of $93,183 per year.

In contrast, average annual household incomes in the Secondary Zone are much closer to the provincial average, estimated to be $87,967 as of 2015.

3.4 Demographics and Retail Market Trends

The retail sector is dynamic and constantly changing in response to the marketplace.

The fallout from the 2008 recession has led to a few retail acquisitions (e.g. certain Zellers sites were acquired by Target and Wal-Mart, and RONA was acquired by Lowe's), certain major retail shakeouts (e.g. Future Shop closure, Target closure), and other downsizings (e.g. Benix, Bombay, Bowring, Holt Renfrew, Jacob, Mexx, Sears, Sony) that have left ±20,000 Canadian retail employees unemployed in 2014-2015. These contractions provide a post-recessionary context for evaluating the potential for emerging retail trends to have any effect on St. Thomas' retail commercial hierarchy.

The following key demographic trends have been identified as important based on their potential impact on the retail commercial market and long term demand in St. Thomas:

- **Aging population**: The population of St. Thomas, similar to that of Ontario, is aging. In 2011, 27.7% of the population were between the ages of 45-64 (up from 22.5% in 2001) and 16.4% of the population were 65 years or older (up from 14.9% in 2001).[1]
- **Reduced household size**: Average household sizes have also declined over time in St. Thomas. In 2011, the average household size was 2.36 people per household, down from 2.43 in 2001 and 3.00 in 1971. This decline reflects lower birthrates, aging of the population, and other socio-economic trends.
- **Reduced household incomes**: Appendix A-3 demonstrates that since 1996 per capita household incomes had fallen 3.4% by 2015 in St. Thomas to about 15% below the provincial average, while those of Secondary trade area residents had fallen 6.0% by 2015 to 16.1% below the provincial average.

The following key global retail market trends have been identified as important based on their potential impact on the retail commercial market and long term demand in St. Thomas:

- **Changing format for department stores:** The Canadian retail marketplace has historically been shaped by the presence of international retail players. The entrance of Wal-Mart into the Canadian marketplace in 1991, through the purchase of the

[1] Age profile based on St. Thomas Population, Housing and Employment Projections, 2011-2036, Lapointe Consulting, April 3 2015.

Woolco Canada chain from the F.W. Woolworth Company, has reshaped the retail landscape and specifically the role of department stores. Wal-Mart and other big box retailers have eroded the market shares previously attributed to traditional and other discount department stores, resulting in significant challenges for many mid-market department stores and general merchandisers. This has resulted in the loss of many department stores in malls, such as the Elgin Mall's loss of Sears and more recently Zellers.

- **Blurring of retail types**: Traditionally, most retailers focused on one line of merchandise: grocery stores sold food; pharmacies sold health products; clothing stores sold apparel. In an effort to capture a larger market share, today's 'one-stop' retail stores have led to a blurring of retail categories. Some stores at the forefront of this trend are: Shoppers Drug Mart, where one can now purchase gifts and groceries in addition to one's health care needs; Canadian Tire, where one can purchase home improvement and gardening equipment in addition to auto related goods; Winners, where one can buy gifts and specialty food items on top of one's apparel needs; and Wal-Mart, where one can purchase virtually anything commonly found in retail outlets (groceries, health, toys, electronics, appliances, jewelry, movies and books, household goods, outdoor living, sporting and recreation, and office supplies).
- **Consolidation:** In order to increase their market share and continue to compete with large international retailers, many Canadian chains have relied upon acquisitions. Some of the largest acquisitions have been the recent acquisition of Shoppers Drug Mart by Loblaws (completed in 2014 for $12.4 billion), the acquisition of Canada Safeway Inc. by Sobeys (2013 for $5.8 billion), and Leon's (Furniture) acquisition of The Brick Ltd. (2012 for $700 million).
- **E-Commerce**: With technical advancements, the advent of the internet age (which began in August 1991 when British computer scientist Tim Berners-Lee released files describing his idea of the worldwide web which soon after debuts as the publically available service on the internet) and smartphones, e-commerce is a growing retail format that continues to build market share. E-commerce, as it relates to retail, refers to retail transactions which occur through electronic media (e.g. purchasing over the Internet); while completion of a transaction may occur outside the context of a traditional storefront setting (e.g. goods delivered by mail), e-commerce may still imply a bricks-and-mortar retail presence (e.g. order fulfillment at a local store).[2] To adapt to this trend, many retailers are focusing their growth efforts on e-commerce, recognizing the significant market opportunity this provides. Provision for same-day delivery of retail goods, pick-up locations for online purchases, special 'available online only' discounts, and free shipping are just some of the marketing tools used to support e-commerce. Some retailers are now allocating significant store space to 'showrooming', providing space for consumers who wish to inspect a product of interest in a store, but who intend to look it up and purchase it online. Many retailers are reducing their store numbers or store size significantly, partially as a result of e-commerce, while some are

[2] It must be recognized that researchers and practitioners alike are still grappling with how to clearly define the nature of e-commerce as it relates to retail. See Yeates and Hernandez (2013), *E-retail in Canada: Performance meets 'bricks & mortar'.* Centre for the Study of Commercial Activity.

closing for good: Future Shop/Best Buy (closed 66 Future Shop stores in March 2015), Staples (closed 15 stores in Canada and announced plans to close 225 across Canada and the US by the end of 2015), Office Depot and Grand and Toy (having gone entirely online after closing all of their Canadian stores), Blockbuster (closed 35% of their 146 Canadian stores in May 2011 and later that year announced that it would wind down operations and close all stores by the end of 2011), and many others.

- **Permissions for beer sales in grocery stores**: The Provincial government has recently announced that there will be changes to the alcohol distribution system in Ontario. These changes are expected to permit beer sales in up to 450 grocery stores across the province. This change is expected to impact the future expenditures related to supermarkets and Liquor/Beer/Wine.

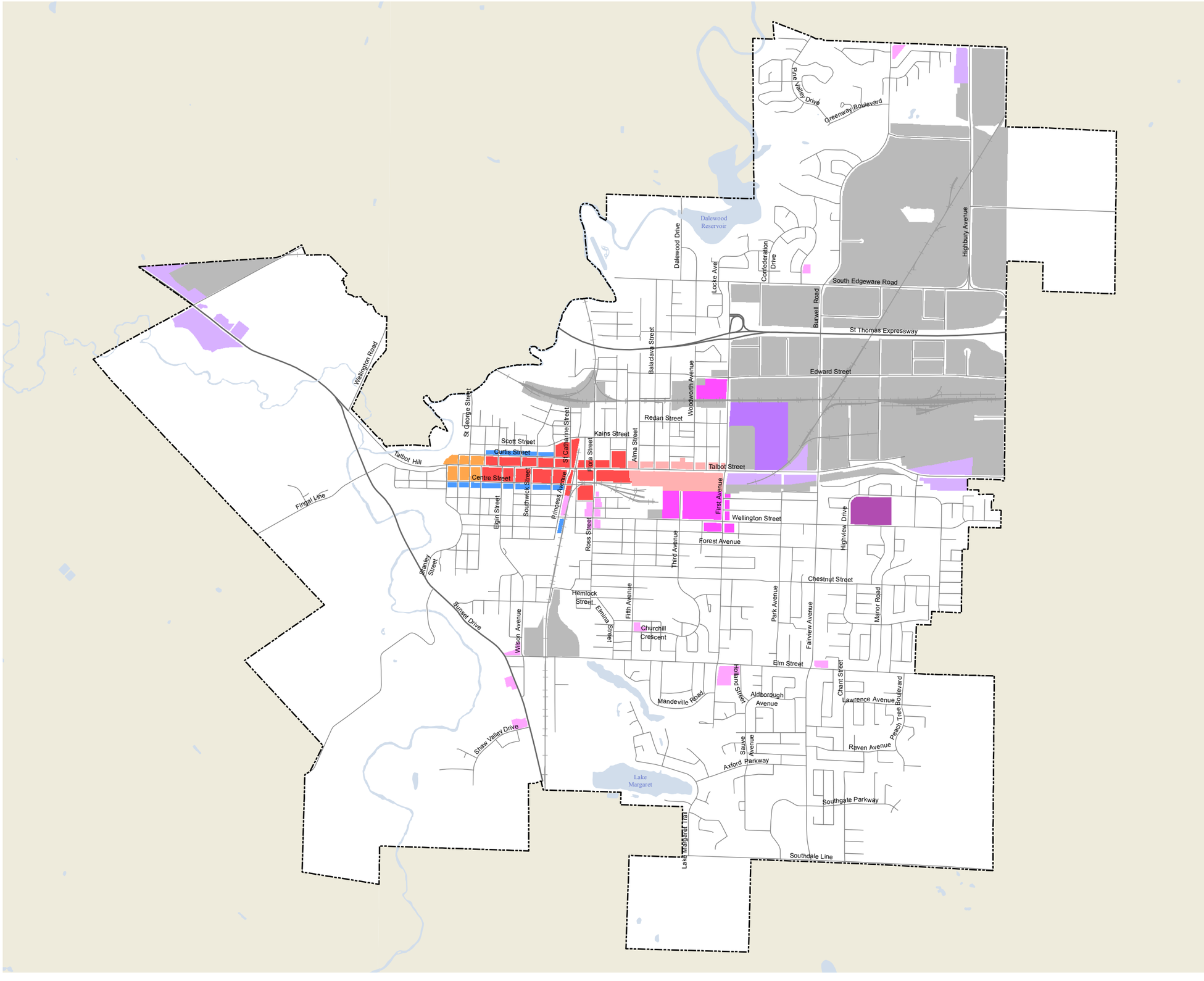
4.0 Existing Retail Supply

The following section describes the existing retail supply within the City of St. Thomas.

4.1 St. Thomas Retail Nodes

St. Thomas has ten existing retail nodes delineated by their commercial land use designation (or commercial permissions within an employment land use designation), which have been described below and presented in **Figure 4-1**:

- **Node 1: Office/Professional** – This node is 14.65 acres in size, comprised of the lands designated for office uses and is generally located along the north and south side of Talbot Central. This node has been identified as it includes a number of service commercial uses.
- **Node 2: Talbot West –** This node is 12.33 acres in size and is comprised of lands designated for retail and service commercial uses. It is generally located to the west of Node 3, on the north and south sides of Talbot Street, from Stanley Street east to Metcalfe/Elgin Street.
- **Node 3: Talbot Central –** This node is 59.43 acres in size and is comprised of lands designated for retail, business and professional services uses. It is generally located on the north and south sides of Talbot Street, from Metcalfe Street east to Manitoba Street.
- **Node 4: Talbot East –** This node is 39.12 acres in size and is comprised of lands intended for automobile-oriented, space-extensive commercial uses as well as restaurants and service commercial uses. It is generally located to the east of Node 3, on the north and south sides of Talbot Street, from Manitoba Street east to First Avenue.
- **Node 5: Secondary Commercial –** This node is 43.24 acres in size and is comprised of lands designated for retail and service commercial uses in the form of traditional strip plazas as well as small box retail formats. It is generally located within 2 sub-nodes: the first is located directly south of Node 4, and the second is located between Woodworth Avenue to the west, Edward Street to the north, and First Avenue to the east.
- **Node 6: Minor Commercial –** This node consists of multiple sub-nodes throughout the City, totaling 25.45 acres in size. These sub-nodes are comprised of lands designated for small-scale retail and commercial services that provide for the day-to-day needs of local residents.
- **Node 7: Highway Commercial –** This node is 94.20 acres in size and is comprised of lands designated for traditional highway commercial uses intended to cater to the travelling public. It is made up of 3 sub-nodes: Sub-node 1 is located at the western extent of the City limits, along the north and south sides of Sunset Drive; Sub-node 2 is found at the north extent of the City limits, on the west side of Highbury Avenue; and, Sub-node 3 is located along the north and south sides of Talbot Street, between First Avenue to the west and the City limits to the east.



CITY OF ST. THOMAS
RETAIL STUDY

ST. THOMAS EXISTING RETAIL NODES
FIGURE 4-1

- HIGHWAY
- ROAD
- RAIL LINE
- WATERBODY
- ST. THOMAS BOUNDARY

EXISTING RETAIL NODES

- NODE 1: OFFICE PROFESSIONAL (5.93 ha)
- NODE 2: TALBOT WEST (4.99 ha)
- NODE 3: TALBOT CENTRAL (24.05 ha)
- NODE 4: TALBOT EAST (15.83 ha)
- NODE 5: SECONDARY COMMERCIAL (17.50 ha)
- NODE 6: MINOR COMMERCIAL (10.30 ha)
- NODE 7: HIGHWAY COMMERCIAL (38.12 ha)
- NODE 8: INDUSTRIAL (517.06 ha)
- NODE 9: MAJOR COMMERCIAL (7.91 ha)
- NODE 10: POWER CENTRE (19.61 ha)

0 250 500 1,000 m

N W E S

MAP DRAWING INFORMATION:
DATA PROVIDED BY MNR, CITY OF ST. THOMAS

MAP CREATED BY: PFM
MAP CHECKED BY: JG
MAP PROJECTION: NAD 1983 UTM Zone 17N

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Figure 4-1 St Thomas Existing Retail Nodes.mxd

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PROJECT: 152192
STATUS: DRAFT
DATE: 08/24/11

- **Node 8: Industrial –** This node is 1,277.71 acres in size and is comprised of lands designated for industrial uses including manufacturing, processing of goods/raw materials, warehousing and bulk storage. It is made up of 3 sub-nodes: Sub-node 1 is located at the western extent of the City limits, generally bounded by Sunset Drive to the southwest and Major Line to the southeast; Sub-node 2 is located along the north-south rail line that runs through the city, and is generally bounded by Wilson Avenue to the west, Centre Street to the north, Moore Street to the east, and Elm Street to the south; and, Sub-node 3, which accounts for a large portion of the City's lands, is generally bounded by First Avenue and Burwell Road to the west, Ron McNeil Line and the City limits to the north, Talbot Line and the City limits to the east, and Talbot Street to the south. This node has been identified as it includes a number of retail and service commercial uses. The Official Plan policies for lands designated Industrial permit retail and wholesale businesses, provided the businesses do not conflict with the long term use of the surrounding land for industrial purposes or the commercial facilities in the Downtown or Major Commercial areas.
- **Node 9: Major Commercial –** This node is 19.55 acres in size and is the site of the Elgin Mall, a regional shopping centre. It is generally located at the commercial plaza bounded by Highview Drive to the west and north, Manor Road to the east, and Wellington Street to the south.
- **Node 10: Power Centre –** This node is 48.46 acres in size and is comprised of lands designated for big and small-box retail in a power centre format. It is generally located at the commercial power centre plaza bounded by First Avenue to the west, Edward Street to the north, Burwell Road to the east, and Talbot Street to the south.

4.2 2015 Floorspace Inventory

The 2015 inventory in the Primary Zone consists of approximately 2.5 million square feet of retail commercial space, as presented in **Table 4-1**.

Table 4-1: 2015 Floorspace Inventory

Category	Inventory, 2015	Share of Total Inventory
Supermarket / Grocery	218,478	8.9%
Specialty Food	51,247	2.1%
Subtotal FSR	**269,725**	**10.9%**
Department Store	140,010	5.7%
General Merchandise	66,104	2.7%
Drug / Cosmetics / Pers. Care	48,807	2.0%
Apparel & Accessories	78,040	3.2%
Home Furnishings	103,075	4.2%
Other Non-Food Retail	149,298	6.1%
Canadian Tire /TBA/HAAS	103,575	4.2%
Subtotal NFSR	**688,909**	**28.0%**

Category	Inventory, 2015	Share of Total Inventory
Home Improvement	123,737	5.0%
L/B/W	23,728	1.0%
Total FSR+NFSR+HI+L/B/W	**1,106,099**	**44.9%**
Services:		
Restaurant	165,485	6.7%
Bank / Trust	46,564	1.9%
Personal Service	90,306	3.7%
Other Service	544,954	22.1%
FIRE+SBM+Vet+Travel	137,793	5.6%
Medical/Dental/Health Ser.	58,859	2.4%
Subtotal Services	**1,043,961**	**42.4%**
Vacant	313,353	12.7%
TOTAL (millions of ft²)	**2,463,413**	**100%**

Service-oriented uses account for the single largest category of retail floorspace inventory in St. Thomas, accounting for 42.4% of the total inventory. Retail uses, including Food Store Retail (FSR) plus Non-Food Store Retail (NFSR) plus home improvement (HI) plus liquor/beer/wine retail (LBW) account for a similar share of the city's total floorspace (44.9%). FSR space alone accounts for about one tenth of all floor space (10.9%).

The differences between the 2000 and 2015 FSR, NFSR, Services and Vacancy inventories in St. Thomas are presented in **Table 4-2.** In terms of total square footage, the retail floorspace inventory of St. Thomas has grown by 80.0% since 2000 and 14.9% since 2007.

Table 4-2: 2000-2015 Floorspace Inventory

INVENTORY (ft²)	Inventory Difference, 2000-2015	Inventory Difference, 2007-2015	Inventory Change (%), 2000-2015	Inventory Change (%), 2007-2015
Supermarket / Grocery	74,438	21,783	51.7%	11.1%
Specialty Food	-11,784	-8,749	-18.7%	-14.6%
Subtotal FSR	**62,654**	**13,034**	**30.3%**	**5.1%**
Department Store	22,526	-53,443	19.2%	-27.6%
General Merchandise	6,637	-9,156	11.2%	-12.2%
Drug / Cosmetics / Pers. Care	22,097	-2,950	82.7%	-5.7%
Apparel & Accessories	14,090	-3,865	22.0%	-4.7%
Home Furnishings	9,341	-4,929	10.0%	-4.6%

INVENTORY (ft²)	Inventory Difference, 2000-2015	Inventory Difference, 2007-2015	Inventory Change (%), 2000-2015	Inventory Change (%), 2007-2015
Other Non-Food Retail	36,060	24,395	31.8%	19.5%
Canadian Tire /TBA/HAAS	79,363	23,197	327.8%	28.9%
Subtotal NFSR	**190,114**	**-26,751**	**38.1%**	**-3.7%**
Home Improvement	80,926	-12,754	189.0%	-9.3%
L/B/W	4,142	0	21.1%	0.0%
Total FSR+NFS+ HI+L/B/W	**337,836**	**-26,471**	**44.0%**	**-2.3%**
Services:				
Restaurant	-7,442	-16,173	-4.3%	-8.9%
Bank / Trust	1,341	-3,602	3.0%	-7.2%
Personal Service	13,558	5,376	17.7%	6.3%
Other Service	466,138	217,066	584.2%	66.2%
FIRE+SBM+Vet+Travel	57,741	2,371	72.1%	1.8%
Medical/Dental/Health Ser.	27,514	26,559	87.8%	82.2%
Subtotal Services	**558,850**	**231,597**	**114.8%**	**28.5%**
Vacant	198,379	113,919	174.5%	57.1%
TOTAL (ft²)	**1,095,065**	**319,045**	**80.0%**	**14.9%**

Compared to the floorspace inventory in 2000, all categories of retail have grown in square footage except for the Specialty Food and Restaurant categories, which experienced a loss of almost 12,000 and 7,500 square feet, respectively.

Since 2007, multiple categories have declined in square footage, including most categories of non-food store retail. This is exemplified by the loss of the Zeller's at Elgin Mall. At the same time, the Services category has grown substantially, adding more than 230,000 square feet, most of which falls under the Other Service subcategory. The Other Non-Food Retail and Supermarket categories also experienced growth of more than 24,000 and 21,000 square feet, respectively.

The major vacancies in the 2015 inventory for St. Thomas are presented in **Table 4-3**. Comparing the 2007 and 2015 square footage vacancies in St. Thomas reveals that the total vacant area has increased by 57.1%, from 199,434 ft^2 in 2007 to 313,353 ft^2 by 2015. Most nodes experienced an increase in vacancy compared to 2007. Nodes 9, 3, 5 and 8 underwent the largest increases in vacancy, accounting for a combined total increase of more than 126,000 square feet of vacant space. The vacancies in these nodes are each composed of one or two large vacant properties combined with smaller vacancies. These nodes also account for the majority of vacant retail space in the city, amounting to 81.0 % of all vacant space.

Table 4-3: 2015 Vacancy Rates by Node

Node	Nodal Vacancy Rate, 2015	Vacant Area per node, 2015 (ft^2)	Vacant Area per node, 2007 (ft^2)	Change in Vacant Space, 2007-2015 (ft^2)
Node 1: Office Professional	0.0%	0	3,173	(3,173)
Node 2: Talbot West	8.6%	8,556	22,300	(13,744)
Node 3: Talbot Central	14.5%	90,793	82,390	8,403
Node 4: Talbot East	6.4%	16,618	9,278	7,340
Node 5: Secondary Commercial	12.1%	26,664	21,590	5,074
Node 6: Minor Commercial	7.7%	12,595	20.230	(7,635)
Node 7: Highway Commercial	4.7%	9,320	7,442	1,878
Node 8: Industrial	14.9%	20,711	1,680	19,031
Node 9: Major Commercial	42.4%	115,592	21,123	94,469
Node 10: Power Centre	2.9%	12,504	7,210	5,294
Total	**12.7%**	**313,353**	**199,434**	**113,919**

Node 9 (Elgin Mall) has experienced the loss of its anchor store, Zellers, which accounts for 87,000 square feet of the total 116,000 square feet of vacant space in the node.

Talbot Central has more than 40 vacancies totaling approximately 91,000 square feet of vacant space.

Only three nodes experienced a decrease in net vacant space since 2007: Node 1 – Office Professional reduced its vacant space by slightly more than 3,000 square feet; Node 2 – Talbot West reduced its vacant space by more than 13,000 square feet; and Node 6 – Minor Commercial saw a reduction of more than 7,600 square feet.

The vacant space approximated 114,000 ft^2 in the January 2000 study versus 199,000 square feet (8.3% of total space) in the June 2007 study versus 194,000 square feet (7.3% of total space) in the June 2009 study. Today the amount of vacancy @ 313,353 square feet (12.7% of total space) is almost three times the amount of vacancy in the June 2000 study.

Although the power centre reduced outflow to other big box retailing, particularly in London, the current vacancy is unprecedented due to the recent closure of the remaining department store anchor in Elgin Mall (Zellers @ 87,000 ft^2) whose closure precipitated the closure of other national chain and independent stores (about 30,000 ft^2). Elgin Mall is currently 42.4% vacant (about 116,000 ft^2).

The following sections describe the retail floorspace inventory by store type. More detailed data can be found in **Appendix B1**.

4.2.1 Food-Store Retail

Food-store retail (FSR) accounts for almost 270,000 ft^2 of retail space in the St. Thomas inventory, or 10.9% of the total inventory. Almost half of all FSR floorspace is accounted for by The Real Canadian Superstore in Node 10: Power Centre. The Supermarket & Grocery category

itself accounts for 81% of all FSR floorspace, while Specialty Food Stores account for 19% of FSR floorspace. These types of retail are found throughout almost all nodes.

4.2.2 Non-food-store Retail

Non-food-store retail (NFSR) accounts for approximately 688,909 ft^2 of retail floorspace in St. Thomas, or 28.0% of the total retail floorspace inventory. Similar to FSR retail, approximately 39.3% of all NFSR retail floorspace is found within Node 10: Power Centre. More than one-quarter of all NFSR floorspace is located within Node 3: Talbot Central. Remaining NFSR floorspace is spread throughout the city, across all nodes.

4.2.3 Home Improvement & Liquor/Beer/Wine

Home Improvement (HI) retail accounts for 5.0% of all retail inventory in St. Thomas, totaling 123,737 ft^2. Three-quarters of all HI floorspace is located in Node 5: Secondary Commercial accounted for by the Home Hardware and Rona stores. HI floorspace can also be found in Node 8: Industrial as well as Node 7: Highway Commercial.

Liquor, beer and wine (L/B/W) retail floorspace is limited to two properties in St. Thomas: the LCBO in Node 4: Talbot East and the Beer Store in Node 7: Highway Commercial. Together these two properties amount to 23,728 ft^2 and account for 1.0% of total retail floorspace in St. Thomas.

4.2.4 Services

Services account for almost 1.05 million square feet of retail space in St. Thomas, which amounts to 42.4% of the total share of retail floorspace. This category includes personal services, medical/dental services, professional services, banking and FIRE (finance, insurance and real estate) services, as well as restaurants/fast food outlets and other services. Almost half of all floorspace categorized as Services can be found within Node 3: Talbot Central and Node 4: Talbot East. The remaining floorspace is found spread throughout the city.

5.0 Projected Retail Demand

5.1 Trade Area Expenditure Potential

In order to project the total future retail market demand, an estimation of the current Trade Area expenditure levels for each retail type is undertaken and projected forward based on population growth and estimated real growth. To assess the current Trade Area expenditure levels, the 2015 Ontario average per capita expenditures are used, and adjusted to account for the difference in income levels. The process to adjust the Ontario-wide expenditures to obtain St. Thomas Trade Area expenditures by type is explained in Section 5.1.1.

5.1.1 Linear Regression Model

The findings of this report are based on the assumption that a household's spending patterns directly relate to its income, such that higher levels of income lead to higher levels of expenditure for certain types of retail goods.

This assumption is tested using linear regression, a proven statistical method which allows us to understand the relationship between these two variables. The linear regression model used in this report uses income and expenditure data from the 2013 Survey of Household Spending and the 2014 Retail Trade survey. Applying this method to analyze historical income and expenditure data shows that there is a strong positive correlation between the two variables, such that an increase in income will likely lead to an increase in expenditure.

Given this relationship between income and spending, the model is used to predict expenditure levels of a particular type of a good for a given level of income. Using income data for the Primary and Secondary zones, the model allows us to estimate annual retail expenditure levels for St. Thomas and the surrounding area.

The data used to build the model and resulting regression equations are detailed in appendices A1-A4. Appendix A1 details the per-person income and expenditure indices used to calculate the regression equations used by the predictive model. Appendix A2 lists the reported values for annual retail sales by store type for the province of Ontario in 2014, as well as estimated per-capita values. This data is sourced from Statistics Canada's annual Retail Trade survey. Appendix A3 lists the per-capita income and expenditure indices computed using the regression equations detailed in Appendix A1. Appendix A4 lists the estimated levels of annual retail expenditure by spending category for the Primary and Secondary zones. These values are computed using the expenditure data listed in Appendix A2 and the expenditure indices detailed in Appendix A3.

5.1.2 Non-food Store Retail

The current (base year 2015) estimated non-food store retail expenditure is $389,700,000 for the total Trade Area, as presented in **Table 5-1**. Projecting forward based on a real growth assumption of 0.5% per annum compounded to 2021 and 0.25% between 2021 and 2026, there is a total Trade Area expenditure for non-food store retail of $467,300,000 in 2031.

Table 5-2: St. Thomas Trade Area "NFSR" (GAFO/DRUG) Expenditure Potential

Trade Area	2015	2016	2021	2026	2031
Primary Zone					
Population	40,135	40,435	42,720	45,235	47,675
Per Capita Expenditure ($) *	$5,147	$5,173	$5,303	$5,370	$5,370
Expenditure Potential ($ m's)	$206.6	$209.2	$226.6	$242.9	$256.0
Secondary Zone					
Population	35,195	35,380	36,605	37,790	38,925
Per Capita Expenditure ($) *	$5,204	$5,230	$5,362	$5,429	$5,429
Expenditure Potential ($ m's)	$183.1	$185.0	$196.3	$205.2	$211.3
Trade Area ($ m's)	**$389.7**	**$394.2**	**$422.8**	**$448.1**	**$467.3**

** Relative to an estimated 2015 Ontario average per capita NFSR (= GAFO / DRUG) expenditure of $5,366 per Appendix A-4.*
Assume real growth @ 0.5% per annum compounded to the year 2021 and 0.25% to 2026.

5.1.3 Home Improvement

The current (base year 2015) estimated home improvement retail expenditure is $57,500,000 for the total Trade Area, as presented in **Table 5-3**. Projecting forward based on a real growth assumption of 0.5% per annum compounded to 2021 and 0.25% between 2021 and 2026, there is a total Trade Area expenditure for home improvement retail of $68,900,000 in 2031.

Table 5-3: St. Thomas Trade Area "HI" (Home Improvement) Expenditure Potential

Trade Area	2015	2016	2021	2026	2031
Primary Zone					
Population	40,135	40,435	42,720	45,235	47,675
Per Capita Expenditure ($) *	$759	$763	$782	$792	$792
Expenditure Potential ($ m's)	$30.5	$30.8	$33.4	$35.8	$37.8
Secondary Zone					
Population	35,195	35,380	36,605	37,790	38,925
Per Capita Expenditure ($) *	$767	$771	$791	$801	$801
Expenditure Potential ($ m's)	$27.0	$27.3	$28.9	$30.3	$31.2
Trade Area ($ m's)	**$57.5**	**$58.1**	**$62.4**	**$66.1**	**$68.9**

** Relative to an estimated 2015 Ontario average per capita "HI" (Home Improvement / Hardware / Specialized Bldg. Material / Garden Ctr.) expenditure of $792 per Appendix A-4.*
Assume real growth @ 0.5% per annum compounded to the year 2021 and 0.25% to 2026.

5.1.4 Food Store Retail

The current (base year 2015) estimated food store retail expenditure is $178,400,000 for the total Trade Area, as presented in **Table 5-4**. Projecting forward based on a real growth assumption of 0.25% per annum compounded to 2026, there is a total Trade Area expenditure for food store retail of $210,700,000 in 2031.

Table 5-4: St. Thomas Trade Area "FSR" (Food Store Retail) Expenditure Potential

Trade Area	2015	2016	2021	2026	2031
Primary Zone					
Population	40,135	40,435	42,720	45,235	47,675
Per Capita Expenditure ($) *	$2,366	$2,371	$2,401	$2,431	$2,431
Expenditure Potential ($ m's)	$94.9	$95.9	$102.6	$110.0	$115.9
Secondary Zone					
Population	35,195	35,380	36,605	37,790	38,925
Per Capita Expenditure ($) *	$2,370	$2,376	$2,406	$2,436	$2,436
Expenditure Potential ($ m's)	$83.4	$84.1	$88.1	$92.1	$94.8
Trade Area ($ m's)	**$178.4**	**$180.0**	**$190.6**	**$202.0**	**$210.7**

** Relative to estimated 2015 Ontario average per capita FSR expenditure of $2,381 per Appendix A-4. Assume real growth @ 0.25% per annum compounded to the year 2026.*

5.1.5 Liquor/Beer/Wine

The current (base year 2015) estimated liquor/beer/wine expenditure is $42,600,000 for the total Trade Area, as presented in **Table 5-5**. Projecting forward based on a real growth assumption of 0.25% per annum compounded to 2026, there is a total Trade Area expenditure for liquor/beer/wine of $50,400,000 in 2031.

Table 5-5: St. Thomas Trade Area Liquor/Beer/Wine Expenditure Potential

Trade Area	2015	2016	2021	2026	2031
Primary Zone					
Population	40,135	40,435	42,720	45,235	47,675
Per Capita Expenditure ($) *	$561	$563	$570	$577	$577
Expenditure Potential ($ m's)	$22.5	$22.8	$24.3	$26.1	$27.5
Secondary Zone					
Population	35,195	35,380	36,605	37,790	38,925
Per Capita Expenditure ($) *	$571	$573	$580	$587	$587
Expenditure Potential ($ m's)	$20.1	$20.3	$21.2	$22.2	$22.9
Trade Area ($ m's)	**$42.6**	**$43.0**	**$45.6**	**$48.3**	**$50.4**

** Relative to an estimated 2015 Ontario average per capita Liquor/Beer/Wine expenditure of $604 per Appendix A-4. Assume real growth @ 0.25% per annum compounded to the year 2026.*

5.1.6 Restaurant

The current (base year 2015) estimated restaurant expenditure is $66,000,000 for the total Trade Area, as presented in **Table 5-6**. Projecting forward based on a real growth assumption of 0.25% per annum compounded to 2026, there is a total Trade Area expenditure for restaurant of $78,000,000 in 2031.

Table 5-6: St. Thomas Trade Area Restaurant Expenditure Potential

Trade Area	2015	2016	2021	2026	2031
Primary Zone					
Population	40,135	40,435	42,720	45,235	47,675
Per Capita Expenditure ($) *	$869	$871	$882	$893	$893
Expenditure Potential ($ m's)	**$34.9**	**$35.2**	**$37.7**	**$40.4**	**$42.6**
Secondary Zone					
Population	35,195	35,380	36,605	37,790	38,925
Per Capita Expenditure ($) *	$885	$887	$898	$909	$909
Expenditure Potential ($ m's)	**$31.1**	**$31.4**	**$32.9**	**$34.4**	**$35.4**
Trade Area ($ m's)	**$66.0**	**$66.6**	**$70.5**	**$74.7**	**$78.0**

** Relative to an estimated 2015 Ontario average per capita Restaurant expenditure of **$941** per Appendix A-4. Assume real growth @ 0.25% per annum compounded to the year 2026.*

5.2 Market Demand and Residual Space

Once potential per capita expenditure values are calculated for each retail category, potential demand for retail commercial space can be estimated through the calculation of residual market demands. This involves multiplying the estimated future per capita expenditures in each retail category by the projected population levels; then applying percent local capture rates derived from the 2007 study's consumer telephone survey; then adding in inflow support to derive the total expenditure potential of the existing space. Dividing the total potential by the existing square footage in each retail category yields the base year performance per square foot. Allowance is made for a limited amount of growth in the base year performance of the existing space in future years. Subtracting the sales of the existing space from the overall expenditure potential yields an amount "left over" for new space (the residual potential). Dividing the future residual potentials by appropriate sales performance levels per square foot for each retail category yields an estimate of the warranted new space (residual space estimates).

Residual demand indicates when new retail space could be developed without taking sales away from existing space; in this way, it constitutes a test for the 'ease of entry' of new space into the market. These values are used to plan for a balanced commercial supply within the retail commercial hierarchy of St. Thomas.

5.2.1 Non-food Store Retail

5.2.1.1 Department Store (NFSR)

Table 5-7 details future residual demands for department store retail space. It is assumed that 22.5% of all NFSR sales in the Primary and Secondary Zones are accounted for by the department store subcategory throughout the projection period. Of the remaining sales volume, 70% is assumed to remain within the Primary Zone for 2015, increasing to 70.5% in 2016, and to 71% for the remainder of the projection period; in the Secondary Zone, this value is assumed to be 50% throughout the projection period. The estimated amount of local-only

sales is then increased by 15% throughout the projection period in order to account for sales originating from consumers residing outside the study area (inflow).

Based on these assumptions, it is estimated that in the 2015 base year St. Thomas will capture approximately $62.5m in annual sales in the department store category, which are estimated to increase to $75.0m by 2031. Once the growing sales of the existing retail supply are subtracted from the department store sales potential, this total capture value decreases to $2.8m by 2031. Assuming that sales productivity for the existing space increases over the projection period, potential residual demand for approximately 4,200ft^2 of department store space is estimated to be warranted by 2026, exceeding 5,500ft^2 by 2031.

Table 5-7: St. Thomas Trade Area Department Store NFSR (GAFO/DRUG) Demands & Residual Space

Trade Area		2015	2016	2021	2026	2031
Primary Zone (St. Thomas)						
Expenditure Potential ($ m's)		$206.6	$209.2	$226.6	$242.9	$256.0
Dep't Store NFSR Share *						
@ 22.5%		$46.5				
@ 22.5%	*Jan./00 @ 25.0% vs. June 15/07 @ 35.0% vs. Apr. 21/09 @ 35.0%*		$47.1	$51.0	$54.7	$57.6
Local Capture*						
@ 70.0%		**$32.5**				
@ 70.5%	*Jan./00 @ 61.5% vs. June 15/07 @ 70.5% vs. Apr. 21, 2009 @ 71.0%*		**$33.2**			
@ 71.0%	*Jan./00 @ 87.5% vs. June 15/07 @ 71.0% vs. Apr. 21, 2009@ 71.0%*			**$36.2**	**$38.8**	**$40.9**
Secondary Zone						
Expenditure Potential ($ m's)		$183.1	$185.0	$196.3	$205.2	$211.3
Dep't Store NFSR Share *						
@ 22.5%		$41.2				
@ 22.5%	*Jan./00 @ 25.0% vs. June 15/07 @ 30.0% vs. Apr. 21/09 @ 30.0%*		$41.6	$44.2	$46.2	$47.5
Local Capture *						
@ 50.0%		**$20.6**				
@ 50.0%	*Jan./00 @ 77.5% vs. June 15/07 @ 61.5% vs. Apr. 21/09 @ 61.5%*		**$20.8**	**$22.1**	**$23.1**	**$23.8**
St. Thomas Primary and Secondary Zone Local Share Without Inflow		**$53.1**	**$54.0**	**$58.3**	**$61.9**	**$64.7**
PLUS Inflow **						
@ 15.0%		$9.4				
@ 15.0%	*Jan./00 @ 15.0% vs. June 15/07 @ 20.0% vs. Apr. 21/09 @ 20.0%*		$9.5	$10.3	$10.3	$10.3
Total Potential St. Thomas Local Capture		**$62.5**	**$63.5**	**$68.6**	**$72.2**	**$75.0**
Less Existing Competition						
*Jan./00 @ 117**,484** ft² vs. June 15/07 and Apr. 21/09 @ 193,455 ft²*						
Wal-Mart @ **140,010** ft² GLA ***						
$447 / ft² GLA		$62.5				

Trade Area	2015	2016	2021	2026	2031
$454 / ft² GLA		$63.5			
$490 / ft² GLA			$68.6		
$500 / ft² GLA				$70.0	
$515 / ft² GLA					$72.1
Residual Potential / Residual Sales Demand ($ m's)	**$0.0**	**$0.0**	**$0.0**	**$2.2**	**$2.8**
Residual / Warranted ft² GLA:					
@ $500 per ft² GLA	0	0	0	4,326	5,698
@ $510 per ft² GLA	0	0	0	4,241	5,586
@ $515 per ft² GLA	0	0	0	4,200	5,532

** Consumer telephone survey results (June 15, 2007) were used to determine base year shares*
*** Assume inflow @ 15.0% until 2021 and declining in percentage terms thereafter.*
**** Note the net loss of 53,445 ft² of dep't store space in St. Thomas since June 15, 2007 and April 21, 2009 studies due to Wal-Mart expansion and Zellers closure.*

5.2.1.2 Non-food Store Retail (excluding department stores)

Table 5-8 details the residual demands for non-food store retail, not including department store sales. Applying the reciprocal of the department store category, it is assumed that 77.5% of total NFSR sales in both study zones are accounted for by non-department store retail space. Of the remaining sales volume, 60% is assumed to be captured by St. Thomas retailers (60% local capture rate) for 2015, increasing to 62.5% in 2016, and to 65% for the remainder of the projection period. In the Secondary Zone, 30% of sales volume is assumed to be captured by St. Thomas retailers, increasing to 32.5% in 2016, and to 35% for the remainder of the projection period. The estimated amount of local-only sales is then increased by 15% throughout the projection period in order to account for sales inflow (i.e. sales originating from consumers residing outside the study area).

Based on these assumptions, it is estimated that in the 2015 base year St. Thomas will capture approximately $163.1m in annual non-department store NFSR sales, which are estimated to increase to $215.8m by 2031. Once the growing sales of the existing retail operations are subtracted from the non-department store sales potential, the total capture value decreases to $37.4m by 2031. Assuming increasing sales productivity over time, the base year value of $297/ft^2 in 2015 rises to $325/ft^2 by 2021. Thereafter, potential mid-range residual demands for more than 58,000 ft^2 of non-department store NFSR space are estimated to be warranted by 2026, exceeding 118,000 ft^2 by 2031.

Table 5-8: St. Thomas Trade Area Non-Department Store NFSR (GAFO/DRUG) Demands & Residual Space

Trade Area		2015	2016	2021	2026	2031
Primary Zone (St. Thomas)						
Expenditure Potential ($ m's)		$206.6	$209.2	$226.6	$242.9	$256.0
Non-Dep't Store NFSR Share *						
@ 77.5%	*Jan./00 @ 79.0% vs. June 15/07 @ 63.0% vs. Apr. 21/09 @ 63.0%*	$160.1				

Trade Area		2015	2016	2021	2026	2031
@ 77.5%	*Jan./00 @ 75.0% vs. June 15/07 @ 65.0% vs. Apr. 21/09 @ 65.0%*		$162.1	$175.6	$188.2	$198.4
Local Capture *						
@ 60.0%	*Jan./00 @ 63.3% vs. June 15/07 @ 66.1% vs. Apr. 21/09 @ 66.1%*	$96.1				
@ 62.5%	*Jan./00 @ 72.5% vs. June 15/07 @ 70.0% vs. Apr. 21/09 @ 70.0%*		$101.3			
@ 65.0%	*Jan./00 @ 72.5% vs. June 15/07 @ 70.5% vs. Apr. 21/09 @ 70.5%*			$114.1	$122.4	$129.0
Secondary Zone						
Expenditure Potential ($ m's)		$183.1	$185.0	$196.3	$205.2	$211.3
Non-Dep't Store NFSR Share *						
@ 77.5%	*Jan./00 @ 79.0% vs. June 15/07 @ 68.9% vs. Apr. 21/09 @ 68.9%*	$141.9				
@ 77.5%	*Jan./00 @ 75.0% vs. June 15/07 @ 70.0% vs. Apr. 21/09 @ 70.0%*		$143.4	$152.1	$159.0	$163.8
Local Capture *						
@ 30.0%	*Jan./00 @ 35.6% vs. June 15/07 @ 29.0% vs. Apr. 21/09 @ 29.0%*	$42.6				
@ 32.5%	*Jan./00 @ 65.0% vs. June 15/07 @ 29.5% vs. Apr. 21/09 @ 29.5%*		$46.6			
@ 35.0%	*Jan./00 @ 65.0% vs. June 15/07 @ 30.0% vs. Apr. 21/09 @ 30.0%*			$53.2	$55.7	$57.3
St. Thomas Primary and Secondary Zone Local Share Without Inflow		**$138.6**	**$147.9**	**$167.4**	**$178.0**	**$186.3**
Plus Inflow **						
@ 15.0%	*Jan./00 @ 15.0% vs. June 15/07 @ 17.5% vs. Apr. 21/09 @ 17.5%*	$24.5				
@ 15.0%			$26.1	$29.5	$29.5	$29.5
Total Potential St. Thomas Local Capture		**$163.1**	**$174.0**	**$196.9**	**$207.5**	**$215.8**
Less Existing Competition						
Jan./00 @ 381,311 ft² vs. June 15/07 @ 522,207 ft² vs. Apr. 21/09 @ 566,127 ft²						
@ **548,899** ft² GLA ***						
@ $297 / ft² GLA		**$163.1**				
@ $317 / ft² GLA			**$174.0**			
@ $325 / ft² GLA				**$178.4**	**$178.4**	**$178.4**
Residual Sales Demand		**$0.0**	**$0.0**	**$18.5**	**$29.2**	**$37.4**
Residual / Warranted ft² GLA:						
@ $300 per ft² GLA		0	0	61,682	97,184	124,757
@ $315 per ft² GLA		0	0	58,745	92,556	118,816
@ $330 per ft² GLA		0	0	56,074	88,349	113,415

** The base year Local Capture rates are based on the consumer telephone survey results (June 15, 2007 Appendix C).*
*** Assume inflow @ 15.0% until 2021 and declining in percentage terms thereafter.*
**** Note the loss of 38,817 ft² of non-dep't store NFSR space in St. Thomas since April 21, 2009 study.*

Table 5-9 tests the non-department store NFSR retail space against existing vacancies. St. Thomas' vacancy rates have gone up since the previous retail market studies (8.3% of the supply was vacant in 2000 and 2007, 7.3% of the supply was vacant in 2009 and 13% of the supply is vacant in 2015). Assuming almost one-third of currently-vacant space is allotted for future non-department store NFSR space over the projection period (i.e. 100,000 ft^2), the estimated residual demand will begin to exceed the projected supply at some point between 2026 and 2031. Much of the vacancy uptake can be expected at Elgin Mall where there is a need for replacement non-department store NFSR space, particularly if a sizeable amount of the vacant Zellers department store is re-purposed to non-department store NFSR.

Table 5-9: St. Thomas Trade Area Test - NFSR (GAFO/DRUG) Combined Impacts

Trade Area	2015	2016	2021	2026	2031
Residual Space Demands (Sq. Ft.):					
@ $300 per ft² GLA	0	0	61,652	97,184	124,757
@ $315 per ft² GLA	0	0	58,745	92,556	118,816
@ $330 per ft² GLA	0	0	56,074	88,349	113,415
Mid-range Residual Demands (2016-2031) (rounded ft²)	**0**	**0**	**60,000**	**95,000**	**120,000**
LESS Potential Non-Department Store NFSR Supply (ft²):					
Committed Supply					
ST. THOMAS					
31.6% Vacancy uptake rate against 313,353 ft^2 (=15% of current vacancy)*			100,000	100,000	100,000
Other Zoned Site(s)			0	0	0
Subtotal Committed			**100,000**	**100,000**	**100,000**
Not Committed Supply					
Unassigned Notional Test Allocation (ft²)			**0**	**0**	**0**
Total Potential Supply (ft²)			**100,000**	**100,000**	**100,000**
(Committed + Unassigned Notional Test Allocation)					
Surplus (+) / Shortfall (-) of Supply Over Demand (Sq. Ft.)			**40,000**	**5,000**	**-20,000**
Residual Sales Demand ($ m's)			**$18.5**	**$29.2**	**$37.4**
Less Potential Non-Department Store NFSR Sales ($ m's):					
@ Total Potential Supply (ft²)			**100,000**	**100,000**	**100,000**
@ $315 per ft²			**$31.5**	**$31.5**	**$31.5**
Potential Sales (-) Transfer / (+) Increment ($ m's)			**($13.0)**	**($2.34)**	**$5.9**
Resultant Sales Performance of Existing Non-Department Store NFSR Space ($ per ft²) Measured against base year sales of $297 / ft² GLA			$301	$321	$336
Resultant Impact on Existing Sales Performance (%)			-7.3%	-1.3%	3.3%

** Compare vacant space in Jan 00 @ 114,140 ft² (= 8.3% vacancy rate), June 07 @ 199,434 ft² (= 8.3% vacancy rate), June 09 @ 193,943 ft² (= 7.3% vacancy rate)*

5.2.1.3 HAAS/TBA (e.g. Canadian Tire)

As a check calculation**, Table 5-10** details residual demands for HAAS/TBA retail activities which are already included in the non-department store NFSR analysis.

It is assumed that 7% of total NFSR sales in both study zones are accounted for by these types of expenditures.

The existing Canadian Tire store and other HAAS/TBA retailers in St. Thomas are expected to capture 90% of the expenditures by Primary zone residents; in the Secondary Zone, a local capture rate of 40% is set in 2015, increasing to 50% for the remainder of the projection period. Sales originating from non-trade area residents are assumed to increase local sales by 15% throughout the forecast period.

Based on these assumptions, it is estimated that St. Thomas will capture approximately $21,300,000 in annual HAAS/TBA sales in the 2015 base year, increasing to $27,300,000 by 2031. Once the sales of the existing retail operations are taken into account, only $1m of residual demand is available for new space in 2031. Based on an average sales productivity level of $225/ft^2, potential residual space demand for 4,600ft^2 of space is estimated to be warranted by 2031.

Table 5-10: St. Thomas Trade Area HAAS/TBA (including Canadian Tire) Residual Demands

Trade Area		2015	2016	2021	2026	2031
Primary Zone (St. Thomas)						
Expenditure Potential ($ m's)		$206.6	$209.2	$226.6	$242.9	$256.0
HAAS / TBA Share of NSR (GAFO + Drug) ($ m's)						
@ 7.0%	*Jan./00 @ 8.0% vs. June 15/07 @ 7.25% vs. Apr. 21/09 @ 7.25%*	$14.5	$14.6	$15.9	$17.0	$17.9
HAAS / TBA Local Capture *						
@ 90.0%	*Jan./00 @ 96.6% vs. June 15/07 @ 96.9% vs. Apr. 21/09 @ 96.9%*	$13.0				
@ 90.0%	*Jan./00 @ 97.5% vs. June 15/07 @ 96.5% vs. Apr. 21/09 @ 96.5%*		$13.2	$14.3	$15.3	$16.1
Secondary Zone						
Expenditure Potential ($ m's)		$183.1	$185.0	$196.3	$205.2	$211.3
HAAS / TBA Share ($ m's)						
@ 7.0%	*Jan./00 @ 8.0% vs. June 15/07 @ 7.25% vs. Apr. 21/09 @ 7.25%*	$12.8	$13.0	$13.7	$14.4	$14.8
HAAS / TBA Local Capture *						
@ 40.0%	*Jan./00 @ 34.8% vs. June 15/07 @ 38.8% vs. Apr. 21/09 @38.8%*	$5.1				
@ 50.0%	*Jan./00 @ 70.0% vs. June 15/07 @ 50.0% vs. Apr. 21/09 @50.0%*		$6.5	$6.9	$7.2	$7.4
St. Thomas Primary and Secondary Zone Local Share Without Inflow		**$18.1**	**$19.7**	**$21.1**	**$22.5**	**$23.5**
Plus Inflow **						
@ 15.0%	*Jan./00 @ 15.0% vs. June 15/07 @ 16.5% vs. Apr. 21/09 @ 16.5%*					
@ 15.0%		$3.2	$3.5	$3.7	$3.7	$3.7
Total Potential St. Thomas Local Capture		**$21.3**	**$23.1**	**$24.9**	**$26.2**	**$27.3**
Less Existing Competition						
Canadian Tire + Other HAAS / TBA						
Jan./00 @ 24,212 ft² vs. June 15/07 @ 80,378 ft² vs. Apr. 21/09 @ 129,397 ft²						
@ 103,575 ft² GLA						

Trade Area	2015	2016	2021	2026	2031
@ $206 /ft² GLA	$21.3				
@ $223 /ft² GLA		$23.1			
@ $240 /ft² GLA			$24.9		
@ $253 /ft² GLA				$26.2	$26.2
Residual Sales Demand	**$0.0**	**$0.0**	**$0.00**	**$0.0**	**$1.0**
Residual / Warranted ft² GLA:					
@ $200 per ft² GLA	0	0	0	0	5,206
@ $225 per ft² GLA	0	0	0	0	4,627
@ $250 per ft² GLA	0	0	0	0	4,164

** Consumer telephone survey results (June 15, 2007) used to determine base year shares.*
*** Assume future inflow @ 15.0% until 2021 and assume declining inflow in percentage terms thereafter.*

5.2.2 Home Improvement

Table 5-11 details residual demands for home improvement (HI) retail sales. It is assumed that 75% of total HI sales will be captured by St. Thomas HI retailers in 2015, increasing to 80% in 2016, then to 82.5% of sales by 2021 and for the remainder of the projection period. In the Secondary Zone, it is assumed that 45% of total HI sales will be captured by St. Thomas HI retailers in 2015, increasing to 50% in 2016, then to 52.5% of sales by 2021 and for the remainder of the forecast period. Sales inflow originating from non-trade area residents are assumed to increase local sales by 20% throughout the projection period.

Based on these assumptions, it is estimated that St. Thomas will capture approximately $43,800,000 in annual HI sales in 2015. The sales potential is estimated to increase to $58,200,000 by 2031. Once the sales volumes of the existing retail operations are taken into account, the available sales potential decreases to $11,800,000 by 2031. Based on an average sales productivity of $350/ft^2, potential residual space demand for more than 4,000ft^2 of space is estimated to be warranted as early as 2016, increasing to 33,700ft^2 by 2031.

Table 5-11: St. Thomas Trade Area Home Improvement Demands & Residual Space

Trade Area	2015	2016	2021	2026	2031
Primary Zone (St. Thomas)					
Expenditure Potential ($ m's)	$30.5	$30.8	$33.4	$35.8	$37.8
@ 75.0% *Jan./00 @ 54.8% vs. June 15/07 @ 72.3% vs. Apr. 21/09 @ 72.3%*	$22.8				
@ 80.0% *Jan./00 @ 85.0% vs. June 15/07 @ 80.0% vs. Apr. 21/09 @ 80.0%*		$24.7			
@ 82.5% *Jan./00 @ 85.0% vs. June 15/07 @ 80.0% vs. Apr. 21/09 @ 80.0%*			$27.6	$29.6	$31.1
Secondary Zone					
Expenditure Potential ($ m's)	$27.0	$27.3	$28.9	$30.3	$31.2
Local Capture *					
@ 45.0% *Jan./00 @ 29.3% vs. June 15/07 @43.8% vs. Apr. 21/09 @ 43.8%*	$12.2				

Trade Area	2015	2016	2021	2026	2031
@ 50.0% *Jan./00 @ 60.0% vs. June 15/07 @ 65.0% vs. Apr. 21/09 @ 65.0%*		$13.6			
@ 52.5% *Jan./00 @ 60.0% vs. June 15/07 @ 65.0% vs. Apr. 21/09 @ 65.0%*			$15.2	$15.9	$16.4
St. Thomas Primary and Secondary Zone Local Share Without Inflow	**$35.0**	**$38.3**	**$42.8**	**$45.4**	**$47.5**
Plus Inflow					
@ 20.0% *Jan./00 @ 15.0% vs. June 15/07 @ 35% vs. Apr. 21/09 @ 25%*					
@ 20.0% **	$8.8	$9.6	$10.7	$10.7	$10.7
Total Potential St. Thomas Local Capture	**$43.8**	**$47.9**	**$53.5**	**$56.1**	**$58.2**
Less Existing Competition					
Jan./00 @ 42,811 ft² vs. June 15/07 @ 136,491 ft² vs. Apr. 21/09 @ 126,746 ft²					
@ 123,737 ft² GLA					
@ $354 /ft² GLA	$43.8				
@ $375 /ft² GLA		$46.4	$46.4	$46.4	$46.4
Residual Sales Demand	**$0.0**	**$1.5**	**$7.1**	**$9.7**	**$11.8**
Residual / Warranted ft² GLA:					
@ $325 per ft² GLA	0	4,616	21,696	29,937	36,311
@ $350 per ft² GLA	0	4,286	20,146	27,800	33,717
@ $375 per ft² GLA	0	4,001	18,803	25,946	31,469

** Consumer telephone survey results (June 15, 2007) used to determine base year shares.*
*** Assume future inflow @ 20.0% until 2021 and assume declining inflow in percentage terms thereafter.*

Note: The warranted square footages exclude seasonal unenclosed outdoor garden centre space. The sales for the garden centre space are rolled into the sales of the permanent building.

5.2.3 Food Store Retail

5.2.3.1 Supermarket/Grocery Store (FSR)

Table 5-12 details residual demand for supermarket grocery store retail sales. It is assumed that 85% of total FSR sales in the Primary and Secondary Zones are accounted for by these types of expenditures. In the Primary Zone, a local capture rate of 90% is assumed in 2015, increasing to 92.5% in 2016 and for the remainder of the projection period. In the Secondary Zone, a 40% local capture rate is assumed, increasing to 41.5% in 2016 and beyond. Sales originating from non-local residents are assumed to increase local sales by 15% throughout the projection period.

Based on these assumptions, it is estimated that St. Thomas will capture approximately $118,800,000 in annual supermarket/Grocery sales in 2015. The sales potential is estimated to increase to $144,300,000 by 2031. Once existing supermarket/grocery operations are subtracted from the sales potential, the available sales potential decreases to $22,000,000 by 2031. Based on an average sales productivity level of $550/ft^2, a residual space demand of 6,200ft^2 of space is estimated to be warranted in 2016, increasing to nearly 40,000ft^2 by 2031.

Table 5-12: St. Thomas Trade Area Supermarket Demands & Residual Space

Trade Area		2015	2016	2021	2026	2031
Primary Zone (St. Thomas)						
Expenditure Potential ($ m's)		$94.9	$95.9	$102.6	$110.0	$115.9
Supermarket / Grocery Share						
@ 85.0%	*Jan./00 @ 75.0% vs. June 15/07 @ 81.0% vs. Apr. 21/09 @ 81.0%*	$80.7				
@ 85.0%	*Jan./00 @ 80.0% vs. June 15/07 @ 85.0% vs. Apr. 21/09 @ 85.0%*		$81.5	$87.2	$93.5	$98.5
Local Capture *						
@ 90.0%	*Jan./00 @ 96.2% vs. June 15/07 @ 97.5% vs. Apr. 21/09 @ 97.5%*	**$72.6**				
@ 92.5%	*Jan./00 @ 96.5% vs. June 15/07 @ 97.5% vs. Apr. 21/09 @ 97.5%*		**$75.4**	**$80.7**	**$86.5**	**$91.1**
Secondary Zone						
Expenditure Potential ($ m's)		$83.4	$84.1	$88.1	$92.1	$94.8
Supermarket / Grocery Share						
@ 85.0%	*Jan./00 @ 75.0% vs. June 15/07 @ 80.5% vs. Apr. 21/09 @ 80.5%*	$70.9				
@ 85.0%	*Jan./00 @ 805.0% vs. June 15/07 @82.0% vs. Apr. 21/09 @ 82.0%*		$71.5	$74.9	$78.3	$80.6
Local Capture *						
@ 40.0%	*Jan./00 @ 34.4 vs. June 15/07 @ 46.5% vs. Apr. 21/09 @ 46.5%*	**$28.4**				
@ 41.5%	*Jan./00 @ 37.5% vs. June 15/07 @ 50.5% vs. Apr. 21/09 @ 50.5%*		**$29.7**	**$31.1**	**$32.5**	**$33.4**
St. Thomas Primary and Secondary Zone Local Share Without Inflow		**$101.0**	**$105.0**	**$111.7**	**$118.9**	**$124.6**
Plus Inflow **						
@ 15.0%	*Jan./00 @ 7.5% vs. June 15/07 @ 17.5% vs. Apr. 21/09 @ 17.5%*					
@ 15.0%		$17.8	$18.5	$19.7	$19.7	$19.7
Total Potential St. Thomas Local Capture		**$118.8**	**$123.6**	**$131.4**	**$138.7**	**$144.3**
Less Existing Competition						
*Jan./00 @ 144,040 ft² vs. June 15/07 @ 169,895 ft² vs. Apr. 21/09 @ 198,663 ft² ****						
@ 218,478 ft² GLA						
@ $544 /ft² GLA		**$118.8**				
@ $550 /ft² GLA			**$120.2**			
@ $560 /ft² GLA				**$122.3**	**$122.3**	**$122.3**
Residual Sales Demand		**$0.0**	**$3.4**	**$9.1**	**$16.3**	**$22.0**
Residual / Warranted ft² GLA:						
@ $525 per ft² GLA		0	6,517	17,310	31,081	41,824
@ $550 per ft² GLA		0	6,221	16,523	29,668	39,923
@ $575 per ft² GLA		0	5,951	15,805	28,378	38,187

** Consumer telephone survey results (June 15, 2007) used to determine base year shares.*
*** Assume future inflow @ 15.0% until 2021 and assume declining inflow in percentage terms thereafter.*
**** Existing Competition does not account for the Royal Canadian Super Store (RCSS) expansion potential of 12,000 square feet.*

Table 5-13 lists the existing supermarket/grocery store supply and estimates directional sales impacts. It also estimates the effect of adding 30,000ft^2 of supermarket space in 2021 as a notional test allocation for a new/expanded store. Assuming the additional space achieves a 9% market share of all supermarket/grocery sales in St. Thomas, and assuming the additional space operated at a lower sales productivity than existing stores ($396/ft^2 in 2021, increasing to $433/ft^2 by 2031), minor directional impacts would be experienced by the existing supermarkets and grocery store in 2021, with full recovery and sales gains by 2026 and thereafter.

Table 5-13: St. Thomas Trade Area Supermarket/Grocery Store Directional Impacts

	2015	2016	2021	2026	2031
Total Potential St. Thomas Local Capture ($m)	**$118.8**	**$123.6**	**$131.4**	**$138.7**	**$144.3**
Less Existing Competition					
Real Canadian Super Store ($m)	$71.3	$74.2	$71.0	$74.9	$78.2
% Share	60.0%				
Future % Share (Power Ctr.)		60.0%	54.0%	54.0%	54.2%
Sales/ft² @ 128,583 ft² GLA (excluding gas bar)	**$554**	**$577**	**$552**	**$582**	**$608**
Impact on 2015 Base Year Sales Volume (%)		***4.0%***	***-0.4%***	***5.0%***	***9.8%***
Briwood Farmers Market ($m)	$4.8	$4.9	$4.9	$5.2	$5.4
% Share (Highway Commercial)	4.0%				
Future % Share		4.0%	3.8%	3.8%	3.8%
Sales/ft² @ 7,845 ft² GLA	**$606**	**$630**	**$628**	**$663**	**$690**
Impact on 2015 Base Year Sales Volume (%)		***4.0%***	***3.7%***	***9.4%***	***13.9%***
FreshCo (formerly Price Chopper**) ($m)**	$16.6	$17.3	$17.0	$17.9	$18.4
% Share (Talbot East - 1010 Talbot St.)	14.0%				
Future % Share		14.0%	12.9%	12.9%	12.8%
Sales/ft² 31,030 ft² GLA	**$536**	**$558**	**$546**	**$576**	**$594**
Impact on 2015 Base Year Sales Volume (%)		***4.0%***	***1.9%***	***7.5%***	***10.9%***
Foodland (formerly IGA**) ($m)**	$8.9	$9.3	$9.2	$9.7	$10.1
% Share (22 William St.)	7.5%				
Future % Share		7.5%	7.0%	7.0%	7.0%
Sales/ft² 17,410 ft² GLA	**$512**	**$532**	**$528**	**$558**	**$580**
Impact on 2015 Base Year Sales Volume (%)		***4.0%***	***3.2%***	***8.9%***	***13.4%***
Metro (formerly A&P) **($m)**	$17.2	$17.9	$17.5	$18.5	$19.1
% Share (Elgin Mall - 417 Wellington St.)	14.5%				
Future % Share		14.5%	13.3%	13.3%	13.3%
Sales/ft² 33,610 ft² GLA	**$513**	**$533**	**$520**	**$551**	**$569**
Impact on 2015 Base Year Sales Volume (%)		***4.0%***	***1.5%***	***7.4%***	***11.0%***
Notional Supermarket/Grocery Store Test Allocation ($m) *			$11.9	$12.5	$13.0

	2015	2016	2021	2026	2031
Future % Share			9.0%	9.0%	9.0%
Sales/ft² @ 30,000 ft² GLA			**$396**	**$416**	**$433**
Total St. Thomas Supermarket Share (%)	*100.0%*	*100.0%*	*100.0%*	*100.0%*	*100.0%*
Total St. Thomas Supermarket Sales ($ m's)	$118.8	$123.6	$131.4	$138.7	$144.3
Total St. Thomas Supermarket Sales/ ft²					
2015-2021 218,478 ft² GLA	$544	$566	$547		
2026-2031 248,478 ft² GLA				$558	$581
Residual Sales Demand ($m)	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**

** The notional test allocation represents either expansion potential of existing supermarket/grocery stores or a new supermarket/grocery store*

5.2.3.2 Specialty Food

Table 5-14 details the residual demands for specialty food store retail sales. Following the 85% supermarket share of FSR spending, it is assumed that a 15% reciprocal share of total FSR sales in both study zones are accounted for by specialty food expenditures. An 80% local capture rate is assumed for the Primary Zone in 2015, increasing to 81.5% in 2016 and for the remainder of the projection period. In the Secondary Zone, a local capture rate of 30% is assumed in 2015, increasing to 31.5% in 2016 and thereafter. Sales inflow is assumed to increase local sales by 10% throughout the projection period.

Based on these assumptions, it is estimated that St. Thomas can capture approximately $16,800,000 in annual specialty food sales in 2015. The sales potential is estimated to increase to $18,700,000 by 2031. Once the sales of the existing specialty food operations are subtracted from the future sales potential, the remaining residual potential decreases to $17,900,000 by 2031. Based on an average sales productivity level of $325/ft^2, there is a potential residual space demand for 1,900ft^2 of space by 2021, increasing to 7,900ft^2 by 2031.

Table 5-14: St. Thomas Trade Area Specialty Food Demands & Residual Space

Trade Area		2015	2016	2021	2026	2031
Primary Zone (St. Thomas)						
Expenditure Potential ($ m's)		$94.9	$95.9	$102.6	$110.0	$115.9
Specialty Food Share						
@ 15.0%	*Jan./00 @ 25.0% vs. June 15/07 @ 19.0% vs. Apr. 21/09 @ 19.0%*	$14.2				
@ 15.0%	*Jan./00 @ 20.0% vs. June 15/07 @ 15.0% vs. Apr. 21/09 @ 15.0%*		$14.4	$15.4	$16.5	$17.4
Local Specialty Food Capture *						
@ 80.0%	*Jan./00 @ 88.2% vs. June 15/07 @ 79.7% vs. Apr. 21/09 @ 79.7%*	**$11.4**				
@ 81.5%	*Jan./00 @ 92.5% vs. June 15/07 @ 80.5% vs. Apr. 21/09 @ 80.5%*		**$11.7**	**$12.5**	**$13.4**	**$14.2**

Trade Area		2015	2016	2021	2026	2031
Secondary Zone						
Expenditure Potential ($ m's)		$83.4	$84.1	$88.1	$92.1	$94.8
Specialty Food Share						
@ 15.0%	*Jan./00 @ 25.0% vs. June 15/07 @ 19.5% vs. Apr. 21/09 @ 19.5%*	$12.5				
@ 15.0%	*Jan./00 @ 20.0% vs. June 15/07 @ 18.0% vs. Apr. 21/09 @ 18.0%*		$12.6	$13.2	$13.8	$14.2
Local Specialty Food Capture *						
@ 30.0%	*Jan./00 @ 61.7% vs. June 15/07 @ 14.4% vs. Apr. 21/09 @ 14.4%*	**$3.8**				
@ 31.5%	*Jan./00 @ 68.5% vs. June 15/07 @ 14.5% vs. Apr. 21/09 @ 14.5%*		**$4.0**	**$4.2**	**$4.3**	**$4.5**
St. Thomas Primary and Secondary Zone Local Share Without Inflow		**$15.1**	**$15.7**	**$16.7**	**$17.8**	**$18.7**
Plus Inflow **						
@ 10.0%	*Jan./00 @ 5.0% vs. June 15/07 @ 15.0% vs. Apr. 21/09 @ 15.0%*					
@ 10.0%		$1.7	$1.7	$1.9	$1.9	$1.9
Total Potential St. Thomas Local Capture		**$16.8**	**$17.4**	**$18.6**	**$19.7**	**$20.5**
Less Existing Competition						
Jan./00 @ 63,031 ft² vs. June 15/07 @ 60,000 ft² vs. Apr. 21/09 @ 51,652 ft²						
@ 51,247 ft² GLA						
@ $328 /ft² GLA		**$16.8**				
@ $340 /ft² GLA			**$17.4**			
@ $350 /ft² GLA				**$17.9**	**$17.9**	**$17.9**
Residual Sales Demand		**$0.0**	**$0.0**	**$0.6**	**$1.7**	**$2.6**
Residual / Warranted ft² GLA:						
@ $300 per ft² GLA		0	0	2,070	5,716	8,569
@ $325 per ft² GLA		0	0	1,911	5,276	7,910
@ $350 per ft² GLA		0	0	1,774	4,899	7,345

** Consumer telephone survey results (June 15, 2007) used to determine base year shares.*
*** Assume inflow @ 10.0% until 2021 and declining in percentage terms thereafter.*

5.2.4 Restaurant

Table 5-15 details residual demands for restaurant sales. It is assumed that 85% of restaurant sales will be captured by St. Thomas restaurateurs throughout the projection period. In the Secondary Zone, it is assumed that 40% of restaurant sales will be captured by St. Thomas restaurateurs in 2016, decreasing to 37.5% in 2021 for the remainder of the projection period. Sales originating from non-local residents are assumed to increase local sales by 20% throughout the projection period.

Based on the assumptions, it is estimated that St. Thomas can capture approximately $52,600,000 in annual restaurant sales in 2015. The restaurant sales potential is estimated to increase to $60,500,000 by 2031. After subtracting out the sales of existing restaurant space, the residual potentials range from $2,300,000 in 2021 to $7,400,000 by 2031. Dividing the

residual sales potentials by a mid-range sales productivity level of $325/ft^2 yields a residual space demand of 7,000ft^2 of space by 2021, increasing to nearly 23,000ft^2 by 2031.

Table 5-15: St. Thomas Trade Area Restaurant Demands & Residual Space

Trade Area		2015	2016	2021	2026	2031
Primary Zone (St. Thomas)						
Expenditure Potential ($ m's)		$34.9	$35.2	$37.7	$40.4	$42.6
Local Capture *						
@ 85.0%	*June 15/07 @ 85.0% vs. Apr. 21/09 @ 85.0%*	**$29.6**	**$29.9**			
@ 85.0%	*June 15/07 @ 85.0% vs. Apr. 21/09 @ 85.0%*			**$32.0**	**$34.3**	**$36.2**
Secondary Zone						
Expenditure Potential ($ m's)		$31.1	$31.4	$32.9	$34.4	$35.4
Local Capture *						
@ 40.0%	*June 15/07 @ 40.0% vs. Apr. 21/09 @ 40.0%*	**$12.5**	**$12.5**			
@ 37.5%	*June 15/07 @ 40.0% vs. Apr. 21/09 @ 40.0%*			**$12.3**	**$12.9**	**$13.3**
St. Thomas Primary and Secondary Zone Local Share Without Inflow		**$42.1**	**$42.5**	**$44.3**	**$47.2**	**$49.4**
Plus Inflow						
@ 20.0%	*June 15/07 @ 20.0% vs. Apr. 21/09 @ 20.0%*	$10.5	$10.6			
@ 20.0%**				$11.1	$11.1	$11.1
Total Potential St. Thomas Local Capture		**$52.6**	**$53.1**	**$55.4**	**$58.3**	**$60.5**
Less Existing Competition						
Jan./00 @ 172,927 ft² vs. June 15/07 @ 181,658 ft² vs. Apr. 21/09 @ 175,545 ft²						
@ 165,485 ft² GLA						
@ $318 /ft² GLA		**$52.6**				
@ $321 /ft² GLA			**$53.1**	**$53.1**	**$53.1**	**$53.1**
Residual Sales Demand		**$0.0**	**$0.0**	**$2.3**	**$5.2**	**$7.4**
Residual / Warranted ft² GLA:						
@ $300 per ft² GLA		0	0	7,768	17,333	24,795
@ $325 per ft² GLA		0	0	7,171	16,000	22,888
@ $350 per ft² GLA		0	0	6,658	14,857	21,253

** Consultant estimate.*
*** Assume inflow @ 20.0% until 2021 and declining in percentage terms thereafter.*

5.2.5 Liquor/ Beer/ Wine

Table 5-16 details residual demands for the sale of alcoholic products from retail outlets (liquor, beer, wine). Local capture rates of 80% and 20% respectively are assumed for the Primary and Secondary Zones. Sales originating from non-local residents are assumed to increase local sales by 10% throughout the projection period.

Based on these assumptions, it is estimated that St. Thomas can capture approximately $24,500,000 in annual LBW sales in 2015. The sales potential is estimated to increase to

$29,200,000 by 2031. Subtracting out the sales of existing LBW operations yields a residual sales potential of $24,700,000 by 2031. Based on an average sales productivity level of $1040/ft^2, there is a potential residual space demand for 1,500ft^2 by 2021, increasing to 4,300ft^2 by 2031.

Table 5-16: St. Thomas Trade Area Liquor/Beer/Wine Demands & Residual Space

Trade Area		2015	2016	2021	2026	2031
Primary Zone (St. Thomas)						
Expenditure Potential ($ m's)		$22.5	$22.8	$24.3	$26.1	$27.5
Local Capture						
@ 80.0%	*June 15/07 @ 80.0% vs. Apr. 21/09 @ 80.0%*	**$18.0**				
@ 80.0%	*June 15/07 @ 80.0% vs. Apr. 21/09 @ 80.0%*		**$18.2**	**$19.5**	**$20.9**	**$22.0**
Secondary Zone						
Expenditure Potential ($ m's)		$20.1	$20.3	$21.2	$22.2	$22.9
Local Capture						
@ 20.0%	*June 15/07 @ 20.0% vs. Apr. 21/09 @ 20.0%*	**$4.0**				
@ 20.0%	*June 15/07 @ 20.0% vs. Apr. 21/09 @ 20.0%*		**$4.1**	**$4.2**	**$4.4**	**$4.6**
St. Thomas Primary and Secondary Zone Local Share Without Inflow		**$22.0**	**$22.3**	**$23.7**	**$25.3**	**$26.6**
Plus Inflow						
@ 10.0%	*June 15/07 @ 10.0% vs. Apr. 21/09 @ 10.0%*	$2.4				
@ 10.0%			$2.5	$2.6	$2.6	$2.6
Total Potential St. Thomas Local Capture		**$24.5**	**$24.7**	**$26.4**	**$28.0**	**$29.2**
Less Existing Competition						
Jan./00 @ 19,586 ft² vs. June 15/07 @ 23,728 ft² vs. Apr. 21/09 @ 25,175 ft²						
@ 23,728 ft² GLA						
@ $1,032 /ft² GLA		**$24.5**				
@ $1,042 /ft² GLA			**$24.7**	**$24.7**	**$24.7**	**$24.7**
Residual Sales Demand		**$0.0**	**$0.0**	**$1.6**	**$3.2**	**$4.5**
Residual / Warranted ft² GLA:						
@ $1,030 per ft² GLA		0	0	1,578	3,130	4,352
@ $1,040 per ft² GLA		0	0	1,563	3,100	4,311
@ $1,050 per ft² GLA		0	0	1,548	3,070	4,270

** Consultant estimate.*
*** Assume inflow @ 10.0% until 2021 and declining in percentage terms thereafter.*

5.2.6 Services

Table 5-17 examines the demands for service-oriented uses such as local office space, personal services, medical services, services to business management (SBM), and FIRE (finance/insurance/real estate). These uses are typically oriented towards serving both the local and regional population, and growth in demand is tied directly to population growth. Fixed ratios of average square footage needed per capita are used to estimate warranted demand for space for these categories. It is assumed that personal and other services require

an average of 2.1ft^2 per capita, 1.0ft^2 per capita for financial institutions, and 2.1ft^2 per capita for local office space. It is also assumed that 75% of the total space demand for these categories will be retained within St. Thomas.

Based on these assumptions, it is estimated that St. Thomas can reasonably expect demand for more than 1,100ft^2 of space as early as 2016, increasing to more than 29,000ft^2 by 2031.

Table 5-17: St. Thomas Trade Area Per Capita Space Ratios and Warranted Space Based on Cumulative Population Growth

Primary Zone (St. Thomas)	2015	2016	2021	2026	2031
Population Projection	40,135	40,435	42,720	45,235	47,675
Cumulative Population Growth		300	2,585	5,100	7,540
	Sq. Ft.	Sq. Ft.	Sq. Ft.	Sq. Ft.	Sq. Ft.
Warranted Space Based on Per Capita Space Ratios	2015	2016	2021	2026	2031
Personal + Other Service Space @ 2.1ft² per capita	0	615	5,299	10,455	15,457
Financial Institution Space @ 1.0ft² per capita	0	300	2,585	5,100	7,540
Local Office Space @ 2.1ft² per capita *	0	630	5,429	10,710	15,834
Total Warranted Space Based on Per Capita Ratios	0	1,545	13,313	26,265	38,831
Assume Average Local Capture @ 75%	**0**	**1,159**	**9,985**	**19,699**	**29,123**

** Includes Finance Insurance Real Estate (FIRE) and Services to Business Management (SBM) and Medical Dental*

6.0 Conclusions and Recommendations

The following section outlines the retail market study residual demand, conclusions and the commercial policy recommendations for St. Thomas.

6.1 Retail Market Study Residual Demand and Conclusions

In estimating the residual space demands over the forecast period, a number of adjustments have been made.

Specifically, adjustments for e-commerce have been made to the residual space estimates for department store NFSR space, non-department store NFSR space, home improvement centre space and supermarket space. The other residual space categories (specialty food, restaurant, and L/B/W) have not been adjusted since there is little evidence that e-commerce materially affects their sales. The rationale for e-commerce adjustments has been outlined below. The adjusted residual demand is presented following the description of adjustments.

6.1.1 Accounting for e-commerce

E-commerce has begun to play a notable role in the Canadian retail space, and its effects on traditional 'bricks and mortar' retail and commercial space should not be ignored. Its impacts to the distribution of sales and therefore square footage demand is an emerging impact that retail commercial market analysts across the country have attempted to forecast. While e-commerce has undoubtedly had a disruptive effect on the retail space (e.g. demise of storefront video rental and music sales; the practice of "showrooming"), its effects will not be felt equally across all retail sectors, nor in the same timeframe.

As mentioned earlier, our understanding as to the nature of e-commerce in Canada suffers from variations in definitions and a lack of reliable data. As a result, estimating the impact of e-commerce on traditional retail is inherently difficult.

Estimates of the current and future impact of e-commerce on retail sales in Canada vary widely. In their own reporting on the topic of e-commerce, the latest data from Statistics Canada indicates that e-commerce accounted for 1.8% of total retail sales in Canada in 2013, up from 1.4% in 2011. This can be seen as the most conservative estimate of the sales impact of e-commerce in the retail space, yet also likely the most rigorous. This is significantly lower than the estimated U.S. e-commerce sales (U.S. Department of Commerce, Washington D.C., November 17, 2015 Quarterly Retail E-Commerce Sales 3rd quarter 2015) which reported adjusted 3rd quarter 2015 sales at 7.4% of total retail sales – up 15.1% from prior 3rd quarter 2014 sales, versus retail sales same year-over-year increase of just 1.6%. Although it is recognized that the U.S. market is more mature than Canada's in terms of e-commerce, the industry consensus in Canada tends towards the view that the Statistics Canada figures underestimate the true level of e-commerce retail sales in Canada and that estimates of the degree to which underestimation may be occurring vary widely.

Yeates and Hernandez (2013) estimate that e-commerce accounted for 3.7% of retail sales in 2011, projected to increase to 6.2% by 2018. Their projection assumes that retail sales will grow at an annual rate of 1.7% while e-commerce sales grow at a rate of 9.3% per year between 2011 and 2018. This approach revises the Statistics Canada data by assuming that

almost all sales by traditional store-based retailers which occur through non-store channels (e.g. catalogues, mail order, and "other methods") are actually likely to be representative of e-commerce activity.

On the generous end of the spectrum, Forrester Research estimates that e-commerce already accounted for 6.0% of retail sales in 2014, and projected its share to increase to 9.5% by 2019. This projection assumes that Canadian e-commerce sales are actually much closer to American patterns of retail spending than the Statistics Canada data would suggest.

Alternative methods of estimating the impact of e-commerce centre on its direct impact on space needs. Yeates and Hernandez (2013) estimate that e-commerce will decrease retail service ratios by 2.0% per year at least until 2018. Kircher (2013) estimates that the impact of e-commerce already implies a reduction of overall retail service ratios by 1.5 to 2.0 square feet per capita, which he projects will increase to between 4.0 and 5.0 square feet per capita by the early 2020's.

Our approach to estimating the impact of e-commerce on retail demands in St. Thomas involves reducing the identified residual demands (in Tables 5-7 through 5-17) by the estimated percentages that e-commerce makes up of certain (but not all) retail sales. Specifically we have identified the e-commerce effects on the residual department store NFSR spaces *plus* residual non-department store NFSR space *plus* home improvement space *plus* residual supermarket space.

Accordingly, we have adopted increasing percentage e-commerce shares of department store NFSR and non-department store NFSR residual space of 4.0% in 2015, 5.5% in 2021, 6.5% in 2026 and 7.5% in 2031. For residual home improvement and residual supermarket space, lower shares are estimated (2.0% in 2015, 3.0% in 2021, 3.5% in 2026 and 4.0% in 2031), as presented in **Table 6-1**.

Table 6-1: Estimated Impact of E-Commerce by Retail Category, 2015-2031

Retail Expenditure Category	2015	2016	2021	2026	2031
Department Stores	4.0%	4.5%	5.5%	6.5%	7.5%
Non-department Store (NFSR)	4.0%	4.5%	5.5%	6.5%	7.5%
Home Improvement (HI)	2.0%	2.25%	3.0%	3.5%	4.0%
Supermarket Space	2.0%	2.25%	3.0%	3.5%	4.0%
Specialty Food Store	N/A	N/A	N/A	N/A	N/A
Restaurant	N/A	N/A	N/A	N/A	N/A
Liquor/Beer/Wine (LBW)	N/A	N/A	N/A	N/A	N/A

6.1.2 Residual Demand

The residual demand by retail type has been summarized in **Table 6-2**. The summary table identifies a total residual demand of 250,000 square feet based on the adjusted space demand for NFSR, FSR, HI, L/B/W (having adjusted for e-commerce) and the per capita warranted space for personal and other service space, financial institutions and local office space. However, this demand does not account for any uptake of the existing vacant supply (identified as 313,000 square feet).

Table 6-2: St. Thomas Trade Area Summary Demands & Residual Space

Retail Type	2015	2016	2021	2026	2031
	Sq.ft.	Sq.ft	Sq.ft	Sq.ft	Sq.ft
Department Store Space					
Adjustments for E-Commerce	*4.0%*	*4.50%*	*5.5%*	*6.5%*	*7.5%*
@ $500 /ft² GLA	0	0	0	4,045	5,271
@ $510 /ft² GLA	0	0	0	3,965	5,167
@ $515 /ft² GLA	0	0	0	3,927	5,117
Non-department Store NFSR Space					
Adjustments for E-Commerce	*4.0%*	*4.50%*	*5.5%*	*6.5%*	*7.5%*
@ $300 /ft² GLA	0	0	58,289	90,867	115,400
@ $315 /ft² GLA	0	0	55,514	86,540	109,905
@ $330 /ft² GLA	0	0	52,990	82,607	104,909
Home Improvement Centre Space					
Adjustments for E-Commerce	*2.0%*	*2.25%*	*3.0%*	*3.5%*	*4.0%*
@ $325 /ft² GLA	0	4,512	21,045	28,890	34,858
@ $350 /ft² GLA	0	4,190	19,542	26,827	32,368
@ $375 /ft² GLA	0	3,911	18,239	25,038	30,210
Supermarket Space					
Adjustments for E-Commerce	*2.0%*	*2.25%*	*3.0%*	*3.5%*	*4.0%*
@ $525 /ft² GLA	0	6,371	16,791	29,993	40,151
@ $550 /ft² GLA	0	6,081	16,027	28,630	38,326
@ $575 /ft² GLA	0	5,817	15,331	27,385	36,659
Specialty Food Store Space					
@ $300 /ft² GLA	0	0	2,070	5,716	8,569
@ $325 /ft² GLA	0	0	1,911	5,276	7,910
@ $350 /ft² GLA	0	0	1,774	4,899	7,345
Restaurant Space					
@ $300 /ft² GLA	0	0	7,768	17,333	24,795
@ $325 /ft² GLA	0	0	7,171	16,000	22,888
@ $350 /ft² GLA	0	0	6,658	14,857	21,253
Liquor/Beer/Wine Space					
@ $1,030 /ft² GLA	0	0	1,578	3,130	4,352
@ $1,040 /ft² GLA	0	0	1,563	3,100	4,311
@ $1,050 /ft² GLA	0	0	1,548	3,070	4,270
TOTAL RETAIL & SELECTED COMMERCIAL					
Low Range	0	10,883	107,541	179,973	233,396
Mid Range	0	10,271	101,727	170,338	220,874
Upper Range	0	9,727	96,541	161,782	209,763
PER CAPITA SPACE RATIOS					
Primary Zone (St. Thomas)	2015	2016	2021	2026	2031

Retail Type	2015	2016	2021	2026	2031
Population Projection	40,135	40,435	42,720	45,235	47,675
Cumulative Population Growth		300	2,585	5,100	7,540
WARRANTED SPACE BASED ON PER CAPITA SPACE RATIOS	Sq.ft.	Sq.ft.	Sq.ft.	Sq.ft.	Sq.ft.
Personal + Other Service Space @ 2.1 ft² per capita	0	615	5,299	10,455	15,457
Financial Institution Space @ 1.0 ft² per capita	0	300	2,585	5,100	7,540
Local Office Space @ 2.1 ft² per capita*	0	630	5,429	10,710	15,834
Total Warranted Space Based on Per Capita Ratios	0	1,545	13,313	26,265	38,831
Assume Average Local Capture @ 75%	**0**	**1,159**	**9,985**	**19,699**	**29,123**
** Includes Finance Insurance Real Estate (FIRE) and Services to Business Management (SBM) and Medical Dental*					
TOTAL RETAIL AND SELECTED COMMERCIAL RESIDUALS PLUS OTHER WARRANTED SPACE BASED ON PER CAPITA SPACE RATIOS					
Low Range	0	12,042	117,526	199,672	262,519
Mid Range	**0**	**11,430**	**111,712**	**190,037**	**249,997**
Upper Range	0	10,886	106,525	181,481	238,886

The combined mid-range rounded residual demands for St. Thomas' retail and service commercial sectors amounts to approximately 10,000 square feet in 2016, 110,000 in 2021, 190,000 square feet in 2026 and 250,000 square feet in 2031, as presented in **Table 6-3**. Based on a coverage ratio of 30%, this would theoretically require an approximate additional 19 acres of retail and service commercial land by 2031 and based on a 25% coverage ratio this would theoretically require an approximate additional 23 acres of retail and service commercial land by 2031. However, again, this does not account for any uptake of the existing vacant supply (identified as 313,000 square feet).

Table 6-3: Comparison of Square Footage Demands and Potential Supply

	2015	2016	2021	2026	2031
Low Range	0	12,042	117,526	199,672	262,519
Mid Range	**0**	**11,430**	**111,712**	**190,037**	**249,997**
Upper Range	0	10,886	106,525	181,481	238,886
Rounded Mid Range Residual Demands (2016 - 2031)	**0**	**10,000**	**110,000**	**190,000**	**250,000**
Additional Land Requirement (acres)	Acres	Acres	Acres	Acres	Acres
@ 30.0% coverage	0.0	0.8	8.4	14.5	**19.1**
		Required	*Required*	*Required*	*Required*
@ 25.0% coverage	0.0	0.9	10.1	17.4	**23.0**
		Required	*Required*	*Required*	*Required*

6.1.3 Conclusions

St. Thomas' remaining anchor stores (after the loss of Sears and Zellers at Elgin Mall) include Wal-Mart, Canadian Tire, TSC Store, Home Hardware/Building Center, Rona, the Real Canadian Super Store, other supermarkets, three Shoppers Drug Marts, and the Galaxy Theatre. The interaction of these anchor stores has established a new retail commercial equilibrium whereby the market is neither under-stored nor over-stored in the 2015 base year. This study provides updated projections of residual demands for new retail space, along with per capita space ratios for estimating demands for additional Personal Service and Other Service space, financial institutional space, and local office space (which includes Finance Insurance Real Estate or FIRE, Services to Business Management or SBM, and Medical Dental Veterinary space). The residual space estimates represent "ease of entry" calculations that do not involve sales transfers away from existing retail space.

These updated projections have been negatively affected by an aging population, decreases in household size, declines in per capita household incomes, closure of the Zellers department store space in Elgin Mall, and increased competition from London and elsewhere, particularly in the apparel and accessories, home furnishings, and most non-department store NFSR categories where gaps still exist in the provision of such space in St. Thomas. These factors have combined to yield an almost three-fold increase in the vacancy rate over the period 2000 to 2015 (i.e. from 114,000 ft^2 to 313,000 ft^2).

Based on the combined residual demands by 2031, plus additional warranted space for local office space, financial institutional space, and personal and other services space by 2031, a theoretical land requirement of between 19 acres (rounded) and 23 acres (rounded) is generated at 30% and 25% respectively based on a combined demand for 250,000 square feet by 2031.

Given that these calculations do not account for uptake of existing vacant supply (313,000 ft^2), and unbuilt and partially built-out designated land, it will be important to consider these factors as well as the possibility of store relocations, infilling, intensification, redevelopment of existing sites, industrial conversions, and municipal economic incentives in any discussion of new anchor stores or new commercial land-use designations.

6.1.4 Official Plan Policy Directions

The following strategy is recommended for the City of St. Thomas based on the outcome of the retail market analysis:

1. **Build on the City's existing commercial structure:** The retail market analysis has not identified a need for any wholesale changes to the City's existing commercial structure nor any major gaps in the existing commercial supply in St. Thomas. Instead, it has identified a number of opportunities for improvements to the existing policy framework, as presented in the following subsections.
2. **Update retail commercial trends and other contextual information in the OP policies:** The Official Plan policies include contextual information from the previous retail commercial reviews. The update of the policies should include an update to the contextual information to reflect the findings of this retail market study.
3. **Focus retail investment in the downtown core commercial district**: The City of St. Thomas has identified the Downtown as a core priority for the city, recognizing its role

in attracting investment, supporting the needs of residents and visitors and its direct impact on the profile of the City. The City continues to invest significantly along this corridor. Talbot Street is a long main street (over 2km from William Street to First Avenue) and Talbot West, Talbot Central and Talbot East each serves a unique function. Cultural preservation, place making, streetscape improvements and community events all have an impact on the perceived vibrancy of the downtown and its competitive advantage as the core commercial district.

4. **Encourage revitalization of the Elgin Mall:** Recognizing the existing vacancies and market outlook for department stores and large anchor stores, the Elgin Mall has been identified as an opportunity for revitalization in the City. The Elgin Mall site is a total of 8 hectares (approximately 20 acres) and, at the time of this study, had 115,600 sq.ft. of vacant space of the 272,800 sq.ft. leasable retail space. Existing uses include Metro grocery store, Galaxy Cinemas and a variety of retail and service commercial uses. Redevelopment opportunities should include provision for retail uses, recognizing the important role the grocery store and service retail uses provide for the surrounding community.

5. **Leverage the City's existing assets**: As the retail market continues to be more competitive, the City of St. Thomas should leverage its existing assets to differentiate itself from surrounding municipalities. The City of St. Thomas has a quaint downtown with historic features and buildings, as rich history in the CASO lands (former railways lands) and competitive land prices. An economic development campaign that highlights and builds upon the City's current assets could assist in attracting and retaining retail investment in the City.

6. **Improve pedestrian connections in the downtown and to key destinations**: The City of St. Thomas has a good trail system and a strong north/south connection along the rail corridor. Connecting pedestrians and cyclists in the downtown and to other key destinations is important to increasing pedestrian and cyclist traffic and supporting a vibrant downtown. Policy 5.3.3.12 of the Official Plan identifies the need to develop a system of pedestrian linkages/walkways to connect the focal points on community interest/significance in the downtown area including Talbot Street, the future civic square and future redevelopment projects along the Railway Lands. The City of St. Thomas should implement this policy by reviewing the pedestrian environment and trail network to identify improvements in the pedestrian environment of the downtown and broader active transportation connections. The review should include the consideration for sidewalk widths and cyclist connections along Talbot Street, completion of the trail along the railway lands, and completion of the trail along the CN rail to London. Similar policies should be included within the Talbot East and Talbot West designations to enhance their role in supporting connectivity.

The policy directions and opportunities for improvement have been organized around the City's existing commercial policy structure as previously outlined in Section 4.1. The following section presents the recommended policy directions. Staff will be preparing an official plan amendment to implement these policy directions as part of the next steps of this assignment.

6.1.4.1 Node 1: Office/Professional

The Office/Professional land use designation is intended to serve as a buffer between the Downtown uses and adjoining residential area. The following policy recommendations have been identified for the Office/Professional designation:

- **Additional land use permissions**: Lands designated Office/Professional are intended to be predominantly for office use. The current policy permissions include medium and high density residential uses with some site specific restrictions and a site specific retail commercial permission for lands on the north side of Curtis Street. Additional permissions for personal care and other service commercial uses where ancillary to the primary office use would support the intent of this designation, while providing for additional amenities. These ancillary uses should be limited to 15-20% of the gross floor area of the primary use.

6.1.4.2 Node 2: Talbot West

Talbot West has been identified in the Official Plan as an area for redevelopment with an emphasis on residential intensification/redevelopment and tourism development. The following policy recommendations have been identified for the Talbot West designation:

- **Encourage residential development and intensification**: In order to bring additional people into the downtown, residential development should be encouraged within the Talbot West area. In addition to the medium and high density residential uses permitted along Talbot Street, to support a range of built form and accommodation options, the City might consider permitting lower density options such as townhouse residential development on properties fronting Curtis and Centre Street.
- **Discourage auto-oriented uses**: The Talbot West area currently has a number of auto-oriented uses which impact the pedestrian realm, walkability and profile of this area. These sites should be encouraged to redevelop for residential intensification and tourism development. To support this through policy, the Official Plan could make specific reference to these uses being discouraged.
- **Incentives and urban design guidelines:** In addition to the policy changes to encourage residential development and intensification while discouraging auto-oriented uses, the City should review the Community Improvement Plan (CIP) incentive programs and design guidelines for the Talbot West area. A review of the CIP incentive programs and design guidelines should include stakeholder engagement to confirm the unique needs of the land developers to establish a variety of tools that suit the local redevelopment needs.

6.1.4.3 Node 3: Talbot Central

Talbot Central is the historic downtown of St. Thomas and contains the most intensive concentration of pedestrian-oriented retail activities in the City. The following policy recommendations have been identified for the Talbot Central designation:

- **Leverage municipal government assets**: There are a number of municipal government assets within the Talbot Central area including the municipal offices, library, and police station. These provide an opportunity for the City to implement improvements that will have an overall positive impact to the district. The City should define the municipal

government block in policy and seek opportunities to introduce community facilities and public realm and streetscape improvements to support this community node. One opportunity is on the police station site, as this use is being relocated to the Caso Crossings former railway lands. This provides an opportunity to redevelop the site for community use including active and passive recreational uses.

- **Continue to restrict first floor to retail**: In order to support a vibrant downtown core and activate the street, the Official Plan and zoning for Talbot Central requires that commercial and/or office use must be provided on the ground floor level of new or existing buildings adjacent to Talbot Street. This requirement should be maintained.
- **Incentives and urban design guidelines:** In addition to the policy and regulation changes identified above, the City should review its Community Improvement Plan (CIP) incentive programs and design guidelines for the Talbot Central area to encourage private space improvements. A review of the incentive programs and design guidelines should include stakeholder engagement to confirm the unique needs of the land developers to establish a variety of tools that suit the local redevelopment needs.
- **Permit retail serving industrial uses**: One trend in industrial and retail businesses is the development of business-to-business industrial establishing a new retail function. Some examples of this are craft breweries and wholesale bakeries, which function as a light industrial operation with a significant retail function. These uses require specific planning considerations due to their unique needs. Generally, these uses may be most appropriate in Talbot East, however the City of St. Thomas could also consider specific permissions for these uses within the Talbot Central designation, where the use would have an active street-oriented retail use that would help enliven the right of way and frontage along Talbot Street.

6.1.4.4 Node 4: Talbot East

Talbot East is characterized by space-extensive, automobile-oriented commercial uses. The following policy recommendations have been identified for the Talbot East designation:

- **Improve easterly gateway function to the downtown:** Talbot East functions as the easterly gateway to the downtown. Through streetscaping, signage and pedestrian realm improvements this gateway could be improved. The Official Plan should outline policies to improve its function as a gateway.
- **Maintain its focus on auto-oriented, space-extensive uses while they continue to be in demand**: The Official Plan policies recognize the need for auto-oriented, space extensive uses within the City of St. Thomas, and have guided this retail development to the Talbot East area. While there continues to be a demand for these uses, providing clear direction for the location of uses is beneficial to support the commercial structure.
- **Leverage improved connectivity of Caso Crossings developments and Talbot Street:** The City has completed a new road extension that connects Talbot Street with Wellington Street to provide access to the new Police Services facility (Caso Crossings). This provides better access and connectivity from to the Timken Centre and between the downtown and Wellington Street for pedestrians, transit users and vehicles. This connection should be identified within the Official Plan and appropriate policies be established to improve active transportation connections through this area. The

Secondary Commercial policies for the adjacent commercial lands should also be reviewed to recognize the improved access and viability of these lands to accommodate commercial development.

- **Permit retail serving industrial uses**: The City of St. Thomas should consider specific permissions for business-to-business industrial uses within the Talbot East designation, where land extensive and high traffic uses are currently permitted.

6.1.4.5 Node 5: Secondary Commercial

The Secondary Commercial designation is intended to provide for a range of retail and service commercial uses in both traditional strip plaza and new format retail smaller box platform that complements and supports the commercial hierarchy and the downtown. The following policy recommendations have been identified for the Secondary Commercial designation:

- **Proactively attract hotel/motel use:** The City of St. Thomas is limited in short term accommodation options. Short term accommodations provide opportunities for direct and indirect economic benefits to the community including increased retail expenditures from visitors. The Secondary Commercial designation permits hotel/motel uses and the policies should specifically recognize this gap in the existing services.
- **Permit retail serving industrial uses**: In addition to the Talbot East designation, the City of St. Thomas should consider specific permissions for business-to-business industrial uses with significant retail functions within the Secondary Commercial designation.

6.1.4.6 Node 6: Minor Commercial

The Minor Commercial designation is intended to serve the day-to-day retail and service needs of the surrounding residential areas. The following policy recommendations have been identified for the Minor Commercial designation:

- **Maintain existing locations and support new uses where planned as part of a block plan of subdivision**: The existing minor commercial lands provide neighbourhood level services that support the day-to-day service needs of the surrounding community. Retail trends to larger scale and clustered retail have resulted in challenges in accommodating these small scale establishments. New minor commercial uses should only be designated as part of a large block plan of subdivision for new areas of development to serve their neighbouring local population. These uses should only be permitted where they do not impact the larger retail market, and the City should consider maximum GFA's and control these uses through the City's zoning by-law.

6.1.4.7 Node 7: Highway Commercial

The Highway Commercial designation is intended to focus on services that cater to the traveling public. The following policy recommendations have been identified for the Highway Commercial designation:

- **Recognize servicing status and limitations**: Lands within the Highway Commercial designation have development limitations due to lack of municipal servicing. The policy should be updated to reflect these limitations to development.

6.1.4.8 Node 8: Industrial

The Industrial designation is intended to provide for adequate land for industrial growth. The Industrial designation has been included within the analysis as it includes a number of retail and service commercial uses, however the City of St. Thomas is currently undertaking a municipal comprehensive review process which may impact the employment land use designations. The following policy recommendations have been identified for the Industrial designation:

- **Maintain employment focus**: Lands within the Industrial designation are intended to provide for employment opportunities and industrial growth and should maintain for this function. Non-employment uses should be restricted or limited to ensure land use compatibility issues are managed.
- **Transitional uses**: Where lands are along the periphery of an employment area, transitional uses may be appropriate such as light industrial and commercial uses to act as a buffer between industrial and residential uses. The policies should consider transitional uses within these locations.
- **Limit retail and commercial uses to supportive uses**: The Official Plan policies for lands designated Industrial permit retail and wholesale businesses, provided the businesses do not conflict with the long term use of the surrounding land for industrial purposes or the commercial facilities in the Downtown or Major Commercial areas. Recent trends in employment land planning continue to reinforce the need for supportive retail uses in industrial areas to provide services for employees. These retail and commercial uses should be limited to those ancillary to and serving the employment with a maximum gross floor area (GFA) of 15% of the total GFA. The limitation should not permit stand alone retail uses.

6.1.4.9 Node 9: Major Commercial

The Major Commercial designation was established for the Elgin Mall major shopping centre located in the east end of the City. The following policy recommendations have been identified for the Major Commercial designation:

- **Proactively consult with landowner to define a long term vision for the Elgin Mall**: The City should proactively work with the landowner of the Elgin Mall to identify a preferred long term vision to revitalize the site. The revitalization of the site should maintain a retail and service commercial function to support surrounding residential community, while considering mixed use redevelopment opportunities.

6.1.4.10 Node 10: Power Centre

The Power Centre Commercial designation provides retail and service commercial uses in an auto-oriented, open-air, detached building, non-shopping mall format. Based on the retail market analysis and as this area is built-out, there are no policy recommendations that have been identified at this time.

Appendix A1

Income/Expenditure Indexing Methodology (Regression Analysis)

APPENDIX A–1

INCOME/EXPENDITURE INDEXING METHODOLOGY (REGRESSION ANALYSIS)

Income Quantiles (n)	Average per-person income	(x) Income	(y1) FSR	Per-person Indexes (y2) NFSR	(y3) Restaurant	(y4) L/B/W
1	$12,471	36.6	98.6	81.0	68.9	80.0
2	$19,481	57.1	96.9	88.8	86.3	73.4
3	$26,046	76.4	98.4	97.0	86.7	92.8
4	$33,435	98.0	98.9	95.2	95.8	93.0
5	$59,791	175.3	104.7	122.4	135.9	137.3
All Classes	$34,110	100.0	100.0	100.0	100.0	100.0

Source: Statistics Canada Survey of Household Spending in 2013 for NFSR & FSR.
=detailed av. household exp. by household income quintile, Canada 2013 (CANSIM 203-0022 - February 2015)

REGRESSION EQUATION

$$y = a + bx$$

where n = number of income classes
where x = independent variable or Income Index
where y = dependent variable or Expenditure Index

$$b = \frac{n(\sum xy) - (\sum x)(\sum y)}{n(\sum x2) - (\sum x)2} \quad \text{and} \quad a = \frac{\sum y - b(\sum x)}{n}$$

INCOME/EXPENDITURE REGRESSION EQUATIONS

FSR Expenditure Index: y1 = 94.93 + 0.05 (x)
NFSR Expenditure Index: y2 = 71.51 + 0.29 (x)
Restaurant Expenditure Index: y3 = 53.82 + 0.46 (x)
Liquor/Beer/Wine Expenditure Index: y4 = 55.58 + 0.45 (x)

Appendix A2

2014 Estimates of Ontario Retail Sales by Trade Group

Retail Market Study

January 2016

DILLON CONSULTING

APPENDIX A-2

2014 ESTIMATES OF ONTARIO RETAIL SALES BY TRADE GROUP

NAICS		2014 TOTAL ($)	2014 Per Capita *	Share of FSR %
	FSR (Food Store Retail)			
44511	Supermarket & Grocery Stores	26,310.7	$1,924	84.8%
44512	Convenience & Specialty Food Stores	4,710.8	$344	15.2%
4452	**TOTAL FSR**	**31,021.5**	**$2,268**	100.0%

NAICS		2014 TOTAL ($)	2014 Per Capita *	Share of NFSR (excl. Dept) %	Share of NFSR %	Share of NFSR + HI %
	NFSR (Non-Food Store Retail)					
	"**GAFO + DRUGS** " (Formerly Department Store Type Merchandise)					
4421	Furniture Stores	3,643.8	$266			
4422	Home Furnishings Stores	2,170.7	$159			
443	Home electronics + appliance + computer/software	6,091.8	$445			
	Subtotal	**11,906.3**	$870	20.29%	17.0%	14.84%
446	Pharmacies and personal care stores	**13,300.2**	$972	22.67%	19.0%	16.58%
4481	Clothing stores	8,924.6	$652			
4482	Shoe Stores	1,279.2	$94			
4483	Jewellery, clothing accessories, and luggage & leather stores	1,085.2	$79			
	Subtotal	**11,289.0**	$825	19.24%	16.1%	14.07%
4521	Department stores (excluding concessions)	**11,240.9**	$822		16.1%	14.01%
4529	Other general merchandise stores (incl. Can. Tire + TSC + Costco)	**12,483.5**	$913	21.28%	17.9%	15.56%
452	Subtotal	**23,724.4**	$1,735		33.9%	29.57%
451	Sporting goods, hobby, music and book stores	**4,008.1**	$293		5.7%	5.00%
453	Miscellaneous store retail (adjusted to **90%**)	**3,587.1**	$262		5.1%	4.47%
	Subtotal	**7,595.2**	$555	12.95%	10.9%	9.47%
4413	Tires + Batteries + Auto Parts & Accessories (TBA)	2,094.4	$153	3.57%	3.0%	2.61%
	Subtotal	**2,094.4**	$153		3.0%	2.61%
	"**HI**"					
444	Building material and garden equipment and supplies dealers	10,310.5	$754			12.85%
	Subtotal	**10,310.5**	$754			12.85%
	TOTAL NFSR = "GAFO + DRUG"	**69,909.5**	**$5,111**	100.0%	100.0%	
	TOTAL NFSR + HI = "GAFO + DRUG" + "HI"	**80,220.0**	**$5,865**			100.0%
	Dep't. Store Share of NFSR = "GAFO + DRUG"	**$11,240.9/$69,909.5 =**	**16.1%**			
	Dep't. Store Share of NFSR + HI	**$11,240.9/$80220.0 =**	**14.0%**			
4453	**L/B/W**	7,869.1	$575			

* Per Capita @ 13,677,687 persons (per estimate at July 1 from Statistics Canada Annual Demographic Estimates, including net undercoverage of non-permanent residents and returning Canadians (September 2015, Cat. # 91-002-X, Table 1.1-1).
Source: Retail Trade, Statistics Canada Cat. # 63-005, Table 3-7, December 2014.
** Morgan estimate.

Appendix A3 & A4

St. Thomas Trade Area – Income and Expenditure Indexes

Trade Area FSR, GAFO+DRUG, HI, HAAS/TBA and L/B/W Expenditure Levels

Retail Market Study

January 2016

DILLON CONSULTING

APPENDIX A-3

ST. THOMAS TRADE AREA -- INCOME AND EXPENDITURE INDEXES

Trade Areas	*Study Area Pop'n %*	Census Pop'n	Number Households	HH Income ($)	Total HH Income ($ m's)	Per Cap Income ($)	Per Cap Income Index	FSR Index	NFSR GAFO + Drug & HI Index	Restaurant Index	L/B/W Index
Ontario											
1996 Census *		10,753,573	3,924,510	$54,291	213,065.6	$19,813	100	100	100	100	100
2001 Census **		11,410,046	4,219,410	$66,836	282,008.5	$24,716	100	100	100	100	100
2015 Environics ***		13,794,782	5,401,658	$93,183	494,862.7	$35,873	100	100	100	100	100
Primary Zone - ST. THOMAS											
1996 Census *	*52.8%*	32,275	12,695	$44,463	564.5	$17,489	88.3	99.5	96.7	94.5	95.1
2001 Census **	*50.3%*	33,236	13,320	$51,878	691.0	$20,791	84.1	99.3	95.6	92.6	93.3
2015 Environics ***	*54.6%*	39,768	16,798	$73,270	1,217.2	$30,607	85.3	99.3	95.9	93.2	93.8
Secondary Zone											
1996 Census *	*47.2%*	28,834	9,690	$52,649	510.2	$17,693	89.3	99.5	97.0	95.0	95.6
2001 Census **	*49.7%*	32,782	11,320	$62,797	710.9	$21,685	87.7	99.5	96.6	94.3	94.9
2015 Environics ***	*45.4%*	33,044	12,080	$87,967	1,055.3	$31,936	89.0	99.5	97.0	94.9	95.5

Regression Equations applied to 2015 income data:

FSR Expenditure Index	y = 94.93 + 0.05 (Income Index)
NFSR +HI Expenditure Index	y = 71.51 + 0.29 (Income Index)
Restaurant Expenditure Index	y = 53.82 + 0.46 (Income Index)
Liquor/Beer/Wine Expenditure Index	y = 55.58 + 0.45 (Income Index)

* Values sourced from Morgan (2000), Retail Market Demand Analysis: Regional Commercial Systems Study, City of St. Thomas & Municipality of Central Elgin
** Values sourced from Morgan (2007), Regionial Commercial Systems Study, City of St. Thomas & Municipality of Central Elgin
*** Values sourced using custom order from Environics Analytics

APPENDIX A-4

TRADE AREA FSR, GAFO + DRUG, HI, HAAS/TBA, AND L/B/W EXPENDITURE LEVELS

Trade Areas	2015 Per Cap Income ($)	2015 Per Cap Income Index	2015 FSR Per Cap Exp.	2015 NFSR (GAFO+DRUG)+ HI Per Cap Exp.	2015 NFSR (GAFO + Drug) Per Cap Exp.	2015 HI Per Cap Exp. *	2015 HAAS/TBA Per Cap Exp. *	2015 Restaurant Per Cap Exp.	2015 L/B/W Per Cap Exp.
Ontario	$35,873	100.0	$2,381	$6,158	$5,367	$792	$161	$932	$598
Per cap expendtitures = % conversion 2014 $ to 2015 $			*5.0%*	*5.0%*	*5.0%*	*5.0%*	*5.0%*	*4.0%*	*4.0%*
ST. THOMAS TRADE AREA									
Primary Zone (St. Thomas)	$30,607	85.3	$2,366	$5,906	$5,147	$759	$154	$869	$561
Secondary Zone	$31,936	89.0	$2,370	$5,971	$5,204	$767	$156	$885	$571

* Ontario HAAS/TBA shares of NFSR + HI in Ontario @ $6,158 per capita	2.6%
Ontario HI shares of NFSR + HI in Ontario @ $6,158 per capita	12.9%
HI shares = 5 times HAAS/TBA shares	15.5%

Appendix A5

Population and Inventory Longitudinal Comparisons

Retail Market Study

January 2016

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APPENDIX A-5

COMPARISON OF POPULATION PROJECTIONS

	1996	2001	2006	2011	2016	2021	2026	2031
Morgan January 2000								
POPULATION (#)								
Primary Zone	32,275	35,575	37,600	40,180	42,590	44,650		
Secondary Zone	28,835	31,075	33,360	35,405	37,510	39,695		
Trade Area	**61,110**	**66,650**	**70,960**	**75,585**	**80,100**	**84,345**		
RESIDUALS (ft²)								
FSR	0	12,522	29,631	45,909	61,536	75,728		
NFSR	0	216,331	271,816	324,197	370,324	413,455		
HI	0	16,892	20,345	23,093	25,753	28,215		

	2006	2011	2016	2021	2026	2031
Morgan June 15, 2007						
POPULATION (#)						
Primary Zone	36,110	39,170	42,115	44,880	na	49,060
Secondary Zone	33,280	34,500	35,260	36,680	na	38,300
Trade Area	**69,390**	**73,670**	**77,375**	**81,560**	na	**87,360**
RESIDUALS (ft²)						
FSR	0	29,035	45,682	58,754	na	78,548
NFSR	0	77,386	129,528	153,659	na	190,199
HI	0	46,078	54,485	60,010	na	68,385

	2006	2011	2015	2021	2026	2031
Morgan April 21, 2009						
POPULATION ADJISTED FOR CENSUS UNDERCOUNT **(#)**						
Primary Zone	37,505	39,620	40,840	43,465	46,015	48,515
Secondary Zone	34,635	35,050	36,795	38,340	39,185	40,030
Trade Area	**72,140**	**74,670**	**77,635**	**81,805**	**85,200**	**88,545**
RESIDUALS (ft²)						
FSR	na	na	0	54,093	66,163	78,233
NFSR	na	na	0	185,112	215,932	246,751
HI	na	na	0	3,981	6,863	9,744

	Census 2006	Census 2011	2015	2021	2026	2031
Morgan DRAFT December 16, 2015						
POPULATION ADJUSTED FOR CENSUS UNDERCOUNT **(#)**						
Primary Zone	37,490	38,935	40,135	42,720	45,235	47,675
Secondary Zone	34,620	34,445	35,195	36,605	37,790	38,925
Trade Area	**72,110**	**73,380**	**75,330**	**79,325**	**83,025**	**86,600**
RESIDUALS (ft²)						
FSR			6,081	17,938	33,906	46,235
NFSR			0	52,009	86,544	110,774
HI			4,190	19,542	26,827	32,368

APPENDIX A-5 continued

LONGITUDINAL COMPARISONS OF FOUR (4) FLOORSPACE INVENTORIES OVER 15 YEARS

INVENTORY (ft²)	January, 2000		June 15, 2007		April 21, 2009		December 16, 2015		Difference 2007-2015
Supermarket / Grocery	144,040	*69.6%*	196,695	*76.6%*	198,663	*79.4%*	218,478	*81.0%*	21,783
Specialty Food	63,031	*30.4%*	59,996	*23.4%*	51,652	*20.6%*	51,247	*19.0%*	-8,749
Subtotal FSR	**207,071**	*100%*	**256,691**	*100%*	**250,315**	*100%*	**269,725**	*100%*	13,034
Dep't Store	117,484	*8.6%*	193,453	*9.0%*	193,453	*8.4%*	140,010	*5.6%*	-53,443
Gen'l Merchandise	59,467	*4.3%*	75,260	*3.5%*	67,740	*2.9%*	66,104	*2.7%*	-9,156
Drug / Cosmetics / Pers. Car	26,710	*2.0%*	51,757	*2.4%*	53,324	*2.3%*	48,807	*2.0%*	-2,950
Apparel & Accessories	63,950	*4.7%*	81,905	*3.8%*	79,986	*3.5%*	78,040	*3.1%*	-3,865
Home Furnishings	93,734	*6.9%*	108,004	*5.0%*	78,544	*3.4%*	103,075	*4.1%*	-4,929
Other Non-Food Retail	113,238	*8.3%*	124,903	*5.8%*	157,213	*6.8%*	127,708	*5.1%*	2,805
Canadian Tire /TBA/HAAS	24,212	*1.8%*	80,378	*3.7%*	129,397	*5.6%*	103,575	*4.2%*	23,197
Subtotal NFSR	**498,795**	*36.5%*	**715,660**	*33.4%*	**759,657**	*32.9%*	**667,319**	*26.8%*	-48,341
Home Improvement	42,811	*3.1%*	136,491	*6.4%*	126,746	*5.5%*	123,737	*5.0%*	-12,754
L/B/W	19,586	*1.4%*	23,728	*1.1%*	25,175	*1.1%*	23,728	*1.0%*	0
Total FSR+NFS+ HI+L/B/W	**768,263**	*56.1%*	**1,132,570**	*52.8%*	**1,161,893**	*50.4%*	**1,084,509**	*43.6%*	-48,061
Services:									
Restaurant	172,927	*12.6%*	181,658	*8.5%*	175,545	*7.6%*	165,485	*6.6%*	-16,173
Bank / Trust	45,223	*3.3%*	50,166	*2.3%*	38,915	*1.7%*	46,564	*1.9%*	-3,602
Personal Service	76,748	*5.6%*	84,930	*4.0%*	89,884	*3.9%*	90,306	*3.6%*	5,376
Other Service	79,650	*5.8%*	327,888	*15.3%*	351,695	*15.2%*	545,788	*21.9%*	217,900
Prof'l/Admin/Ed'n/Social Serv.	80,052	*5.9%*	135,422	*6.3%*	218,981	*9.5%*	134,620	*5.4%*	-802
Medical/Dental/Health Serv.	31,345	*2.3%*	32,300	*1.5%*	75,664	*3.3%*	58,859	*2.4%*	26,559
Subtotal Services	**485,945**	*35.5%*	**812,364**	*37.9%*	**950,684**	*41.2%*	**1,041,622**	*41.8%*	229,258
Vacant	**114,140**	*8.3%*	**199,434**	*9.3%*	**193,943**	*8.4%*	**363,374**	*14.6%*	163,940
TOTAL (millions of ft²)	**1,368,348**	*100%*	**2,144,368**	*100%*	**2,306,520**	*100%*	**2,489,505**	*100%*	345,137

APPENDIX A-5 continued

LONGITUDINAL COMPARISONS OF FOUR (4) FLOORSPACE INVENTORIES OVER 15 YEARS

INVENTORY (ft²)	Difference 2000-2015	Annual Difference Over 15 Years 2000-2015	**%** Increase 2015/2000
Supermarket / Grocery	74,438	4,963	51.7%
Specialty Food	-11,784	-786	-18.7%
Subtotal FSR	**62,654**	**4,177**	**30.3%**
Dep't Store	22,526	1,502	19.2%
Gen'l Merchandise	6,637	442	11.2%
Drug / Cosmetics / Pers. Care	22,097	1,473	82.7%
Apparel & Accessories	14,090	939	22.0%
Home Furnishings	9,341	623	10.0%
Other Non-Food Retail	14,470	965	12.8%
Canadian Tire / TBA / HAAS	79,363	5,291	327.8%
Subtotal NFSR	**168,524**	**11,235**	**33.8%**
Home Improvement	80,926	5,395	189.0%
L/B/W	4,142	276	21.1%
Total FSR + NFSR + HI + L/B/W	**316,246**	**21,083**	**41.2%**
Services:			
Restaurant	-7,442	-496	-4.3%
Bank / Trust	1,341	89	3.0%
Personal Service	13,558	904	17.7%
Other Service	466,138	31,076	585.2%
FIRE+SBM+Vet+Travel	54,568	3,638	68.2%
Medical/Dental/Health Ser.	27,514	1,834	87.8%
Subtotal Services	**555,677**	**37,045**	**114.3%**
Vacant	249,234	16,616	218.4%
TOTAL (millions of ft²)	**1,121,157**	**74,744**	**81.9%**

Population Increase 2001-2015	
Primary Zone	113%
Secondary Zone	113%
Trade Area	113%

Appendix B1

St. Thomas Retail and Service Floorspace 2015 Inventory

Retail Market Study

January 2016

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APPENDIX B-1 **RETAIL & SERVICE FLOORPSPACE INVENTORY**

Project **St. Thomas Retail and Service Inventory**

Compilation date Municipal compilation, July 2015

Production Justine Giancola, August 2015

					1	*2*	*3*	*4*	*5*	*6*	*7*	*8*	*9*	*10*	*11*	*12*	*13*	*14*	*15*	*16*	*19*	*21*	*22*	*27*		*28*	
						FSR			**NFSR**									**HI**	**BANKS**	**FIRE & PROFESSIONAL SERVICES**	**MEDICAL**	**REST. + FF**	**PERSONAL SERVICES**	**LBW**	**OTHER**	**VACANT**	
					Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	**Store Name**	**Store Type**	**NAICS Code**	**Study Code**	**Total Space** *GLA*	**Supermarket & Grocery** *GLA*	**Specialty Foods** *GLA*	**Subtotal - FSR** *GLA*	**Major & Discount Dept. Stores** *GLA*	**Other General Merch.** *GLA*	**Drugs, Cosmetics, Opticians & Personal Care** *GLA*	**Fashion & Accessories** *GLA*	**Home Furnishings, Computers & Electronics** *GLA*	**Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc** *GLA*	**Canadian Tire, TSC, Tire stores, P+A** *GLA*	**Subtotal, Non-department Stores (NFSR)** *GLA*	**Subtotal - NSFR** *GLA*	**Home Centres, Hardware & Building Supply, Nursery** *GLA*	**Bank, Trust, Credit Union** *GLA*	**FIRE, Legal, Accounting, Photo & Veterinary Services** *GLA*	**Medical, Dental & Other Health Services** *GLA*	**Restaurant, Fast Food, Drinking** *GLA*	**Personal Services** *GLA*	**Liquor, Beer, Wine** *GLA*	**Subtotal - Other** *GLA*	**Vacant** *GLA*	**Total** *GLA*
NODE 1: OFFICE PROFESSIONAL																											
133 CURTIS ST	Health Options	Other Health Practitioner (e.g. chiropractor, optometrist, psychologist, other therapist)	6213	153	1,866			-								-	-			**1,866**				-		**1,866**
127 CURTIS ST	Dentist	Dentist	6212	152	2,400			-								-	-				**2,400**				-		**2,400**
132 CENTRE ST	Conrad Denture Clinic	Dentist	6212	152	1,386			-								-	-				**1,386**				-		**1,386**
136 CENTRE ST	Raven Accountant	Accounting (e.g. accountant, tax preparer, bookkeeper, payroll service)	5412	141	2,647			-								-	-			**2,647**					-		**2,647**
154 CENTRE ST	Elgin Reality	Real Estate Agent / Broker	53121	139	1,200			-								-	-			**1,200**					-		**1,200**
142 CENTRE ST	Siskind, Cromarty, Ivey and Dowler	Legal (e.g. lawyer, notary, paralegal)	5411	140	1,084			-								-	-			**1,084**					-		**1,084**
172 CENTRE ST	Rod Geer Chartered Accountant	Accounting (e.g. accountant, tax preparer, bookkeeper, payroll service)	5412	141	2,464			-								-	-			**2,464**					-		**2,464**
32 WHITE ST	Matsomoto Accountant	Accounting (e.g. accountant, tax preparer, bookkeeper, payroll service)	5412	141	1,064			-								-	-			**1,064**					-		**1,064**
22 METCALFE ST	Gunn and Assoc.	Legal (e.g. lawyer, notary, paralegal)	5411	140	7,098			-								-	-			**7,098**					-		**7,098**
112 CENTRE ST	Reith and Assoc.	Legal (e.g. lawyer, notary, paralegal)	5411	140	1,240			-								-	-			**1,240**					-		**1,240**
118 CENTRE ST	Barristers and Solicitors	Legal (e.g. lawyer, notary, paralegal)	5411	140	2,772			-								-	-			**2,772**					-		**2,772**
94 CENTRE ST	Ashton and Tillford Insurance Brokers	Insurance Agent / Broker	52421	138	1,137			-								-	-			**1,137**					-		**1,137**
90 CENTRE ST	Dr.Hagerman	Physician (including psychiatrist)	6211	151	1,536			-								-	-				**1,536**				-		**1,536**
28 PRINCESS AVE	The Old Garden Flower Shop	Florist	45311	93	1,920			-						1,920		1,920	**1,920**								-		**1,920**
107-107 1/2 CURTIS ST	Friendly Variety	Convenience Store	44512	3	779		779	**779**								-	-								-		**779**
98 CENTRE ST	Vacant	Vacant		200	3,173			-								-	-								-	**3,173**	**3,173**
130 CENTRE ST	Elgin Financial Corporation	Investment Advice / Financial Planning	52393	137	1,521			-								-	-			**1,521**					-		**1,521**
144 CENTRE ST	Richard Aylsworth Accountant	Accounting (e.g. accountant, tax preparer, bookkeeper, payroll service)	5412	141	759			-								-	-			**759**					-		**759**
146 CENTRE ST	Big Brothers & Big Sisters of St. Thomas Elgin	Individual and Family Service (e.g. family counselling, big brothers and sisters)	6241	156	694			-								-	-								**694**		**694**
21 SOUTHWICK ST	McLay & Company	Legal (e.g. lawyer, notary, paralegal)	5411	140	983			-								-	-			**983**					-		**983**
133 CURTIS ST	Herbal One Weight Management Centre	Weight Loss Centre (e.g. Jenny Craig, Herbal Magic)	81219	187	1,866			-								-	-						**1,866**		-		**1,866**
133 CURTIS ST	Re-Treate Day Spa and Salon	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	1,866			-								-	-						**1,866**		-		**1,866**
115 CURTIS ST	Lassan& Co Chartered Professional Accountant	Accounting (e.g. accountant, tax preparer, bookkeeper, payroll service)	5412	141	2,714			-								-	-			**2,714**					-		**2,714**
SUBTOTAL NODE 1: OFFICE PROFESSIONAL					**44,169**	-	**779**	**779**	-	-	-	-	-	**1,920**	-	**1,920**	**1,920**	-	-	**26,683**	**7,188**	-	**3,732**	-	**694**	**3,173**	**44,169**
				check	44,863																						
NODE 2: TALBOT WEST																											
208-216 TALBOT ST	Laundry Town Inc.	Coin-Operated Laundry	81231	191	1,904			-								-	-						**1,904**		-		**1,904**
208-216 TALBOT ST	Factory Muffler	Mechanical and Electrical (e.g. general repair, specialty repair of muffler, brake, transmission)	81111	175	3,520			-								-	-								**3,520**		**3,520**
180 TALBOT ST 101	Vacant	Vacant		200	1,500			-								-	-								-	**1,500**	**1,500**
22 WILLIAM ST(ST THOMAS)	Foodland	Supermarket	44511	1	17,410	17,410		**17,410**								-	-								-		**17,410**
230 TALBOT ST	Vacant Lands	Vacant		200	3,552			-								-	-								-	**3,552**	**3,552**
181 TALBOT ST	Subway	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,540			-								-	-					**1,540**			-		**1,540**
191 TALBOT ST	Tim Hortons	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	2,482			-								-	-					**2,482**			-		**2,482**
261-273 TALBOT ST	Mister Transmission	Mechanical and Electrical (e.g. general repair, specialty repair of muffler, brake, transmission)	81111	175	1,418			-								-	-								**1,418**		**1,418**

					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	19	21	22	27		28	
						FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
					Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	Store Name	Store Type	NAICS Code	Study Code	Total Space	Supermarket & Grocery	Specialty Foods	Subtotal - FSR	Major & Discount Dept. Stores	Other General Merch.	Drugs, Cosmetics, Opticians & Personal Care	Fashion & Accessories	Home Furnishings, Computers & Electronics	Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc	Canadian Tire, TSC, Tire stores, P+A	Subtotal, Non-department Stores (NFSR)	Subtotal - NSFR	Home Centres, Hardware & Building Supply, Nursery	Bank, Trust, Credit Union	FIRE, Legal, Accounting, Photo & Veterinary Services	Medical, Dental & Other Health Services	Restaurant, Fast Food, Drinking	Personal Services	Liquor, Beer, Wine	Subtotal - Other	Vacant	Total
					GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA
247-251 TALBOT ST	Talbot Chiropractor	Other Health Practitioner (e.g. chiropractor, optometrist, psychologist, other therapist)	6213	153	1,936			-								-	-				**1,936**				-		**1,936**
247-251 TALBOT ST	Diamonds and Toads	Vacant		200	1,691			-								-	-								-	**1,691**	**1,691**
247-251 TALBOT ST	Credit Bureau of St. Thomas	Credit Union	52213	125	944			-								-	-		**944**						-		**944**
247-251 TALBOT ST	Seven Medi Spa	Vacant		200	1,760			-								-	-								-	**1,760**	**1,760**
287 TALBOT ST	Mac's Convenience Stores	Convenience Store	44512	3	1,631		1,631	**1,631**								-	-								-		**1,631**
277-283 TALBOT ST	Traffic Ticket Terminators	Legal (e.g. lawyer, notary, paralegal)	5411	140	4,900			-								-	-			**4,900**					-		**4,900**
275 TALBOT ST	Tim Lamay Wrought Iron	Other Building Materials	44419	121	810			-								-	-	**810**							-		**810**
277-283 TALBOT ST	Hair Care Anywhere	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	1,352			-								-	-						**1,352**		-		**1,352**
260 TALBOT ST	Ideal Autos	Other Automotive Repair and Maintenance (e.g. lubrication, emission testing, undercoating)	811199	178	2,580			-								-	-								**2,580**		**2,580**
284-286 TALBOT ST	Residential							-								-	-								-		-
5 NEW ST	Canadian Woodenware Mfrs.	Household Furniture	44211	58	6,030			-					6,030			6,030	**6,030**								-		**6,030**
12 PEARL ST	Gloin, Hall & Sheilds	Legal (e.g. lawyer, notary, paralegal)	5411	140	2,900			-								-	-			**2,900**					-		**2,900**
244-248 TALBOT ST	Natures Balance Health Food Inc	Health Food	445299	13	800		800	**800**								-	-								-		**800**
268-274 TALBOT ST	Residential							-								-	-								-		-
17 QUEEN ST(ST THOMAS)	Greens Printing Service	Business Service Centre (e.g. photocopying service, private mail centre)	56143	145	1,750			-								-	-								**1,750**		**1,750**
244-248 TALBOT ST	Grace Cafe	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,689			-								-	-					**1,689**			-		**1,689**
180 TALBOT ST 101	Ministry of Solicitor General & Correctional Services	General Office Space		202	932			-								-	-								**932**		**932**
261-273 TALBOT ST	Lube Clinic & St. Thomas Car Care	Other Automotive Repair and Maintenance (e.g. lubrication, emission testing, undercoating)	811199	178	1,367			-								-	-								**1,367**		**1,367**
15 QUEEN ST(ST THOMAS)	Sparkle Carstar Collision	Body, Paint, Interior and Glass	81112	176	5,691			-								-	-								**5,691**		**5,691**
18 METCALFE ST	Natural Health Therapy Centre	Other Health Practitioner (e.g. chiropractor, optometrist, psychologist, other therapist)	6213	153	852			-								-	-				**852**				-		**852**
2 CURTIS ST	Bridges Packaging a Division of Community Living Elgin	Individual and Family Service (e.g. family counselling, big brothers and sisters)	6241	156	5,225			-								-	-								**5,225**		**5,225**
180 TALBOT ST 101	ParkSpin Inc.	Sewing, Needlework and Piece Goods (including yarn and fabric)	45113	89	2,034			-						2,034		2,034	**2,034**								-		**2,034**
244-248 TALBOT ST	Vacant	Vacant		200	3,605			-								-	-								-	**3,605**	**3,605**
18 ST GEORGE ST	Wiener's Flower Designs	Florist	45311	93	1,436			-						1,436		1,436	**1,436**								-		**1,436**
10 ST GEORGE ST	Styles and Salon	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	1,078			-								-	-						**1,078**		-		**1,078**
245 TALBOT ST	Real Touch Auto Clean Centre Inc.	Other Automotive Repair and Maintenance (e.g. lubrication, emission testing, undercoating)	911199	178	1,591			-								-	-								**1,591**		**1,591**
245 TALBOT ST	Harley Perry Motors Sales	Vehicle Dealers	44112	201	845			-								-	-								**845**		**845**
10 ST GEORGE ST	Style's Salon	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	1,078			-								-	-						**1,078**		-		**1,078**
16 PEARL ST	Infinity Style and Salon	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	1,697			-								-	-						**1,697**		-		**1,697**
257-259 TALBOT ST	The Antique Alley	Used Furniture / Antiques	45331	98	2,200			-						2,200		2,200	**2,200**								-		**2,200**
14 METCALFE ST	Klassen Construction	General Office Space		202	1,771			-								-	-								**1,771**		**1,771**
277-283 TALBOT ST	RCA Accounting	Accounting (e.g. accountant, tax preparer, bookkeeper, payroll service)	5412	141	1,000			-								-	-			**1,000**					-		**1,000**
14 NEW ST	Residential				-			-								-	-								-		-
12 NEW ST	Residential				-			-								-	-								-		-
10 NEW ST	Accountant & Tax Professionals	Accounting (e.g. accountant, tax preparer, bookkeeper, payroll service)	5412	141	650			-								-	-			**650**					-		**650**
8 NEW ST	Residential				-			-								-	-								-		-
201-215 TALBOT ST	Vacant Land	Vacant Land			-			-								-	-								-		-
217-219 TALBOT ST	Vacant Land	Vacant Land			-			-								-	-								-		-
223 TALBOT ST	Vacant Lands	Vacant Land			-			-								-	-								-		-

					1	*2*	*3*	*4*	*5*	*6*	*7*	*8*	*9*	*10*	*11*	*12*	*13*	*14*	*15*	*16*	*19*	*21*	*22*	*27*		*28*	
						FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
					Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	**Store Name**	**Store Type**	**NAICS Code**	**Study Code**	**Total Space**	**Supermarket & Grocery**	**Specialty Foods**	**Subtotal - FSR**	**Major & Discount Dept. Stores**	**Other General Merch.**	**Drugs, Cosmetics, Opticians & Personal Care**	**Fashion & Accessories**	**Home Furnishings, Computers & Electronics**	**Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc**	**Canadian Tire, TSC, Tire stores, P+A**	**Subtotal, Non-department Stores (NFSR)**	**Subtotal - NSFR**	**Home Centres, Hardware & Building Supply, Nursery**	**Bank, Trust, Credit Union**	**FIRE, Legal, Accounting, Photo & Veterinary Services**	**Medical, Dental & Other Health Services**	**Restaurant, Fast Food, Drinking**	**Personal Services**	**Liquor, Beer, Wine**	**Subtotal - Other**	**Vacant**	**Total**
					GLA	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*
225 TALBOT ST	Vacant Lands	Vacant Land			-			-								-	-							-		-
227 TALBOT ST	Vacant Lands	Vacant Land			-			-								-	-							-		-
247-251 TALBOT ST	Parking Lot	Vacant		200	-			-								-	-							-	-	-
16-16 1/2 CURTIS ST	Residential				-			-								-	-							-		-
18 CURTIS ST	Residential				-			-								-	-							-		-
22 CURTIS ST	Residential				-			-								-	-							-		-
24 CURTIS ST	Equity Associates	Financial Institution	52219	126	1,400			-								-	-		**1,400**					-		**1,400**
180 TALBOT ST 101	Residential				-			-								-	-							-		-
8 CURTIS ST	Residential				-			-								-	-							-		-
20 QUEEN ST(ST THOMAS)	Residential				-			-								-	-							-		-
18 QUEEN ST(ST THOMAS)	Residential				-			-								-	-							-		-
16 QUEEN ST(ST THOMAS)	Residential				-			-								-	-							-		-
91 CENTRE ST	Residential				-			-								-	-							-		-
244-248 TALBOT ST	Residential				-			-								-	-							-		-
8 METCALFE ST	Residential				-			-								-	-							-		-
10 METCALFE ST	Residential				-			-								-	-							-		-
107 CENTRE ST	Residential				-			-								-	-							-		-
105 CENTRE ST	Residential				-			-								-	-							-		-
19 QUEEN ST(ST THOMAS)	Elgin Counselling and Meditation Centre	Individual and Family Service (e.g. family counselling, big brothers and sisters)	6241	156	1,082			-								-	-							**1,082**		**1,082**
11-11 1/2 QUEEN ST(ST THOMAS)	Residential				-			-								-	-							-		-
257-259 TALBOT ST	Antique Alley	Used Furniture / Antiques	45331	98	1,700			-						1,700		1,700	**1,700**							-		**1,700**
247-251 TALBOT ST	Manulife	Insurance Agent / Broker	52421	138	2,200			-								-	-			**2,200**				-		**2,200**
SUBTOTAL NODE 2: TALBOT WEST					**103,533**	**17,410**	**2,431**	**19,841**	**-**	**-**	**-**	**-**	**6,030**	**7,370**	**-**	**13,400**	**13,400**	**810**	**2,344**	**11,650**	**2,788**	**5,711**	**7,109**	**-**	**27,772**	**12,108**	**103,533**
				check	*103,533*																						
NODE 3: TALBOT CENTRAL																											
780 TALBOT ST	Giant Tiger	Variety Store (e.g. Bargain Shop, Giant Tiger, Liquidation World)	452999	33	21,679			-		21,679						21,679	**21,679**							-		**21,679**
664-668 TALBOT ST	Destination Church	Other Non-Retail		201	7,491			-								-	-							**7,491**		**7,491**
648 TALBOT ST	Ansell's Awards and Specialties	Other Miscellaneous Retailer (including water systems)	453999	113	2,030			-						2,030		2,030	**2,030**							-		**2,030**
644 TALBOT ST	Yours Fish & Chips	Full-Service Restaurant	7221	172	1,440			-								-	-	**1,440**						-		**1,440**
640-642 TALBOT ST	Chef Bondi's Pizza Restaurant	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,088			-								-	-	**1,088**						-		**1,088**
636 TALBOT ST	Studio 36	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	1,144			-								-	-					**1,144**		-		**1,144**
632-634 TALBOT ST	K & K Locksmiths	Other Personal& Household Goods (e.g. garments, bicycles, jewellery, watches, key cutting)	81149	183	1,760			-								-	-							**1,760**		**1,760**
9 PRINCESS AVE	Legends Tavern	Full-Service Restaurant	7221	172	4,096			-								-	-	**4,096**						-		**4,096**
783-785 TALBOT ST	Stitch & Sew Complete Alteration Service	Other Personal& Household Goods (e.g. garments, bicycles, jewellery, watches, key cutting)	81149	183	900			-								-	-							**900**		**900**
779 TALBOT ST	The Dutch Bakery	Bakery	445291	7	1,904	1,904		**1,904**								-	-							-		**1,904**
777 TALBOT ST	Ron's Used Furniture	Used Furniture / Antiques	45331	98	2,426			-						2,426		2,426	**2,426**							-		**2,426**
773-775 TALBOT ST	Kev's Barber Shop	Barber Shop (i.e. men only)	812114	184	1,200			-								-	-						**1,200**	-		**1,200**
769-771 TALBOT ST	Hammersley's Fish and Chips	Full-Service Restaurant	7221	172	1,200			-								-	-	**1,200**						-		**1,200**
763-765 TALBOT ST	Vacant	Vacant		200	1,200			-								-	-							-	**1,200**	**1,200**
739-743 TALBOT ST	Bank of Montreal	Bank	52211	124	4,080			-								-	-		**4,080**					-		**4,080**
735-737 TALBOT ST	Pizza Pizza	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	2,100			-								-	-	**2,100**						-		**2,100**
719-721 TALBOT ST	Muscat Jewellers	Jewellery	44831	56	1,632			-				1,632				1,632	**1,632**							-		**1,632**
725-727 TALBOT ST	Dr. James M Pallo, Dentist	Dentist	6212	152	2,200			-								-	-				**2,200**			-		**2,200**
715-717 TALBOT ST	Vacant	Vacant		200	1,632			-								-	-							-	**1,632**	**1,632**
715-717 TALBOT ST	Capri Pizza	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,320			-								-	-	**1,320**						-		**1,320**
707 TALBOT ST	CTP Computers	Consumer Electronics (e.g. TV, radio, stereo)	44311	75	2,146			-					2,146			2,146	**2,146**							-		**2,146**

						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	19	21	22	27		28	
							FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
						Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	Store Name	Store Type	NAICS Code	Study Code	Total Space		Supermarket & Grocery	Specialty Foods	Subtotal - FSR	Major & Discount Dept. Stores	Other General Merch.	Drugs, Cosmetics, Opticians & Personal Care	Fashion & Accessories	Home Furnishings, Computers & Electronics	Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc	Canadian Tire, TSC, Tire stores, P+A	Subtotal, Non-department Stores (NFSR)	Subtotal - NSFR	Home Centres, Hardware & Building Supply, Nursery	Bank, Trust, Credit Union	FIRE, Legal, Accounting, Photo & Veterinary Services	Medical, Dental & Other Health Services	Restaurant, Fast Food, Drinking	Personal Services	Liquor, Beer, Wine	Subtotal - Other	Vacant	Total
					GLA		GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA
703 TALBOT ST	Midtown Tavern	Full-Service Restaurant	7221	172	1,660				-								-	-					**1,660**			-		**1,660**
791 TALBOT ST	Antiques on the Side	Used Furniture / Antiques	45331	98	2,296				-						2,296		2,296	**2,296**								-		**2,296**
745 TALBOT ST	Talbot Teen Centre	Individual and Family Service (e.g. family counselling, big brothers and sisters)	6241	156	3,369				-								-	-								**3,369**		**3,369**
535-539 TALBOT ST	Family and Child Services	Individual and Family Service (e.g. family counselling, big brothers and sisters)	6241	156	5,060				-								-	-								**5,060**		**5,060**
527 TALBOT ST	Elgin Realty	Real Estate Agent / Broker	53121	139	2,625				-								-	-			**2,625**					-		**2,625**
523-525 TALBOT ST	Yurek Pharmacy	Pharmacy / Drug Store	44611	17	2,500				-			2,500					2,500	**2,500**								-		**2,500**
483-495 TALBOT ST	Annie Thingz	Art Supply	453999	105	3,740				-						3,740		3,740	**3,740**								-		**3,740**
483-495 TALBOT ST	Royal LePage	Real Estate Agent / Broker	53121	139	3,300				-								-	-			**3,300**					-		**3,300**
483-495 TALBOT ST	Gospel Lighthouse	Books and News	45121	91	4,815				-						4,815		4,815	**4,815**								-		**4,815**
483-495 TALBOT ST	Vacant	Vacant		200	1,200				-								-	-								-	**1,200**	**1,200**
481 TALBOT ST	Liberty Tax Service	Accounting (e.g. accountant, tax preparer, bookkeeper, payroll service)	5412	141	2,295				-								-	-			**2,295**					-		**2,295**
529-531 TALBOT ST	Winstons Fashions Ltd.	Women's Clothing	44812	36	3,410				-				3,410				3,410	**3,410**								-		**3,410**
535-539 TALBOT ST	Rogers Television	Other Non-Retail		201	1,356				-								-	-								**1,356**		**1,356**
679-691 TALBOT ST	Discoveries Thrift Store	Hobby, Toy and Game (including arts and crafts, console game stores)	45112	88	3,650				-						3,650		3,650	**3,650**								-		**3,650**
679-691 TALBOT ST	Village Body Bronzing Inc.	Ear Piercing / Tattooing / Tanning Salon	81219	189	1,520				-								-	-						**1,520**		-		**1,520**
633 TALBOT ST	Vacant	Vacant		200	800				-								-	-								-	**800**	**800**
637 TALBOT ST	Baskins Fabrics	Sewing, Needlework and Piece Goods (including yarn and fabric)	45113	89	3,600				-						3,600		3,600	**3,600**								-		**3,600**
643 TALBOT ST	Medlyn Stain Glass & Jewellery Studio	Jewellery	44831	56	1,260				-				1,260				1,260	**1,260**								-		**1,260**
647 TALBOT ST	Scoops & Cakes	Bakery	445291	7	2,455			2,455	**2,455**								-	-								-		**2,455**
651 TALBOT ST	William W. Johnson & Associates	Legal (e.g. lawyer, notary, paralegal)	5411	140	1,800				-								-	-			**1,800**					-		**1,800**
561-569 TALBOT ST	Bell	Other Non-Retail		201	960				-								-	-								**960**		**960**
557-559 1/2 TALBOT ST	Toth Jewellers Ltd.	Jewellery	44831	56	1,200				-				1,200				1,200	**1,200**								-		**1,200**
575 TALBOT ST	Maxwell's Foto Source & Studio	Camera and Photography Supply	44313	83	1,600				-					1,600			1,600	**1,600**								-		**1,600**
579 TALBOT ST	Merry Mount	Individual and Family Service (e.g. family counselling, big brothers and sisters)	6241	156	1,664				-								-	-								**1,664**		**1,664**
581-583 TALBOT ST	Hamilton Ward & Cathers Insurance Service Limited Fall 2015	Insurance Agent / Broker	52421	138	3,960				-								-	-			**3,960**					-		**3,960**
587-589 TALBOT ST	Phantastic Nails	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	720				-								-	-						**720**		-		**720**
591 TALBOT ST	Coffey's News Depot	Convenience Store	44512	3	1,200			1,200	**1,200**								-	-								-		**1,200**
7 WHITE ST	Great Floors	Flooring	44221	63	6,480				-					6,480			6,480	**6,480**								-		**6,480**
530-550 TALBOT ST	Tim Hortons	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	800				-								-	-					**800**			-		**800**
492-496 TALBOT ST	Locke Insurance Brokers	Insurance Agent / Broker	52421	138	1,232				-								-	-			**1,232**					-		**1,232**
476-478 TALBOT ST	Vacant	Vacant		200	10,350				-								-	-								-	**10,350**	**10,350**
488 TALBOT ST	Zabian's Mens Wear	Men's Clothing	44811	35	782				-				782				782	**782**								-		**782**
472 TALBOT ST	Scotia Bank	Bank	52211	124	4,257				-								-	-		**4,257**						-		**4,257**
468-470 TALBOT ST	Casey's Creative Kitchen	China / Glassware / Cutlery / Kitchenware	442298	67	4,560				-					4,560			4,560	**4,560**								-		**4,560**
462-464 TALBOT ST	Reith & Associates	Insurance Agent / Broker	52421	138	2,816				-								-	-			**2,816**					-		**2,816**
452-456 TALBOT ST	etjYoga	Athletic Instruction (e.g. gymnastics club, martial arts club)	61162	149	4,938				-								-	-								**4,938**		**4,938**
458 TALBOT ST	Stafford Associates Law	Legal (e.g. lawyer, notary, paralegal)	5411	140	1,242				-								-	-			**1,242**					-		**1,242**
440-442 TALBOT ST	CIBC	Bank	52211	124	7,396				-								-	-		**7,396**						-		**7,396**
410-420 TALBOT ST	Shoppers Drug Mart	Pharmacy / Drug Store	44611	17	7,100				-			7,100					7,100	**7,100**								-		**7,100**
426-430 TALBOT ST	Vacant	Vacant		200	2,800				-								-	-								-	**2,800**	**2,800**
410-420 TALBOT ST	Dr. D.I. Atkinson, Dr Leslie Baker, Dr. Paul Kerr, Dr. Rober	Physician (including psychiatrist)	6211	151	2,600				-								-	-				**2,600**				-		**2,600**
406-408 TALBOT ST	Elgin Association for Community Living	All Other Personal Service (e.g. party planning, personal shopping, psychic, shoe shine, escorts)	81299	196	3,645				-								-	-						**3,645**		-		**3,645**
377 TALBOT ST	Scotts Printing	Business Service Centre (e.g. photocopying service, private mail centre)	56143	145	1,400				-								-	-								**1,400**		**1,400**
373-375 TALBOT ST	Why Not Cookies	Other Specialty Food	445299	16	3,266			3,266	**3,266**								-	-								-		**3,266**
367 TALBOT ST	Royal Bank of Canada	Bank	52211	124	2,887				-								-	-		**2,887**						-		**2,887**
341 TALBOT ST	Vacant	Vacant		200	2,156				-								-	-								-	**2,156**	**2,156**

						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	19	21	22	27		28	
							FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
						Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	Store Name	Store Type	NAICS Code	Study Code	Total Space		Supermarket & Grocery	Specialty Foods	Subtotal - FSR	Major & Discount Dept. Stores	Other General Merch.	Drugs, Cosmetics, Opticians & Personal Care	Fashion & Accessories	Home Furnishings, Computers & Electronics	Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc	Canadian Tire, TSC, Tire stores, P+A	Subtotal, Non-department Stores (NFSR)	Subtotal - NSFR	Home Centres, Hardware & Building Supply, Nursery	Bank, Trust, Credit Union	FIRE, Legal, Accounting, Photo & Veterinary Services	Medical, Dental & Other Health Services	Restaurant, Fast Food, Drinking	Personal Services	Liquor, Beer, Wine	Subtotal - Other	Vacant	Total
						GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA
349 TALBOT ST	Now and Zen Thrift Emporium	Dollar Store (e.g. Dollarama, Buck or Two)	452999	32	2,450				-		2,450						2,450	**2,450**								-		**2,450**
429 TALBOT ST	Mugford Shoes	Family Shoes	44821	52	3,500				-				3,500				3,500	**3,500**								-		**3,500**
431 TALBOT ST	Ted's Place & Lotto Centre	Convenience Store	44512	3	2,350			2,350	**2,350**								-	-								-		**2,350**
437 TALBOT ST	Bella Jack's Mexican Cantina	Full-Service Restaurant	7221	172	2,310				-								-	-					**2,310**			-		**2,310**
439-441 TALBOT ST	Edge Sports	Other Sporting Goods (including uniforms)	45111	87	1,344				-						1,344		1,344	**1,344**								-		**1,344**
305-309 TALBOT ST	St. Thomas-Elgin Public Art Centre	Other Amusement and Recreation Facility (e.g. amusement rides, miniature golf)	71399	171	9,348				-								-	-								**9,348**		**9,348**
311-313 TALBOT ST	Community Alternatives for Youth	Individual and Family Service (e.g. family counselling, big brothers and sisters)	6241	156	612				-								-	-								**612**		**612**
311-313 TALBOT ST	Vacant	Vacant		200	600				-								-	-								-	**600**	**600**
315 TALBOT ST	Check It Out	Used Furniture / Antiques	45331	98	2,068				-						2,068		2,068	**2,068**								-		**2,068**
321 TALBOT ST	Stay True Tattoo	Ear Piercing / Tattooing / Tanning Salon	81219	189	2,068				-								-	-						**2,068**		-		**2,068**
323 TALBOT ST	Maestro Music Academy	Musical Instruments and Supplies	45114	90	9,159				-						9,159		9,159	**9,159**								-		**9,159**
333-337 TALBOT ST	Animal Aide of St. Thomas	Pet Care (e.g. animal shelter, boarding kennel, pet grooming)	81291	194	1,302				-								-	-						**1,302**		-		**1,302**
333-337 TALBOT ST	Tabby's Treasures Gift Shop	Used Furniture / Antiques	45331	98	1,480				-						1,480		1,480	**1,480**								-		**1,480**
11-11 1/2 HIAWATHA ST	BNB Screening	Print and Picture Frame	442292	65	1,100				-					1,100			1,100	**1,100**								-		**1,100**
9-9 1/2 HIAWATHA ST	Vacant	Vacant		200	1,100				-								-	-								-	**1,100**	**1,100**
15 HIAWATHA ST	Vacant	Vacant		200	6,480				-								-	-								-	**6,480**	**6,480**
9 PRINCESS AVE	Vacant	Vacant		200	1,764				-								-	-								-	**1,764**	**1,764**
9 PRINCESS AVE	Gamble Insurance	Insurance Agent / Broker	52421	138	860				-								-	-			**860**					-		**860**
9 PRINCESS AVE	Elgin and St Thomas Housing Corporation	Individual and Family Service (e.g. family counselling, big brothers and sisters)	6241	156	1,720				-								-	-								**1,720**		**1,720**
9 PRINCESS AVE	Michelle and Sams hair	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	900				-								-	-						**900**		-		**900**
392 TALBOT ST	Le Cafe Siam	Full-Service Restaurant	7221	172	1,600				-								-	-					**1,600**			-		**1,600**
378-380 TALBOT ST	TD Canada Trust	Bank	52211	124	4,624				-								-	-		**4,624**						-		**4,624**
19 ELGIN ST	Vacant	Vacant		200	5,106				-								-	-								-	**5,106**	**5,106**
368 TALBOT ST	Goliath Pet	Pet Care (e.g. animal shelter, boarding kennel, pet grooming)	81291	194	1,800				-								-	-						**1,800**		-		**1,800**
6 HINCKS ST	Tammy Herring MSW & Jane Kirkland, Counsellor	Legal (e.g. lawyer, notary, paralegal)	5411	140	900				-								-	-			**900**					-		**900**
423-427 TALBOT ST	Ontario Works	Employment Service	5613	144	3,780				-								-	-								**3,780**		**3,780**
445 TALBOT ST	Vacant	Vacant		200	2,658				-								-	-								-	**2,658**	**2,658**
459-463 TALBOT ST	CIBC Wood Gundy	Investment Advice / Financial Planning	52393	137	6,604				-								-	-			**6,604**					-		**6,604**
469 TALBOT ST	Hair Ideas	Unisex Hair Salon (i.e. men and women)	812116	186	1,600				-								-	-						**1,600**		-		**1,600**
471-473 TALBOT ST	Vacant	Vacant		200	1,320				-								-	-								-	**1,320**	**1,320**
17 HINCKS ST	Jed Chinneck, Lawyer	Legal (e.g. lawyer, notary, paralegal)	5411	140	425				-								-	-			**425**					-		**425**
15 SOUTHWICK ST	Kaneco Designs & Consulting Inc.	General Office Space		202	2,100				-								-	-								**2,100**		**2,100**
17 PEARL ST	Dr Pettit & Dr. Morin, Dental Surgeon	Dentist	6212	152	2,640				-								-	-				**2,640**				-		**2,640**
711-713 TALBOT ST	Why Wait Delivery Service	All Other Personal Service (e.g. party planning, personal shopping, psychic, shoe shine, escorts)	81299	196	900				-								-	-						**900**		-		**900**
10-14 SOUTHWICK ST	Sanders, Cline Law Firm	Legal (e.g. lawyer, notary, paralegal)	5411	140	1,280				-								-	-			**1,280**					-		**1,280**
291 TALBOT ST	Vacant	Vacant		200	1,131				-								-	-								-	**1,131**	**1,131**
295 TALBOT ST	Lotus Thai	Full-Service Restaurant	7221	172	4,064				-								-	-					**4,064**			-		**4,064**
432 TALBOT ST	Jennings W.B. Co. Ltd.	Household Furniture	44211	58	17,020				-					17,020			17,020	**17,020**								-		**17,020**
515-517 TALBOT ST	Lucky Gardens Chinese Food	Full-Service Restaurant	7221	172	2,816				-								-	-					**2,816**			-		**2,816**
503-505 TALBOT ST	Vacant	Vacant		200	1,000				-								-	-								-	**1,000**	**1,000**
552-560 TALBOT ST	Belle's Book Bin	Books and News	45121	91	390				-						390		390	**390**								-		**390**
566 TALBOT ST	Coldwell Banker at Success Realty	Real Estate Agent / Broker	53121	139	960				-								-	-			**960**					-		**960**
747-759 TALBOT ST	Phantastic Nails	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	2,395				-								-	-						**2,395**		-		**2,395**
345-347 TALBOT ST	Eagle's Nest Ministries	Other Non-Retail		201	2,010				-								-	-								**2,010**		**2,010**
343 TALBOT ST	Smitty's Country Market	Fruits and Vegetables	44523	6	2,153		2,153		**2,153**								-	-								-		**2,153**
344-360 TALBOT ST	Vacant	Vacant		200	3,173				-								-	-								-	**3,173**	**3,173**
4-8 ELGIN ST(ST THOMAS)	Monty Fordham	Legal (e.g. lawyer, notary, paralegal)	5411	140	683				-								-	-			**683**					-		**683**

						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	19	21	22	27		28	
							FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
						Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	**Store Name**	**Store Type**	**NAICS Code**	**Study Code**	**Total Space**		**Supermarket & Grocery**	**Specialty Foods**	**Subtotal - FSR**	**Major & Discount Dept. Stores**	**Other General Merch.**	**Drugs, Cosmetics, Opticians & Personal Care**	**Fashion & Accessories**	**Home Furnishings, Computers & Electronics**	**Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc**	**Canadian Tire, TSC, Tire stores, P+A**	**Subtotal, Non-department Stores (NFSR)**	**Subtotal - NSFR**	**Home Centres, Hardware & Building Supply, Nursery**	**Bank, Trust, Credit Union**	**FIRE, Legal, Accounting, Photo & Veterinary Services**	**Medical, Dental & Other Health Services**	**Restaurant, Fast Food, Drinking**	**Personal Services**	**Liquor, Beer, Wine**	**Subtotal - Other**	**Vacant**	**Total**
					GLA		*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*
552-560 TALBOT ST	Vacant	Vacant		200	347				-								-	-								-	**347**	**347**
562 TALBOT ST	Vacant	Vacant		200	1,400				-								-	-								-	**1,400**	**1,400**
658 TALBOT ST	Conrad Denture Clinic	Dentist	6212	152	1,325				-								-	-				**1,325**				-		**1,325**
650-652 TALBOT ST	Vacant	Vacant		200	1,852				-								-	-								-	**1,852**	**1,852**
612-614 TALBOT ST	St Thomas Transit	All Other Personal Service (e.g. party planning, personal shopping, psychic, shoe shine, escorts)	81299	196	8,624				-								-	-						**8,624**		-		**8,624**
795-797 TALBOT ST	Vesta	Insurance Agent / Broker	52421	138	4,293				-								-	-			**4,293**					-		**4,293**
655-659 TALBOT ST	Vacant	Vacant		200	1,900				-								-	-								-	**1,900**	**1,900**
595-599 TALBOT ST	Sunny's Tavern & Hotel	Drinking Places (e.g. bars, pubs, lounges, night clubs, taverns)	7224	174	3,962				-								-	-					**3,962**			-		**3,962**
555 TALBOT ST	Co Operators	Insurance Agent / Broker	52421	138	1,863				-								-	-			**1,863**					-		**1,863**
561-569 TALBOT ST	Aline's Fine Lingerie	Lingerie	448199	43	2,399				-				2,399				2,399	**2,399**								-		**2,399**
561-569 TALBOT ST	Sherry's Gifts	Gift, Novelty and Souvenir	45322	95	2,200				-						2,200		2,200	**2,200**								-		**2,200**
571-573 TALBOT ST	Fan of the Sport	Children's and Infants' Clothing	44813	37	1,794				-				1,794				1,794	**1,794**								-		**1,794**
587-589 TALBOT ST	The Art Crypt	Gift, Novelty and Souvenir	45322	95	1,126				-						1,126		1,126	**1,126**								-		**1,126**
2 PRINCESS AVE	Vacant	Vacant		200	1,369				-								-	-								-	**1,369**	**1,369**
6 PRINCESS AVE	Julie Lee Law Office	Legal (e.g. lawyer, notary, paralegal)	5411	140	1,261				-								-	-			**1,261**					-		**1,261**
530-550 TALBOT ST	Vacant	Vacant		200	769				-								-	-								-	**769**	**769**
8 SOUTHWICK ST	Vacant	Vacant		scott	834				-								-	-								**834**		**834**
403 TALBOT ST	Canada Post Corporation	General Office Space		202	14,310				-								-	-								**14,310**		**14,310**
387-393 TALBOT ST	Whoopie Bowl	Bowling Alley	71395	169	1,749				-								-	-								**1,749**		**1,749**
381-383 TALBOT ST	Chick Boss Cake	Bakery	445291	7	3,267			3,267	**3,267**								-	-								-		**3,267**
385 TALBOT ST	Funk N Whimsy Emporium Thrift Store	Used Furniture / Antiques	45331	98	1,876				-						1,876		1,876	**1,876**								-		**1,876**
379 TALBOT ST	HardCore Tattoos & Piercing	Ear Piercing / Tattooing / Tanning Salon	81219	189	705				-								-	-						**705**		-		**705**
359 TALBOT ST	Central community Health Centre	Physician (including psychiatrist)	6211	151	3,803				-								-	-				**3,803**				-		**3,803**
481 TALBOT ST	Vacant	Vacant		200	463				-								-	-								-	**463**	**463**
396 TALBOT ST	Vacant	Vacant		200	2,596				-								-	-								-	**2,596**	**2,596**
370 TALBOT ST	Railway City Vapes e-cigs)	Other Miscellaneous Retailer (including water systems)	453999	113	752				-						752		752	**752**								-		**752**
364-366 TALBOT ST	Vacant	Vacant		200	2,008				-								-	-								-	**2,008**	**2,008**
344-360 TALBOT ST	Vacant	Vacant		200	1,546				-								-	-								-	**1,546**	**1,546**
344-360 TALBOT ST	Vacant	Vacant		200	2,870				-								-	-								-	**2,870**	**2,870**
18 ELGIN ST(ST THOMAS)	OK Tire & Auto Service	Mechanical and Electrical (e.g. general repair, specialty repair of muffler, brake, transmission)	81111	175	6,678				-								-	-								**6,678**		**6,678**
10 HINCKS ST	Corporate I.T. Solutions Inc	General Office Space		202	1,503				-								-	-								**1,503**		**1,503**
449-453 TALBOT ST	Dollar Haven	Dollar Store (e.g. Dollarama, Buck or Two)	452999	32	6,543				-	6,543							6,543	**6,543**								-		**6,543**
475-479 TALBOT ST	Clinic 217 St. Thomas Medical Pharmacy	Pharmacy / Drug Store	44611	17	3,147				-			3,147					3,147	**3,147**								-		**3,147**
16-18 HINCKS ST	St. Thomas Times Journal / Elgin County Market	All Other Personal Service (e.g. party planning, personal shopping, psychic, shoe shine, escorts)	81299	196	7,755				-								-	-						**7,755**		-		**7,755**
19 SOUTHWICK ST	Bell	Telephone (including cellular phone)	44311	78	7,081				-					7,081			7,081	**7,081**								-		**7,081**
18-22 PRINCESS AVE	Elgin Labour Temple	Other Non-Retail		201	7,551				-								-	-								**7,551**		**7,551**
16 MARY ST	YWCA	Athletic Instruction (e.g. gymnastics club, martial arts club)	61162	149	6,314				-								-	-								**6,314**		**6,314**
94 CURTIS ST	DHP Homes	General Office Space		202	1,447				-								-	-								**1,447**		**1,447**
168 CURTIS ST	Vacant	Vacant		200	2,427				-								-	-								-	**2,427**	**2,427**
12-14 ST CATHARINE ST	Pets/Friends For Life	Pet Care (e.g. animal shelter, boarding kennel, pet grooming)	81291	194	751				-								-	-						**751**		-		**751**
12-14 ST CATHARINE ST	Vacant	Vacant		200	3,720				-								-	-								-	**3,720**	**3,720**
12-14 ST CATHARINE ST	Vacant	Vacant		200	1,173				-								-	-								-	**1,173**	**1,173**
41 MONDAMIN ST	Sears	Catalogue Sales Showroom (e.g. Sears Catalogue and Sears Dealer stores)	45299	31	2,331				-	2,331							2,331	**2,331**								-		**2,331**
41 MONDAMIN ST	State Farm	Insurance Agent / Broker	52421	138	799				-								-	-			**799**					-		**799**
41 MONDAMIN ST	Vacant	Vacant		200	3,398				-								-	-								-	**3,398**	**3,398**
41 MONDAMIN ST	Vacant	Vacant		200	1,651				-								-	-								-	**1,651**	**1,651**
672 TALBOT ST	Vacant Land	Vacant Land		200	16,060				-								-	-								-	**16,060**	**16,060**
344-360 TALBOT ST	Vacant	Vacant		200	3,197				-								-	-								-	**3,197**	**3,197**
384-390 TALBOT ST	Too Good Studios	Other Clothing	448199	48	3,278				-				3,278				3,278	**3,278**								-		**3,278**
41 MONDAMIN ST	Service Ontario Licenses	Other Non-Retail		201	898				-								-	-								**898**		**898**
499 TALBOT ST	Psychiatric Survivors Network of Elgin	Individual and Family Service (e.g. family counselling, big brothers and sisters)	6241	156	1,026				-								-	-								**1,026**		**1,026**

					1	*2*	*3*	*4*	*5*	*6*	*7*	*8*	*9*	*10*	*11*	*12*	*13*	*14*	*15*	*16*	*19*	*21*	*22*	*27*		*28*	
						FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
					Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	**Store Name**	**Store Type**	**NAICS Code**	**Study Code**	**Total Space** *GLA*	**Supermarket & Grocery** *GLA*	**Specialty Foods** *GLA*	**Subtotal - FSR** *GLA*	**Major & Discount Dept. Stores** *GLA*	**Other General Merch.** *GLA*	**Drugs, Cosmetics, Opticians & Personal Care** *GLA*	**Fashion & Accessories** *GLA*	**Home Furnishings, Computers & Electronics** *GLA*	**Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc** *GLA*	**Canadian Tire, TSC, Tire stores, P+A** *GLA*	**Subtotal, Non-department Stores (NFSR)** *GLA*	**Subtotal - NSFR** *GLA*	**Home Centres, Hardware & Building Supply, Nursery** *GLA*	**Bank, Trust, Credit Union** *GLA*	**FIRE, Legal, Accounting, Photo & Veterinary Services** *GLA*	**Medical, Dental & Other Health Services** *GLA*	**Restaurant, Fast Food, Drinking** *GLA*	**Personal Services** *GLA*	**Liquor, Beer, Wine** *GLA*	**Subtotal - Other** *GLA*	**Vacant** *GLA*	**Total** *GLA*
574-584 TALBOT ST	Edward Jones Financial	Investment Advice / Financial Planning	52393	137	1,612			-								-	-			**1,612**					-		**1,612**
574-584 TALBOT ST	No Hassle Cash	Cheque Cashing Service	52239	130	965			-								-	-								**965**		**965**
574-584 TALBOT ST	Grant Paralegal	Legal (e.g. lawyer, notary, paralegal)	5411	140	886			-								-	-			**886**					-		**886**
399 TALBOT ST	Southern Charm Boutique	Women's Clothing	44812	36	762			-				762				762	**762**								-		**762**
395-397 TALBOT ST	Titewads Stereo & Hobby	Hobby, Toy and Game (including arts and crafts, console game stores)	45112	88	1,031			-						1,031		1,031	**1,031**								-		**1,031**
10-12 MONDAMIN ST	Office Space including REA Financial, MNP l.t.c Proposal Administrators, Changing Ways, United Way Elgin St. Thomas, The Focal Point, Julie Lee barrister & solicitors family law, Addiction Services, Small Enterprise (Elgin/St. Thomas)	General Office Space		202	13,412			-								-	-								**13,412**		**13,412**
13-23 ST CATHARINE ST	RCA Accounting Services	Accounting (e.g. accountant, tax preparer, bookkeeper, payroll service)	5412	141	3,765			-								-	-			**3,765**					-		**3,765**
10 ELGIN ST(ST THOMAS)	Pampered Pooch	Pet Care (e.g. animal shelter, boarding kennel, pet grooming)	81291	194	588			-								-	-						**588**		-		**588**
669 TALBOT ST	Century 21	Real Estate Agent / Broker	53121	139	1,562			-								-	-			**1,562**					-		**1,562**
10 PRINCESS AVE	Karate Cardio Kick Boxing	Athletic Instruction (e.g. gymnastics club, martial arts club)	61162	149	2,983			-								-	-								**2,983**		**2,983**
625 TALBOT ST	The Bistro	Full-Service Restaurant	7221	172	960			-								-	-					**960**			-		**960**
613 TALBOT ST	Keepers Donation Centre Store	Used Clothing	45331	97	6,561			-						6,561		6,561	**6,561**								-		**6,561**
616-620 TALBOT ST	Vacant	Vacant		200	908			-								-	-								-	**908**	**908**
622-626 TALBOT ST	Vacant	Vacant		200	1,041			-								-	-								-	**1,041**	**1,041**
4 SOUTHWICK ST	Capital Management Group	Investment Advice / Financial Planning	52393	137	800			-								-	-			**800**					-		**800**
18 EAST ST	Mersereau, Keli D., Law Office	Legal (e.g. lawyer, notary, paralegal)	5411	140	1,350			-								-	-			**1,350**					-		**1,350**
323 TALBOT ST	Blue Skies Recording Studio	Other Miscellaneous Retailer (including water systems)	453999	113	5,000			-						5,000		5,000	**5,000**								-		**5,000**
17 EAST ST	Paul Van Meppelen Barrister & Solicitor	Legal (e.g. lawyer, notary, paralegal)	5411	140	983			-								-	-			**983**					-		**983**
361 TALBOT ST	Vacant	Vacant		200	1,896			-								-	-								-	**1,896**	**1,896**
90 CURTIS ST	Residential							-								-	-								-		-
433-435 TALBOT ST	Wind N Willow	Women's Clothing	44812	36	1,610			-				1,610				1,610	**1,610**								-		**1,610**
509-511 TALBOT ST	Crazy Joe's Gym	Athletic Instruction (e.g. gymnastics club, martial arts club)	61162	149	4,000			-								-	-								**4,000**		**4,000**
13-23 ST CATHARINE ST	Dr. Rob Martin, Dentist	Dentist	6212	152	1,443			-								-	-				**1,443**				-		**1,443**
13-23 ST CATHARINE ST	Keli D.Mersereau Law Office	Legal (e.g. lawyer, notary, paralegal)	5411	140	1,443			-								-	-			**1,443**					-		**1,443**
13-23 ST CATHARINE ST	Bendle & Associates Ltd.	Investment Advice / Financial Planning	52393	137	1,443			-								-	-			**1,443**					-		**1,443**
13-23 ST CATHARINE ST	Dr. Shirley Kovacs, Optometrist	Optician	44613	19	1,443			-			1,443					1,443	**1,443**								-		**1,443**
631 TALBOT ST	St. Thomas Pawn Shop	Pawnbroker	522299	128	4,178			-								-	-								**4,178**		**4,178**
729 TALBOT ST	Andrew Crichton, State Farm Insurance	Insurance Agent / Broker	52421	138	1,632			-								-	-			**1,632**					-		**1,632**
747-759 TALBOT ST	Vacant	Vacant		200	1,751			-								-	-								-	**1,751**	**1,751**
795-797 TALBOT ST	Step Above Dance	Athletic Instruction (e.g. gymnastics club, martial arts club)	61162	149	4,293			-								-	-								**4,293**		**4,293**
300-330 TALBOT ST	MYFM	Real Estate Agent / Broker	53121	139	1,500			-								-	-			**1,500**					-		**1,500**
400 TALBOT ST	Employment Services Elgin	Employment Service	5613	144	1,677			-								-	-								**1,677**		**1,677**
384-390 TALBOT ST	Destination Church	Other Non-Retail		201	1,856			-								-	-								**1,856**		**1,856**
557-559 1/2 TALBOT ST	Vacant	Vacant		200	473			-								-	-								-	**473**	**473**
452-456 TALBOT ST	Closing the Gap health Care	Other Health Practitioner (e.g. chiropractor, optometrist, psychologist, other therapist)	6213	153	1,200			-								-	-				**1,200**				-		**1,200**
730 TALBOT ST	Rent a Centre	Consumer Electronics (e.g. TV, radio, stereo)	44311	75	4,577			-					4,577			4,577	**4,577**								-		**4,577**
730 TALBOT ST	Bulk Barn	Bulk Food	445299	15	4,577		4,577	**4,577**								-	-								-		**4,577**
574-584 TALBOT ST	Olive Branch Hair Studio	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	1,200			-								-	-						**1,200**		-		**1,200**
570-572 TALBOT ST	Park place Catering	Other Non-Retail		201	752			-								-	-								**752**		**752**
606-610 TALBOT ST	Vacant Building	Vacant		200	-			-								-	-								-	-	-
15 PEARL ST	Residential				-			-								-	-								-		-
40 CURTIS ST	Residential				-			-								-	-								-		-
42 CURTIS ST	Residential				-			-								-	-								-		-
44 CURTIS ST	Residential				-			-								-	-								-		-

						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	19	21	22	27		28	
							FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
						Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	Store Name	Store Type	NAICS Code	Study Code	Total Space		Supermarket & Grocery	Specialty Foods	Subtotal - FSR	Major & Discount Dept. Stores	Other General Merch.	Drugs, Cosmetics, Opticians & Personal Care	Fashion & Accessories	Home Furnishings, Computers & Electronics	Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc	Canadian Tire, TSC, Tire stores, P+A	Subtotal, Non-department Stores (NFSR)	Subtotal - NSFR	Home Centres, Hardware & Building Supply, Nursery	Bank, Trust, Credit Union	FIRE, Legal, Accounting, Photo & Veterinary Services	Medical, Dental & Other Health Services	Restaurant, Fast Food, Drinking	Personal Services	Liquor, Beer, Wine	Subtotal - Other	Vacant	Total
					GLA		GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA
46 CURTIS ST	Residential				-				-									-								-		-
20 EAST ST	Residential				-				-									-								-		-
327 TALBOT ST	Vacant Land	Vacant		200	-				-									-								-	-	-
339 TALBOT ST	Vacant Space	Vacant		200	1,480				-									-								-	**1,480**	**1,480**
PLAN 15 PT LOTS 11 TO 14	Parking Lot Municipal				-				-									-								-		-
19 EAST ST	Residential				-				-									-								-		-
15 EAST ST	Residential				-				-									-								-		-
341 TALBOT ST	Vacant Building	Vacant		200	2,156				-									-								-	**2,156**	**2,156**
353 TALBOT ST	Teliticom	Business Service Centre (e.g. photocopying service, private mail centre)	56143	145	1,450				-									-								**1,450**		**1,450**
387-393 TALBOT ST	Team Hilton Boxing Club	Athletic Instruction (e.g. gymnastics club, martial arts club)	61162	149	1,000				-									-								**1,000**		**1,000**
80 CURTIS ST	Living Hope Community Church	General Office Space		202	1,523				-									-								**1,523**		**1,523**
88 CURTIS ST	Residential				-				-									-								-		-
92 CURTIS ST	Residential				-				-									-								-		-
96 CURTIS ST	Parking Lot Municipal				-				-									-								-		-
18-20 HIAWATHA ST	Residential				-				-									-								-		-
18-20 HIAWATHA ST	Residential				-				-									-								-		-
12-16 HIAWATHA ST	Residential				-				-									-								-		-
10 HIAWATHA ST	Residential				-				-									-								-		-
15 HIAWATHA ST	Studio Dance Pointe	Athletic Instruction (e.g. gymnastics club, martial arts club)	61162	149	7,000				-									-								**7,000**		**7,000**
120-126 CURTIS ST	Parking Lot Municipal				-				-									-								-		-
25 ST CATHARINE ST	Parking Lot Municipal				-				-									-								-		-
30-34 ST CATHARINE ST	Police Station	Other Non-Retail		201	-				-									-								-		-
153 CURTIS ST	Library	Other Non-Retail		201	-				-									-								-		-
18 KAINS ST	Residential				-				-									-								-		-
16 KAINS ST	Residential				-				-									-								-		-
39 1/2 ST CATHARINE ST	Residential				-				-									-								-		-
45 ST CATHARINE ST	Residential				-				-									-								-		-
43 ST CATHARINE ST	Residential				-				-									-								-		-
41 ST CATHARINE ST	Residential				-				-									-								-		-
39 ST CATHARINE ST	Residential				-				-									-								-		-
37 ST CATHARINE ST	Residential				-				-									-								-		-
35 ST CATHARINE ST	Residential				-				-									-								-		-
661 TALBOT ST	Talbot Cafe	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	660				-									-		**660**						-		**660**
767 TALBOT ST	Vacant	Vacant		200	1,636				-									-								-	**1,636**	**1,636**
294 TALBOT ST	Residential				-				-									-								-		-
300-330 TALBOT ST	Residential				-				-									-								-		-
300-330 TALBOT ST	Elements Hair Nails	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	-				-									-							-	-		-
300-330 TALBOT ST	Ernest Manfredi Accountant	Accounting (e.g. accountant, tax preparer, bookkeeper, payroll service)	5412	141	-				-									-			-					-		-
410-420 TALBOT ST	Ontario Government Office	General Office Space		202	7,100				-									-								**7,100**		**7,100**
502 TALBOT ST	Holy Angels Church	General Office Space		202	8,400				-									-								**8,400**		**8,400**
468-470 TALBOT ST	Barb Weir Photography	Photographer	54192	142	1,200				-									-			**1,200**					-		**1,200**
568 TALBOT ST	Vacant	Vacant		200	1,244				-									-								-	**1,244**	**1,244**
6 PRINCESS AVE	Desjardin Financial	Insurance Agent / Broker	52421	138	600				-									-			**600**					-		**600**
9 PRINCESS AVE	OMAC	Mortgage and Loan Broker	52231	129	500				-									-								**500**		**500**
530-550 TALBOT ST	Vacant	Vacant		200	1,200				-									-								-	**1,200**	**1,200**
530-550 TALBOT ST	Vacant	Vacant		200	1,200				-									-								-	**1,200**	**1,200**
530-550 TALBOT ST	Spice Spa	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	810				-									-						**810**		-		**810**
552-560 TALBOT ST	Vacant	Vacant		200	-				-									-								-	-	-
552-560 TALBOT ST	Antoine's Furnishings	Household Furniture	44211	58	8,000				-					8,000			8,000	**8,000**								-		**8,000**
570-572 TALBOT ST	My Salon	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	752				-									-						**752**		-		**752**
650-652 TALBOT ST	St. John Ambulance	Other Health Practitioner (e.g. chiropractor, optometrist, psychologist, other therapist)	6213	153	900				-									-				**900**				-		**900**

					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	19	21	22	27		28	
						FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
					Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	Store Name	Store Type	NAICS Code	Study Code	Total Space	Supermarket & Grocery	Specialty Foods	Subtotal - FSR	Major & Discount Dept. Stores	Other General Merch.	Drugs, Cosmetics, Opticians & Personal Care	Fashion & Accessories	Home Furnishings, Computers & Electronics	Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc	Canadian Tire, TSC, Tire stores, P+A	Subtotal, Non-department Stores (NFSR)	Subtotal - NSFR	Home Centres, Hardware & Building Supply, Nursery	Bank, Trust, Credit Union	FIRE, Legal, Accounting, Photo & Veterinary Services	Medical, Dental & Other Health Services	Restaurant, Fast Food, Drinking	Personal Services	Liquor, Beer, Wine	Subtotal - Other	Vacant	Total
					GLA	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*
476-478 TALBOT ST	CrossFit Elgin	Athletic Instruction (e.g. gymnastics club, martial arts club)	61162	149	10,350			-								-	-								**10,350**		**10,350**
679-691 TALBOT ST	Richardson Home & Decor Beyond	Housewares	442298	68	800			-					800			800	**800**								-		**800**
468-470 TALBOT ST	St. Thomas & District "Right to Life"	Community Food, Housing, Emergency Relief Service (e.g. food bank, meals on wheels)	6242	157	900			-								-	-								**900**		**900**
545 TALBOT ST	St. Thomas City Hall	General Office Space		202	-			-								-	-								-		-
41 MONDAMIN ST	Vacant	Vacant		200	900			-								-	-								-	**900**	**900**
41 MONDAMIN ST	Sears	Catalogue Sales Showroom (e.g. Sears Catalogue and Sears Dealer stores)	452999	31	2,331			-		2,331						2,331	**2,331**								-		**2,331**
41 MONDAMIN ST	State Farm	Insurance Agent / Broker	52421	138	799			-								-	-			**799**					-		**799**
41 MONDAMIN ST	Vacant	Vacant		200	3,398			-								-	-								-	**3,398**	**3,398**
41 MONDAMIN ST	City Centre Plaza	General Office Space		202	1,651			-								-	-								**1,651**		**1,651**
41 MONDAMIN ST	Service Ontario Licenses	General Office Space		202	898			-								-	-								**898**		**898**
SUBTOTAL NODE 3: TALBOT CENTRAL					**647,979**	-	**21,172**	**21,172**	-	**35,334**	**14,190**	**21,627**	**53,364**	**55,544**	-	**180,059**	**180,059**	-	**23,244**	**58,773**	**16,111**	**30,076**	**40,379**	-	**165,666**	**112,499**	**647,979**
				check	*647,979*																						-
NODE 4: TALBOT EAST																											-
995-1009 TALBOT ST	Tim Hortons	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	2,640			-								-	-					**2,640**			-		**2,640**
995-1009 TALBOT ST	Vacant	Vacant		200	1,000			-								-	-								-	**1,000**	**1,000**
995-1009 TALBOT ST	Vacant	Vacant		200	8,261			-								-	-								-	**8,261**	**8,261**
987 TALBOT ST	Sunset Dental	Dentist	6212	152	750			-								-	-				**750**				-		**750**
989 TALBOT ST	City Denture Clinic	Dentist	6212	152	797			-								-	-				**797**				-		**797**
993 TALBOT ST	HWC Insurance	Insurance Agent / Broker	52421	138	900			-								-	-			**900**					-		**900**
985 TALBOT ST	Pizza Hut	Full-Service Restaurant	7221	172	3,472			-								-	-					**3,472**			-		**3,472**
979 TALBOT ST	KFC	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	3,444			-								-	-					**3,444**			-		**3,444**
965 TALBOT ST	Spicer's Bakery	Bakery	445291	7	1,750	1,750	**1,750**									-	-								-		**1,750**
965 TALBOT ST	Cash Money	Cheque Cashing Service	52239	130	1,600			-								-	-								**1,600**		**1,600**
965 TALBOT ST	Yorgurty's	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,250			-								-	-					**1,250**			-		**1,250**
965 TALBOT ST	Popeyes Louisiana Kitchen	Full-Service Restaurant	7221	172	3,500			-								-	-					**3,500**			-		**3,500**
951-959 TALBOT ST	McDonalds	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	4,719			-								-	-					**4,719**			-		**4,719**
965 TALBOT ST	Leisure Fun Pool Inc.	Hot Tubs / Whirlpools / Swimming Pools	453999	107	1,250			-						1,250		1,250	**1,250**								-		**1,250**
965 TALBOT ST	Sun City	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	1,750			-								-	-						**1,750**		-		**1,750**
939 TALBOT ST	Burger King	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	4,950			-								-	-					**4,950**			-		**4,950**
945 TALBOT ST	Family Video	Video Tape and Disc Rental	53223	134	5,390			-								-	-								**5,390**		**5,390**
891 TALBOT ST	Harry's Charcoal Broiled	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	2,000			-								-	-					**2,000**			-		**2,000**
899 TALBOT ST	Digital Power Corporation	Telephone (including cellular phone)	44311	78	1,861			-					1,861			1,861	**1,861**								-		**1,861**
909-913 TALBOT ST	St. Thomas Tire Service Ltd.	Other Automotive Repair and Maintenance (e.g. lubrication, emission testing, undercoating)	811199	178	4,480			-								-	-								**4,480**		**4,480**
877 TALBOT ST	Longhorns Texas Grill	Full-Service Restaurant	7221	172	4,968			-								-	-					**4,968**			-		**4,968**
827-831 TALBOT ST	H&R Block	Accounting (e.g. accountant, tax preparer, bookkeeper, payroll service)	5412	141	2,040			-								-	-			**2,040**					-		**2,040**
827-831 TALBOT ST	St. Thomas Roadhouse Bar & Grill	Drinking Places (e.g. bars, pubs, lounges, night clubs, taverns)	7224	174	5,040			-								-	-					**5,040**			-		**5,040**
827-831 TALBOT ST	Coffee Culture Cafe & Eatery	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	2,720			-								-	-					**2,720**			-		**2,720**
817 TALBOT ST	Collect Em All Sports Cards	Autographs, Cards and Collectibles	453999	109	1,086			-						1,086		1,086	**1,086**								-		**1,086**
811 TALBOT ST	Vacant	Vacant		200	2,040			-								-	-								-	**2,040**	**2,040**
809 TALBOT ST	Allen Skuce Barrister & Solicitor	Legal (e.g. lawyer, notary, paralegal)	5411	140	962			-								-	-			**962**					-		**962**

						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	19	21	22	27		28	
							FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
						Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	**Store Name**	**Store Type**	**NAICS Code**	**Study Code**	**Total Space**		**Supermarket & Grocery**	**Specialty Foods**	**Subtotal - FSR**	**Major & Discount Dept. Stores**	**Other General Merch.**	**Drugs, Cosmetics, Opticians & Personal Care**	**Fashion & Accessories**	**Home Furnishings, Computers & Electronics**	**Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc**	**Canadian Tire, TSC, Tire stores, P+A**	**Subtotal, Non-department Stores (NFSR)**	**Subtotal - NSFR**	**Home Centres, Hardware & Building Supply, Nursery**	**Bank, Trust, Credit Union**	**FIRE, Legal, Accounting, Photo & Veterinary Services**	**Medical, Dental & Other Health Services**	**Restaurant, Fast Food, Drinking**	**Personal Services**	**Liquor, Beer, Wine**	**Subtotal - Other**	**Vacant**	**Total**
					GLA		*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*
801-805 TALBOT ST	The Caring Cupboard	Community Food, Housing, Emergency Relief Service (e.g. food bank, meals on wheels)	6242	157	4,800				-								-	-								**4,800**		**4,800**
825 TALBOT ST	Asuka Japanese Cuisine	Full-Service Restaurant	7221	172	4,100				-								-	-					**4,100**			-		**4,100**
827-831 TALBOT ST	Split Ends	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	1,360				-								-	-						**1,360**		-		**1,360**
940 TALBOT ST	Go Glass & Accessories	Other Automotive Repair and Maintenance (e.g. lubrication, emission testing, undercoating)	811199	178	1,000				-								-	-								**1,000**		**1,000**
950 TALBOT ST	Hit the Spot	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	3,624				-								-	-					**3,624**			-		**3,624**
960 TALBOT ST	Wimpy's Diner	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	2,550				-								-	-					**2,550**			-		**2,550**
808 TALBOT ST	Moe's Variety	Convenience Store	44512	3	1,600			1,600	**1,600**								-	-								-		**1,600**
808 TALBOT ST	Royal LePage	Real Estate Agent / Broker	53121	139	1,250				-								-	-			**1,250**					-		**1,250**
904 TALBOT ST	The Mufflerman	Mechanical and Electrical (e.g. general repair, specialty repair of muffler, brake, transmission)	81111	175	2,640				-								-	-								**2,640**		**2,640**
930 TALBOT ST	Rogers AT&T	Telephone (including cellular phone)	44311	78	975				-					975			975	**975**								-		**975**
930 TALBOT ST	Century Sound	Consumer Electronics (e.g. TV, radio, stereo)	44311	75	6,000				-					6,000			6,000	**6,000**								-		**6,000**
930 TALBOT ST	First Choice Haircutters	Unisex Hair Salon (i.e. men and women)	812116	186	1,300				-								-	-						**1,300**		-		**1,300**
930 TALBOT ST	Mr Sub	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,071				-								-	-					**1,071**			-		**1,071**
995-1009 TALBOT ST	Valvoline	Gasoline Station with Convenience Store	44711	203	150				-								-	-								**150**		**150**
923-929 TALBOT ST	Brunswick Tavern	Drinking Places (e.g. bars, pubs, lounges, night clubs, taverns)	7224	174	4,370				-								-	-					**4,370**			-		**4,370**
808 TALBOT ST	Cellular Magician (repair)	All Other Personal Service (e.g. party planning, personal shopping, psychic, shoe shine, escorts)	81299	196	775				-								-	-						**775**		-		**775**
808 TALBOT ST	Vacant	Vacant		200	577				-								-	-								-	**577**	**577**
930 TALBOT ST	Talbot Animal Clinic	Veterinarian	54194	143	817				-								-	-			**817**					-		**817**
11 MANITOBA ST	Motor Man	Mechanical and Electrical (e.g. general repair, specialty repair of muffler, brake, transmission)	81111	175	3,543				-								-	-								**3,543**		**3,543**
841-849 TALBOT ST	Speedy Auto Service	Mechanical and Electrical (e.g. general repair, specialty repair of muffler, brake, transmission)	81111	175	5,935				-								-	-								**5,935**		**5,935**
800 TALBOT ST	Vanpelt's Office Plus	Business Service Centre (e.g. photocopying service, private mail centre)	56143	145	19,920				-								-	-								**19,920**		**19,920**
1010 TALBOT ST	FreshCo	Supermarket	44511	1	31,030		31,030		**31,030**								-	-								-		**31,030**
1010 TALBOT ST	Dollarama Inc.	Dollar Store (e.g. Dollarama, Buck or Two)	452999	32	10,600				-		10,600						10,600	**10,600**								-		**10,600**
1010 TALBOT ST	A & W Restaurant	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	2,488				-								-	-					**2,488**			-		**2,488**
1010 TALBOT ST	Easy Home	Household Furniture and Appliance	44211	59	2,908				-					2,908			2,908	**2,908**								-		**2,908**
1010 TALBOT ST	Hakim Optical	Other Health Practitioner (e.g. chiropractor, optometrist, psychologist, other therapist)	6213	153	2,514				-								-	-				**2,514**				-		**2,514**
1010 TALBOT ST	Frisco's Family	Full-Service Restaurant	7221	172	655				-								-	-					**655**			-		**655**
1010 TALBOT ST	Quizno's Subs	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	2,938				-								-	-					**2,938**			-		**2,938**
1010 TALBOT ST	Pet Valu Discount	Pet and Pet Supply	45391	102	2,884				-						2,884		2,884	**2,884**								-		**2,884**
1010 TALBOT ST	Tan Factory	Ear Piercing / Tattooing / Tanning Salon	81219	189	642				-								-	-						**642**		-		**642**
1010 TALBOT ST	Money Mart	Cheque Cashing Service	52239	130	652				-								-	-								**652**		**652**
1010 TALBOT ST	Land Registry Office	General Office Space		202	4,922				-								-	-								**4,922**		**4,922**
1010 TALBOT ST	Vacant	Vacant		200	1,106				-								-	-								-	**1,106**	**1,106**
1010 TALBOT ST	LCBO	Liquor	44531	24	9,248				-								-	-							**9,248**	-		**9,248**
1010 TALBOT ST	Medi Centre	Convenience Store	44512	3	2,782			2,782	**2,782**								-	-								-		**2,782**

					1	*2*	*3*	*4*	*5*	*6*	*7*	*8*	*9*	*10*	*11*	*12*	*13*	*14*	*15*	*16*	*19*	*21*	*22*	*27*		*28*	
						FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
					Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	**Store Name**	**Store Type**	**NAICS Code**	**Study Code**	**Total Space** *GLA*	**Supermarket & Grocery** *GLA*	**Specialty Foods** *GLA*	**Subtotal - FSR** *GLA*	**Major & Discount Dept. Stores** *GLA*	**Other General Merch.** *GLA*	**Drugs, Cosmetics, Opticians & Personal Care** *GLA*	**Fashion & Accessories** *GLA*	**Home Furnishings, Computers & Electronics** *GLA*	**Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc** *GLA*	**Canadian Tire, TSC, Tire stores, P+A** *GLA*	**Subtotal, Non-department Stores (NFSR)** *GLA*	**Subtotal - NSFR** *GLA*	**Home Centres, Hardware & Building Supply, Nursery** *GLA*	**Bank, Trust, Credit Union** *GLA*	**FIRE, Legal, Accounting, Photo & Veterinary Services** *GLA*	**Medical, Dental & Other Health Services** *GLA*	**Restaurant, Fast Food, Drinking** *GLA*	**Personal Services** *GLA*	**Liquor, Beer, Wine** *GLA*	**Subtotal - Other** *GLA*	**Vacant** *GLA*	**Total** *GLA*
1010 TALBOT ST	Topper's Pizza	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	3,000			-								-	-					**3,000**			-		**3,000**
1010 TALBOT ST	Remax	Real Estate Agent / Broker	53121	139	1,100			-								-	-			**1,100**					-		**1,100**
860 TALBOT ST	Boston Pizza	Full-Service Restaurant	7221	172	5,649			-								-	-					**5,649**			-		**5,649**
899 TALBOT ST	CMC Motorsports	Automotive Parts and Accessories	44131	29	1,675			-							1,675	1,675	**1,675**								-		**1,675**
800 TALBOT ST	Starwood Customer Contact Centre	General Office Space		202	6,945			-								-	-								**6,945**		**6,945**
930 TALBOT ST	Healthy Lifestyles Inc.	Health Supplements (not food)	446191	20	800			-			800					800	**800**								-		**800**
900 TALBOT ST	Global Pet	Pet and Pet Supply	45391	102	4,111			-						4,111		4,111	**4,111**								-		**4,111**
877 TALBOT ST	The Open Kitchen Original Family Grill	Full-Service Restaurant	7221	172	2,634			-								-	-					**2,634**			-		**2,634**
877 TALBOT ST	Vacant	Vacant		200	1,317			-								-	-								-	**1,317**	**1,317**
877 TALBOT ST	Union Burger	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,317			-								-	-					**1,317**			-		**1,317**
877 TALBOT ST	Vacant	Vacant		200	1,317			-								-	-								-	**1,317**	**1,317**
877 TALBOT ST	Cash 4 You	Cheque Cashing Service	52239	130	1,317			-								-	-								**1,317**		**1,317**
877 TALBOT ST	Pita Pit	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,317			-								-	-					**1,317**			-		**1,317**
909-913 TALBOT ST	St Thomas Tire Service	Mechanical and Electrical (e.g. general repair, specialty repair of muffler, brake, transmission)	81111	175	4,480			-								-	-								**4,480**		**4,480**
1010 TALBOT ST	P.J. Family Hair Centre	Unisex Hair Salon (i.e. men and women)	812116	186	655			-								-	-						**655**		-		**655**
995-1009 TALBOT ST	Talbot Mini Mart	Convenience Store	44512	3	1,985		1,985	**1,985**								-	-								-		**1,985**
995-1009 TALBOT ST	Vacant	Vacant		200	1,000			-								-	-								-	**1,000**	**1,000**
995-1009 TALBOT ST	ATM Lotto Centre	Convenience Store	44512	3	1,000		1,000	**1,000**								-	-								-		**1,000**
SUBTOTAL NODE 4: TALBOT EAST					**259,965**	**31,030**	**9,117**	**40,147**	**-**	**10,600**	**800**	**-**	**11,744**	**9,331**	**1,675**	**34,150**	**34,150**	**-**	**-**	**7,069**	**4,061**	**74,416**	**6,482**	**9,248**	**67,774**	**16,618**	**259,965**
					check																						-
NODE 5: SECONDARY COMMERCIAL																											-
295 WELLINGTON ST	Home Hardware	Hardware Store	44413	115	52,650			-								-	-	**52,650**							-		**52,650**
24 FIRST AVE	B & L Jewellers	Jewellery	44831	56	1,210			-			1,210					1,210	**1,210**								-		**1,210**
24 FIRST AVE	Vacant	Vacant		200	1,531			-								-	-								-	**1,531**	**1,531**
24 FIRST AVE	CAA Travel Store	Travel Service (e.g. travel agent, tour operator, auto club, ticket agent, tourist bureau)	5615	146	7,215			-								-	-								**7,215**		**7,215**
24 FIRST AVE	The Wine Maker	Beer and Wine-Making Supply	453992	104	1,224			-						1,224		1,224	**1,224**								-		**1,224**
24 FIRST AVE	Joe Preston	Insurance Agent / Broker	52421	138	969			-								-	-			**969**					-		**969**
24 FIRST AVE	Vacant	Vacant		200	1,185			-								-	-								-	**1,185**	**1,185**
24 FIRST AVE	HCR	Employment Service	5613	144	1,162			-								-	-								**1,162**		**1,162**
24 FIRST AVE	Listen Up! Hearing Aid Clinic	Medical Aids and Equipment (e.g. hearing aids, orthopaedic aids, oxygen)	446199	21	1,001			-			1,001					1,001	**1,001**								-		**1,001**
310 WELLINGTON ST	First Optometry	Optician	44613	19	750			-			750					750	**750**								-		**750**
310 WELLINGTON ST	Vacant	Vacant		200	1,150			-								-	-								-	**1,150**	**1,150**
310 WELLINGTON ST	Edward Jones Investment	Investment Advice / Financial Planning	52393	137	800			-								-	-			**800**					-		**800**
310 WELLINGTON ST	Al's Pizzeria	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,150			-								-	-					**1,150**			-		**1,150**
310 WELLINGTON ST	Country Charm Cafe	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,550			-								-	-					**1,550**			-		**1,550**
310 WELLINGTON ST	Sketchly Cleaners	Dry Cleaning	81232	192	800			-								-	-						**800**		-		**800**
310 WELLINGTON ST	Family First Tattoo	Ear Piercing / Tattooing / Tanning Salon	81219	189	1,300			-								-	-						**1,300**		-		**1,300**
308 WELLINGTON ST	Vacant	Vacant		200	6,000			-								-	-								-	**6,000**	**6,000**
308 WELLINGTON ST	Elgin Optical	Optician	44613	19	1,938			-			1,938					1,938	**1,938**								-		**1,938**
308 WELLINGTON ST	Little Caesars	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,397			-								-	-					**1,397**			-		**1,397**
308 WELLINGTON ST	Mattress Brand	Mattress	44211	62	1,998			-					1,998			1,998	**1,998**								-		**1,998**
296-298 WELLINGTON ST	St. Thomas Variety	Convenience Store	44512	3	1,215		1,215	**1,215**								-	-								-		**1,215**

					1	*2*	*3*	*4*	*5*	*6*	*7*	*8*	*9*	*10*	*11*	*12*	*13*	*14*	*15*	*16*	*19*	*21*	*22*	*27*		*28*	
						FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
					Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	**Store Name**	**Store Type**	**NAICS Code**	**Study Code**	**Total Space** *GLA*	**Supermarket & Grocery** *GLA*	**Specialty Foods** *GLA*	**Subtotal - FSR** *GLA*	**Major & Discount Dept. Stores** *GLA*	**Other General Merch.** *GLA*	**Drugs, Cosmetics, Opticians & Personal Care** *GLA*	**Fashion & Accessories** *GLA*	**Home Furnishings, Computers & Electronics** *GLA*	**Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc** *GLA*	**Canadian Tire, TSC, Tire stores, P+A** *GLA*	**Subtotal, Non-department Stores (NFSR)** *GLA*	**Subtotal - NSFR** *GLA*	**Home Centres, Hardware & Building Supply, Nursery** *GLA*	**Bank, Trust, Credit Union** *GLA*	**FIRE, Legal, Accounting, Photo & Veterinary Services** *GLA*	**Medical, Dental & Other Health Services** *GLA*	**Restaurant, Fast Food, Drinking** *GLA*	**Personal Services** *GLA*	**Liquor, Beer, Wine** *GLA*	**Subtotal - Other** *GLA*	**Vacant** *GLA*	**Total** *GLA*
296-298 WELLINGTON ST	Scissor & Trands	Unisex Hair Salon (i.e. men and women)	812116	186	765			-								-	-						**765**		-		**765**
296-298 WELLINGTON ST	Pizza Tonite	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,665			-								-	-					**1,665**			-		**1,665**
6 FIRST AVE	Doctors Office	Physician (including psychiatrist)	6211	151	2,350			-								-	-				**2,350**				-		**2,350**
7 FIRST AVE	Vacant	Vacant		200	21,590			-								-	-								-	**21,590**	**21,590**
275 WELLINGTON ST N/S	Elgin Chrysler	New Cars	44111	201	11,120			-								-	-								**11,120**		**11,120**
2-4 SECOND AVE	Bowser and Bowser Law Firm	Legal (e.g. lawyer, notary, paralegal)	5411	140	4,142			-								-	-			**4,142**					-		**4,142**
292-294 WELLINGTON ST	Vacant	Vacant		200	2,318			-								-	-								-	**2,318**	**2,318**
292-294 WELLINGTON ST	Vacant	Vacant		200	14,480			-								-	-								-	**14,480**	**14,480**
1 MARY ST EAST	Woody's Body Shop	Body, Paint, Interior and Glass	81112	176	3,882			-								-	-								**3,882**		**3,882**
265 WELLINGTON ST	Knights Of Columbus	Other Non-Retail		201	5,530			-								-	-								**5,530**		**5,530**
107 EDWARD ST(ST THOMAS)	Shoppers Drug Mart	Pharmacy / Drug Store	44611	17	16,420			-			16,420					16,420	**16,420**								-		**16,420**
105 EDWARD ST(ST THOMAS)	Salvation Army	Individual and Family Service (e.g. family counselling, big brothers and sisters)	6241	156	7,885			-								-	-								**7,885**		**7,885**
101 EDWARD ST(ST THOMAS)	Rona	Home Improvement Centre	44411	114	29,580			-								-	-	**29,580**							-		**29,580**
101 EDWARD ST(ST THOMAS)	Rona (Storage Building)	Home Improvement Centre	44411	114	10,910			-								-	-	**10,910**							-		**10,910**
107 EDWARD ST(ST THOMAS)	Medical Offices	Physician (including psychiatrist)	6211	151	-			-								-	-				-				-		-
SUBTOTAL NODE 5: SECONDARY COMMERCIAL					**220,832**	-	**1,215**	**1,215**	-	-	**20,109**	**1,210**	**1,998**	**1,224**	-	**24,541**	**24,541**	**93,140**	-	**5,911**	**2,350**	**5,762**	**2,865**	-	**36,794**	**48,254**	**220,832**
					check																						
NODE 6: MINOR COMMERCIAL																											
321 ELM ST	Plaza Convenience	Convenience Store	44512	3	2,500	2,500	**2,500**									-	-								-		**2,500**
321 ELM ST	Goodwill	Used Clothing	45331	97	11,760		-							11,760		11,760	**11,760**								-		**11,760**
204 FIRST AVE	Robert Travels	Travel Service (e.g. travel agent, tour operator, auto club, ticket agent, tourist bureau)	5615	146	975		-									-	-								**975**		**975**
204 FIRST AVE	Eye Designs	Optician	44613	19	1,950		-				1,950					1,950	**1,950**								-		**1,950**
204 FIRST AVE	Royal Lepage	Real Estate Agent / Broker	53121	139	2,923		-									-	-			**2,923**					-		**2,923**
204 FIRST AVE	Shoppers Drug Mart	Pharmacy / Drug Store	44611	17	8,740		-				8,740					8,740	**8,740**								-		**8,740**
534 ELM ST	Mac's	Convenience Store	44512	3	2,640	2,640	**2,640**									-	-								-		**2,640**
534 ELM ST	Upper Deck Sports Bar	Full-Service Restaurant	7221	172	1,440		-									-	-					**1,440**			-		**1,440**
534 ELM ST	Edward Jones Investment	Investment Advice / Financial Planning	52393	137	1,560		-									-	-			**1,560**					-		**1,560**
534 ELM ST	Pizza Worx	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,200		-									-	-					**1,200**			-		**1,200**
534 ELM ST	Golden Dragon Chinese Food	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,020		-									-	-					**1,020**			-		**1,020**
184-186 SUNSET DR	Sunset Donuts & Bake Goods	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	2,968		-									-	-					**2,968**			-		**2,968**
184-186 SUNSET DR	CT Snip Its	Unisex Hair Salon (i.e. men and women)	812116	186	1,064		-									-	-						**1,064**		-		**1,064**
184-186 SUNSET DR	Vacant	Vacant		200	1,120		-									-	-								-	**1,120**	**1,120**
60 ELM ST	Tim Hortons	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,438		-									-	-					**1,438**			-		**1,438**
114 CONFEDERATION DR	Greenfields Variety & Video	Convenience Store	44512	3	3,220	3,220	**3,220**									-	-								-		**3,220**
114 CONFEDERATION DR	Al's Pizzeria	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	3,388		-									-	-					**3,388**			-		**3,388**
114 CONFEDERATION DR	Vacant	Vacant		200	850		-									-	-								-	**850**	**850**
71 ROSS ST	Bestt Laundry Cafe and Cleaners	Coin-Operated Laundry	81231	191	4,000		-									-	-						**4,000**		-		**4,000**

						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	19	21	22	27		28	
							FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
						Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	**Store Name**	**Store Type**	**NAICS Code**	**Study Code**	**Total Space**		**Supermarket & Grocery**	**Specialty Foods**	**Subtotal - FSR**	**Major & Discount Dept. Stores**	**Other General Merch.**	**Drugs, Cosmetics, Opticians & Personal Care**	**Fashion & Accessories**	**Home Furnishings, Computers & Electronics**	**Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc**	**Canadian Tire, TSC, Tire stores, P+A**	**Subtotal, Non-department Stores (NFSR)**	**Subtotal - NSFR**	**Home Centres, Hardware & Building Supply, Nursery**	**Bank, Trust, Credit Union**	**FIRE, Legal, Accounting, Photo & Veterinary Services**	**Medical, Dental & Other Health Services**	**Restaurant, Fast Food, Drinking**	**Personal Services**	**Liquor, Beer, Wine**	**Subtotal - Other**	**Vacant**	**Total**
					GLA		*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*
43 ROSS ST	Pam's Family's Restaurant	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,260				-								-	-					**1,260**			-		**1,260**
81-85 ROSS ST	Rita Payne Income Tax	Accounting (e.g. accountant, tax preparer, bookkeeper, payroll service)	5412	141	2,650				-								-	-			**2,650**					-		**2,650**
108 ROSS ST	Canadian Mortgage Expert Centre	Mortgage and Loan Broker	52231	129	450				-								-	-								**450**		**450**
110-114 ROSS ST	Paul's Bicycle Storage	Other Personal& Household Goods (e.g. garments, bicycles, jewellery, watches, key cutting)	81149	183	720				-								-	-								**720**		**720**
125-129 ROSS ST	Books and Beats	Books and News	45121	91	1,640				-						1,640		1,640	**1,640**								-		**1,640**
125-129 ROSS ST	Bennett Vacuum	Vacuum Cleaners	44311	81	1,000				-					1,000			1,000	**1,000**								-		**1,000**
133 ROSS ST	Dudes & Dads Barbershop Plus	Barber Shop (i.e. men only)	812114	184	450				-								-	-						**450**		-		**450**
143-145 ROSS ST	Vacant	Vacant		200	990				-								-	-								-	**990**	**990**
204 FIRST AVE	Elmwood Family Health Centre	Physician (including psychiatrist)	6211	151	696				-								-	-				**696**				-		**696**
530 ELM ST	Shell Service Station	Gasoline Station with Convenience Store	44711	203	135				-								-	-								**135**		**135**
89-95 ROSS ST	St.Thomas Appliance Repair	Appliance (including consumer electronics)	811412	180	1,235				-								-	-								**1,235**		**1,235**
89-95 ROSS ST	Vacant			200	1,558				-								-	-								-	**1,558**	**1,558**
111-113 ROSS ST	Dotsy's Entertainment Company & Costume Shop	Other Clothing	448199	48	1,688				-				1,688				1,688	**1,688**								-		**1,688**
119-123 ROSS ST	Select Second	Used Furniture / Antiques	45331	98	2,000				-						2,000		2,000	**2,000**								-		**2,000**
184-186 SUNSET DR	Sunny's Gas Bar & Car Wash Bays	Car Wash	811192	177	3,580				-								-	-								**3,580**		**3,580**
230 FIRST AVE	St. Thomas Medical Walk-In Clinic	Physician (including psychiatrist)	6211	151	9,937				-								-	-				**9,937**				-		**9,937**
43 ROSS ST	Silver Springs Massage Therapy	Other Personal Care Service (e.g. bath house, massage parlour)	81219	190	1,781				-								-	-						**1,781**		-		**1,781**
153-161 ROSS ST	The Crepe Place	Delicatessen	445299	14	1,650			1,650	**1,650**								-	-								-		**1,650**
140-154 FIFTH AVE	Lifemark Physiotherapy	Other Health Practitioner (e.g. chiropractor, optometrist, psychologist, other therapist)	6213	153	2,265				-								-	-				**2,265**				-		**2,265**
140-154 FIFTH AVE	Brian's Family Hair Care	Insurance Agent / Broker	52421	138	2,580				-								-	-			**2,580**					-		**2,580**
140-154 FIFTH AVE	Ollee's Bar & Eatery	Full-Service Restaurant	7221	172	2,109				-								-	-					**2,109**			-		**2,109**
140-154 FIFTH AVE	Wind Mobile	Telephone (including cellular phone)	44311	78	11,390				-					11,390			11,390	**11,390**								-		**11,390**
140-154 FIFTH AVE	Convenience Video	Convenience Store	44512	3	1,947			1,947	**1,947**								-	-								-		**1,947**
140-154 FIFTH AVE	China House	Full-Service Restaurant	7221	172	2,283				-								-	-					**2,283**			-		**2,283**
140-154 FIFTH AVE	Thames Valley Children Centre	General Office Space		202	1,535				-								-	-								**1,535**		**1,535**
140-154 FIFTH AVE	Vacant	Vacant		200	2,122				-								-	-								-	**2,122**	**2,122**
140-154 FIFTH AVE	Vacant	Vacant		200	1,955				-								-	-								-	**1,955**	**1,955**
140-154 FIFTH AVE	Plaza Beauty Salon	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	1,912				-								-	-						**1,912**		-		**1,912**
140-154 FIFTH AVE	Noad Chriopracter	Other Health Practitioner (e.g. chiropractor, optometrist, psychologist, other therapist)	6213	153	1,882				-								-	-				**1,882**				-		**1,882**
81-85 ROSS ST	The Loft	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	1,200				-								-	-						**1,200**		-		**1,200**
101-109 ROSS ST	Imaginus Styling	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	1,225				-								-	-						**1,225**		-		**1,225**
101-109 ROSS ST	Elgin Bookkeeping	Accounting (e.g. accountant, tax preparer, bookkeeper, payroll service)	5412	141	1,200				-								-	-			**1,200**					-		**1,200**
101-109 ROSS ST	Jennette Mansell	General Office Space		202	1,200				-								-	-								**1,200**		**1,200**
115 ROSS ST	Paul's Bicycle Repair	Bicycles	45111	84	785				-						785		785	**785**								-		**785**
125-129 ROSS ST	Pepe Salon	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	1,000				-								-	-						**1,000**		-		**1,000**
153-161 ROSS ST	Books and Beats	Books and News	45121	91	1,000				-						1,000		1,000	**1,000**								-		**1,000**
153-161 ROSS ST	Bennet Vacuum	Vacuum Cleaners	44311	81	1,000				-					1,000			1,000	**1,000**								-		**1,000**
140-154 FIFTH AVE	Rom's Alteration and Clothing Store	Other Personal& Household Goods (e.g. garments, bicycles, jewellery, watches, key cutting)	81149	183	2,000				-								-	-								**2,000**		**2,000**
140-154 FIFTH AVE	Vacant	Vacant		200	2,000				-								-	-								-	**2,000**	**2,000**
140-154 FIFTH AVE	Vacant	Vacant		200	2,000				-								-	-								-	**2,000**	**2,000**
140-154 FIFTH AVE	Tru Hot Yoga	Athletic Instruction (e.g. gymnastics club, martial arts club)	61162	149	1,000				-								-	-								**1,000**		**1,000**
5 SHAW VALLEY DR	Milestone's Children Centre	Child Day-Care Service	6244	159	11,000				-								-	-								**11,000**		**11,000**

					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	19	21	22	27		28	
						FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
					Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	Store Name	Store Type	NAICS Code	Study Code	Total Space	Supermarket & Grocery	Specialty Foods	Subtotal - FSR	Major & Discount Dept. Stores	Other General Merch.	Drugs, Cosmetics, Opticians & Personal Care	Fashion & Accessories	Home Furnishings, Computers & Electronics	Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc	Canadian Tire, TSC, Tire stores, P+A	Subtotal, Non-department Stores (NFSR)	Subtotal - NSFR	Home Centres, Hardware & Building Supply, Nursery	Bank, Trust, Credit Union	FIRE, Legal, Accounting, Photo & Veterinary Services	Medical, Dental & Other Health Services	Restaurant, Fast Food, Drinking	Personal Services	Liquor, Beer, Wine	Subtotal - Other	Vacant	Total
					GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA
188 SUNSET DR	Foot Services	Other Health Practitioner (e.g. chiropractor, optometrist, psychologist, other therapist)	6213	153	1,400			-								-	-				**1,400**				-		**1,400**
188 SUNSET DR	Sunset Medical Centre	Physician (including psychiatrist)	6211	151	1,400			-								-	-				**1,400**				-		**1,400**
188 SUNSET DR	Dr. e Telford Family Physician	Physician (including psychiatrist)	6211	151	1,400			-								-	-				**1,400**				-		**1,400**
534 ELM ST	Elm street Restaurant Grill	Full-Service Restaurant	7221	172	1,000			-								-	-					**1,000**			-		**1,000**
575 BURWELL RD	ST THOMAS EARLY LEARNING CENTRE	Child Day-Care Service	6244	159	10,700			-								-	-								**10,700**		**10,700**
SUBTOTAL NODE 6: MINOR COMMERCIAL					**162,666**	-	**11,957**	**11,957**	-	-	**10,690**	**1,688**	**13,390**	**17,185**	-	**42,953**	**42,953**	-	-	**10,913**	**18,980**	**18,106**	**12,632**	-	**34,530**	**12,595**	**162,666**
				check	*162,666*																						
NODE 7: HIGHWAY COMMERCIAL																											
1014 TALBOT ST	Brewery Inc	Beer	44531	22	14,480			-								-	-							**14,480**	-		**14,480**
1014 1/2 TALBOT ST	Swiss Chalet	Full-Service Restaurant	7221	172	3,384			-								-	-					**3,384**			-		**3,384**
1016 TALBOT ST	Park'N'Bowl	Bowling Alley	71395	169	9,720			-								-	-								**9,720**		**9,720**
1018 TALBOT ST	Dulux Paints	Paint and Wallpaper	44412	116	3,600			-								-	-	**3,600**							-		**3,600**
1020 TALBOT ST	Pioneer (Gas Bar)	Body, Paint, Interior and Glass	81112	176	2,600			-								-	-								**2,600**		**2,600**
1030 TALBOT ST	Briwood Farmers Market	Grocery Store	44511	2	7,845	7,845		**7,845**								-	-								-		**7,845**
1099 TALBOT ST	Royal Bank of Canada	Bank	52211	124	6,392			-								-	-		**6,392**						-		**6,392**
1093 TALBOT ST	Braxton's Roadhouse	Full-Service Restaurant	7221	172	5,600			-								-	-					**5,600**			-		**5,600**
1091 TALBOT ST	Omni Insurance Broker	Insurance Agent / Broker	52421	138	3,496			-								-	-			**3,496**					-		**3,496**
1089 TALBOT ST	Vacant	Vacant		200	2,420			-								-	-								-	**2,420**	**2,420**
1026 TALBOT ST	Elgin Carpet One	Floor Coverings (e.g. carpet, tile, wood, linoleum)	44221	63	5,000			-					5,000			5,000	**5,000**								-		**5,000**
1026 TALBOT ST	State Farm Insurance	Insurance Agent / Broker	52421	138	4,300			-								-	-			**4,300**					-		**4,300**
1204 TALBOT ST	Tim Hortons	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	3,030			-								-	-					**3,030**			-		**3,030**
1227 TALBOT ST	Ambrose Plumbing & Heating Ltd.	Plumbing	44419	119	5,000			-								-	-	**5,000**							-		**5,000**
1229 TALBOT ST	Yarmouth Mutual Insurance	Insurance Agent / Broker	52421	138	3,467			-								-	-			**3,467**					-		**3,467**
1231 TALBOT ST A	A&E Radiator	Mechanical and Electrical (e.g. general repair, specialty repair of muffler, brake, transmission)	81111	175	4,009			-								-	-								**4,009**		**4,009**
1012 TALBOT ST	Eastway Ford Sales Ltd	New Cars	44111	201	19,310			-								-	-								**19,310**		**19,310**
1022-1024 TALBOT ST	Mike's Garage	Car Rental	53211	131	1,531			-								-	-								**1,531**		**1,531**
1022-1024 TALBOT ST	Mike's Garage	Body, Paint, Interior and Glass	81112	176	2,166			-								-	-								**2,166**		**2,166**
1213 TALBOT ST	Heritage Lanes	Bowling Alley	71395	169	11,420			-								-	-								**11,420**		**11,420**
1210 TALBOT ST	Glen Haven Restaurant	Full-Service Restaurant	7221	172	787			-								-	-					**787**			-		**787**
1218 TALBOT ST	Vacant	Vacant		200	3,946			-								-	-								-	**3,946**	**3,946**
1222 TALBOT ST	Doug Coleman Trucking	Mechanical and Electrical (e.g. general repair, specialty repair of muffler, brake, transmission)	81111	175	2,123			-								-	-								**2,123**		**2,123**
1207-1209 TALBOT ST	Bridgeview Motors	Used Cars	44112	201	6,141			-								-	-								**6,141**		**6,141**
1210 TALBOT ST	Glen Haven Motel	Other Non-Retail		201	5,390			-								-	-								**5,390**		**5,390**
1237 TALBOT ST	Pete's Auto Sales	Used Cars	44112	201	1,256			-								-	-								**1,256**		**1,256**
1212 TALBOT ST	Red Line Taxi	All Other Personal Service (e.g. party planning, personal shopping, psychic, shoe shine, escorts)	81299	196	10,020			-								-	-						**10,020**		-		**10,020**
1026 1/2 TALBOT ST	Vacant	Vacant		200	2,954			-								-	-								-	**2,954**	**2,954**
1024 1/2 TALBOT ST	C&Z Auto - Used Cars	Other Non-Retail		201	2,767			-								-	-								**2,767**		**2,767**
1105 TALBOT ST	Enterprise	Car rental	53211	131	1,890			-								-	-								**1,890**		**1,890**
1028 TALBOT ST	Benjamin Moore	Paint and Wallpaper	44412	116	9,000			-								-	-	**9,000**							-		**9,000**
1230 TALBOT ST	Elgin St.Thomas Public Health	General Office Space		202	30,115			-								-	-								**30,115**		**30,115**
400 HIGHBURY AVE	Petro Canada	Gasoline Station with Convenience Store	44711	203	1,291			-								-	-								**1,291**		**1,291**
400 HIGHBURY AVE	Subway	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,184			-								-	-					**1,184**			-		**1,184**
400 HIGHBURY AVE	Tim Hortons	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	2,696			-								-	-					**2,696**			-		**2,696**
SUBTOTAL NODE 7: HIGHWAY COMMERCIAL					**200,330**	**7,845**	-	**7,845**	-	-	-	-	**5,000**	-	-	**5,000**	**5,000**	**17,600**	**6,392**	**11,263**	-	**16,681**	**10,020**	**14,480**	**101,729**	**9,320**	**200,330**
				check	*200,330*																				-		
NODE 8: INDUSTRIAL																									-		
4 FIRST AVE	St.Thomas Upholstery	Reupholstery and Furniture Repair (including furniture refinishing)	81142	181	2,058			-								-	-								**2,058**		**2,058**

					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	19	21	22	27		28	
						FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
					Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	Store Name	Store Type	NAICS Code	Study Code	Total Space	Supermarket & Grocery	Specialty Foods	Subtotal - FSR	Major & Discount Dept. Stores	Other General Merch.	Drugs, Cosmetics, Opticians & Personal Care	Fashion & Accessories	Home Furnishings, Computers & Electronics	Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc	Canadian Tire, TSC, Tire stores, P+A	Subtotal, Non-department Stores (NFSR)	Subtotal - NSFR	Home Centres, Hardware & Building Supply, Nursery	Bank, Trust, Credit Union	FIRE, Legal, Accounting, Photo & Veterinary Services	Medical, Dental & Other Health Services	Restaurant, Fast Food, Drinking	Personal Services	Liquor, Beer, Wine	Subtotal - Other	Vacant	Total
					GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA	GLA
100 WILSON AVE	Gramma Lyn's Corner Café	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	1,096			-								-	-					**1,096**			-		**1,096**
100 WILSON AVE	Daisy Market	Convenience Store	44512	3	2,000		2,000	**2,000**								-	-								-		**2,000**
100 WILSON AVE	M&M Meats	Meat	44521	4	1,096		1,096	**1,096**								-	-								-		**1,096**
100 WILSON AVE	Vacant	Vacant		200	1,096			-								-	-								-	**1,096**	**1,096**
123 WELLINGTON ST	Simply Pure Water	Other Miscellaneous Retailer (including water systems)		113	1,680			-						1,680		1,680	**1,680**								-		**1,680**
53 PRINCESS AVE	Curves	Weight Loss Centre (e.g. Jenny Craig, Herbal Magic)	81219	187	1,581			-								-	-						**1,581**		-		**1,581**
239 WELLINGTON ST	Uniglass Plus Ziebart	Mechanical and Electrical (e.g. general repair, specialty repair of muffler, brake, transmission)	81111	175	4,200			-								-	-								**4,200**		**4,200**
45 PRINCESS AVE	Violence Against Women Services Elgin County	Individual and Family Service (e.g. family counselling, big brothers and sisters)	6241	156	688			-								-	-								**688**		**688**
120 WELLINGTON ST	Trinton Group LTD Propert Management Group	General Office Space		202	4,275			-								-	-								**4,275**		**4,275**
75 BURWELL RD	Berry Hill Ltd.	General Store (e.g. Co-Op, Country Depot, "farmer's supply" stores)	452999	34	9,370			-		9,370						9,370	**9,370**								-		**9,370**
51 PRINCESS AVE	Martin A N Limited (Contracting)	General Office Space		202	1,551			-								-	-								**1,551**		**1,551**
239 WELLINGTON ST	Best Automatic No Touch Car Wash	Car Wash	811192	177	7,747			-								-	-								**7,747**		7,747
235 WELLINGTON ST	Vacant	Vacant		200	105			-								-	-								-	**105**	**105**
1241 TALBOT ST	Prefered Auto Centre	Mechanical and Electrical (e.g. general repair, specialty repair of muffler, brake, transmission)	81111	175	5,843			-								-	-								**5,843**		**5,843**
1259 TALBOT ST	Fairway Auto Sales			201	2,432			-								-	-								**2,432**		**2,432**
1253 TALBOT ST	Canada Building Materials Co.	Other Building Materials (e.g. brick and tile, fencing, glass, roofing)	44419	121	9,393			-								-	-	**9,393**							-		**9,393**
1249 TALBOT ST	RV World Inc.	Recreational Vehicle sales		201	5,610			-								-	-								**5,610**		**5,610**
1249 TALBOT ST	Russ Canvas & Awning	Other Building Materials	44419	121	2,794			-								-	-	**2,794**							-		**2,794**
237 WELLINGTON ST	Best Do it yourself Car Wash	Car Wash	811192	177	6,363			-								-	-								**6,363**		**6,363**
245 SOUTH EDGEWARE RD	Vacant	Vacant		200	3,280			-								-	-								-	**3,280**	**3,280**
245 SOUTH EDGEWARE RD	Southedge Convience	Gasoline Station with Convenience Store	44711	203	1,567			-								-	-								**1,567**		**1,567**
145 SOUTH EDGEWARE RD	Tim Hortons	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	3,080			-								-	-					**3,080**			-		**3,080**
85 SOUTH EDGEWARE RD	Vacant	Vacant		200	14,230			-								-	-								-	**14,230**	**14,230**
85 SOUTH EDGEWARE RD	Vacant	Vacant		200	2,000			-								-	-								-	**2,000**	**2,000**
239 WELLINGTON ST	Napa Autopro	Other Automotive Repair and Maintenance (e.g. lubrication, emission testing, undercoating)	811199	178	4,217			-								-	-								**4,217**		**4,217**
235 WELLINGTON ST	Bestt Car Wash	Car Wash	811192	177	2,940			-								-	-								**2,940**		**2,940**
235 WELLINGTON ST	Lyle Cook Ltd Automotive	Other Automotive Repair and Maintenance (e.g. lubrication, emission testing, undercoating)	811199	178	2,233			-								-	-								**2,233**		**2,233**
115 EDWARD ST(ST THOMAS)	TSC	Hardware Store	452991	28	30,000			-							30,000	30,000	**30,000**								-		**30,000**
39-41 BURWELL RD	St Thomas Health Club	Fitness and Recreational Sports Centre	71394	168	-			-								-	-								-		-
120 WELLINGTON ST	Romantic Designs (Art Studio)	Art Dealer	45392	103	900			-						900		900	**900**								-		**900**
120 WELLINGTON ST	Dr Offices	Physician (including psychiatrist)	6211	151	3,800			-								-	-				**3,800**				-		**3,800**
SUBTOTAL NODE 8: INDUSTRIAL					**139,225**	-	**3,096**	**3,096**	-	**9,370**	-	-	-	**2,580**	**30,000**	**41,950**	**41,950**	**12,187**	-	-	**3,800**	**4,176**	**1,581**	-	**51,724**	**20,711**	**139,225**
				check	*139,225*																				-		
NODE 9: MAJOR COMMERCIAL																									-		
417 WELLINGTON ST	Station Master Restaurant	Full-Service Restaurant	7221	172	5,000			-								-	-					**5,000**			-		**5,000**
417 WELLINGTON ST	Vacant (former ZELLERS)	Vacant		200	86,853			-								-	-								-	**86,853**	**86,853**
417 WELLINGTON ST	Galaxy Cinema	Movie Theatre / Cinema	51213	160	30,631			-								-	-								**30,631**		**30,631**
417 WELLINGTON ST	TD Canada Trust	Bank	52211	124	4,333			-								-	-		**4,333**						-		**4,333**
417 WELLINGTON ST	Vacant	Vacant		200	425			-								-	-								-	**425**	**425**
417 WELLINGTON ST	Dairy Queen	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	953			-								-	-					**953**			-		**953**

					1	*2*	*3*	*4*	*5*	*6*	*7*	*8*	*9*	*10*	*11*	*12*	*13*	*14*	*15*	*16*	*19*	*21*	*22*	*27*		*28*	
						FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
					Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	**Store Name**	**Store Type**	**NAICS Code**	**Study Code**	**Total Space**	**Supermarket & Grocery**	**Specialty Foods**	**Subtotal - FSR**	**Major & Discount Dept. Stores**	**Other General Merch.**	**Drugs, Cosmetics, Opticians & Personal Care**	**Fashion & Accessories**	**Home Furnishings, Computers & Electronics**	**Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc**	**Canadian Tire, TSC, Tire stores, P+A**	**Subtotal, Non-department Stores (NFSR)**	**Subtotal - NSFR**	**Home Centres, Hardware & Building Supply, Nursery**	**Bank, Trust, Credit Union**	**FIRE, Legal, Accounting, Photo & Veterinary Services**	**Medical, Dental & Other Health Services**	**Restaurant, Fast Food, Drinking**	**Personal Services**	**Liquor, Beer, Wine**	**Subtotal - Other**	**Vacant**	**Total**
					GLA	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*
417 WELLINGTON ST	Citi Financial	Mortgage and Loan Broker	52231	129	1,100			-								-	-							**1,100**		**1,100**
417 WELLINGTON ST	Elgin Travel Mart	Travel Service (e.g. travel agent, tour operator, auto club, ticket agent, tourist bureau)	5615	146	863			-								-	-							**863**		**863**
417 WELLINGTON ST	Dr. Sesto Dental Clinic	Dentist	6212	152	1,816			-								-	-				**1,816**			-		**1,816**
417 WELLINGTON ST	PharmaSave	Pharmacy / Drug Store	44611	17	1,786			-			1,786					1,786	**1,786**							-		**1,786**
417 WELLINGTON ST	Vacant	Vacant		200	668			-								-	-							-	**668**	**668**
417 WELLINGTON ST	St.Thomas Town & Country Reality Inc Bokerage	Real Estate Agent / Broker	53121	139	680			-								-	-			**680**				-		**680**
417 WELLINGTON ST	Alia N Tanjay	Women's Clothing	44812	36	1,300			-				1,300				1,300	**1,300**							-		**1,300**
417 WELLINGTON ST	Vacant	Vacant		200	1,633			-								-	-							-	**1,633**	**1,633**
417 WELLINGTON ST	Flair	Women's Clothing	44812	36	2,127			-				2,127				2,127	**2,127**							-		**2,127**
417 WELLINGTON ST	Northern Reflections	Women's Clothing	44812	36	1,388			-				1,388				1,388	**1,388**							-		**1,388**
417 WELLINGTON ST	GNC Health Supplements	Health Supplements (not food)	446191	20	1,232			-			1,232					1,232	**1,232**							-		**1,232**
417 WELLINGTON ST	Vacant	Vacant		200	231			-								-	-							-	**231**	**231**
417 WELLINGTON ST	Mags Smokes	Convenience Store	44512	3	1,480		1,480	**1,480**								-	-							-		**1,480**
417 WELLINGTON ST	Suzy Sheir	Women's Clothing	44812	36	2,443			-				2,443				2,443	**2,443**							-		**2,443**
417 WELLINGTON ST	Vacant	Vacant		200	1,020			-								-	-							-	**1,020**	**1,020**
417 WELLINGTON ST	Random Clothing Store	Women's Clothing	44812	36	7,620			-				7,620				7,620	**7,620**							-		**7,620**
417 WELLINGTON ST	Vacant	Vacant		200	966			-								-	-							-	**966**	**966**
417 WELLINGTON ST	Vacant	Vacant		200	2,825			-								-	-							-	**2,825**	**2,825**
417 WELLINGTON ST	Vacant	Vacant		200	1,250			-								-	-							-	**1,250**	**1,250**
417 WELLINGTON ST	Vacant	Vacant		200	641			-								-	-							-	**641**	**641**
417 WELLINGTON ST	Magic Nails	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	987			-								-	-						**987**	-		**987**
417 WELLINGTON ST	Random Liquidations	Athletic Clothing (not uniforms)	448199	39	11,726			-				11,726				11,726	**11,726**							-		**11,726**
417 WELLINGTON ST	Flair Fashion	Women's Clothing	44812	36	1,000			-				1,000				1,000	**1,000**							-		**1,000**
417 WELLINGTON ST	Charm Diamond Centre	Jewellery	44831	56	1,860			-				1,860				1,860	**1,860**							-		**1,860**
417 WELLINGTON ST	Hallmark	Greeting Cards	45322	96	4,325			-						4,325		4,325	**4,325**							-		**4,325**
417 WELLINGTON ST	Brix & Stix	Women's Clothing	44812	36	1,441			-			1,441					1,441	**1,441**							-		**1,441**
417 WELLINGTON ST	Vacant	Vacant		200	985			-								-	-							-	**985**	**985**
417 WELLINGTON ST	Vacant	Vacant		200	2,041			-								-	-							-	**2,041**	**2,041**
417 WELLINGTON ST	Vacant	Vacant		200	349			-								-	-							-	**349**	**349**
417 WELLINGTON ST	Wok Express	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	347			-								-	-	**347**						-		**347**
417 WELLINGTON ST	Vacant	Vacant		200	350			-								-	-							-	**350**	**350**
417 WELLINGTON ST	Vacant	Vacant		200	341			-								-	-							-	**341**	**341**
417 WELLINGTON ST	Bentley Leather	Clothing Accessories (e.g. handbags, hosiery, hats, scarves, ties, gloves, umbrellas)	44815	55	1,499			-				1,499				1,499	**1,499**							-		**1,499**
417 WELLINGTON ST	Smithbooks	Books and News	45121	91	2,774			-						2,774		2,774	**2,774**							-		**2,774**
417 WELLINGTON ST	Community Room	Other Non-Retail		201	1,638			-								-	-							**1,638**		**1,638**
417 WELLINGTON ST	Rogers Wireless	Telephone (including cellular phone)	44311	78	1,003			-					1,003			1,003	**1,003**							-		**1,003**
417 WELLINGTON ST	Vacant	Vacant		200	1,006			-								-	-							-	**1,006**	**1,006**
417 WELLINGTON ST	The Perk	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	555			-								-	-	**555**						-		**555**
417 WELLINGTON ST	Vacant	Vacant		200	3,047			-								-	-							-	**3,047**	**3,047**
417 WELLINGTON ST	Metro	Supermarket	44511	1	33,610	33,610		**33,610**								-	-							-		**33,610**
417 WELLINGTON ST	Vacant	Vacant		200	540			-								-	-							-	**540**	**540**
417 WELLINGTON ST	Life Labs	Medical and Diagnostic Laboratory	6215	155	1,765			-								-	-				**1,765**			-		**1,765**
417 WELLINGTON ST	Hairmasters	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	1,678			-								-	-						**1,678**	-		**1,678**
417 WELLINGTON ST	Express Tailoring	Other Personal& Household Goods (e.g. garments, bicycles, jewellery, watches, key cutting)	81149	183	377			-								-	-							**377**		**377**
417 WELLINGTON ST	St. Thomas Doll Club	Gift, Novelty and Souvenir	45322	95	644			-						644		644	**644**							-		**644**
417 WELLINGTON ST	Payless Shoes	Family Shoes	44821	52	3,817			-				3,817				3,817	**3,817**							-		**3,817**
417 WELLINGTON ST	Library Friendship	Other Non-Retail		201	1,090			-								-	-							**1,090**		**1,090**
417 WELLINGTON ST	Vacant	Vacant		200	2,006			-								-	-							-	**2,006**	**2,006**
417 WELLINGTON ST	Subway	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173	283			-								-	-	**283**						-		**283**
417 WELLINGTON ST	Fanshawe Career & Employment Service	Employment Service	5613	144	2,864			-								-	-							**2,864**		**2,864**
417 WELLINGTON ST	Vacant	Vacant		200	2,823			-								-	-							-	**2,823**	**2,823**

						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	19	21	22	27		28	
							FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
						Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
Street	**Store Name**	**Store Type**	**NAICS Code**	**Study Code**	**Total Space**		**Supermarket & Grocery**	**Specialty Foods**	**Subtotal - FSR**	**Major & Discount Dept. Stores**	**Other General Merch.**	**Drugs, Cosmetics, Opticians & Personal Care**	**Fashion & Accessories**	**Home Furnishings, Computers & Electronics**	**Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc**	**Canadian Tire, TSC, Tire stores, P+A**	**Subtotal, Non-department Stores (NFSR)**	**Subtotal - NSFR**	**Home Centres, Hardware & Building Supply, Nursery**	**Bank, Trust, Credit Union**	**FIRE, Legal, Accounting, Photo & Veterinary Services**	**Medical, Dental & Other Health Services**	**Restaurant, Fast Food, Drinking**	**Personal Services**	**Liquor, Beer, Wine**	**Subtotal - Other**	**Vacant**	**Total**
					GLA		*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*
417 WELLINGTON ST	Bluenotes	Family Clothing	44814	38	4,400				-				4,400				4,400	**4,400**								-		**4,400**
417 WELLINGTON ST	Vacant	Vacant		200	4,213				-								-	-								-	**4,213**	**4,213**
417 WELLINGTON ST	Fit 4 Less	Fitness and Recreational Sports Centre	71394	168	11,051				-								-	-								**11,051**		**11,051**
417 WELLINGTON ST	Vacant	Vacant		200	1,379				-								-	-								-	**1,379**	**1,379**
417 WELLINGTON ST	OMAC	Insurance Agent / Broker	52421	138	1,678				-								-	-			**1,678**					-		**1,678**
SUBTOTAL NODE 9: MAJOR COMMERCIAL					**272,756**		**33,610**	**1,480**	**35,090**	**-**	**-**	**3,018**	**40,621**	**1,003**	**7,743**	**-**	**52,385**	**52,385**	**-**	**4,333**	**2,358**	**3,581**	**7,138**	**2,665**	**-**	**49,614**	**115,592**	**272,756**
				check	*272,756*																							
NODE 10: POWER CENTRE																												
1063 TALBOT ST	25 Canadian Tire	Home and Auto Supply (e.g. Canadian Tire, TSC Stores)	452991	28	71,900				-							71,900	71,900	**71,900**								-		**71,900**
1063 TALBOT ST	Walmart	Traditional Department Store	45211	25	140,010				-	140,010							-	**140,010**								-		**140,010**
1063 TALBOT ST	EB Games	Hobby, Toy and Game (including arts and crafts, console game stores)	45112	88	1,811				-						1,811		1,811	**1,811**								-		**1,811**
TALBOT ST N/S	The Real Canadian Superstore	Supermarket	44511	1	128,248	128,248			**128,248**								-	-								-		**128,248**
1073 TALBOT ST	Libro Credit Union -Branch	Credit Union	52213	125	4,826				-								-	-		**4,826**						-		**4,826**
1063 TALBOT ST	Toronto Dominion Bank	Bank	52211	124	5,425				-								-	-		**5,425**						-		**5,425**
1063 TALBOT ST	Ardenes	Costume Jewellery	44815	54	4,979				-				4,979				4,979	**4,979**								-		**4,979**
1063 TALBOT ST	25 Canadian Tire Gas Bar	Gasoline Station with Convenience Store	44711	203	2,281				-								-	-								**2,281**		**2,281**
1063 TALBOT ST	Sally Hansen Beauty	Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185	1,484				-								-	-						**1,484**		-		**1,484**
1063 TALBOT ST	First Choice Hair	Unisex Hair Salon (i.e. men and women)	812116	186	1,357				-								-	-						**1,357**		-		**1,357**
1063 TALBOT ST	Elgin Pet	Pet and Pet Supply	45391	102	2,968				-						2,968		2,968	**2,968**								-		**2,968**
1063 TALBOT ST	Vacant	Vacant		200	3,171				-								-	-								-	**3,171**	**3,171**
1063 TALBOT ST	Rogers	Telephone (including cellular phone)	44311	78	1,490				-					1,490			1,490	**1,490**								-		**1,490**
1063 TALBOT ST	Telus	Telephone (including cellular phone)	44311	78	1,478				-					1,478			1,478	**1,478**								-		**1,478**
1063 TALBOT ST	Community Care Access Centre	Fitness and Recreational Sports Centre	71394	168	7,210				-								-	-								**7,210**		**7,210**
1063 TALBOT ST	Marks Work Warehouse	Uniforms and Work Clothing	448199	47	7,915				-				7,915				7,915	**7,915**								-		**7,915**
1063 TALBOT ST	Dollar Tree	Dollar Store (e.g. Dollarama, Buck or Two)	452999	32	10,800				-		10,800						10,800	**10,800**								-		**10,800**
1063 TALBOT ST	Vacant	Vacant		200	1,280				-								-	-								-	**1,280**	**1,280**
1063 TALBOT ST	Staples	Office Supply and tationery	45321	94	20,032				-						20,032		20,032	**20,032**								-		**20,032**
1063 TALBOT ST	Source	Consumer Electronics (e.g. TV, radio, stereo)	44311	75	3,789				-					3,789			3,789	**3,789**								-		**3,789**
1063 TALBOT ST	Vacant	Vacant		200	8,053				-								-	-								-	**8,053**	**8,053**
1063 TALBOT ST	Bell World	Telephone (including cellular phone)	44311	78	3,789				-					3,789			3,789	**3,789**								-		**3,789**
1061 TALBOT ST	The Real Canadian Superstore (Gas Bar)	Supermarket	44511	1	335	335			**335**								-	-								-		**335**
1063 TALBOT ST	Wendy's	Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7221	173	3,419				-								-	-					**3,419**			-		**3,419**
SUBTOTAL NODE 10: POWER CENTRE					**438,050**	**128,583**	**-**	**128,583**	**140,010**	**10,800**	**-**	**12,894**	**10,546**	**24,811**	**71,900**	**130,951**	**270,961**	**-**	**10,251**	**-**	**-**	**3,419**	**2,841**	**-**	**9,491**	**12,504**	**438,050**
				check	*438,050*																							

	Total Space	FSR			NFSR								HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT	
SUMMARY NODES 1 - 10:	*GLA*	1-2	3-16	**Subtotal - FSR**	25-26	31-34	17-21	35-57	58-83	84-113	28-30	***Subtotal, Non-department Stores (NFSR)***	**Subtotal - NSFR**	114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200	
NODE 1: OFFICE PROFESSIONAL	**44,169**	-	779	**779**	-	-	-	-	-	1,920	-	1,920	**1,920**	-	-	**26,683**	**7,188**	-	**3,732**	-	**694**	**3,173**	**44,169**
		0%	2%	2%	0%	0%	0%	0%	0%	4%	0%	4%	4%	0%	0%	60%	16%	0%	8%	0%	2%	7%	100%
NODE 2: TALBOT WEST	**103,533**	17,410	2,431	**19,841**	-	-	-	-	6,030	7,370	-	13,400	**13,400**	**810**	**2,344**	**11,650**	**2,788**	**5,711**	**7,109**	-	**27,772**	**12,108**	**103,533**
		17%	2%	19%	0%	0%	0%	0%	6%	7%	0%	13%	13%	1%	2%	11%	3%	6%	7%	0%	27%	12%	100%
NODE 3: TALBOT CENTRAL	**647,979**	-	21,172	**21,172**	-	35,334	14,190	21,627	53,364	55,544	-	180,059	**180,059**	-	**23,244**	**58,773**	**16,111**	**30,076**	**40,379**	-	**165,666**	**112,499**	**647,979**
		0%	3%	3%	0%	5%	2%	3%	8%	9%	0%	28%	28%	0%	4%	9%	2%	5%	6%	0%	26%	17%	100%
NODE 4: TALBOT EAST	**259,965**	31,030	9,117	**40,147**	-	10,600	800	-	11,744	9,331	1,675	34,150	**34,150**	-	-	**7,069**	**4,061**	**74,416**	**6,482**	**9,248**	**67,774**	**16,618**	**259,965**

					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	19	21	22	27		28		
						FSR			NFSR									HI	BANKS	FIRE & PROFESSIONAL SERVICES	MEDICAL	REST. + FF	PERSONAL SERVICES	LBW	OTHER	VACANT		
					Study Code	1-2	3-16	1-16	25-26	31-34	17-21	35-57	58-83	84-113	28-30			114-123	124-126	137-143	151-155	172-174	184-196	22-24	127-136, 144-150, 156-171, 175-183, 200+	200		
Street	Store Name	Store Type	NAICS Code	Study Code	Total Space	Supermarket & Grocery	Specialty Foods	Subtotal - FSR	Major & Discount Dept. Stores	Other General Merch.	Drugs, Cosmetics, Opticians & Personal Care	Fashion & Accessories	Home Furnishings, Computers & Electronics	Sports, Hobby, Music, Books, Florists, Gifts, Art, Used & Misc	Canadian Tire, TSC, Tire stores, P+A	Subtotal, Non-department Stores (NFSR)	Subtotal - NSFR	Home Centres, Hardware & Building Supply, Nursery	Bank, Trust, Credit Union	FIRE, Legal, Accounting, Photo & Veterinary Services	Medical, Dental & Other Health Services	Restaurant, Fast Food, Drinking	Personal Services	Liquor, Beer, Wine	Subtotal - Other	Vacant	Total
					GLA	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*	*GLA*
						12%	4%	15%	0%	4%	0%	0%	5%	4%	1%	13%	13%	0%	0%	3%	2%	29%	2%	4%	26%	6%	100%
NODE 5: SECONDARY COMMERCIAL					**220,832**	-	1,215	**1,215**	-	-	20,109	1,210	1,998	1,224	-	24,541	**24,541**	**93,140**	-	**5,911**	**2,350**	**5,762**	**2,865**	-	**36,794**	**48,254**	**220,832**
						0%	1%	1%	0%	0%	9%	1%	1%	1%	0%	11%	11%	42%	0%	3%	1%	3%	1%	0%	17%	22%	100%
NODE 6: MINOR COMMERCIAL					**162,666**	-	11,957	**11,957**	-	-	10,690	1,688	13,390	17,185	-	42,953	**42,953**	-	-	**10,913**	**18,980**	**18,106**	**12,632**	-	**34,530**	**12,595**	**162,666**
						0%	7%	7%	0%	0%	7%	1%	8%	11%	0%	26%	26%	0%	0%	7%	12%	11%	8%	0%	21%	8%	100%
NODE 7: HIGHWAY COMMERCIAL					**200,330**	7,845	-	**7,845**	-	-	-	-	5,000	-	-	5,000	**5,000**	**17,600**	**6,392**	**11,263**	-	**16,681**	**10,020**	**14,480**	**101,729**	**9,320**	**200,330**
						4%	0%	4%	0%	0%	0%	0%	2%	0%	0%	2%	2%	9%	3%	6%	0%	8%	5%	7%	51%	5%	100%
NODE 8: INDUSTRIAL					**139,225**	-	3,096	**3,096**	-	9,370	-	-	-	2,580	30,000	41,950	**41,950**	**12,187**	-	-	**3,800**	**4,176**	**1,581**	-	**51,724**	**20,711**	**139,225**
						0%	2%	2%	0%	7%	0%	0%	0%	2%	22%	30%	30%	9%	0%	0%	3%	3%	1%	0%	37%	15%	100%
NODE 9: MAJOR COMMERCIAL					**272,756**	33,610	1,480	**35,090**	-	-	3,018	40,621	1,003	7,743	-	52,385	**52,385**	-	**4,333**	**2,358**	**3,581**	**7,138**	**2,665**	-	**49,614**	**115,592**	**272,756**
						12%	1%	13%	0%	0%	1%	15%	0%	3%	0%	19%	19%	0%	2%	1%	1%	3%	1%	0%	18%	42%	100%
NODE 10: POWER CENTRE					**438,050**	128,583	-	**128,583**	140,010	10,800	-	12,894	10,546	24,811	71,900	130,951	**270,961**	-	**10,251**	-	-	**3,419**	**2,841**	-	**9,491**	**12,504**	**438,050**
						29%	0%	29%	32%	2%	0%	3%	2%	6%	16%	30%	62%	0%	2%	0%	0%	1%	1%	0%	2%	3%	100%
TOTAL NODES 1-10					**2,489,505**	218,478	51,247	**269,725**	140,010	66,104	48,807	78,040	103,075	127,708	103,575	**527,309**	**667,319**	123,737	46,564	134,620	58,859	165,485	90,306	23,728	545,788	363,374	**2,489,505**
						9%	2%	11%	6%	3%	2%	3%	4%	5%	4%	21%	27%	5%	2%	5%	2%	7%	4%	1%	22%	15%	100%