

J.C. WILLIAMS GROUP

Review of Proposed Retail Development at 410-446 Bathurst Street

DRAFT

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1.0 Introduction and Terms of Reference

The City of Toronto requested that J.C. Williams Group conduct a high level retail impact assessment of the proposed retail development for 410-446 Bathurst Street, based on the analysis and recommendations in the report, 'Evaluating Large Retail Developments Near Pedestrian Shopping Areas in Toronto' (J.C. Williams Group, January 2014) - 'the Retail Study'.

Riocan has indicated that it does not intend to lease space to Walmart or to lease space to a single store greater than about 4,200 m² (the area of the second floor of the proposed development, plus some loading and access space on the ground floor). At this time the applicant has not confirmed what type of retail store will occupy the second floor.

In consultation with the City, this review looks at three possible types of retail for the site that include both convenience based retailing and comparison based retailing. This includes:

1. Supermarket;
2. Health and personal care store (due to the proximity of Toronto Western Hospital);
3. Department store.

Of the three types of retail considered, the possible impacts of a potential 4,200 m² supermarket would likely have the greatest impact on nearby pedestrian shopping areas. Therefore this review focuses more on this type of retail use in order to understand this possibility in greater depth.

Summary of Findings

The results showed that:

- For the Primary Trade Area based on a 10 minute walking distance or approximately 800 m radius for convenience based retail, a proposed redevelopment that would add more than 1,800 m² and contain a supermarket greater than 3,500 m² could be supported;
- The overall viability of Kensington Market as a unique, experiential type shopping district would be not affected;
- A large department store may not be appropriate in this location;
- While the local neighbourhood may not support demand for more health and personal care stores, this sector is part of the strength of the Toronto Western Hospital area and additional stores could create critical mass to serve customers from outside the neighbourhood.

Retail Development Application Understanding and Assumptions

The proposed development would require a zoning by-law amendment and retail impact assessment under the recommendations proposed by J.C. Williams Group in the Retail Study'. The total proposed non-residential GFA is 13,124 m² (approximately 13,300 m²). The total proposed non-residential retail GFA is 6,622 m². This is greater than the retail calculation of 1,800 m² plus the existing retail as of 1993. This is approximately 4,100 m². In addition, a single retail unit of 4,200 m² (excluding mezzanine, galleria, and service space) on the second storey is greater than the 3,500 m² for a single retail unit.

Additional FSI requirements are in place that would be reviewed and are not specifically part of this review. In addition, any transportation or other impact type assessments are not part of this review.

The proposed development at 410–446 Bathurst Street includes the following assumptions:

- Total development: approximately 6,622 m² retail including a single retail unit with a maximum GFA of 4,200 m² and 6,502 m² for office uses for a total non-residential gross floor area of 13,124 m² (approximately 13,200 m²).
- Size: 2.9 times the area of the lot.
- The first storey would be divided into a minimum of six units (current drawings illustrate eight retail units), as well galleria, service and back of house space and loading space. The retail area is 2,373 m² excluding galleria space for the second storey retail unit.
- The second storey could include a single retail use such as a supermarket (4,200 m² excluding mezzanine, galleria, and service space). Access to the second storey is located at the north end of the site (near College Street). The second storey is 4,123 m² plus 126 m² for the first storey retail galleria space. Total GFA is 4,249 m².
- Commercial office space is to be located on third and fourth storeys, approximately 6,334 m² plus 168 m² on the first storey office galleria space. Total office GFA is 6,502 m².
- 4.8 m sidewalk width on Bathurst Street.
- Three levels of underground parking totalling approximately 298 spaces.
- Loading and service are to be located on first storey (at the south end of the proposed development as part of Nassau Street).

While the planning allowances focus on gross floor area for the zoning by-law, the analysis of impact should take the sellable area into consideration. For example, for a possible supermarket, the basis for the demand analysis and the retail impact assessment is Statistics Canada's Ontario sales per capita for supermarkets and food and beverage stores. As such, almost 100% of the comparable supermarkets used in data collection are single storey retailers with outdoor loading areas, outdoor parking areas, and outdoor cart corrals. A second floor supermarket at 410–446 Bathurst would have these functions located inside the proposed building. In addition, the foyer is smaller

compared to vertical retailers that require more space for escalators, elevators, and pedestrian movements. As a result more space is required for vertical urban retailers. The City of Toronto should take this into consideration when assessing the total area allowable by a single retailer (primarily the selling area of the retailer).

Methodology

The basis for this review included using the following resources as applicable:

- Urban Metrics Residual Retail Market Demand and Impact Analysis 410-446 Bathurst Street Toronto Ontario dated September 6, 2013 that included the impact on Kensington Market, Little Italy, Trinity Bellwoods, and China Town;
- J.C. Williams Group study of Bathurst Street and assessment of the viability and vitality of nearby shopping districts;
- J.C. Williams Group consumer satisfaction survey;
- Statistics Canada and Environics estimates of the new trade area population; and
- RioCan proposed development application for the 410-446 Bathurst Street site that included a single store retail use on the second storey, multiple retail units on the first storey, and office uses on the third and fourth storeys (dated Feb 5 2014) and Goodman's letter (dated Feb 6 2014).

2.0 Trade Area Delineation

The Primary Trade Area for convenience type retail use on Bathurst Street is focused on residents who can walk there within 10 minutes. For ease of analysis, this has been represented as an 800 m radius circle surrounding the site.

The Primary Trade Area is affected by the following:

- Critical mass of retail: there is approximately 68,500 sq. ft. (6,366 m²) of retail on Bathurst Street, which includes a funeral home, The Beer Store, Starbucks, and hospital related quick service food and pharmacy goods and services (for staff, patients, and visitors). There is little synergy and few complementary retailers that the development can build off of that would extend the trade area unless it is health care related.
- Visibility and accessibility: although it is not a corner location, both visibility and accessibility are good and it is on a streetcar route.
- Natural man-made barriers: the lack of street connectivity to the neighbourhood to the west is an issue affecting the trade area. The hospital is a major barrier blocking pedestrian movement. Spadina Avenue would be a barrier due to the retail commercial presence of Chinatown and the width of the street.
- The area is known for the Toronto Western Hospital and draws workers, volunteers, students, patients, visitors, etc. from a greater trade area region. This was evidenced in the intercept survey for Trinity Bellwoods by Urban Metrics and the pedestrian traffic volume.

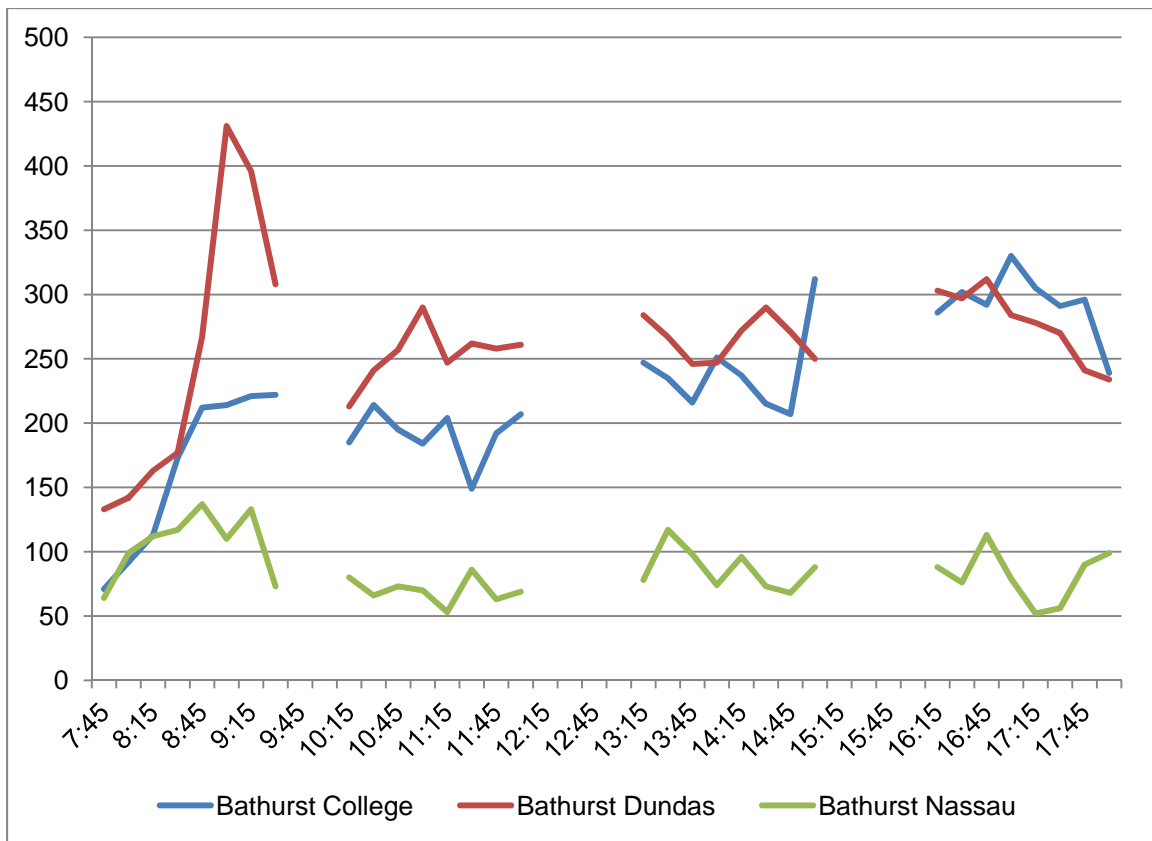
This review makes reference to the trade areas used by Urban Metrics.

- Urban Metrics Primary Trade Area: Bloor Street West to Queen Street West and Ossington Avenue to University Avenue.
- Urban Metrics Secondary Trade Area: Queen Street West to Front Street/CN Rail Line, and Ossington Avenue to University Avenue.

Pedestrian Traffic

- Pedestrian traffic at Bathurst Street and Dundas Street West is primarily focused on commuters, workers, and patients/visitors to the hospital. There is an early morning spike in pedestrian traffic consistent with commuter traffic patterns of walking to work or walking to public transit stops.
- Pedestrian traffic at Bathurst Street and College Street includes a portion of commuters but it builds steadily in the afternoon and continues to the early evening consistent with the range of goods and services geared to food services.
- Pedestrian traffic at Bathurst Street and Nassau Street is significantly lower than Dundas Street West and College Street. There is a relative consistency to the traffic throughout the day with a slight bump during the morning commute.

Pedestrian Counts: 15 Minute Intervals



Source: City of Toronto, Traffic Safety Unit, Turning Movement Count

Bathurst/College: Jun 1 2011, (Wed)

Bathurst/Dundas: Mar 25 2009 (Wed)

Bathurst/Nassau: May 9 2011 (Mon)

Other Considerations

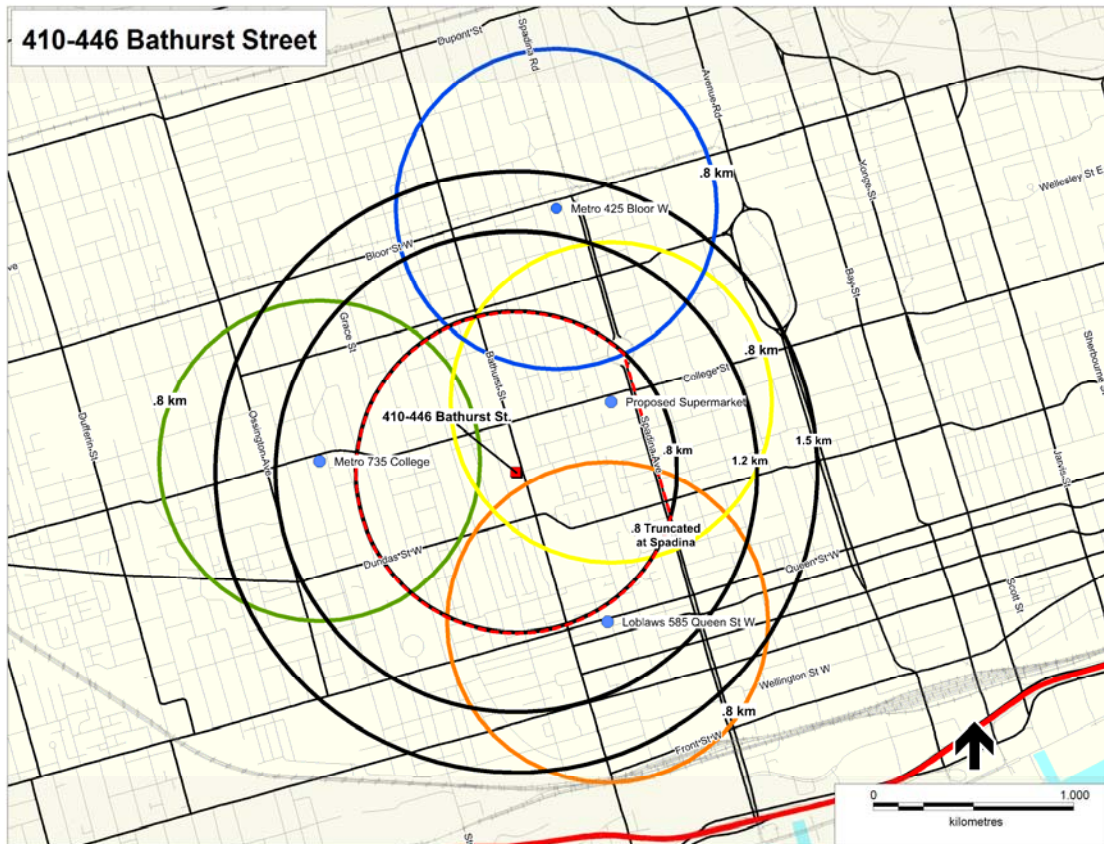
In addition, the natural movement of pedestrian traffic is towards Downtown. Any proposed retail project on Bathurst Street would draw slightly more traffic from the west than from the east.

Trade Areas

The primary trade area is based on a ten minute walking distance from the proposed development. The intersection of Bathurst and Nassau was used as the centre point. The trade area is truncated at Spadina Avenue.

Additional rings of 1.2 km and 1.5 km were added. In addition, 800 m rings were used for the other large retailers, the existing supermarkets at: Queen/Portland (Loblaws), College (Metro), Bloor (Metro), and the proposed supermarket on College. Other grocery such as Sobey’s Express and P.A.T. Central Market are classified as grocery and other food stores.

410-446 Bathurst Trade Areas



Finding

The assessment reveals that there is no major supermarket within an 800 m walking distance of the proposed site (except for the proposed supermarket on College Street: Tribute development). Therefore, there is an unmet demand for a supermarket in this mixed-use neighbourhood area of Bathurst Street.

Caveat

Alternatively, an analysis of the 800 m Primary Trade Areas could include the assessment that all other supermarkets in the local area provide sufficient coverage so that almost all residents are within a ten minute walk of a major supermarket and few local residents are underserved. J.C. Williams Group believes the finding statement to be better representative of reality (that there is no current supermarket in the trade area and therefore unmet demand). There are often overlapping trade areas for supermarkets. The caveat statement would be sufficient if the requirement was to have only one grocery store serve each local trade area, which is not the case.

2.1 Primary Trade Area

Select socio-economic characteristics of the Primary Trade Area around 410–446 Bathurst Street:

Socio Economic Characteristics of Primary Trade Area

	1996	2001	2006	2011	2013
Population	22,010	22,544	22,605	23,418	23,935
Change		534	61	813	517
Households	7,890	8,772	8,884	9,715	10,103
Change		882	112	831	388
Age Profile					
Under 20	18%	17%	15%	14%	13%
20 to 39	42%	42%	41%	42%	45%
40 to 59	20%	22%	24%	24%	24%
60+	20%	19%	20%	20%	18%
Persons Per Household	2.70	2.50	2.40	2.30	2.30
Visible Minority	8,445	8,899	9,663	n/a	12,441
Select Transportation to Work					
Public Transit	40%	38%	33%	n/a	34%
Walk	20%	20%	27%	n/a	28%
Bicycle	8%	7%	11%	n/a	11%
Household Income					
Average Household Income	\$41,090	\$54,530	\$60,279	n/a	\$79,525
Less than \$20,000	34%	25%	24%	n/a	22%
More than \$100,000	8%	16%	17%	n/a	22%
Mother Tongue					
Chinese	5,395	5,515	6,231	5,488	4,899
Portuguese	4,305	3,283	2,413	2,006	1,912
Italian	1,015	1,200	768	668	640

Source: Statistics Canada, Environics

Findings include:

- No adjustment has been made for under counting except for 2013 estimates by Environics.
- There has been a modest population and household count increase from 1996 to 2013.
- The proportion of young adults has remained relatively high and constant, increasing to 45% in 2013.
- The proportion of children under 20 years of age has decreased.
- The proportion of seniors over 60 years of age has remained relatively constant, falling slightly in 2013.
- Household sizes have been decreasing but are still relatively high. This is due to the larger households in Alexandra Park and adult children living at home in many older households.
- Average household income is low but polarized. East of Bathurst it is relatively low but west of Bathurst includes gentrified households. Households earning more than \$100,000 has increased to 22% of total households from 8% in 1996.
- There is a high proportion of visible minority households including a high proportion of Chinese. In addition, there are older generation Italian and Portuguese households in the area.
- The number of residents identifying Portuguese as their mother tongue has declined significantly. Similarly, Italian identified mother tongue residents has declined. Those who identify Chinese as mother tongue had increased from 1996 to 2006, but have recently declined.

Trade Area Review

	Primary Trade Area: 800 m	800 m to 1,200 m	1,200 m to 1,500 m	Total Area
Population 2013	23,935	22,389	27,631	73,955
Annualized Change (2008-2013)	0.8%	1.0%	2.7%	1.3%
Average Household Income	\$79,525	\$85,877	\$96,952	\$88,340

Source: Statistics Canada, Environics

- There is a sizeable local population within 800 m of the proposed site.
- In the past, there were higher growth rates outside of the Primary Trade Area.
- Higher household incomes are outside the Primary Trade Area.

Detailed findings on smaller trade areas surrounding the proposed site are provided in final section of this report.

Alexandra Park Redevelopment

The Master Plan calls for replacing 333 subsidized apartments and townhouses, refurbishing 473 subsidized apartments, and building 1,540 market rate condos over 10 to 15 years. The first project (SQ) at 20 Cameron Street is 14 storeys and includes approximately 241 units. The anticipated completion is 2017. SQ is located just outside the Primary Trade Area.

3.0 Competitive Positioning

The following assesses Kensington Market, Trinity Bellwoods, and Little Italy. These were included in the assessment by Urban Metrics. Urban Metrics included a review of Chinatown.

The vitality and viability aspects of the three shopping districts are provided in Appendix A and B of the Retail Study. This included a review of vacancies, rents, vacant unit turnover, and positioning, among other attributes.

This was complemented by consumer satisfaction surveys for Kensington Market and Little Italy (Appendix B of the Retail Study).

Overall, there was a well recognized vision and brand for Kensington Market and Little Italy. Trinity Bellwoods is less well known and is an area that is transitioning away from home improvement type stores to more food services, specialty food, and other specialized goods/services.

In addition, there is about 68,500 sq. ft. (6,366 m²) of retail along Bathurst Street from College Street to Dundas Street West. This includes the funeral home and the retail in Toronto Western Hospital.

4.0 Growth Specialty Food

There has been growth in the food sector including fresh fruit/vegetables, fresh meat and poultry, fresh fish and other seafood, dairy products and eggs, and prepared foods. Annualized growth for bakery products is relatively high. There is a special focus on raw foods within the supermarket and specialty food category so this additional analysis is provided.

Growth of Select Fresh Specialty Food Products and Total Food - Canada (\$ million)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	Annualized Growth
Fresh Meat and Poultry	\$9,204	\$9,408	\$9,474	\$9,569	\$10,117	\$10,518	\$11,301	\$11,913	\$12,070	
Growth		2.2%	0.7%	1.0%	5.7%	4.0%	7.4%	5.4%	1.3%	3.4%
Fresh Fish and Other Seafood	\$1,002	\$1,103	\$1,207	\$1,236	\$1,355	\$1,364	\$1,425	\$1,441	\$1,502	
Growth		10.0%	9.4%	2.4%	9.6%	0.7%	4.5%	1.1%	4.3%	5.2%
Fresh Fruits and Vegetables	\$8,274	\$8,738	\$9,057	\$9,648	\$10,318	\$11,078	\$11,701	\$12,369	\$12,631	
Growth		5.6%	3.6%	6.5%	6.9%	7.4%	5.6%	5.7%	2.1%	5.4%
Dairy Products and Eggs	\$7,645	\$8,150	\$8,512	\$8,977	\$9,723	\$10,529	\$10,663	\$11,001	\$11,312	
Growth		6.6%	4.4%	5.5%	8.3%	8.3%	1.3%	3.2%	2.8%	5.0%
Bakery Products	\$3,948	\$4,090	\$4,293	\$4,529	\$5,046	\$5,229	\$5,543	\$5,583	\$5,456	
Growth		3.6%	5.0%	5.5%	11.4%	3.6%	6.0%	0.7%	-2.3%	4.1%
Deli, Salad Bar, Prepared Foods	\$3,249	\$3,474	\$3,654	\$3,813	\$4,116	\$4,116	\$4,441	\$4,709	\$5,037	
Growth		6.9%	5.2%	4.3%	7.9%	0.0%	7.9%	6.0%	7.0%	5.6%
Total Food (excl. Beverages)	\$56,897	\$59,753	\$62,799	\$65,872	\$70,251	\$74,204	\$78,044	\$80,342	\$82,175	
Growth		5.0%	5.1%	4.9%	6.6%	5.6%	5.2%	2.9%	2.3%	4.7%

Source: Statistics Canada

Specialty food stores have been gaining sales and market share.

Market Share of Food and Beverage Stores – Ontario

	2004	2005	2006	2007	2008	2009	2010	2011	2012
Supermarkets and Other Grocery	70.3%	70.6%	70.0%	69.1%	69.9%	70.5%	69.9%	69.4%	69.2%
Convenience Stores	5.3%	5.3%	5.5%	5.8%	5.5%	5.5%	5.7%	5.4%	5.4%
Specialty Food Stores	3.8%	3.8%	4.2%	4.7%	4.8%	4.9%	4.9%	5.2%	5.5%
Beer, Wine, and Liquor Stores	20.6%	20.3%	20.4%	20.5%	19.8%	19.1%	19.5%	19.9%	19.9%

Source: Statistics Canada

Kensington Market is feeling the pressure from supermarkets. There is also pressure from elsewhere in the City as more specialized food stores and farmers' markets establish themselves in each shopping district including raw food categories. Overall, there are increased market share and sales for specialty food stores.

5.0 Competitive Positioning: Specialty Food

Kensington Market

- According to Urban Metrics, there are two supermarket/grocery store operations and 39 convenience/specialty food store operations (note that J.C. Williams Group's review of Ryerson University's Centre for the Study of Commercial Activity (CSCA) data includes three supermarket/grocery and 42 convenience, specialty foods, or food manufacturing/selling retailers). There is difficulty assigning a business category to many businesses that include both manufacturing/baking, wholesale/catering, and food services all at the same location (e.g., Wanda's Pie in the Sky is wholesaler/caterer, restaurants, and specialty food store to the public). The range of food related retail extends from higher end food and food products to value oriented food and food products. There are some retailers selling goods that are priced higher based on convenience factors but are not higher quality goods (e.g., convenience type stores selling milk and bread).

According to the CSCA data, there are 19 fewer food based retailers (including wholesalers) in Kensington Market in 2012 compared to 2002. However, it is not a consistent decline in businesses. There was a constant flow of businesses closing and new ones opening but overall more food based retailers closed or relocated than opened. Although there was a natural evolution toward fewer food based retailers in Kensington Market, it is still a major function of the retail district.

From 1993 to 2012, 38 new food based businesses opened and are still in operation in 2012. The openings were spread out over the following years.

New Food Based Businesses Opening and Still In Operation in 2012

1994	1995	1996	1997	1998	1999
1	2	2	3	4	4
2000	2001	2002	2003	2004	2005
2	1	2	1	4	2
2006	2007	2008	2009	2010	2011
3	0	0	2	2	3

There were 50 food based businesses in 2002 and of those 30 were still in operation in 2012. There are numerous reasons for their closure, not specifically competition.

As stated in J.C. Williams Group's review of Kensington Market (in the Retail Study), the area is reliant on a few specialized categories for its success including food, used specialty clothing and, to a certain extent, food services. It is important to keep in mind that Kensington Market is not a traditional main street shopping district. It is located off the main street. On summer weekends the streets are closed to vehicular traffic. It is not a market like St. Lawrence Market that is almost 100% food based, and operated by a single agency. As stated, there are specializations and there are businesses that sell similar goods/services (e.g., several fruit and vegetable vendors, several industrial work wear vendors, several similar used clothing vendors, etc.) that together create the critical mass that draws visitors to shop. The specialization is a strength but it is also a weakness if tastes change or if several of them close at once. A new food venture will have an impact. But similarly, any new food business may have an impact on some Kensington Market related food businesses whether located inside the market area or on the periphery.

Another interesting fact is that the market draws visitors from a wide geographic area. This is confirmed in both the Urban Metrics intercept survey and J.C. Williams Group's consumer satisfaction survey. It is evident that visitors come for the unique products and services and for the overall atmosphere. According to the Urban Metrics survey, thirty-four percent of Saturday/Sunday visitors stated their primary purpose was just visiting. In addition, in reviewing the other business districts and malls that Kensington Market visitors go to, there is a wide range of business districts and malls including Dufferin Mall, Toronto Eaton Centre, St. Lawrence Market, Little Italy, Queen Street West, etc. Many Kensington Market visitors are in contact with other food shopping areas including specialty food and major supermarkets. Despite their high level of mobility to visit and shop other areas, they choose to visit and buy from Kensington Market for a variety of reasons (product they want, quality, service, the atmosphere, friends, tradition, etc.).

Cross Shopping Kensington Market Visitors

Where Else do Visitors to Kensington Market Shop ?	Those Who Chose Kensington Market as Primary Main Street to Visit of the Choices Offered	Any Visitor to Kensington in Past 6 Months
Toronto Eaton Centre	66.7%	80.0%
Dufferin Mall	33.3%	55.2%
Yonge Street Downtown	29.6%	53.6%
Queen Street West (Spadina)	18.5%	52.8%
St. Lawrence Market	40.7%	49.6%
Queen Street West (Trinity Bellwoods)	25.9%	47.2%
Little Italy/College Street	25.9%	46.4%
Queen Street West (Bathurst Street)	33.3%	44.0%
College Park	33.3%	44.0%
Yorkdale	14.8%	40.8%
Bloor Yorkville	22.2%	38.4%
Fashion District King Street West	25.9%	37.6%
Bloor Annex	33.3%	36.8%
PATH	22.2%	36.8%
IKEA	14.8%	32.8%
Queen Street West (Dufferin)	18.5%	31.2%
Liberty Village	25.9%	31.2%
King Street West (Bathurst Street)	22.2%	30.4%
Korea Town	25.9%	29.6%
Mirvish Village	25.9%	29.6%
Parkdale	22.2%	27.2%
Dundas Street West (Bathurst)	14.8%	25.6%
Church Wellesley	11.1%	24.0%
Sherway Gardens	3.7%	24.0%
The Junction	18.5%	20.8%
Walmart St. Clair Avenue West	11.1%	20.8%
Harbord Village	11.1%	19.2%
Bloor West Village	14.8%	19.2%
King Street West (Dufferin)	14.8%	18.4%
Costco Queensway	3.7%	16.0%
Dupont Street (Spadina Avenue)	11.1%	15.2%
Dupont Street (Bathurst/Christie)	7.4%	13.6%
College Promenade	3.7%	12.8%
Stockyards	14.8%	12.8%
Shops at Don Mills	7.4%	12.0%

Survey of residents from Humber River to Yonge Street and St. Clair Avenue West to Lake Ontario

Source: J.C. Williams Group, 2013

Little Italy

- According to the Urban Metrics audit, there is one supermarket/grocery and 11 convenience and specialty food store operations.
- This matches the CSCA audit in 2012. It was noted that the number of specialty food stores has decreased from 2002 to 2012 from 18 to 11 businesses. In 2002 there were five meat markets and now there are two. There are fewer fruit and vegetable retailers, and fewer traditional convenience stores.

Trinity Bellwoods

- The main street area has been transitioning away from both ethnic based businesses (e.g., Portuguese bakeries) and home improvement type retail (e.g., lumber supplies, flooring) to more neighbourhood goods and services including cafes, restaurants, and small specialty home furnishing items.
- Vacancy is still a concern in the area.
- Rents are lower compared to Little Italy, Kensington Market, and Queen Street West (at Bathurst Street).
- There are five convenience and specialty food stores including a range from 7/11 to Odile Chocolate.
- Several specialty food stores closed including Pare Vittoria (closed in 2003), Portuguese Fish Market (closed in 2003), and Portuguese Butcher and Grocery (closed in 2012). However, Caldense Bakery opened in 2008.

Chinatown

According to the Urban Metrics audit, there are four supermarket/grocery store operations and 29 convenience store/specialty food store operations. Many of the operations are focused on Chinese food preparation products.

Summary

As stated, the number of specialty food stores has been increasing in other parts of the City. Within these shopping districts, the number of specialty food stores has been declining. In part this is due to changing ethnic composition of the local neighbourhoods. There are fewer Portuguese and Italian (and, to a certain extent, fewer Chinese) residents as identified by Mother Tongue. The shopping districts are re-adjusting to changing local demographic conditions.

6.0 Competitive Positioning: Supermarket

As stated, within the 800 m Primary Trade Area there is no current supermarket. There are several specialty food stores in all the shopping districts as well as grocery stores in Kensington Market.

There is a proposed supermarket at 292 College Street at approximately 20,000 sq. ft. (1,859 m²) that may be a Loblaws.

In Kensington Market, there are the following grocery stores:

- Zimmerman's Freshmart
- Sam's Food Store (convenience store)

Near the proposed site there are:

- Metro: 735 College Street at Shaw Street
- Loblaws: 585 Queen Street West at Portland Street

Other supermarkets nearby include:

- Metro: 425 Bloor Street West

Other grocery includes:

- P.A.T.: 675 Bloor Street West (Korea Town)
- Sobeys Express: 503 Bloor Street West
- Fiesta Farms: 200 Christie Street

7.0 Capture Rates

After a consistent trade area analysis, the other major factor that can affect the retail impact assessment is the assigned capture rate. The capture rate is the proportion of the trade area spending that goes to (is captured by) the store under review. For convenience retail, the capture rate can be higher as the retail is meant to appeal and serve the local residents. This includes grocery stores, supermarkets, pharmacies, etc. For comparison retail including apparel stores, furniture stores, and general merchandise stores including department stores the capture rates are smaller to reflect the broader choice.

According to the Urban Metrics consumer survey and analysis:

- Of the supermarket expenditures, local supermarkets such as the two Metros and the Loblaws at Queen/Portland capture 32% of the supermarket expenditure. The rest is absorbed outside of the larger trade area at Dufferin Mall, Dupont Street or other locations.
- In the larger, Urban Metrics defined Primary Trade Area, residents spend \$13.2 million at Kensington Market. This represents 38% of all their grocery and other store expenditure (excludes supermarket expenditures). This is significant.
- On average over \$250 per resident is spent annually at small grocery stores, specialty food, alcohol stores, and convenience stores.
- Compared to the City of Toronto or Ontario average, local residents tend to spend more than average at specialty food store operations included in Kensington Market.
 - As a result, J.C. Williams Group reduced the supermarket share in the analysis from 70% to 65%.
 - This is consistent with the unweighted responses of the Urban Metrics survey.
 - In addition, it is clear from the Urban Metrics survey that local residents are leaving the area to buy groceries elsewhere such as at No Frills, FreshCo, Fiesta Farms, or supermarkets on Dupont Street.

8.0 Bathurst Street as a Food Destination

The number of supermarkets existing and proposed on or near Bathurst Street makes it a food destination. Loblaws will have four locations in close proximity (Dupont Street, College Street, Queen Street West, and Lake Shore Boulevard). At one time there was a proposed Whole Foods. In addition, specialty stores such as P.A.T. Central Market (Korean specialty grocery), and Sobeys Express are located nearby. This makes Bathurst Street a location to go to for food. To stop the outflow of sales from local residents to other food and beverage retailers outside the trade area, the assumption would be that the proposed development must offer a competitive alternative to those food based retailers such as at Dufferin Mall and on Dupont Street.

9.0 Not Directly Comparable to St. Lawrence Market Area

Many will cite that St. Lawrence Market remains a vibrant market despite the fact that many traditional supermarkets have opened nearby (Loblaws, Metro, Sobeys Urban, and No Frills).

This fact should be analyzed in conjunction with the high population growth and high household income growth that occurred in the area from 1996 to 2013.



Socio-Economic Characteristics of St. Lawrence Market Area

	1996	2001	2006	2011	2013
Population	6,255	10,482	12,747	15,275	16,704
Households	3,490	5,969	7,640	9,186	10,236
Person Per Household	1.8	1.7	1.6	1.7	1.6
Age: <20	14%	14%	12%	11%	12%
Age: 20 to 39	45%	42%	44%	46%	44%
Average Household Income	\$57,056	\$63,241	\$77,675	\$97,148	\$101,866
Household Income >\$100,000	9%	21%	20%		30%
Household Income : \$60,000 to \$99,999	18%	22%	26%		25%

Source: Statistics Canada Census and Environics 2013 Estimates

Salient findings from St. Lawrence Market area:

- Population has increased 2.5 times since 1996.
- The number of households has tripled.
- Household incomes have increased significantly, growing by 3.5 % annually.

J.C. Williams Group recommends caution should be used in making direct comparisons between St. Lawrence Market and Kensington Market.

10.0 Food Store Retail (FSR) Demand

The retail impact assessment is based on the following assumptions:

- Per capita income for the 800 m Primary Trade Area is slightly higher than that used by Urban Metrics and reflected in the analysis, resulting in a Primary Trade Area/Ontario income index of 94.167.
- The population growth to 2021 is similar to Urban Metrics at 0.92% annualized growth. The Master Plan proposed for Alexandra Park includes replacing 333 subsidized apartments and townhouses, refurbishing 473 subsidized apartments, and adding 1,540 market based condos. This will occur over the next ten to fifteen years.
- The same Food Store Retailer expenditure data is used by Urban Metrics: \$2,226/capita.
- The same Elasticity of Demand is used, resulting in a slightly higher FSR Expenditure Index to Province of 99.358.
- FSR annualized real growth rate of 0.25% was used, the same as Urban Metrics.
- As stated, Urban Metrics used a 70%/30% split in expenditure between supermarkets and grocery/other food store share. J.C. Williams Group chose to allow for a greater proportion for grocery/other food store. 65%/35% split was used in 2012 to reflect the presence of Kensington Market and the high number of specialty food stores and the lack of supermarkets in the area. Going forward the split is lowered to 70%/30% to account for the increased competition from a major supermarket and to put it at the Ontario average.
- As stated, 100% of the current sales from the Primary Trade Area would be considered leakage.
- Retaining 70% of the sales (this still allows for 30% outflow) and allowing for the proposed 20,000 sq. ft. (1,859 m²) supermarket at 292 College (\$6 million sales from Primary Trade Area) means that there is \$21 million available for the Primary Trade Area residents to support a new supermarket at 410-446 Bathurst Street.
- To the local residential demand additional sales come from local workers in the Primary Trade Area and other inflow from residents outside the Primary Trade Area: inflow and sales for office workers. Inflow is kept conservative at 15%.
- The local office worker population (primarily from the hospital and other nearby office commercial areas) and the proposed office workers on the subject site would support additional supermarket and pharmacy sales activity. It is estimated to be 11,345 daytime workers plus an additional 375 workers from the proposed development. The approximate 75,000 sq. ft. (6,970 m²) of office space in the proposed site could support 375 workers (measured at 200 sq. ft. per worker or 18 m² per worker). The \$900 expenditure per worker is based on J.C. Williams Group's work with Toronto area hospital and office workers.

- By 2021, there will be demand from the Primary Trade Area for \$28 million.
- The warranted space calculation is based on a higher sales productivity compared to Urban Metrics. Ranges of \$600 to \$800/sq. ft. (\$6,456 to \$8,608/m²) are used that are similar to Urban Metrics' calculations for other supermarkets nearby.
- At \$700/sq. ft. (7,532/m²), there is demand for 40,575 sq. ft. (3,771 m²) of supermarket space.
- The estimated loss from existing grocery/other food store retailers of approximately \$1.29 million from the Primary Trade Area. This is based on \$18.24 million growing by 0.25% annually to 2021 (\$18.65 million) less estimated sales in 2021 of \$17.36 million = \$1.29 million. Through population increase the loss is narrowed to this level by 2021.

Scenarios

Altering some of the assumptions produces the following results:

- Increasing the Primary Trade Area market share to 75% increases demand to 43,902 sq. ft. (4,080 m²).
- Increasing the inflow to 20% would increase demand to 42,239 sq. ft. (3,926 m²) and increasing inflow to 25% would increase demand to 43,902 sq. ft. (4,080 m²).
- Combining all proposed scenario changes increases demand to 47,519 sq. ft. (4,415 m²).

Conclusion

Overall, a large supermarket could be supported by 2021. Altering some of the demand assumptions makes a 4,200 m² supermarket within the realm of possibilities. Note that this excludes space required for back of house and common areas. The demand is primarily related to selling area within the retailer.

Supermarkets located outside of the 800 m Primary Trade Area will be impacted, but the goal will be to recapture those sales that Urban Metrics determined were occurring well outside their larger trade area.

There will be an impact on existing small specialty food retailers and grocery stores. Sales could be up to \$1.29 million less by 2021 compared to what they would be for these retailers with all other things being constant and no other competition entering the market. The loss could be from grocery stores, fruit and vegetable vendors, specialty meat stores, and/or convenience stores). This would probably happen in the first few years that the new supermarket opened. This would not detract from Kensington Market's ability to function as a vibrant business district. Urban Metrics estimates the sales of grocery and other food stores in Kensington Market to be \$33 million per year for the 39 convenience/specialty food store operations. In addition, there are other food related businesses classified as wholesalers and bakeries/manufacturers that also derive income from wholesale and catering that are not to consumers. However, under a unique scenario whereby the potential loss of \$1.29 million only affected Kensington Market, this would be less than 4% of sales. However, other districts such as Little Italy and Trinity Bellwoods should be factored into this assessment.

The potential loss will depend on the exact merchandising of the stores in the development. If the supermarket is more discount oriented and/or if there is a greater selection of ethnic or unique foods, then it could be more competitive. However, the planning controls (zoning) cannot account for merchandise mix within the store. J.C. Williams Group believes that the impact could occur whether it is a 3,000 m² and 3,500 m² or a 4,200 m² supermarket. The additional space in larger supermarkets tends to be devoted to increased prepared foods, food services, and pharmacy type items as well as some kitchen supply items (some offer clothing such as Loblaws). For prepared food and food services there is little similarity between a Kensington Market or a Little Italy unique restaurant and food service provided in a supermarket.

FSR Demand and Impact

	2012		
Per Capita Expenditure	\$2,226		
	2012	2016	2021
Primary Trade Area			
Income Index to Province	94.167		
FSR Expenditure Index to Province	99.358		
Per Capita FSR Expenditure	\$2,212	\$2,234	\$2,262
Population	23,558	24,437	25,582
Total FSR Potential (\$ million)	\$52.10	\$54.59	\$57.87
Supermarket Share	65%	70%	70%
Grocery and Other Food Store Share	35%	30%	30%
Supermarket Share (\$ million)	\$33.87	\$38.21	\$40.51
Grocery and Other Food Store Share (\$ million)	\$18.24	\$16.38	\$17.36
Total (\$ million)	\$52.10	\$54.59	\$57.87
Supermarket Assessment			
Supermarket Outflow (outside 800 m trade area)	100%	30%	30%
Total Less Outflow	\$0.00	\$26.75	\$28.35
In Trade Area Proposed Supermarket College		\$5.00	\$5.06
Total Less Outflow and Proposed Supermarket College		\$21.75	\$23.29
In Flow 15%		\$3.26	\$3.49
Local Workers 15% of 11,720 workers \$900 annually		\$1.60	\$1.62
Total Demand		\$26.61	\$28.40
Warranted Additional Sq. Ft.			
@ \$600/sq. ft.		44,352	47,337
@ \$700/sq. ft.		38,016	40,575
@ \$800/sq. ft.		33,264	35,503

11.0 Health and Personal Care

As most health and personal care stores are under 3,500 m² (most are under 1,800 m²), there is little need to review the demand and impact from health and personal care stores. This includes retailers such as Shoppers Drug Mart, Sephora, optical stores, etc.

Urban Metrics states that health care and pharmacy expenditure tend to be made very close to residence. However, the review by Urban Metrics showed that with the larger trade area, demand would require relying on 50% of sales to come from their large Primary Trade Area of approximately 50,000 to 55,000 residents and a further 50% sales to come from the 35,000 to 40,000 residents in their Secondary Trade Area. In addition, there is a reliance on an additional 20% inflow outside the Primary and Secondary Trade Area. This is equivalent of stating that local residents in the very large Primary Trade Area would only support 41% of the sales volume. This would be a risky situation for a proposed health and personal care store.

The assumption is that a new pharmacy would recapture a proportion of the outflow. However, the consumer research does not indicate whether the outflow is due to consumers who are not satisfied with the current stores and are shopping elsewhere or if consumers are making these purchases closer to work or for some other reason.

J.C. Williams Group believes that there is over 50,000 sq. ft. (4,647 m²) of health and personal care type retail based on the retail audits conducted by Urban Metrics. There are two Shoppers Drug Mart locations in Little Italy as well as one in the hospital, one on Queen Street West, and several IDA locations. As stated, Rexall recently opened at Spadina Avenue and College Street. This is in excess of the supportable demand from local Primary Trade Area residents within 800 m.

The net increase in the population would result in a low level of new demand. Adding more office space and, if it was similarly focused on health and wellness, would add a small amount to the overall demand.

This is an instance where the retail impact assessment needs further analysis on the type of retail and the vision for the neighbourhood area. The proximity to Toronto Western Hospital and the numerous medical clinics and pharmacies in Little Italy indicate that the area is a draw for health related goods and services. There is a significant amount of space devoted to retail focused on health and personal care stores. The demand analysis indicates that the retailers draw from outside of the local primary trade area to support the level of sales activity.

Many hospitals have a lack of space and any additional office type space could be absorbed by medical and health related services.

Health and Personal Care Stores

	2012		
Per Capita Expenditure	\$936		
	2012	2016	2021
Primary Trade Area			
Income Index to Province	94.167		
Health and Personal Care Expenditure Index to Province	98.25		
Per Capita HPC Expenditure	\$920	\$938	\$962
Population	23,558	24,437	25,582
Total HPC Potential (\$ million)	\$21.66	\$22.93	\$24.61
Health and Personal Care Store			
Existing Market Share	80%	80%	80%
Existing Market Share	\$17.33	\$18.34	\$19.68
Total Less Existing Market Share	\$4.33	\$4.59	\$4.92
Net Increase Population - Demand		\$1.01	\$2.35
Local workers 30% capture rate for 375 workers @ 450		\$0.10	\$0.05
Total		\$1.11	\$2.40
Warranted Additional Sq. Ft.			
@ \$600/sq. ft.		1,852	4,006
@ \$700/sq. ft.		1,588	3,434
@ \$800/sq. ft.		1,389	3,005

There may be demand for a combination of a small pharmacy, optical store, beauty supply store, etc. However, as indicated, it may be argued that the location is a health centre and would draw from beyond several trade areas to support a larger pharmacy and health related function.

For example, should the upper storeys of the proposed development be doctor's offices and specialized health services, there may be demand for a pharmacy and other health related retail.

Conclusion

The retail impact assessment by itself is not enough to prove or disprove that a health care and personal care operation would be warranted or not. Additional information on the nature of the development related to health and personal care stores should be conducted to assess if this category could be supported in the development.

12.0 Department Stores

According to the consumer survey, the highest Department Store market share capture in Urban Metrics' Primary Trade Area was:

- The Bay (Downtown) 25%
- Walmart Supercentre (Dufferin Mall) 24%
- Sears (Toronto Eaton Centre) 16%

J.C. Williams Group's research indicated that Yorkdale and Sherway Gardens are well visited by local residents. This would include visits to these department stores.

The Urban Metrics' assessment of demand for Department Stores required 40% capture rate by the Primary Trade Area and 30% capture rate by the Secondary Trade Area to support a new department store at this location. This is very high. As stated, the other department stores do not command similar capture rates. In addition, it is a leap to assume that one department store on Bathurst would draw that type of capture rate when the other department stores are associated with major malls that include other anchors and fashion apparel to draw visitors for additional shopping.

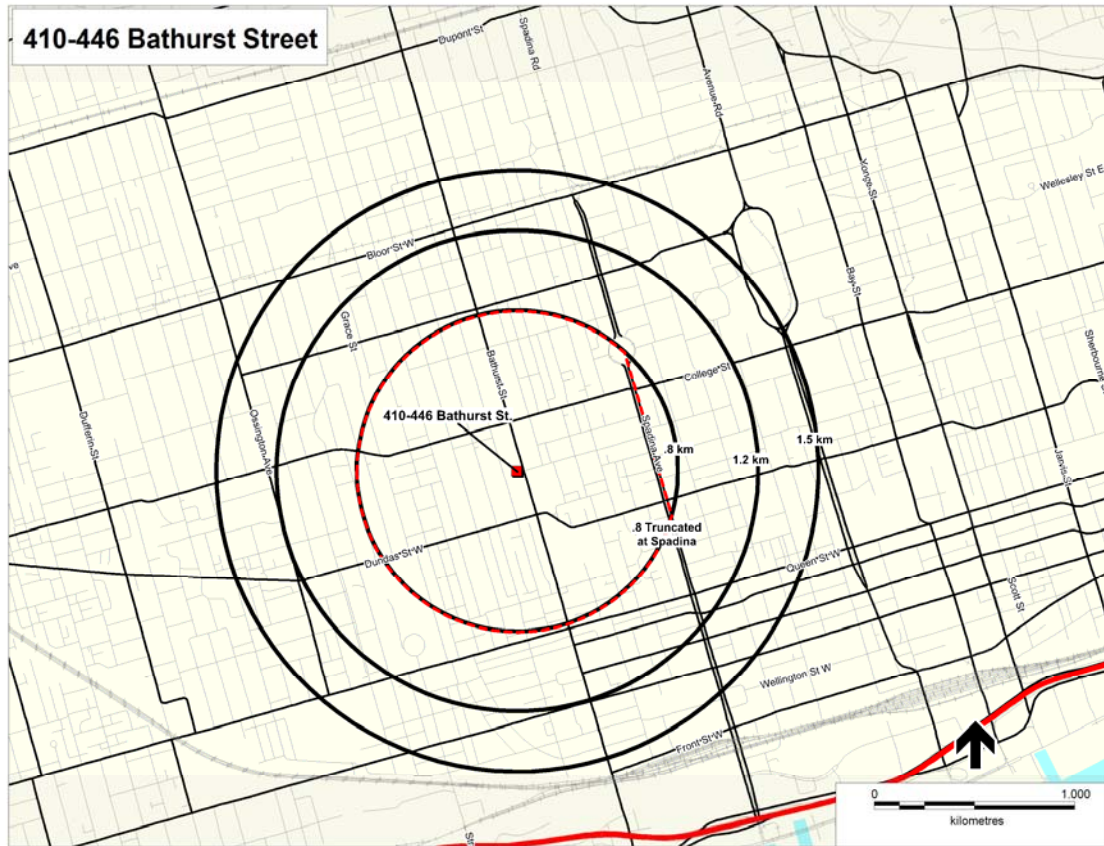
Given the three trade areas surrounding the proposed site (see following page), it will be difficult to prove there is sufficient demand for a department store given the range of department stores nearby.

However, based on the retail impact study parameters and given that there are no other major department stores except for Honest Ed's nearby (classified as an Other General Merchandise), it is difficult to determine impact. As stated, the demand analysis would not be plausible given the high capture rates that would be required to support that amount of square footage.

The retail impact assessment is based on the following assumptions:

- Department stores are comparison type goods and would rely on a greater trade area than supermarkets. Three trade areas have been used for the analysis.

Three Trade Areas



- Income index is 94.167 for the Primary Trade Area, 100.8 for the Secondary Trade Area, and 113.7 for the Tertiary Trade Area (compared to Ontario household income).
- Total trade areas represent 71,348 residents. This is less than the combined trade areas for Urban Metrics but still a sizeable population.
- Annualized population growth is estimated to be 0.92% for the Primary Trade Area, 1.2% for the Secondary Trade Area, and 2.7% for the Tertiary Trade Area.

- It is assumed that the development would capture 35% of Primary Trade Area, 25% of Secondary Trade Area, and 15% of Tertiary Trade Area. These are reasonable capture rates.
- This would translate into demand for 25,000 to 30,000 sq. ft. (2,323 to 2,788 m²) of department store space. This would be a viable size within the proposed development. However, most department stores in Toronto do not operate on this small scale.
- There would be an impact on smaller stores such as apparel and industrial work wear retailers and general merchandise stores such as Dollarama, Honest Ed's, convenience stores, etc., but it is difficult to determine the exact impact; however, it could be \$5 to \$8 million in sales (20% of sales volume).
- Attaining the sales required to sustain a Department Store of over 9,000 m² would require a much larger trade area. The wider trade area would then necessitate a retail impact study that includes Dufferin Mall and potentially Toronto Eaton Centre, The Bay, and Canadian Tire. The result becomes a complicated assessment.

Conclusion

A relatively small department store of approximately 2,788 m² could be supported. However, few department stores operate on this scale. A larger department store would require a more indepth analysis that takes into consideration the potential impact on Dufferin Mall, Downtown Toronto and Toronto Eaton Centre, among other retail locations.

Department Store Demand

	Primary Trade Area			Secondary Trade Area			Tertiary Trade Area			Total		
	2012			2012			2012					
Per Capita Expenditure	\$812			\$812			\$812					
	2012	2016	2021	2012	2016	2021	2012	2016	2021	2012	2016	2021
Primary Trade Area												
Income Index to Province	94.167			100.8			113.7					
Department Store Expenditure Index to Province	98.25			100.2			104.11					
Per Capita Department Store Expenditure	\$798	\$806	\$816	\$814	\$822	\$832	\$845	\$854	\$865			
Population	23,558	24,437	25,582	21,863	22,931	24,341	25,927	28,843	32,952	71,348	76,211	82,875
Total Department Store Potential (\$ million)	\$18.79	\$19.69	\$20.87	\$17.79	\$18.84	\$20.25	\$21.92	\$24.63	\$28.49	\$58.50	\$63.16	\$69.62
410-446 Bathurst Capture Rate		25%	25%		20%	20%		12%	12%			
410-446 Bathurst Capture Rate (\$ million)		\$4.92	\$5.22		\$3.77	\$4.05		\$2.96	\$3.42		\$11.65	\$12.69
In Flow 15%		\$0.74	\$0.78		\$0.57	\$0.61		\$0.44	\$0.51		\$1.75	\$1.90
Total Demand		\$5.66	\$6.00		\$4.33	\$4.66		\$3.40	\$3.93		\$13.39	\$14.59
Warranted Additional Sq. Ft.												
@ \$450/sq. ft.											29,765	32,425
@ \$550/sq. ft.											24,353	26,529
@ \$600/sq. ft.											22,324	24,318

14.0 Additional Criteria

- Increased sustained vacancy: unlikely. Changing ethnicity characteristics are causing a change in the specialty food retailers in the area, which may have longer term consequences but are not directly linked to the proposed development. Annual sales of existing grocery and other foods in 2021 may be \$1.29 million less than they would have been without a supermarket addition.
- Planned function: questions include: would slightly less food related businesses in Kensington Market change its overall appeal? Would it still be a desirable place to visit? J.C. Williams Group believes that the overall appeal of Kensington Market is its ability to attract a unique visitor by the merchandise mix and overall atmosphere. Goods and services can be found elsewhere but chain stores cannot replicate the experience. Visitation is local but also regional and these visitors seek out Kensington Market for goods and services and also for the social and cultural atmosphere. Overall, the viability as unique, experiential type shopping districts is not affected.
- Will it deter other retailers from locating on Bathurst Street? No. It could spur other retailers to want to locate close to the grocery store; such as an LCBO, banks, or quick service eateries. It may deter other supermarkets from locating nearby.
- Will it spur economic growth of the area? See above – likely to attract other businesses to take advantage of the grocery store traffic.
- The proposed development will cause competition for the Toronto Western Hospital retailers and others nearby that are quick food service and health related goods/services.
- The proposed new space should not be greater than 10% of the space in the nearby retail areas: overall, the proposed development of 7,950 m² is less than the combined retail areas of Kensington Market, Trinity Bellwoods, and Little Italy. It is estimated that the three areas have just over 1 million sq. ft. (92,936 m²) of retail space. Even though there is 68,500 sq. ft. (6,366 m²) of retail on the stretch of Bathurst Street, it is not a well functioning shopping district by itself (yet).
- Flexibility of the retail space for other uses: it is envisioned that the second floor retail space could be reconfigured to other retail or office/commercial space if required at some point in the future.

15.0 Summary

This section summarizes how the recommendations in the Retail Study relate to the 410-446 Bathurst St proposal.

Limit of 1,800 m² of new retail space

- This is the existing threshold that has served the City of Toronto prior to the analysis.
- Less than 1,800 m² is a good threshold for new retail development for total size.
- The preference is smaller units such as 150 m², 300 m² and 500 m² within the 1,800m² total retail development. However, if one retail unit was 1,800 m² this would allow for small grocery stores and small supermarkets to fit into the shopping districts with ease along with a home furnishings retailers such as CB2.
- For retail units less than 1,800 m², using a retail impact assessment as the only means to determine the viability of retail is difficult. Small changes in the demand can sway the calculations. As stated, retail impact studies should be used for directional purposes and in conjunction with other measures.
- The review illustrated this point when assessing health and personal care stores. Because there was a significant amount of health and personal care stores in the local area, the initial finding was that there is very little demand for additional space. However, taking the assessment beyond just a retail impact assessment showed that the area was a health and wellness district and that in some instances more retail focused on health could be warranted as it creates increased critical mass.

Redeveloped Retail Site

- A redeveloped retail site is allowed to replace the existing retail as of 1993 and add 1,800 m². The aim of this regulation is to encourage redevelopment of retail areas for better uses. In the supermarket and department store examples for 410-446 Bathurst Street, the allowable retail as per the regulations would be over 4,100 m².
- The retail impact study illustrated that with a smaller, pedestrian focused trade area than previously used, a supermarket over 3,500 m² could be supported. The impact would be very small on the other specialty food stores and grocery stores. A department store of a smaller size could be supported.
- The use of the existing retail space in 1993 is still relevant for a number of reasons. 1993 was the approximate year that there was an increased number of larger format retailers that entered the Toronto market. The rule is to continue to encourage redevelopment of these mixed use areas. The second rationale is that the 1,800 m² threshold is not a cap but a threshold. It is only a point at which the City of Toronto wants to assess further the viability of the retail development application.

Maximum Store Size Threshold

- The assessment of the Bathurst St proposal assessed the proposed maximum store size of 3,500 m².
- As stated, this was not a fixed size limit, but a threshold beyond which the City of Toronto would want to review in more detail the retail development proposal. Many retailers that fit into the mixed use streets (outside of the Central Core) would fit into 3,500 m² or less. The primary concern is larger supermarkets and general merchandise stores (some leisure retailers such as sporting goods also fit here).
- The assessment illustrated that for convenience goods such as a large supermarket, the prescribed 800 m Primary Trade Area works well. The stretch of Bathurst Street was designated a mixed-use corridor and the corresponding neighbourhood had over 23,000 residents. This trade area can support several supermarkets and specialty food stores as well as allow for outflow to other nearby supermarkets in adjacent shopping districts.
- The review of the department store demand and impact was less straightforward. The retail impact assessment stretched out into three trade areas. This included a population of approximately 74,000 residents. However, within that trade area there were no other department stores, so technically there was no significant impact on trade area department stores. Based on conservative capture rates, the demand for retail space was limited (less than 3,000 m²). In addition, it was determined there would be an impact on other retailers that sell similar items.
- To develop a trade area delineation plan that would support a department store over 9,000 m² would require a much larger trade area. This would bring the proposed development trade areas into contact with Dufferin Mall and Downtown. Then the retail impact study becomes more complicated.

Other Criteria Measures

- Other measures were also used to assess the vitality and viability of the adjacent shopping districts. With respect to the supermarket development proposal, J.C. Williams Group determined that while some retailers may lose sales, the function of the districts was still viable, and the impact was acceptable. In addition, the total development was less than 10% of the surrounding retail area so it re-enforced the notion of gradual change to the neighbourhoods (rather than large shocks that have to be absorbed over a longer period of time).

A final note is that the study did not specifically address the Floor Space Index and other design elements that are part of the City's review process.

16.0 Other Target Markets and Factors That Influence Demand

Other target markets and sources of potential retail demand can include the following:

Transit

- The area is well served with public transit options including the Bathurst LRT (511) as well as College (506) and Dundas (505).
- Daily passenger volume:
 - Bathurst LRT 511: 17,600 (2011)
 - Carlton/College 506: 40,900
 - Dundas 505: 31,900

Toronto Western Hospital

- 239-bed hospital (80,000 overnight patients per year)
- Over 50,000 emergency room visits per year
- Number of day patients (n/a)
- Staff (n/a)
- Retail: extensive food, health, and convenience offering
 - Shopper's Drug Mart, Subway, Tim Hortons, Second Cup, Asian Gourmet, Bagel Stop, Booster Juice, Druxy's, Jerk Chicken, Mix It Up, Mr. Sub, Soup It Up, Sushi by Bento Nouveau, Panzerotto Pizza, flowers, ATM, vending, and eye care services

Education

- Randolph Academy: 134 enrollment
- Central Tech (Secondary School): 1,785 (2008)
- King Edward Elementary School
- Ryerson Elementary School

Community

- Scadding Court Community Centre
- Scadding Court library

Air Passengers – Billy Bishop Airport

- 2.45 million passengers annually (2012)

Nearby Markets

- Kensington Market
- Market 707
- Tuesday: Trinity Bellwoods Park
- Wednesday: Bloor Borden
- Thursday: Dufferin Grove
- Saturday: The Stop Farmers' Market, Wychwood Barns
- Sunday: The Brewery Market, Wychwood Barns

Theatre

Theatre	Address	Venue	Seating Capacity
Tarragon Theatre	30 Bridgman Avenue	Main	205
		Extra Space	113
		Rehearsal	60
		Total	378
Bathurst Street Theatre	736 Bathurst Street		500
Annex Theatre	730 Bathurst Street		100
Factory Theatre	125 Bathurst Street	Main	200
		Studio	100
		Rehearsal Hall	50
		Total	350
Theatre Passe Muraille	Ryerson Street	Main Space	185
		Backspace	55
		Total	240
Total Space			1,568
Estimated Attendance			130,000+

Cinema

- Royal Cinema - one screen: College Street (revue style cinema)
- Cineforum - one screen, 20 seats: 463 Bathurst, alternative (residential conversion)

Socio Economics of Smaller Trade Areas

	Palmerston	Harbord	Little Italy	Kensington	Trinity Bellwoods	Alexandra Park
Population 2013 (Projected)	6,433	6,477	3,605	4,034	5,208	4,768
Annual Growth Rate (2008- 2013)	-0.1%	0.6%	0.4%	0.5%	0.6%	0.6%
Households 2013 (Projected)	3,125	2,905	1,545	1,819	1,923	1,898
Annual Growth Rate (2008- 2013)	0.4%	1.1%	2.2%	1.2%	0.2%	1.6%
Persons per household	2.04	2.04	2.31	2.13	2.69	2.48
Household Income						
<\$20,000	16.4%	18.1%	15.7%	29.0%	14.7%	34.8%
\$20,000-\$39,999	19.2%	18.1%	18.3%	23.4%	16.9%	28.8%
\$40,000-\$59,999	17.9%	15.2%	16.1%	14.7%	17.4%	16.3%
\$60,000-\$79,999	12.5%	12.6%	12.0%	6.8%	14.8%	8.9%
\$80,000-\$99,999	8.0%	10.2%	7.7%	7.0%	12.8%	4.7%
\$100,000-\$149,999	12.9%	12.0%	13.7%	13.7%	14.7%	4.8%
\$150,000-\$200,000	6.5%	4.0%	10.2%	3.2%	3.4%	0.6%
\$200,000+	6.8%	9.9%	6.3%	2.1%	5.4%	1.2%
Average income	\$93,694	\$97,438	\$94,631	\$59,210	\$86,451	\$43,502
Property Ownership						
Owned	43.7%	43.7%	56.0%	40.8%	57.3%	27.1%
Rented	56.3%	56.3%	44.0%	59.2%	42.7%	72.9%
Age						
0-9	5.6%	4.8%	7.4%	4.4%	8.2%	8.4%
10-19	4.9%	4.5%	5.6%	5.1%	6.5%	11.8%
20-29	25.5%	30.7%	21.9%	27.1%	20.1%	22.8%
30-39	24.0%	19.8%	21.8%	19.8%	20.9%	17.8%
40-49	12.7%	11.2%	15.6%	14.7%	16.2%	11.7%
50-59	9.5%	9.5%	11.0%	10.9%	11.5%	10.3%
60-69	7.9%	8.0%	7.3%	6.6%	7.6%	7.1%
70+	10.0%	11.6%	9.3%	11.5%	9.0%	10.1%
Median Age	34.8	34.1	36.1	36.1	36.9	33.4
% Families with Children over 20 Years of Age	42.2%	45.1%	43.8%	45.2%	39.3%	36.3%
Marital Status (15+)						
Single	47.2%	49.9%	42.5%	47.5%	37.7%	44.8%
Education (15 +) and Unique Employment						
University certificate or degree	50.1%	58.2%	30.1%	30.0%	29.4%	15.8%
Employed in Arts, Culture, Recreation, Sport	15.6%	15.4%	9.7%	12.7%	11.2%	6.9%
Method of Transportation						
Public transit	40.5%	33.0%	29.3%	32.7%	33.8%	37.8%
Car as driver	26.3%	17.4%	26.2%	15.7%	24.3%	18.2%
Walked	19.3%	33.9%	26.3%	35.4%	23.1%	32.1%
Bicycle	10.8%	12.6%	10.8%	9.0%	8.7%	5.1%
Other Method	3.1%	3.1%	7.5%	7.2%	10.1%	6.7%
Mother Tongue						
English	67.5%	63.2%	49.4%	47.9%	43.5%	40.3%
Chinese	5.8%	10.1%	18.4%	31.8%	30.3%	31.5%
Portuguese	5.0%	4.8%	14.3%	4.8%	11.2%	1.8%
Spanish	2.3%	1.9%	1.2%	1.3%	1.0%	2.6%
French	1.8%	2.0%	1.3%	1.3%	1.3%	1.3%
Italian	5.3%	1.2%	6.3%	0.6%	1.3%	0.4%
Korean	1.3%	2.0%	0.3%	0.7%	0.4%	0.7%
Russian	0.6%	0.9%	0.5%	0.6%	0.1%	0.4%
Tagalog	0.5%	0.4%	0.2%	0.1%	0.3%	2.0%
Polish	0.7%	0.5%	0.8%	0.3%	1.0%	0.4%
Vietnamese	0.4%	0.7%	0.7%	1.4%	0.5%	3.5%
Daytime Worker Population						
Daytime Worker Population	2,602	4,376	1,719	3,470	1,317	2,970

Source: Statistics Canada, Environics



Retail Characteristics Bathurst Street from College Street to Dundas Street West

	Number	Est. Sq. Ft.
Retail Merchandise	2	2,200
Convenience Goods	3	11,400
Food Services	20	20,000
Personal Services	4	11,000
Professional Services	2	19,500
Vacant	1	800
Commercial Other Use	3	3,600
Total	35	68,500

Includes retail inside the hospital

Source: J.C. Williams Group