

**RETAIL MARKET DEMAND  
STUDY: CLARENCE-ROCKLAND  
ONTARIO  
FINAL REPORT**

Prepared for:  
City of Clarence-Rockland

Prepared by:  
***Shore-Tanner & Associates***

October 17, 2018

## **TABLE OF CONTENTS**

### **Page number**

<b>I.</b>	<b>Executive Summary</b>	<b>3</b>
<b>II.</b>	<b>Subject Site and Environs</b>	<b>8</b>
<b>III.</b>	<b>Socio-Demographic Analysis</b>	<b>10</b>
<b>IV.</b>	<b>Retail Trends</b>	<b>14</b>
<b>V.</b>	<b>Expenditure Analysis</b>	<b>19</b>
<b>VI.</b>	<b>Demand Estimation</b>	<b>25</b>
<b>VII.</b>	<b>Summary of Existing Businesses</b>	<b>31</b>
<b>VIII.</b>	<b>Office Market and Demand Analysis</b>	<b>33</b>
 <b>Appendix A: List of Existing Businesses In Rockland</b>		 <b>37</b>

## I. EXECUTIVE SUMMARY

On behalf of the City of Clarence-Rockland, and as a member of a multi-disciplinary team of consultants under the direction of Fotenn Planning & Design, this study has been carried out by Shore-Tanner & Associates. Its purpose is to determine the scope of market demand for retail, service, and small office businesses in a new part of Rockland. The main findings of the study are summarized below, followed by more detailed substantiation in the main body of the report.

### A. Subject Site

The Subject Site is approximately 133.5 hectares (320 acres) in size, located southeast of Rockland's existing Urban Area Boundary. It is proposed to be added to the City of Rockland through an Expansion Lands Secondary Plan.

**For the purposes of this study, we estimated a total of approximately 3,200 housing units, and associated population of 8,000 on the Subject Site when fully developed.**

### B. Major Socio-Demographic Findings

1. Rockland is a major commercial hub in the United Counties of Prescott and Russell (UCPR) and its businesses attract customers from within this area and beyond.
2. The total population of Clarence-Rockland increased by an average of 372 or 1.8%, and in UCPR by 915 or 1.1% per year from 2006 to 2016 (Table 3.1).
3. The 2018 population of Clarence-Rockland is estimated at 26,746 and that of UCPR at 91,500. Their estimated average annual growth to the year 2028 is 598 or 2.4% and 1,620 or 1.8% respectively (Table 3.3).
4. Considering that an overall average annual population growth of 1% represents a growing and balanced economy, the past and future growth of both of these areas have exceeded this generally accepted growth standard.
5. Due to the development of many housing units over \$300,000 and attracting affluent families, including from Ottawa, incomes in both areas have significantly increased recently. As shown in Table 3.4, the 2016 **median** household incomes were:

- Clarence-Rockland    \$88,823
- UCPR                        \$78,748
- City of Ottawa            \$85,981

**This is particularly important since the City of Ottawa's household incomes are often among the top three to five cities in Canada.**

### **C. Retail Spending**

1. On average, each resident of Clarence-Rockland is estimated to spend \$18,110, and those of UCPR as a whole, \$17,380 in 2018 at all retail and service businesses within and outside these areas (Table 5.1).
2. The total spending of UCPR residents is estimated at \$1.590 **billion** in 2018, and expected to increase by \$28.1 million or 1.8% annually by the year 2028, to \$1.871 **billion** (Table 5.2).
3. The estimated spending portion of the residents of Clarence-Rockland from UCPR's total is \$484.4 million in 2018, and \$592.6 million in 2028 (i.e., average annual growth in spending of \$10.82 million or 2.2% (Table 5.3).
4. At present, some of the spending of UCPR residents takes place at businesses in Ottawa and elsewhere. This leakage-out is due to the following factors:
  - a) Some of the UCPR residents work in Ottawa and spend some of their retail dollars there.
  - b) There are no senior department stores (i.e., Simons, The Bay, Nordstrom) or other new and popular/trendy stores (e.g., J. Crew, Michael Kors) within UCPR. These stores exist in Ottawa, and attract customers from UCPR and other cities and towns within 1-2 hours drive.
5. There are, as well, customers from outside UCPR who shop at businesses there, especially at those in Rockland (i.e., leakage-in).

**As more, especially new, businesses are attracted to Rockland, the leakages of UCPR's shopping dollars to Ottawa will decrease, and the leakages into UCPR will increase.**

### **D. Demand Estimation**

1. The spending of the residents of Clarence-Rockland is estimated to support a minimum total of 967,000 sq. ft. of floor space in 2018, increasing by an average of 21,700 sq. ft. annually, to 1.184 million sq. ft. by 2028 (Table 6.1).

2. The supportable increase by time frame is (Table 6.1):
  - 2018-2020 45,000 sq. ft.
  - 2020-2023 64,000 sq. ft.
  - 2023-2028 108,000 sq. ft.
  - 2018-2028 217,000 sq. ft.
3. At present, some of the total supportable space is outside Clarence-Rockland since its residents do not spend 100% of their shopping dollars at Rockland businesses.

## **E. Inventory of Existing Businesses**

As of May 2018, there were 146 retail and service businesses in Rockland, and they occupied an estimated total of 538,000 sq. ft. of floor space.

Including the limited number of such businesses in the Clarence part, the overall average floor space per capita in Clarence-Rockland is estimated to be 22 sq. ft.

Based on the industry standard of 30 to 40 sq. ft. of floor space per capita, **the City of Clarence-Rockland is under-stored for retail and service businesses.**

Of the 146 existing stores, a total of 14 with a combined size of 29,200 sq. ft. or **5.4% were vacant, and this rate is within the industry range of 4% to 8%.**

## **F. Recommendations For the Expansion Lands**

An overall average of up to 40 sq. ft. of retail and service floor space is generally supportable on a per capita basis.<sup>1</sup> Due to leakages in and out, however, it is not always possible to accurately calculate the actual floor space supported by each resident by location of shopping.

At full development, the Subject Expansion Land is estimated to have approximately 8,000 residents. What would be most needed in this community of 8,000 residents are

---

<sup>1</sup> At a total population of 26,746 in Clarence-Rockland, the total supportable floor space of 967,000 in 2018 represents 36 sq. ft. per capita at businesses within, but also outside this city.

locally-oriented food, convenience, and service businesses in the first few years. Other businesses will also be in demand, but the risk of over-storing should be avoided. Based on these considerations, we recommend the businesses and sizes identified in Table 1.1 for the Subject Expansion Lands. Briefly, they include:

- 1. Total of approximately 100,000 sq. ft. of floor space.**
- 2. Food, convenience, personal services: approximately 60,000 sq. ft. of above.**
- 3. Specialty retail, fashion, gifts, others: approximately 40,000 sq. ft. of above.**
- 4. No businesses offering durable or semi-durable products which already exist in Rockland.**
- 5. Review of the supply-demand dynamics in the entire expanded Rocklands once every five years in order to revise 1-4 above based on market forces.**

<b>Table 1.1</b> <b>Recommended Businesses</b> <b>To Select For the Expansion Lands</b>		
<b>Business Type</b>	<b>No.</b>	<b>Approximate Size (sq. ft.)</b>
Supermarket	1	40,000-50,000
Convenience Stores	3	5,000-6,000
Specialty Food Stores	3	4,000-6,000
Pharmacies	2	8,000-12,000
Computer Supply & Services	1	1,000-2,000
Hardware Store	1	3,000-8,000
Fashion Stores	2	3,000-8,000
Specialty Retail	3	3,000-7,000
Table Service Restaurants	3	5,000-7,000
Coffee Shops	2	3,000-4,000
Fast Food Eateries	3	5,000-8,000
Banks & Other Financial	3	6,000-10,000
Beauty Salons, Barber, Spa	3	4,000-6,000
Miscellaneous	5	5,000-8,000
Office	5	5,000-8,000
<b>Total: Up to 40 Businesses</b>		<b>100,000-150,000</b>

## **II. SUBJECT SITE AND ENVIRONS**

### **A. Subject Site**

The Subject Site is approximately 133.5 hectares (320 acres) in size, located southeast of Rockland's existing Urban Area Boundary. It is proposed to be added to the City of Rockland through an Expansion Lands Secondary Plan.

**For the purposes of this study, we estimated total approximately 3,200 housing units, and associated population of 8,000 on the Subject Site when fully developed.**

The expansion land is currently vacant and is owned by six private-sector individuals and companies. Its boundary at present is:

*David Street to the north, Clarence-Creek to the east,  
close to Baseline Road to the south, and Carson Street to  
the west.*

North of David Street is the residential neighbourhood of Rockland East and Rockland Golf Club. Along all other sides of the Subject Site are vacant lands, farms, and open spaces.

### **B. Development Potential**

At present, the Subject Site is being considered for low-density residential development, and locally-oriented commercial businesses. Based on discussions with the study's Project Manager at Fotenn Planning and Design, the likely development densities on the Subject Site would be in the order of 10 to 12 units per acres, or an overall average of 11 units per acre. The estimated total number of units on the Subject 320 acres is thus approximately 3,200 units at full development. At the 2016 average household size of



2.63 persons (Table 3.2), the total number of residents associated with 3,200 housing units would be 8,416.

Some of the future residents on the expansion lands would be first-time buyers/renters, or otherwise consist of two persons. As well, the average household size has been on a declining trend and this trend is expected to continue. Therefore, to avoid over-estimation of population, we assume that the overall household size on the Subject Site would be 2.5 persons, or a total of 8,000. **For the purposes of this study, therefore, we have used a total population of 8,000 (rounded) on the Subject Expansion Lands when fully developed.**

### III. SOCIO-DEMOGRAPHIC ANALYSIS

#### A. Trade Area

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

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

*The City of Clarence-Rockland as the Primary, and the rest of the United Counties of Prescott & Russell (UCPR) as the Secondary Trade Area.*

Trade areas are not rigid, and change over time based on growth, transportation, competitive facilities, lifestyle, and other such changes and trends. A somewhat larger or smaller Trade Area would also be valid for the purposes of this study. However, we believe what we have defined is quite reasonable for the objectives of this study.

#### B. Total Population: 2006-2016

1. The City of Clarence-Rockland and the rest the UCPR have continued to grow. For the 10-year period 2006-2016, their average annual growth was (Table 3.1):

- Clarence-Rockland    372 or 1.8%
- UCPR                      915 or 1.1%

2. As of mid-2016, Statistics Canada's Census data show total populations of:

- Clarence-Rockland    24,512
- UCPR                      89,333

## C. Households

1. The City of Clarence-Rockland has continued to experience higher growth rates and be more family-dominated than the rest of the UCPR.
2. In 2016, the median age of the residents of Clarence-Rockland was 42.2 years (44.3 in UCPR), its overall average household size was 2.63 (2.52 in UCPR), and 5.8 in 10 of its households (6.2 in UCPR) consisted of only one or two persons (Table 3.2).

## D. Growth Forecasts

Since 2014-2015, residential and thus population growth have significantly accelerated in Clarence-Rockland, and to a lesser extent, in the rest of UCPR. Based on the actual growth since 2014, under construction, planned, and proposed housing developments, the City of Clarence-Rockland, and Hemson Consulting Ltd. Have provided population forecasts for both areas. Based on these forecasts, we have prepared **Table 3.3, which demonstrates the following average annual population increases for the period 2018-2028:**

- |                             |                      |
|-----------------------------|----------------------|
| <b>1. Clarence-Rockland</b> | <b>598 or 2.4%</b>   |
| <b>2. UCPR</b>              | <b>1,620 or 1.8%</b> |

Compared to the actual annual growth from 2006 to 2016, the figures in Table 3.3 appear to be too optimistic. However, for infrastructure planning purposes, it is prudent to use somewhat generous forecasts. As well, the actual 2016 population of UCPR was 89,333 (Table 3.3), whereas Hemson report's estimate was 88,700 (i.e., 633 or 0.7% lower than actual). Above all, as the City of Ottawa continues to expand eastward, and its housing costs continue to be much lower than in Rockland, growth in Rockland/UCPR will only further intensify. From this perspective, the forecasts in Table 3.3 seem quite reasonable, and may even be somewhat too low for the period 2023-2028.

<b>Table 3.1 Historical Population Data</b>		
<b>Year</b>	<b>Clarence-Rockland</b>	<b>Prescott and Russell United Counties (UCPR)</b>
2006	20,790	80,184
2011	23,185	85,381
2016	24,512	89,333
<b>Average Annual Change: 2006-2016:</b>		
Numeric	372	915
%	1.8	1.1

Notes:

<sup>1</sup> In 2016, the median age of the residents was 42.2 in Clarence-Rockland, and 44.3 in UCPR.

<sup>2</sup> Generally, economists and planners consider an average annual population growth of 1.0% to represent an economically growing area.

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

<b>Table 3.2 Households By Size: 2016</b>				
<b>Household Size</b>	<b>Clarence-Rockland</b>		<b>Prescott and Russell United Counties (UCPR)</b>	
	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>
Single Person	1,810	19.4	8,125	23.0
Two Persons	3,635	40.0	13,880	39.2
Three Persons	1,590	17.0	5,665	16.0
Four or More Persons	2,295	24.6	7,720	21.8
<b>Total</b>	<b>9,330</b>	<b>100.0</b>	<b>35,390</b>	<b>100.0</b>
Average Size	2.63	—	2.52	—
Single and Two Persons Combined	5,445	58.4	22,005	62.2

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

<b>Table 3.3 Population Forecasts</b>		
<b>Year</b>	<b>Clarence-Rockland</b>	<b>Prescott and Russell United Counties (UCPR)</b>
2016	24,512	89,333
2018	26,746	91,500
2020	27,955	96,500
2021	28,524	99,000
2023	29,746	101,500
2028	32,723	107,700
<b>Average Annual Change: 2018-2028:</b>		
Numeric	598	1,620
%	2.4	1.8

Sources:

1. City of Clarence-Rockland for Clarence-Rockland
2. Shore-Tanner & Associates for UCPR based on the mid-estimates of population growth in *Growth Forecast and Land Needs Analysis*, by Hemson Consulting Ltd., December 2015. Population growth from about 2023 and thereafter is expected to be higher than 598 per years.

<b>Table 3.4 Household Income Distribution: 2016</b>				
<b>Income Class (\$)</b>	<b>Clarence-Rockland</b>		<b>Prescott and Russell United Counties (UCPR)</b>	
	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>
Under 40,000	1,460	15.6	7,825	22.1
40,000-59,999	1,315	14.1	5,250	14.8
60,000-79,999	1,355	14.5	4,925	13.9
80,000-99,999	1,200	12.9	4,445	12.6
100,000-124,999	1,375	14.7	4,550	12.9
125,000-149,999	1,025	11.0	3,210	9.1
150,000 & over	1,600	17.1	5,185	14.6
<b>Total</b>	<b>9,330</b>	<b>100.0</b>	<b>35,390</b>	<b>100.0</b>
Median Household	88,823	—	78,748	—
Median Per Capita	33,773	—	31,249	—

Note: The 2016 median income for the City of Ottawa was \$85,981 and for the Province of Ontario it was \$74,287.

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

## IV. RETAIL MARKET TRENDS

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

### A. Retail Stores

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

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

## **6. De-Malling**

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

## **7. Store Enlargements**

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

## **8. Walmart Supercentres**

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

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

## **9. Recent Entries Into the Ottawa Market**

Since many residents of the Trade Area shop at businesses in Ottawa, it is helpful to identify significant recent changes in the Ottawa market.

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

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

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

In addition to these new facilities, new methods of conducting business have been created. Purchasing through the Internet is one example. Twinning is another example which makes it possible for two businesses to complement each other, while saving on insurance, utilities, taxes, staff, and other costs. Examples in this regard include Chapter's book stores and Starbucks, Walmart and McDonald's restaurants, The Home Depot and Harvey's restaurants. **Online shopping has been growing very rapidly in the last five years, and is expected to grow further from its estimated total market share of approximately 4% of total spending in Ottawa.**

## **B. Reasons For Success of the New Store Types**

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

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



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

### C. Present Shopping Patterns and Habits

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

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

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

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

electronics, appliances, automotive, box stores, restaurants, and other services often dominate highway commercial strips. Shoppers typically go to these establishments for specific products and/or services, based on pre-determined shopping plan. While there may be comparison shopping, there is usually no window-shopping, socializing, browsing, or cross-shopping. Other than for restaurants, banks, gasoline, and other services, shopping at highway commercial stores is infrequent (furniture, electronics, appliances, and major auto repairs are normally needed less than once a year by most households).

4. The retail industry is dynamic and rapidly evolving. Shoppers demand choice, variety, convenience, value, and fun. In a healthy market, there is a balance between the traditional main street retail stores, suburban shopping centres, and the new and emerging retail facilities as described above.
5. **In the competitive environment of today, maintaining market share, and especially increasing it, is a major challenge for all shopping facilities and districts, requiring new thinking and approaches to merchandising and customer relationship. Targeted use of social media, online services, better understanding of the retail market trends, more awareness of competition from shopping centres and districts, and better recognition of the needs, preferences, and desires of the Trade Area residents are among the key elements of new thinking and approaches, which have to be considered for the planned retail market on the Subject Site in Rockland.**

## V. EXPENDITURE ANALYSIS

Spending at retail and service businesses depends on numerous socio-demographic, lifestyle, and locational factors. Based on hundreds of retail market studies by our firm and other research organizations, income is the most influential factor. Often, the higher their income, the more people shop, spend, and thus support the continuation and/or expansion of businesses.

The estimation of demand for supportable floor space is highly analytical and therefore numerically oriented. The detailed results of the analytical part of the demand estimation are presented in the next chapter, after the estimation of expenditure potentials below.

### A. Per Capita Expenditures

Statistics Canada is the primary source for expenditure data at retail and service stores across Canada. For this study's Trade Area, the data are estimated based on income comparisons, since they are not available for Clarence-Rockland.

The overall median per capita income in 2016 of Trade Area residents was \$33,773 and this was higher than Ontario's which was \$28,572 in 2016. Incomes in both areas are higher now.

In Table 5.1, we have provided estimates of per capita expenditures by the residents of the Trade Area for a number of trade groups which are standard in the retail industry. As noted, **we estimate the overall average per capita spending of the TA residents to be \$17,386 in 2018**. Of course, due to mortgages, family size and other factors, some individuals and families spend less, and others more than these averages, depending on their disposable income.

### B. Total Retail and Service Expenditures

The estimated total expenditures of the residents of UCPR and Clarence-Rockland are provided in Tables 5.2 and 5.3.

<b>Table 5.1</b>		
<b>Estimated Per Capita Retail and Service Spending: 2018</b>		
<b>Trade Group</b>	<b>UCPR Spending (\$)</b>	<b>Clarence-Rockland Spending (\$)</b>
<b>A. Retail Product Stores</b>		
Supermarkets	2,290	2,400
Convenience Stores	220	235
Specialty Food	195	205
Beer, Wine & Liquor	670	700
Drugs & Patent Medicine*	1,105	1,160
Clothing	820	860
Shoes, Jewellery & Accessories	235	250
Home Furnishings	125	130
Electronics & Appliances	495	520
Furniture	285	300
Building Materials, Hardware & Garden Supplies	850	890
Sporting Goods, Hobbies, Music & Books	300	315
Used, Recreation & Other Vehicles	470	490
New Car Sales	2,800	2,900
Auto Parts & Accessories	190	200
Gasoline & Service Stations	1,410	1,400
General Merchandise	960	980
Department Stores	720	750
Other Retail Stores	350	370
<b>Subtotal: Retail Products</b>	<b>14,490</b>	<b>15,055</b>
<b>B. Retail Service Businesses</b>		
Restaurants, Bars & Other Eateries*	1,220	1,300
Personal Care Businesses*	215	225
Sports, Recreation & Entertainment*	1,455	1,530
<b>Subtotal: Service Businesses</b>	<b>2,890</b>	<b>3,055</b>
<b>Grand Total: All Stores &amp; Businesses</b>	<b>17,380</b>	<b>18,110</b>

\* Estimated

1. Online spending is **not** included.

Source: Shore-Tanner & Associates based on CANSIM Tables 080-0030 and other relevant Statistics Canada data.

<b>Table 5.2</b> <b>Estimates of Total Spending By UCPR Residents</b>							
Trade Group	2018 (\$M)	2020 (\$M)	2021 (\$M)	2023 (\$M)	2028 (\$M)	Average Annual Change: 18-28	
Population	91,500	96,500	99,000	101,500	107,700	Numeric	%
<b>A. Retail Product Stores</b>							
Supermarkets	209.5	221.0	226.7	232.4	246.6	3.7	1.8
Convenience Stores	20.1	21.2	21.8	22.3	23.7	0.36	1.8
Specialty Food	17.8	18.8	19.3	19.8	21.0	0.32	1.8
Beer, Wine & Liquor	61.3	64.6	66.3	68.0	72.1	1.1	1.8
Drugs & Patent Medicine*	101.1	106.6	109.4	112.1	119.0	1.8	1.8
Clothing	75.0	79.1	81.2	83.2	88.3	1.3	1.8
Shoes, Jewellery & Accessories	21.5	22.7	23.3	23.8	25.3	0.4	1.8
Home Furnishings	11.4	12.1	12.4	12.7	13.5	0.2	1.8
Electronics & Appliances	45.3	47.8	49.0	50.2	53.3	0.8	1.8
Furniture	26.1	27.5	28.2	28.9	30.7	0.5	1.8
Building Materials, Hardware & Garden Supplies	77.8	82.0	84.1	86.3	91.5	0.8	1.8
Sporting Goods, Hobbies, Music & Books	27.4	29.0	29.7	30.4	32.3	1.4	1.8
Used, Recreation & Other Vehicles	43.0	45.3	46.5	47.7	50.6	0.5	1.8
New Car Sales	256.2	270.2	277.2	284.2	301.6	0.8	1.8
Auto Parts & Accessories	17.4	18.3	18.8	19.3	20.5	4.5	1.8
Gasoline & Service Stations	129.0	136.1	139.6	143.1	151.8	2.3	1.8
General Merchandise	87.8	92.6	95.0	97.4	103.4	1.6	1.8
Department Stores	65.9	69.5	71.3	73.1	77.5	1.2	1.8
Other Retail Stores	32.0	33.8	34.6	35.5	37.7	0.57	1.8
<b>Subtotal: Retail Products</b>	<b>1,325.8</b>	<b>1,398.3</b>	<b>1,434.5</b>	<b>1,470.7</b>	<b>1,560.6</b>	<b>23.5</b>	<b>1.8</b>

\* Estimated

1. Online spending is **not** included.

<b>Table 5.2, continued</b> <b>Estimates of Total Spending By UCPR Residents</b>							
Trade Group	2018 (\$M)	2020 (\$M)	2021 (\$M)	2023 (\$M)	2028 (\$M)	Average Annual Change: 18-28	
						Numeric	%
<b>B. Retail Service Businesses</b>							
Restaurants, Bars & Other Eateries*	111.6	117.7	120.8	123.8	131.4	2.0	1.8
Personal Care Businesses*	19.7	20.7	21.3	21.8	23.1	0.3	1.8
Sports, Recreation & Entertainment*	133.1	140.4	144.0	147.7	156.7	2.4	1.8
<b>Subtotal: Service Businesses</b>	<b>264.4</b>	<b>278.9</b>	<b>286.1</b>	<b>293.3</b>	<b>311.2</b>	<b>4.7</b>	<b>1.8</b>
<b>Grand Total: All Stores &amp; Businesses</b>	<b>1,590.3</b>	<b>1,677.2</b>	<b>1,720.6</b>	<b>1,764.1</b>	<b>1,871.8</b>	<b>28.1</b>	<b>1.8</b>

\* Estimated

1. Online spending is **not** included.

Note: The average annual percentage increases in spending are identical to the estimated population growth of 1.8% in Table 3.3. The dollar figures above are all in the constant value of the Canadian dollar in 2018. In other words, neither inflation, nor actual growth are included in order to avoid possible over-estimation.

Source: Shore-Tanner & Associates.

<b>Table 5.3</b> <b>Estimates of Total Spending By Clarence-Rockland Residents</b>							
Trade Group	2018 (\$M)	2020 (\$M)	2021 (\$M)	2023 (\$M)	2028 (\$M)	Average Annual Change: 18-28	
Population	26,746	27,955	27,524	29,746	32,723	Numeric	%
<b>A. Retail Product Stores</b>							
Supermarkets	64.2	67.1	68.4	71.4	78.5	1.4	2.2
Convenience Stores	6.3	6.6	6.7	7.0	7.7	0.14	2.2
Specialty Food	5.5	5.7	5.8	5.9	6.7	0.12	2.2
Beer, Wine & Liquor	18.7	19.6	20.0	20.8	22.9	0.42	2.2
Drugs & Patent Medicine*	31.0	32.4	33.1	34.5	38.0	0.70	2.2
Clothing	23.0	24.0	24.5	25.6	28.1	0.51	2.2
Shoes, Jewellery & Accessories	6.7	7.0	7.1	7.4	8.2	0.15	2.2
Home Furnishings	3.5	3.6	3.7	3.9	4.2	0.07	2.2
Electronics & Appliances	13.9	14.5	14.8	15.5	17.0	0.31	2.2
Furniture	8.0	8.4	8.6	8.9	9.8	0.18	2.2
Building Materials, Hardware & Garden Supplies	23.3	24.9	25.4	26.5	29.1	0.53	2.2
Sporting Goods, Hobbies, Music & Books	8.4	8.8	9.0	9.4	10.3	0.19	2.2
Used, Recreation & Other Vehicles	13.1	13.7	14.0	14.6	16.0	0.29	2.2
New Car Sales	77.6	81.1	82.7	86.3	94.9	1.73	2.2
Auto Parts & Accessories	5.3	5.6	5.7	5.9	6.5	0.13	2.2
Gasoline & Service Stations	37.4	39.1	40.0	41.6	45.8	0.84	2.2
General Merchandise	26.2	27.4	27.9	29.1	32.1	0.59	2.2
Department Stores	20.0	21.0	21.4	22.3	24.5	0.45	2.2
Other Retail Stores	9.9	10.3	10.6	11.0	12.1	0.22	2.2
<b>Subtotal: Retail Products</b>	<b>402.3</b>	<b>420.9</b>	<b>429.4</b>	<b>447.8</b>	<b>492.6</b>	<b>9.03</b>	<b>2.2</b>

\* Estimated

1. Online spending is **not** included.

<b>Table 5.3, continued</b> <b>Estimates of Total Spending By Clarence-Rockland Residents</b>							
Trade Group	2018 (\$M)	2020 (\$M)	2021 (\$M)	2023 (\$M)	2028 (\$M)	Average Annual Change: 18-28	
						Numeric	%
<b>B. Retail Service Businesses</b>							
Restaurants, Bars & Other Eateries*	34.8	36.3	37.1	38.7	42.5	0.77	2.2
Personal Care Businesses*	6.0	6.3	6.4	6.7	7.4	0.14	2.2
Sports, Recreation & Entertainment*	40.9	42.8	43.6	45.5	50.1	0.92	2.2
<b>Subtotal: Service Businesses</b>	<b>81.7</b>	<b>85.4</b>	<b>87.1</b>	<b>90.9</b>	<b>100.0</b>	<b>1.83</b>	<b>2.2</b>
<b>Grand Total: All Stores &amp; Businesses</b>	<b>484.4</b>	<b>506.3</b>	<b>516.6</b>	<b>538.7</b>	<b>592.6</b>	<b>10.82</b>	<b>2.2</b>

\* Estimated

1. Online spending is **not** included.

Note: The average annual percentage increases in spending are identical to the estimated population growth of 1.8% in Table 3.3. The dollar figures above are all in the **constant** value of the Canadian dollar in 2018. In other words, neither inflation, nor actual growth are included in order to avoid possible over-estimation of demand for additional floor space.

Source: Shore-Tanner & Associates.



## VI. DEMAND ESTIMATION

### A. Productivity Rates

In Tables 5.1-5.3, we have provided estimates of the available spending by Trade Area residents and employees. The next steps involve the estimation of how much floor space these expenditures can support. For these steps, productivity rates or sales per sq. ft. are needed.

Based on over 100 retail studies in the last 15 years, including in-person confidential meetings and surveys of at least 2,000 business managers and/or owners, we have obtained actual and closely estimated sales data. Many of these studies have included presentations at the Ontario Municipal Board hearings where actual sales data were presented by opposing parties and analyzed. Based on these studies, ongoing research, and review of retail trends, we have provided realistic ranges of annual sales per sq. ft. for the types of retail and service businesses most likely to be viable on the Subject Site. As shown in Table 6.1, the average annual sales per sq. ft. at food stores, for example, is estimated to be between \$500 and \$700.

### B. Total Supportable Floor Space

Table 6.1 presents the total supportable floor space for each business for the years 2018-2028. As demonstrated, **Clarence-Rockland's spending is estimated to be supporting a total of 967,000 to 1.277 million sq. ft. of retail and service business floor space in 2018, at businesses within, but also outside this area.** The total supportable space will, of course, increase each year, based on population growth and affluence.

In Table 6.2, we have identified the increase in supportable demand for each business. As demonstrated, **the supportable increase in the total floor space is as follows by time periods by the residents of Clarence-Rockland:**

- |    |           |                 |         |
|----|-----------|-----------------|---------|
| 1. | 2018-2020 | 45,000-81,000   | sq. ft. |
| 2. | 2020-2023 | 64,000- 87,000  | sq. ft. |
| 3. | 2023-2028 | 108,000-144,000 | sq. ft. |
| 4. | 2018-2028 | 217,000-312,000 | sq. ft. |

**In other words, the available spending potential of Clarence-Rockland is estimated to generate demand for 217,000 to 312,000 sq. ft. of additional retail and floor space by the year 2028.**

The demand generated from the residents of UCPR is, of course, much larger. As in the past, many residents of UCPR outside the City of Clarence-Rockland are expected to do much of their shopping at businesses in Rockland. It is therefore necessary to address their spending, in addition to the spending of the Clarence-Rockland residents.

As demonstrated in Table 5.1, the overall average spending of each resident of UCPR is estimated to be \$17,380 in 2018. At this rate, the total spending of UCPR is estimated at \$1.59 **billion** in 2018, increasing by an average of \$28.1 million annually, to a total of 1.817 **billion** in 2028 (Table 5.2).

In view of the relative abundance of retail and service businesses in Rockland, and also in the City of Ottawa, much of the total spending of UCPR residents happens in these two cities. Regardless of where their spending takes place, it is necessary to first determine how much floor space can their spending support. Table 6.1 provides this answer by individual retail and service groups. As demonstrated in Table 6.1, the total spending of residents of Clarence-Rockland is estimated to support a total of at least 967,000 sq. ft. or 36 sq. ft. per capita within and outside this city (the spending of UCPR residents of course supports much more than 967,000 sq. ft.).

<b>Table 6.1</b> <b>Estimates of Total Supportable Floor Space in Clarence-Rockland:</b> <b>Square Feet</b>						
Trade Group	2018	2020	2021	2023	2028	Average Annual Change: 18-28
<b>A. Retail Product Stores</b>						
Supermarkets						
• At \$700/sq. ft.	91,700	95,900	97,700	102,200	112,100	2,140
• At \$500/sq. ft.	128,400	134,200	136,800	142,800	157,000	2,860
Convenience Stores						
• At \$300/sq. ft.	21,000	22,000	22,300	23,300	25,700	470
• At \$250/sq. ft.	25,200	26,400	26,800	28,000	30,800	560
Specialty Food						
• At \$450/sq. ft.	12,200	12,700	12,900	13,100	14,900	270
• At \$350/sq. ft.	15,700	16,300	16,600	16,900	19,100	340
Beer, Wine & Liquor						
• At \$700/sq. ft.	26,700	28,000	28,600	29,700	32,700	600
• At \$500/sq. ft.	37,400	39,200	40,000	41,600	45,800	840
Drugs & Patent Medicine*						
• At \$1,000/sq. ft.	31,000	32,400	33,100	34,500	38,000	700
• At \$700/sq. ft.	44,300	46,300	47,300	49,300	54,300	1,000
Clothing						
• At \$350/sq. ft.	65,000	68,600	70,000	73,100	80,300	1,530
• At \$250/sq. ft.	92,000	96,000	98,000	102,400	112,400	2,040
Shoes, Jewellery & Accessories						
• At \$400/sq. ft.	16,700	17,500	17,700	18,500	20,500	380
• At \$300/sq. ft.	22,300	23,300	23,700	24,700	27,300	500

<b>Table 6.1, continued</b> <b>Estimates of Total Supportable Floor Space In Clarence Rockland:</b> <b>Square Feet</b>						
Trade Group	2018	2020	2021	2023	2028	Average Annual Change: 18-28
Home Furnishings						
• At \$350/sq. ft.	10,000	10,300	10,600	11,100	12,000	200
• At \$250/sq. ft.	14,000	14,400	14,800	15,600	16,800	280
Electronics & Appliances						
• At \$700/sq. ft.	19,900	20,700	21,100	22,100	24,300	440
• At \$500/sq. ft.	27,800	29,000	29,600	31,000	34,000	620
Furniture						
• At \$300/sq. ft.	26,700	28,000	28,700	29,700	32,700	600
• At \$250/sq. ft.	32,000	33,600	34,400	35,600	39,200	720
Building Materials, Hardware & Garden Supplies						
• At \$250/sq. ft.	95,200	99,600	101,600	106,000	116,400	2,120
• At \$175/sq. ft.	136,000	142,300	145,100	151,400	166,300	3,030
Sporting Goods, Hobbies, Music & Books						
• At \$300/sq. ft.	28,000	29,300	30,000	31,300	34,300	630
• At \$225/sq. ft.	37,300	39,100	40,000	41,800	45,800	850
Used, Recreation & Other Vehicles						
• At \$1,000/sq. ft.	13,100	13,700	14,000	14,600	16,000	290
• At \$700/sq. ft.	18,700	19,600	20,000	20,900	22,900	420
New Car Sales						
• At \$2,000/sq. ft.	38,800	40,000	41,300	43,200	47,500	870
• At \$1,400/sq. ft.	55,400	57,900	59,100	61,600	67,800	1,240

<b>Table 6.1, continued</b> <b>Estimates of Total Supportable Floor Space In Clarence-Rockland:</b> <b>Square Feet</b>						
Trade Group	2018	2020	2021	2023	2028	Average Annual Change: 18-28
Auto Parts & Accessories						
• At \$1,500/sq. ft.	3,500	3,600	3,800	3,900	4,300	80
• At \$1,000/sq. ft.	5,300	5,600	5,700	5,900	6,500	120
Gasoline & Service Stations						
• At \$1,200/sq. ft.	31,200	32,600	33,300	34,700	38,200	700
• At \$800/sq. ft.	46,700	48,900	50,000	52,000	57,200	1,050
General Merchandise						
• At \$350/sq. ft.	74,900	78,300	79,700	83,100	91,700	1,680
• At \$250/sq. ft.	104,800	109,600	111,600	116,400	128,000	2,320
Department Stores						
• At \$250/sq. ft.	80,000	84,000	85,600	89,200	98,000	1,800
• At \$200/sq. ft.	100,000	105,000	107,000	111,500	122,500	2,250
Other Retail Stores						
• At \$300/sq. ft.	33,000	34,300	35,300	36,700	40,300	730
• At \$250/sq. ft.	39,600	41,200	42,400	44,000	48,400	880
<b>Subtotal: Retail Products</b>	719,000	752,000	767,000	800,000	880,000	16,100
<b>(rounded)</b>	961,000	1,027,000	1,049,000	1,093,000	1,202,000	24,100

<b>Table 6.1, continued</b> <b>Estimates of Total Supportable Floor Space In Clarence-Rockland:</b> <b>Square Feet</b>						
Trade Group	2018	2020	2021	2023	2028	Average Annual Change: 18-28
<b>B. Retail Service Businesses</b>						
Restaurants, Bars & Other Eateries						
• At \$600/sq. ft.	58,000	60,500	61,800	64,500	70,800	1,280
• At \$450/sq. ft.	77,300	80,700	82,400	86,000	94,400	1,710
Personal Care Businesses						
• At \$225/sq. ft.	26,700	28,000	28,400	29,800	32,900	620
• At \$175/sq. ft.	34,300	36,000	36,600	38,300	42,300	800
Sports, Recreation & Entertainment <sup>1</sup>						
• At \$250/sq. ft.	163,600	171,200	174,400	182,000	200,400	3,680
• At \$200/sq. ft.	204,500	214,000	218,000	227,500	250,500	4,600
<b>Subtotal: Retail Services</b>	248,000	260,000	265,000	276,000	304,000	5,600
<b>(rounded)</b>	316,000	331,000	337,000	352,000	387,000	7,100
<b>Grand Total:</b>	967,000	1,012,000	1,032,000	1,076,000	1,184,000	21,700
<b>All Stores &amp; Businesses</b>	1,277,000	1,358,000	1,386,000	1,445,000	1,589,000	31,200

<sup>1</sup> Includes cinemas, theatres, arenas and sports fields.

Source: Shore-Tanner & Associates.

<b>Table 6.2</b> <b>Estimated Demand For Additional Floor Space</b> <b>By the Spending of Clarence-Rockland Residents</b>	
Time Period	Floor Space (sq. ft.)
2018-2020	45,000-81,000
2020-2021	20,000-28,000
2021-2023	44,000-59,000
2023-2028	108,000-144,000
<b>2018-2028</b>	<b>217,000-312,000</b>

Source: Table 6.1.

## **VII. SUMMARY OF EXISTING BUSINESSES**

### **A. Scope of Research**

Several days in May 2018 we carried out extensive field research in Rockland. Every retail and service business was visited, its name and type identified, and its size visually estimated.

The field research was started at the Smart Centre, then continued on Laurier Street in the eastern direction to Highway 17. From there, all businesses in the western direction to Laurier Street were visited. There are a few scattered businesses on the intersecting roadways which were also visited and their names, types, and estimated sizes recorded. The details of this research are presented in Appendix A.

### **B. Major Findings**

**As of May 2018, there was a total of 146 retail and service businesses in Rockland occupying an estimated 538,000 sq. ft. of floor space.**

With the 2018 population of 26,746 in Clarence-Rockland, the overall average floor space per resident is 20.1 sq. ft. However, some of this space is supported by the spending of the other residents of the UCPR. Therefore, the effective floor space per resident is lower than 20.1 sq. ft. There are as well, a number of retail and service businesses in the Clarence part of the City of Clarence-Rockland and they may increase the per capita floor space to 21 or 22 sq. ft.

Based on the industry standard of 30 to 40 sq. ft. of floor space per capita, it is evident that the City of Clarence-Rockland is currently under-stored for retail and service businesses.

If the residents of Clarence-Rockland spend 100% of their shopping dollars at businesses within the City, at least 802,000 sq.ft. or 262,000 sq. ft. more floor space could be supported in 2018, and more in future years. Due to the proximity of Ottawa and its variety of businesses, there will always be some shopping there by the residents of Clarence-Rockland. However, as its population grows, more retail and service businesses

can be supported and will be attracted to Clarence-Rockland (as it has been the case in the 10-15 years).

At present, a total of 14 stores with a combined floor space of 29,200 sq. ft. or 5.4% of the total space of 538,000 sq. ft., are vacant in Rockland (industry standard vacancy rate is within 4% and 8%). .



## **VIII. OFFICE MARKET AND DEMAND**

### **A. Overview of Office Market**

In Clarence-Rockland, as in similar cities in size close to a major urban area, there is little office space, and not much data available. The existing space is almost entirely for local needs such as medical, insurance, and financial. To better address the supportable office space on the Subject Site, we have first analyzed Ottawa's rich office market.

Due to the presence of the Federal Government, the City of Ottawa's office market is unique. The various Federal Departments, Crown Corporations, and other government agencies own and occupy approximately 30 million sq. ft. of office space.

The privately-owned office space in the City of Ottawa is approximately 40 million sq. ft., most of which is also rented to and occupied by different Federal Government organizations. There are, as well, some 300 associations, major legal, accounting, auditing and consulting firms, most of whose work is government related.

**At a total population of almost one million, the City of Ottawa is the fourth largest in Canada, but its total office floor space of approximately 70 million sq. ft. is the third largest after Toronto and Montreal.**

The Ottawa office market has historically been strong and stable. In the last five years, a number of new, large office towers have been developed, pushing its overall total vacancy rate close to 11%.

### **B. Types of Office Space**

Generally speaking, office spaces fall into the following categories:

- Government/Public Sector
- Corporate
- Professional
- Business

There is some overlap in the bottom three types.

A **Corporate** office is usually large, high quality, located in a Class A building in a prime location, and occupied by banks, insurance companies, other major and often national and/or international corporations. Prestige, visibility, luxury, access, status, and image are important for corporate occupants of this type of office space.

A **Professional** office can be of various sizes and locations, and mostly in a Class B or C building. Legal, accounting, medical, high technology, artificial intelligence, associations, and consultancies are typical occupants of this type of space. In terms of prestige, status, visibility, and access, this type of office is often between the corporate and the business types.

A **Business** office is typically small, occupied by locally-oriented companies, located in affordable areas, including business parks, and in Class B, C or lower buildings. Engineering, architectural, accounting, development, construction, transportation, retail, and other such businesses, mostly with up to about 10 employees, are typical occupants of this type of office space.

### **C. Most Viable Office Space on the Subject Site**

Government, and to some extent, Corporate offices, are not dependent on the economy or population of a city. Most professional and business office enterprises, however, serve the residents and local economy of a given area. **We believe that for the Subject Site, the most market viable types of office businesses would be those that serve the larger area residents.** While government, corporate, or any specialty type office developments are also possible, they cannot be counted on.<sup>2</sup>

---

<sup>2</sup> The need for them is not locally or even city-wide generated. However, elected officials, business leaders, and/or connections may be able to influence the locational decisions of government and corporate officials.

## D. Demand Analysis

Of the approximately 40 million sq. ft. of privately-owned office space in the City of Ottawa, we estimate that up to 8 million sq. ft. or 20.0% are used by professional and business tenants who primarily serve the residents and the local economy.<sup>3</sup> These tenants, furthermore, are in Class B, C or lower buildings. The rest are occupied by various levels of governments, corporate, and prestigious professional/high technology tenants.

**At 8 million sq. ft. of office space and a total City of Ottawa population of almost one million, the overall average office space associated per resident is about 8 sq. ft.** Of course, parts of Ottawa have much higher, and others much lower averages.

In Clarence-Rockland, the total inventory of office space is now almost 0.3 million sq. ft., or approximately 12 sq. ft. per resident, based on a total population of over 26,000 (Table 3.1). Due to the mostly rural and agricultural characteristics of UCPR, its need for office space per capita is much less, and office businesses in Rockland tend to be used by its residents and employees. We have, therefore, used an estimate of 6 sq. ft. for UCPR. **The Trade Area is, therefore, concluded to generate average annual demand for total additional office space of 7,170 sq. ft. in Clarence-Rockland, and 9,700 sq. ft. in UCPR, including the 7,170 sq. ft. for Clarence-Rockland** (Table 7.1).

---

<sup>3</sup> In other words, the combination of population and economic factors generate demand for 8 million sq. ft. of locally-oriented office floor space.

<b>Table 7.1 Estimates of Total Supportable Office Space</b>				
<b>Year</b>	<b>Population</b>		<b>Office Space (sq. ft.)</b>	
	<b>Clarence-Rockland</b>	<b>UCPR</b>	<b>Clarence-Rockland (12 per resident)</b>	<b>UCPR (4 per resident)</b>
2016	24,512	89,333	294,000	536,000
2018	26,746	91,500	321,000	549,000
2020	27,955	96,500	335,500	579,000
2021	28,524	99,000	342,300	594,000
2023	29,746	101,500	357,000	609,000
2028	32,723	107,700	392,700	646,200
<b>Average Annual Increase: 2018-2028:</b>				
Numeric	598	1,620	7,170	9,700
%	2.4	1.8	2.2	1.8

Note: UCPR's figures include the figures for Clarence-Rockland.

Source: Shore-Tanner & Associates

## APPENDIX A

<b>List of Retail and Service Businesses In Rockland</b>		
<b>Business Name</b>	<b>Type</b>	<b>Approximate Size (sq. ft.)</b>
<b>Smart Centre<sup>1</sup></b>		
Rona	Hardware	40,000
Walmart	Department Store	110,000
• Quizno Subs		
• Hair Salon		
• Pharmacy		
• Garden Supplies		
• Grocery		
• Fashion		
Source	Electronics	2,000
Bulk Barn	Specialty Food	3,000
Boston Pizza	Table Service Restaurant	4,000
Dollarama	General Merchandise	6,000
LBCO	Liquor Store	3,000
<b>Laurier Street</b>		
Ford Dealership	Automotive	6,000
Snap Fitness	Fitness	3,000
Tim Horton's	Coffee Shop	1,800
<b>Royal Plaza (on Laurier St.)</b>		
Vapeking	Smoke Shop	2,000
Aqua Life	Sporting Goods	2,000
Rosalynn's	Table Service Restaurant	2,000
New Wave (pool accessories)	Sporting Goods	2,500
RBC	Financial	3,000
Vacant (2)	Vacant	4,000

<sup>1</sup> Started from this shopping centre, walked and/or drove eastward on Laurier Street to Highway 17, then westward on Laurier Street

<b>List of Retail and Service Businesses In Rockland, continued</b>		
<b>Business Name</b>	<b>Type</b>	<b>Approximate Size (sq. ft.)</b>
<b>Laurier Street, continued</b>		
First Choice	Barber	1,000
Rockland Sports	Sporting Goods	3,000
M&M Foods Market	Specialty Foods	1,500
Shawarma Rockland	Table Service Restaurant	1,500
Youngster Salon	Beauty Salon	1,500
Hitices	Clothing	1,500
La Bella Salon	Beauty Salon	1,500
Accent	Furniture	8,000
Touch of Distinction	Flooring Supplies	2,000
Rising Sun	Martial Arts	2,000
Vitrierie Glass & Mirror	Furnishings	2,000
Derma Skin Care	Beauty Salon	1,500
Vacant	Vacant	1,500
Domino's Pizza	Pizza Shop	1,500
Mortgage Intelligence	Financial	1,500
Chiro Fashion	Specialty Retail	1,500
Rockland Pharmacy	Pharmacy	3,000
Pronature Sporting	Sporting Goods	2,000
Tiny Hopper	Daycare	2,500
Salon Tete O Pieds	Beauty Salon	1,500
Shoppers Drug Mart	Pharmacy	4,000
Ultramar	Gas Station & Car Wash	2,000
Your Independent Grocer	Supermarket	50,000
Spartas	Mediterranean Restaurant	1,500
Scotiabank	Financial	3,000
Beer Store	Beer Store	3,000
Napa Auto	Automotive	2,500
McDonald's	Fast Food	2,200
Sullyteck	Phone Repair	600
Bytown Lumber	Building Supplies	10,000
The Thimble	Tailor	800
Envy	Spa	2,000
Vacant	Vacant	3,000
Jumbo Pizza	Pizza Shop	2,000

<b>List of Retail and Service Businesses In Rockland, continued</b>		
<b>Business Name</b>	<b>Type</b>	<b>Approximate Size (sq. ft.)</b>
<b>Laurier Street, continued</b>		
Dunn's Deli	Table Service Restaurant	2,500
Rama	Martial Arts	1,200
Royal Photo	Photo Shop	1,500
Rockland Music	Specialty Retail	1,500
Anne Travel	Travel Agency	1,500
Martel Mortgage	Financial	1,000
Sublime Salon	Beauty Salon	1,000
Christine Raymond Salon	Beauty Salon	1,000
Auto Morin	Automotive	3,000
Sienna Faming	Specialty Retail	2,000
Sacred Art	Tattoo Shop	1,000
The Brunet Funeral	Funeral Services	3,000
L'Atelier Salon	Beauty Salon	2,000
Vacant (several stores)	Vacant	5,000
Rockland Pizza	Pizza Shop	1,200
H & R Block	Financial	1,200
Rockland Variety	Convenience Store	1,500
Vacant	Vacant	1,500
Jean Coutu	Pharmacy	4,500
Post Office	Specialty Retail	2,000
Vacant	Vacant	1,500
Rockland Marine	Boating Supplies	3,000
Giant Tiger	General Merchandise	11,000
Fashion Sports	Clothing	2,000
New Ruby	Chinese Restaurant	3,000
Second Hand Centre	Clothing	1,500
Modelo Salon	Beauty Salon	1,500
Dalrymple Salon	Beauty Salon	1,500
Subway	Fast Food	1,500
Marie-Jo	Table Service Restaurant	2,000
RDS Laundromat	Laundromat	1,200
Chamberland Garage	Automotive	5,000
Rockland Optometry	Specialty Retail	2,000

<b>List of Retail and Service Businesses In Rockland, continued</b>		
<b>Business Name</b>	<b>Type</b>	<b>Approximate Size (sq. ft.)</b>
<b>Laurier Street, continued</b>		
Rockland Barber	Beauty Salon	600
Bourbonnais Electric	Electronic Shop	1,500
Vacant	Vacant	1,200
Friendly Restaurant	Table Service Restaurant	2,000
Big Boss Burgers	Table Service Restaurant	1,600
Vacant	Vacant	1,500
Sonx Plus	Electronics	1,500
National Bank	Financial	3,000
QV Spa	Beauty Salon	1,500
DCV Heating/Cooling	Heating/Cooling Supplies	2,000
Lavolette	Flower Shop	1,500
Café Joyeux	Table Service Restaurant	1,500
Desjardins	Financial	4,000
Maison de Xin	Table Service Restaurant	4,000
Spa Mauve	Beauty Salon	1,500
Extravadance	Specialty Fashion	2,000
Chez L'Bonlanger	Bakery	2,000
Studio Aqua (bronzage)	Beauty Salon	1,500
Main Street Pizza	Pizza Shop	1,500
Vacant	Vacant	1,500
Le Mieux	Convenience Store	1,500
GAB Sports Bar	Table Service Restaurant	2,000
Beautiful Clinic	Beauty Salon	1,500
QV Spa, Nails	Beauty Salon	1,000
Café La Roche	Table Service Restaurant	2,000
Espada	Tattoo Shop	500
Ryan's Auto	Automotive	2,000
SS Chip Wagon	Eatery	200
Vacant	Vacant	2,000
Vacant	Vacant	2,000
Belanger Dodge Dealer	Automotive	2,000
Vacant	Vacant	3,000
Harmony Hyundai	Automotive	2,000
Mr. Gas	Gas Station	100
Tim Horton's	Coffee Shop	1,000
Canadian Tire Station	Gas Station	100
TD	Financial	2,000
Shell Station	Gas Station	100
Circle K	Convenience Store	2,000



<b>List of Retail and Service Businesses In Rockland, continued</b>		
<b>Business Name</b>	<b>Type</b>	<b>Approximate Size (sq. ft.)</b>
<b>Plaza Rockland</b>		
Top Mode Depot	Fashion	11,000
A & W	Fast Food	1,800
Pet Valu	Specialty Retail	2,500
Brown Cleaner	Dry Cleaning	1,200
Super Cut	Barber Shop	1,200
Pop Shoes	Shoe Store	2,500
Gabriel Pizza	Pizza Shop	1,200
Broadway Bar & Grill	Table Service Restaurant	2,500
Subway	Fast Food	1,500
Vacant	Vacant	1,500
Dollar Tree	General Merchandise	5,000
TSC	General Merchandise	25,000
Mark's	Clothing	10,000
St. Hubert	Table Service Restaurant	3,000
Oil Changer	Automotive	4,000
Speedy Glass	Automotive	4,000
Benson Auto Parts	Automotive	3,000
<b>Grand Total</b>	<b>146</b>	<b>538,000</b>

Source: Shore-Tanner & Associates based on field research and visual estimates in late May 2018.