SHORE·TANNER & ASSOCIATES
REAL ESTATE APPRAISERS AND CONSULTANTS

# RETAIL MARKET DEMAND STUDY: RUSSELL TOWNSHIP ONTARIO

Prepared for:

**Russell Township**

Prepared by:

***Shore-Tanner & Associates***

June 11, 2019

148 COLONNADE ROAD SOUTH, SUITE 202, OTTAWA, ONTARIO K2E 7R4
TELEPHONE: (613) 224-8484   FACSIMILE (613) 224-8483

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# I. Executive Summary

On behalf of Russell Township this study has been carried out by Shore-Tanner & Associates. Its purpose is to determine the scope of market demand for retail and service businesses in the Township, including in its recently expanded area. 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 Russell Township (TWP), located to the east of the City of Ottawa. **For the purposes of this study, the Township has estimated a total population of 23,830 by the year 2036 for all of Russell Township as per the Township of Russell Official Plan.**

## B. Major Socio-Demographic Findings

1. Russell Township (TWP) is another commercial hub (in addition to Rockland) in the United Counties of Prescott and Russell (UCPR), and its businesses attract customers from within these counties and beyond.
2. The total population of Russell TWP increased by an average of 255 or 1.7%, and in UCPR by 790 or 0.9% per year from 2011 to 2016 (Table 3.1).
3. The 2018 population of Russell TWP is estimated at 17,170 and that of UCPR at 91,600. Their estimated average annual growth to the year 2028 is 326 or 1.9% and 1,125 or 1.2% respectively (Table 3.3).
4. Considering that an overall average annual population growth of 1% represents a growing and balanced economy, the future growth of both of these areas are estimated to exceed 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:

| | |
|---|---|
| • Russell TWP | $105,488 |
| • 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 Russell TWP is estimated to spend $18,265, and those of UCPR as a whole (i.e., including the TWP) $17,380 in 2018 at all retail and service businesses within and outside these respective areas (Table 5.1).
2. The estimated spending of the residents of Russell TWP is $313.6 million in 2018, and $373.1 million in 2028 (i.e., average annual growth in spending of $5.9 million or 1.9%, Table 5.2).
3. 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 PRUC residents (including the TWP) 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.
4. There are, as well, customers from outside UCPR who shop at businesses there, including at those in Russell TWP (i.e., leakage-in).
5. **As more, especially new, businesses are attracted to Russell TWP due to population growth and affluence, the leakages of UCPR's shopping dollars to Ottawa can be expected to decrease, and the leakages into UCPR will increase. Russell TWP in turn, is in a good position to capture some of the leakage-in sales.**

## D. Demand Estimation

1. The spending of the residents of Russell TWP is estimated to support a minimum total of 901,800 sq. ft. of floor space in 2018, increasing by an average of 17,090 sq. ft. annually, to 1,072,700 sq. ft. by 2028 (Table 5.3). These spaces, furthermore, are within, but also outside Russell TWP.

2. The minimum[1] supportable increase by time frame is (Table 5.4):
   - 2018-2020 38,700 sq. ft.
   - 2021-2023 15,800 sq. ft.
   - 2023-2028 80,400 sq. ft.
   - **2018-2028 170,900 sq. ft.**
3. At present, some of the total supportable space is outside Russell TWP since its residents do not spend 100% of their shopping dollars at Russell businesses.

## E. Inventory of Existing Businesses

1. As of October 2018, there were 158 retail and service businesses in Russell TWP, and they occupied an estimated total of **531,000** sq. ft. of floor space (below, and Appendix A).
2. Based on the industry standard of 30 to 40 sq. ft. of floor space per capita, **Russell TWP is under-stored for retail and service businesses.**
3. **Of the 158 existing stores, a total of 19, with a combined size of 35,000 sq. ft. or 6.7%, were vacant and this rate is within the industry range of 4% to 8%.**

| Area | No. of Businesses | Total Space (sq. ft.) |
|---|---:|---:|
| Embrun | 119 | 382,600 |
| Russell Village | 35 | 115,000 |
| Limoges | 4 | 33,400 |
| **Total** | **158** | **531,000** |

## F. Executive Interviews

We interviewed a total of 27 business owners, managers, or owner-managers in-person, on a confidential basis, in February and March 2019 (Table 7.1 and Appendices B and C). Key findings of this research are:

[1] These figures are based on population forecasts by Hemson Consulting Ltd., which have turned out to be too low in recent years. Higher population forecasts would, of course, increase the additional supportable retail and service floor space.

1. The majority (85%) of these businesses had been at their current locations for 11 years or longer. In view of Russell TWP's population growth, the residents' normal demand for new, different, and trendy businesses, **we believe that the TWP's retail sector is now ready for expansion, diversification, and new businesses**.
2. The number of male and female owners/managers was close (15 and 12 respectively), and 44% of all business owners also owned their properties.
3. Two-thirds of the 27 businesses were small and independent, and the remaining third were chain stores.
4. Being on main streets, having easy access, good exposure, and a supportive community were mentioned most frequently by the interviewees as advantages of being in their current locations.
5. The most severe and challenging problems mentioned by the 27 interviewees are:
   a) TWP residents shopping in Ottawa.
   b) Lack of parking.
   c) Too many old, unattractive, and "passé" businesses.
   d) Rapidly increasing costs of doing business.
6. The most frequently mentioned things that Russell TWP government can/should do to help the business community are:
   a) Relax signage restrictions.
   b) Promote the TWP.
   c) Improve roads/transportation.
7. The total annual sales of 12 (44%) of the 27 businesses had increased in the last two years, for 8 it had stayed the same, and for 4 it had declined (3 did not disclose).
8. **One of the most positive findings of these interviews is that 19 or 70% of the 27 businesses reported that they captured/attracted 11% or more of their total annual sales from outside Russell TWP (including 6 or 22% which captured more than 50% of their total annual sales).**
9. About half of the businesses (14) offer their products or take customer orders online. Also, Facebook, other social media, and newspapers are the most frequently mentioned methods of promotion and advertising.

10. When asked what businesses or anything else is missing in Russell TWP which could improve its retail sector, the most frequent responses were:
    a) Good quality restaurants.
    b) Tourist-type businesses.
    c) More modern, popular businesses.
    d) More special events, festivities, promotions.
    e) A hotel.

## G. Recommendations

In Russell TWP. and generally elsewhere, an overall average of up to 40 sq. ft. of retail and service floor space is generally supportable on a per capita basis.[2] 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.

**There are three positive factors in the TWP. for its retail industry. They are recent population growth which is expected to continue, the high incomes of most of the TWP.'s residents, and shortage of retail and service business. This combination is unique, positive, and provides the context for the study's recommendations and its retail action plan below**

Based on the research for this study, including a review of the reports provided by Russell TWP,[3] we recommend the consideration of the additional businesses identified in Table 1.1. Further explanations and information for our recommendations, and more generally for the Township's retail sector, are as follows:

1. The most successful retail facilities generally have a combination of chain and independent businesses. Most chain businesses are in shopping centres, and most

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[2] At a total population of 17,170 in Russell TWP, the total existing floor space of 531,000 in 2018 represents 31 sq. ft. per capita. However, since residents and others from outside also shop at these businesses, the effective per capita space in Russell TWP is lower than 31 sq. ft. for its own residents.

[3] In addition to data, maps, and other information regarding Russell TWP, we were provided with the following reports:
- ***Prescott-Russell Opportunities***, Township of Russell, November 10, 2017, also known as ***OPRO***. It includes surveys of retail, manufacturing and Prescott-Russell.
- ***Township of Russell Updated Growth Outlook and Employment Land Needs Analysis***, by Hemson Consulting Ltd., January 18, 2017.

independents are on main streets (e.g., Notre Dame Street in Embrun). A chain store on a main street retail corridor, such as a Tim Horton's coffee shop, for example, can have positive impacts on other businesses due to the concept of cross-shopping.[4]

**The Township, commercial property owners, and business owners are thus recommended to be open to chain as well as to independent businesses, both for the replacement of some of the existing businesses, and for new ones. The challenge is to ensure the right balance between the two.**

2. The vast majority of the recommended businesses in Table 1.1 should be in Embrun. It is larger, already has many more businesses than the Villages of Russell and Limoges, and is already a shopping place for the widest variety of products and services.

   **In our opinion, Embrun should offer the complete range of retail product stores, as well as service businesses. The Village of Russell should offer locally-needed food, necessity and convenience businesses, plus gift, specialty, whimsical, arts-oriented entertainment and leisure businesses.**

   Limoges is a small area. Its proximity to Highway 417, as well as Calypso Park, make it most suitable for food, convenience stores and a gasoline station, which already exist there.[5]

3. The recommended food store with on-site pasta making should be one that manufactures and sells all its products in a **visible manner** to shoppers and pedestrians. In this way, it would create an experience/engagement with the public, which will help the nearby businesses as well.

4. The Brew Pub is another modern and popular type of restaurant. The beer brewing part of it should be **visible to customers**, there should also be a stage for small musical bands, and other night-life events to make it another gathering community-centered establishment.

5. The recommendations in Table 1.1, especially stores such as Winners, Marks, and Globo, may appear to be unsupportable at first in Russell TWP. The products which

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[4] Cross-shopping refers to shopping at more than the one business which was initially the main reason for coming to a retail area. It is a highly desirable trend in any retail area, and can be strengthened by attracting a number of complementary and compatible businesses in shopping centres, main streets, and/or highway commercial districts.

[5] The existing Jean-Claude Cayer store is a specialty regional tool business. As such, it is a destination-type business which requires quick access and parking.

they offer, however, are needed, as indicated by the experience of these stores in the towns of Kemptville, Carleton Place, and others with significantly lower populations than that of Russell TWP.

6. The recommended bookstore-coffee shop is envisioned to be a leisure, relaxing and community gathering place. Comfortable lounge chairs, magazines, newspapers, as well as books for a wide variety of demographic groups are recommended to be offered, along with specialty coffees, pastries, drinks and light meals. This business, as well, would create and increase cross-shopping.
7. The two long-term cannabis stores recommended may be questionable in terms of community values, ethics and lifestyles. The demand, however, is most likely there, and these are new and popular businesses. If not in Russell TWP, residents will go to Ottawa or elsewhere to buy cannabis products, and while there, chances are they will shop at other businesses there as well.
8. The recommended McDonald's restaurant is another business which may be questionable, again from the perspective of values, lifestyles, and health considerations. Once again, however, we recommend it, based on existing and potential demand of the residents, employees and visitors in Russell TWP.
9. The co-op/locally-based bank is intended mostly for the large farming community, small construction and trades within and near Prescott-Russell. Based on the existing businesses, it is evident that these groups attract large numbers of clients for Russell TWP's businesses. Co-op and other such small farm and construction-friendly financial institutions are quite helpful in supporting such enterprises.
10. Chocolat Favoris is a new, Quebec-based, and highly successful chain store offering specialty ice creams and chocolate products. This business, and a number of quality restaurants, are in demand in the TWP, based on our research.

**Based on the above, we believe that a range of a minimum of 77,000 to 120,000 sq. ft. of additional retail and service floor space would be market supportable in Russell Township in the period 2019-2028.**

## G. Impacts

With or without additional retail developments, some of the existing businesses will thrive, and some others will become marginal or fail to survive. This is the nature and history of the retail industry, as we understand.

**1. Positive Impacts Of New Businesses**

New businesses, whether additional or replacement of existing ones, can be beneficial in the following areas:

a) Create new demand for their products or services (e.g., Starbucks coffee shop, cell phones, social media, for example, are new and have generated their own market demand).

b) Serve a demand not sufficiently addressed by existing businesses.

c) Capture part of the outflow of shopping dollars from Russell TWP to Ottawa and elsewhere.

d) Encourage/force improvements, renovations in existing businesses, and reduce vacancies.

e) Increase cross-shopping.

f) Attract tourists, visitors, and/or capture more sales from the existing tourists and visitors.

**2. Negative Impacts Of New Businesses**

New businesses or replacements of existing businesses can potentially have negative impacts on some existing businesses in the following situations:

a) Being too close to similar or competitive businesses if the combined total store areas are too high.[6]

b) Transferring sales to new, competitive businesses by more than approximately 10% annually.

c) The transfer of 10% or more sales to competitive businesses goes on for three years or more.[7]

d) The population of the area of study (village, trade area, town, etc.) remains stable or declines.

**It should be mentioned that as long as an area's economy is healthy, the negative impacts are usually not severe or long lasting.**

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[6] For example, the overall average sq. ft. of supportable supermarket space is generally between 4 and 6 per person.

[7] In various Ontario Municipal Board hearings, detrimental retail impacts have been accepted as those which would cause an annual sales loss of 10% or more **and** last more than three consecutive years.

## H. Retail Action Plan

In order for the recommendations and other improvements to take place in a timely and coordinated fashion, all stakeholders have to be involved and work together. **These stakeholders are landlords, business owners, Russell TWP Municipal Government, residents and employees.** The following are the major actions recommended for each, based on our experience.[8]

### H. 1. Russell Township Municipal Government

**There are a number of new initiatives for the TWP Government to undertake in addition to the many business-supportive actions taken in recent years**. As well, a number of other key pro-business actions are usually undertaken by merchant associations, BIAs, or other such organizations. Since these organizations do not yet exist in Russell TWP, we have included them in the list of TWP Government responsibilities for now.

1. Under the leadership of the TWP Government, with significant support and participation by major retail businesses, and commercial property owners, start the formation of one BIA for Embrun, and a separate one for the Village of Russell.

   **The benefits of BIAs are many, including better promotion, increased sales and profits, additional security, increased commercial as well as non-commercial property values, additional customer loyalty, reduction of shopping in Ottawa by the TWP residents, and growth in spending in Russell TWP by residents from outside.[9]**

2. Distribute printed copies of this study's Executive Summary to every retail, service, industrial, office, and other businesses in the TWP, and make the entire report available online to the public.

3. Authorize a transportation study for Embrun with the objectives of:

   a) Easier access to different parts of Notre Dame Street.

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[8] We have carried out comprehensive retail market studies for over 25 Business Improvement Areas (BIAs), and over 100 for shopping centres, independent and chain businesses in Ottawa, other municipalities in Ontario and Quebec.

[9] There are many more things to know about BIAs. Addressing the notion of BIA has not been part of this study. As part of a Retail Action Plan, however, it is necessary to mention it as a strong requirement. Also, based on our experience, where there are BIAs, there are better businesses with higher sales and profitability, and numerous other benefits.

b) Increased customer parking on and near Notre Dame Street.

c) Slowing/calming traffic circulation on Notre Dame Street.

d) Making Notre Dame Street much more pedestrian-friendly.

e) Better control over merchandise delivery trucks.

4. Undertake major beautification of Notre Dame Street, and Russell Village's centre core. Colourful signs, trees, flowers, street furniture, benches, attractive sidewalks, promotions of uniquely Russell products, the Dome, special farm features, and patios are examples of how these areas can become more attractive to the locals and visitors alike (who are likely to stay longer and buy more).
5. Periodically offer special training, presentations and workshops by experts on merchandising, customer relations, employee training, audit and accounting, succession planning, lifestyle and retail trends for the business community.
6. Support the retail community, and do not overburden businesses with tax hikes for the benefit of residents.
7. Together with Tourism Ontario, promote Russell TWP. Its sports, recreational, natural attributes, and proximity to Ottawa make it an attractive place for tourism. In this regard, some of the activities of Winterlude, Tulip, Jazz, Franco, Chamber Music and other festivals should be attracted to the TWP.
8. The abundant industrial land in the TWP provides an excellent opportunity to attract industries and thus increase jobs. This is an especially rare opportunity since industrial land is becoming scarce and quite expensive in Ottawa.

While the above are costly, their benefits can be far greater. The retail sector employs many, and pays a large portion of the various taxes for its size. The above recommendations not only make things better for the existing businesses, they will also attract more businesses, which will pay more taxes, hire more employees, and further improve the quality of life for Russell TWP's residents and employees.

### H. 2. Landlords

Many of Russell TWP's retail and service businesses own their stores. For them, as well as for landlords who have rented out their properties, we strongly recommend the following:

a) Renovations, upgrades, and facelifts of the properties to the extent affordable.

b) Do not raise rents for struggling businesses.

c) Prior to lease renewal times, consider attracting the recommended business in Table 1.1, and/or other needed, unique, attractive businesses.

d) As shown in Appendix A, we believe there are already too many beauty salons and spas (9), pizza shops, mediocre restaurants, and fitness businesses (6). The leases for those which are struggling should not be renewed, and they should be replaced by better businesses.

e) Consider accepting part of the rent as a percentage of sales after certain amounts. In this way, the landlord and the business owner become partners, and thus more cooperative.

**The above recommendations are in the best interest of the landlords over time, based on our experience.**

### H.3. Business Owners

The vast majority (almost 89%) of the existing businesses in Russell TWP have been there for more than 10 years (including 40% which have been there for more than 20 years). Since about 5 years ago, population growth has been rapid in Russell TWP, demand for and consumption of products and services, shopping habits, and expectations have changed. For the business community to be (more) successful and modern, we believe that more of the following changes and initiatives have to be undertaken:

1. Through studies such as this, various published and online articles, increased awareness of the TWP's growth, and visiting other businesses, begin to know more and better the existing and potential customers, their lifestyles, habits and expectations.
2. Undertake renovations and modernization of the business, and follow scientific presentation of products, colour coordination, how to make the store more attractive, and keep the customers in the store longer.
3. Maximize online exposure, and the use of social media.
4. Maintain contacts with other business owners and refer customers to one another.
5. Contribute to school, sports, recreation, festivals, and other special events.
6. Provide good training for employees to ensure helpfulness, full knowledge of the quality, variety, and origins of products being sold.

7. Become aware of and offer trendy products and services as much as possible (e.g., H&M clothing, organic foods, delivery services).
8. Plan and offer targeted promotional activities.
9. Be mindful of the proven saying: “A happy customer will be loyal and recommend you to a few, but an unhappy customer will badmouth you to many.”
10. Undertake as much of the above in conjunction with as many other local businesses as possible.

### H.4. Residents and Employees

Shopping at big-box stores, and increasingly online, have primarily been based on real and/or perceived low prices. These are not reversible trends in the short and medium terms. Their speed, however, can be slowed down.

Russell TWP is fortunate for being affluent, especially in the last few years. All residents and employees in the TWP should be educated in the benefits of shopping locally. These benefits are:

1. Vibrant and attractive retail districts.
2. Increased safety and security.
3. Increased property values.
4. Increased employment opportunities, especially for teenagers.
5. Reduced time and cost compared to shopping in Ottawa.

| Table 1.1<br>Recommended Businesses<br>To Consider For Russell TWP | |
|---|---|
| **Business Types** | **Approximate Size (sq. ft.)** |
| **I. Retail Businesses** | |
| **A. Food & Convenience Businesses** | **25,000-40,000** |
| • Food Store | |
| • Bakery | |
| • Pasta Making Shop | |
| • Butcher Shop | |
| • Seafood | |
| **B. Fashion Businesses** | **15,000-25,000** |
| • Family Clothing (e.g., Winners, Marks) | |
| • Shoes (e.g., Globo, Payless) | |
| • Women's Clothing | |
| **C. Home Improvement Businesses** | **12,000-18,000** |
| • Furniture Store | |
| • Kitchenware Store | |
| • Bath & Bedroom Store | |
| **D. Sporting Goods & Hobbies** | **2,000** |
| • Bookstore-Coffee Shop | |
| **E. Automotive** | **2,000-3,000** |
| • One Dealership (other than Ford, and Dodge) | |
| • One Gasoline Station in Embrun | |
| **F. General Merchandise** | **0** |
| **G. Specialty Retail** | **4,000-8,000** |
| • Cannabis Stores (one in Embrun, and possibly one in Russell Village thereafter) | |
| • Toy Store | |
| • Health & Beauty Store | |
| **Total: Retail Stores** | **60,000-96,000** |

| Table 1.1, continued<br>Recommended Businesses<br>To Consider For Russell TWP | |
|---|---|
| **Business Types** | **Approximate Size (sq. ft.)** |
| **II. Service Businesses** | |
| **H. Eating-Drinking** | **13,000-18,000** |
| • Ethnic Restaurant | |
| • Modern Coffee Shop (e.g., Starbucks, Bridgehead, Second Cup) | |
| • Brew-Pub, St. Hubert's, Wendy's, or similar | |
| • Seafood Restaurant | |
| • McDonald's Restaurant | |
| • Chocolat Favoris | |
| • Quality Restaurants | |
| **I. Personal Services** | **4,000-6,000** |
| • Yoga | |
| • Zumba/Dance | |
| • Co-Op/Locally Based Bank | |
| **Total: Service Businesses** | **17000-24,000** |
| **Grand Total** | **77,000-120,000** |

Source: Shore-Tanner & Associates

**The above is the minimum which should be added to Russell TWP's existing businesses, or replace businesses which have not been performing well in recent years. In either case, these businesses would also attract shoppers from outside Russell TWP. while reducing the Township residents' spending at businesses in Ottawa and elsewhere.**

# II. SUBJECT SITE AND ENVIRONS

## A. Subject Site

The Subject Site is all of Russell Township, including a parcel of vacant land which is approximately 48 acres in size.

**For the purposes of this study, the Township has estimated a total population of 23,830 by the year 2036 for all of Russell Township**

At present, Embrun, which is the largest part of Russell TWP, is located mostly between Route 300 on the north, and Castor River on the south. It is a long stretch of development in the east-west direction, and the vast majority of its retail and service businesses are located along Notre Dame Street (also known as Route 3).

From the eastern parts of the City of Ottawa, the Village of Russell, and Embrun, are within up to 25 minutes drive.

## B. Growth Context

The following points are intended to provide information regarding Russell Township's growth prospects:

1. Until about 2012, Russell TWP could not grow to its potential due to lack of sufficient supply of sewer water. Since then, **the City of Ottawa and the Township have resolved this problem, resulting in a rapid pace of growth.**
2. Russell TWP is very close to the City of Ottawa and has an ample supply of vacant industrial land for its size. In the City of Ottawa, on the other hand, vacant industrial land has been declining rapidly due to the growth of its own economy, as well as re-zoning to other uses. The cost of vacant industrial land, as well, has been increasing in Ottawa, is much higher than in Russell TWP, and is becoming hard to afford for many small and medium-size industries. **Russell TWP is, therefore, in a uniquely advantageous position to attract some of the existing and new businesses from Ottawa which need industrial land**.
3. Along Highway 417 at the Boundary Road entrance-exit ramp, a 1.0+ million sq. ft. warehouse is presently under construction for the American Company, Amazon. It is

planned to have approximately 600 employees when completed in 2019, and to grow to an estimated 1,000 in a few years.

Once completed, it would operate on a two-shift basis, and likely on a 24/7 arrangement. In addition to the warehouse's employees, dozens of trucks are expected to load/unload at the warehouse each day.

**The Villages of Russell, Limoges, and Embrun are the closest areas for the warehouse's employees, truck drivers and other staff for shopping, housing, and motel accommodations.**

4. Most recent housing in Russell TWP have been single detached, semi-detached, and town houses in the $250,000-$500,000 price range. Their occupants are generally quite affluent, resulting in a 2016 median household income of $105,488, which is $19,507 or 23% higher than the City of Ottawa's equivalent median income of $85,981.
5. More than half (55%) of Russell TWP's businesses are locally owned and operated. Almost all business owners (local and other combined) live in Russell TWP, most (67%) have succession plans, 4 in 10 of all businesses plan to expand in the next 18 months, and the average annual sales of 41% of all businesses is in the range of $0.5 to $10 million. **In our view, these are all positive attributes of the Russell TWP businesses, and point to further growth in the coming months and years.**
6. In the period 2011-2016, a total of 9,058 Ottawa residents moved to Prescott-Russell (including the TWP), and 8,738 residents of Prescott-Russell moved to Ottawa. **As house prices and other costs of living increase in Ottawa, more of its residents are likely to continue to move to villages, towns, and cities within up to one hour drive from Ottawa.**
7. Development of family-type housing is expected to continue in Russell TWP. in the coming years, with increased volumes and speed.[10]

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[10] In 2017, a total of 164 and in 2018, a total of 208 residential building permits were issued, with total values of $53.4 million and $66.2 million respectively.

# 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:

> ***Russell Township 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: 2011-2016

1. Russell TWP and the rest the UCPR have continued to grow. For the 5-year period 2011-2016, their average annual growth was (Table 3.1):

    - Russell TWP 255 or 1.7%
    - UCPR 790 or 0.9%

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

    - Russell TWP 16,520
    - UCPR 89,333

3. Growth of residential and thus population in Russell TWP has been higher on an annual basis since 2016 compared to 2011-2016. Furthermore, the higher growth rate is expected to continue in the coming months and years.

## C. Households

1. Russell TWP 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 Russell TWP was 40.6 years (44.3 in PRUC), its overall average household size was 2.81 (2.52 in UCPR), and 5.2 in 10 of its households (6.2 in UCPR) consisted of only one ro two persons (Table 3.2).

## D. Growth Forecasts

Since mid-2016 when the census was undertaken, residential and thus population growth have significantly accelerated in Russell TWP, and to a lesser extent, in the rest of UCPR. Based on the actual growth since 2016, under construction, planned, and proposed housing developments, the Township, 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:**

**1. Russell TWP 326 or 1.9%**

**2. UCPR 1,125 or 1.2%**

Compared to the actual annual growth from 2011 to 2016, the figures in Table 3.3 may appear to be too optimistic. However, for infrastructure planning purposes, it is prudent to use somewhat generous forecasts. **As well, as the City of Ottawa continues to expand eastward, and its housing costs continue to be much higher than in Russell TWP, growth in Russell/UCPR will only further intensify.** From this perspective, the forecasts in Table 3.3 seem quite reasonable, and may even be somewhat too low, especially for the period 2023-2028.

## E. Income

Household income distribution from the 2016 census for Russell TWP and UCPR are presented in Table 3.4. As shown, **the median household income of $105,488 in Russell Township was:**

1. **Higher than the UCPR's by $26,740 or 34.0%.**
2. **Higher than the City of Ottawa's by $19,507 or 22.7%.**
3. The proportion of all households in Russell TWP. with incomes of over $80,000 was 66.4% (i.e., 6.6 in 10 households).
4. Those households whose income was over $100,000 made up 54.1% of the total or 5.4 in 10 households).

Since 2016, the majority of the new homes built and sold in the Township have been detached singles, semis, and town houses, most between $300,000 and $500,000. The residents of these new units are generally affluent. **It is thus concluded that Russell Township was quite affluent in 2016, it is more so now, and expected to be still further affluent in the future. Furthermore, growth in population and level of affluence in turn, increase demand for more retail and service businesses.**

## F. Employment

The number of jobs in Russell TWP, as well as in the UCPR, has continued to grow. As of mid-2018, the numbers were estimated at 4,500 and 30,500 respectively. As estimated by Hemson Consulting Ltd., the average **annual** growth in the number of jobs to the year 2036 is as follows (Table 3.5):

- Russell TWP 61 or 1.36%
- UCPR 144 or 0.47%

**Table 3.1**
**Historical Population Data**

| Year | Russell TWP | United Counties of Prescott & Russell (UCPR) |
|---|---|---|
| 2011 | 15,247 | 85,381 |
| 2016 | 16,520 | 89,333 |
| **Average Annual Change: 2011-2016:** | | |
| Numeric | 255 | 790 |
| % | 1.7 | 0.9 |

Notes:

1. In 2016, the median age of the residents was 40.6 in **Russell TWP**, and 44.3 in UCPR.
2. 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.

**Table 3.2**
**Households By Size: 2016**

| Household Size | Russell TWP | | United Counties of Prescott & Russell (UCPR) | |
|---|---|---|---|---|
| | **No.** | **%** | **No.** | **%** |
| Single Person | 925 | 15.7 | 8,125 | 23.0 |
| Two Persons | 2,130 | 36.3 | 13,880 | 39.2 |
| Three Persons | 1,080 | 18.4 | 5,665 | 16.0 |
| Four or More Persons | 1,735 | 29.6 | 7,720 | 21.8 |
| **Total** | **5,870** | **100.0** | **35,390** | **100.0** |
| Average Size | 2.81 | – | 2.52 | – |
| Single and Two Persons Combined | 3,055 | 52.0 | 22,005 | 62.2 |

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

| Table 3.3<br>Population Forecasts | | |
|---|---|---|
| **Year** | **Russell TWP** | **United Counties of Prescott & Russell (UCPR)** |
| 2016 | 16,520 | 89,333 |
| 2018 | 17,170 | 91,600 |
| 2020 | 17,900 | 93,850 |
| 2021 | 18,200 | 96,000 |
| 2023 | 18,900 | 98,300 |
| 2028 | 20,430 | 102,850 |
| **Average Annual Change: 2018-2028:** | | |
| Numeric | 326 | 1,125 |
| % | 1.9 | 1.2 |

Source: Shore-Tanner & Associates based on ***Updated Growth Outlook and Employment Land Needs Analysis***, January 19, 2017, by Henson Consulting Ltd.

| Table 3.4<br>Household Income Distribution: 2016 | | | | |
|---|---|---|---|---|
| **Income Class ($)** | **Russell TWP** | | **United Counties of Prescott & Russell (UCPR)** | |
| | **No.** | **%** | **No.** | **%** |
| Under 40,000 | 645 | 11.0 | 7,825 | 22.1 |
| 40,000-59,999 | 625 | 10.6 | 5,250 | 14.8 |
| 60,000-79,999 | 700 | 11.9 | 4,925 | 13.9 |
| 80,000-99,999 | 730 | 12.4 | 4,445 | 12.6 |
| 100,000-124,999 | 935 | 15.9 | 4,550 | 12.9 |
| 125,000-149,999 | 755 | 12.8 | 3,210 | 9.1 |
| 150,000 & over | 1,480 | 25.2 | 5,185 | 14.6 |
| **Total** | **5,870** | **100.0** | **35,390** | **100.0** |
| Median Household | 105,488 | – | 78,748 | – |
| Median Per Capita | 37,540 | – | 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.

| Table 3.5<br>Employment in the Trade Area | | |
|---|---|---|
| **Year** | **Russell TWP** | **UCPR** |
| 2011 | 4,160 | 29,500 |
| 2018 | 4,500 | 30,500 |
| 2036 | 5,600 | 33,100 |
| **Average Annual Increase: 2018-2036:** | | |
| Numeric | 61 | 144 |
| % | 1.36 | 0.47 |

Source: Shore-Tanner & Associates based on ***Township of Russell Update Growth Outlook and Employment Land Needs Analysis***, January 19, 2017, by Henson Consulting Ltd.

# IV. RETAIL MARKET TRENDS

**This section presents a number of major trends and changes in shopping habits, patterns, and new retail facilities which are national, and to different degrees apply to Ontario, UCPR, and Russell TWP.** 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 five 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 current 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 the Ottawa area, are considered to be still offering 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 space 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, customers prepare lists of what they want to buy ahead of time, follow 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 a priority.** 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, tournaments, tourism, 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 and in the rest of Russell Township.**

# V. DEMAND ESTIMATION

## A. Per Capita Spending

For Canada as a whole, and each of the Provinces, Statistics Canada provides total business sales annually by retail and service categories. For counties, cities and towns, these sales have to be estimated based on incomes.

We have compared the overall average per capita incomes of Ontario, UCPR, and Russell TWP. On this basis, the available total sales in Ontario, and our experience[11], we have provided estimates for UCPR and Russell TWP in 2018. As demonstrated in Table 5.1, the overall average per capita spendings are estimated as follows:

| **Area** | **Total Per Capita Spending: 2018** | | |
|---|---|---|---|
| | Retail Stores | Service Establishments | Total |
| Russell TWP | $15,290 | $2,975 | $18,265 |
| UCPR | $14,490 | $2,890 | $17,380 |

## B. Estimates of Total Spending

Based on Russell Township's population projections (Table 3.3), and the estimated per capita spending in Table 5.1, we have estimated the total spending of the Russell TWP's residents by trade groups and for the years 2018-2028 (Table 5.2).

**As shown in Table 5.2, the grand total spending of Russell TWP residents is estimated to increase by an annual average of $5.9 million or 1.9% from $313.6 million in 2018, to $373.1 million in 2028.**

The expenditure volumes in Table 5.2 are conservative, do not include inflation, or real growth in per capita expenditures. As well, they represent the total spending at businesses within, as well as outside Russell Township.

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[11] The methodology used is standard, frequently used in reports for municipal councils, and at OMB hearings where there have been questions or disputes regarding the need for additional retail developments.

## C. Productivity Rates

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 hundreds of 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 in Russell TWP. As shown in Table 5.3, the average annual sales per sq. ft. at food stores, for example, is estimated to be between $500 and $700.

## D. Total Supportable Floor Space

Table 5.3 presents the total supportable floor space for each business for the years 2018-2028. As demonstrated, **Russell TWP residents' spending is estimated to be supporting a total of 901,800 sq. ft. of retail and service business floor space in 2018, and 1,072,700 in 2028 at businesses within, but also outside the Township.** The total supportable space will, of course, increase each year, based on population growth and affluence.

In Table 5.4, we have identified the **minimum** 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 Russell TWP:**

| | | | |
|---|---|---|---|
| **1.** | **2018-2020** | **38,700** | **sq. ft.** |
| **2.** | **2020-2023** | **15,800** | **sq. ft.** |
| **3.** | **2023-2028** | **36,000** | **sq. ft.** |
| **4.** | **2018-2028** | **170,900** | **sq. ft.** |

**In other words, the available spending potential of Russell TWP is estimated to generate demand for at least 170,900 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 of Russell TWP are expected to continue to do some of their shopping at businesses in Rockland, Ottawa, etc. in addition to Russell TWP. It is therefore necessary to address their spending, in addition to the spending of Russell TWP's own 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.

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, in addition to what they spend in Russell TWP. Regardless of where their spending takes place, it is necessary to determine how much floor space can their spending support. Table 5.3 provides this answer by individual retail and service groups. **As demonstrated in Table 5.3, the 100.0% spending of residents of Russell TWP is estimated to support a total of at least 901,800 sq. ft. in 2018, and 1,072,700 sq. ft. in 2028 at 36 sq. ft. per capita, within and outside Russell TWP** (the spending of UCPR residents of course supports much more than 901,800 sq. ft.).

On a conservative basis, we have estimated the total additional floor space which can be supported by the spending of the Russell TWP residents. As shown in Table 5.4, the minimum additional supportable space by the year 2028 is estimated at 170,900 sq. ft. If this amount of additional floor space is not developed within Russell TWP by 2028, some of the TWP's residents will shop (or shop more) at retail and service businesses outside the TWP.

**Table 5.1**
**Estimated Per Capita Retail and Service Spending: 2018**

| Trade Group | UCPR Spending ($) | Russell TWP Spending ($) |
|---|---|---|
| **A. Retail Product Stores** | | |
| Supermarkets | 2,290 | 2,600 |
| Convenience Stores | 220 | 250 |
| Specialty Food | 195 | 215 |
| Beer, Wine & Liquor | 670 | 710 |
| Drugs & Patent Medicine* | 1,105 | 1,050 |
| 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 | 870 |
| Sporting Goods, Hobbies, Music & Books | 300 | 325 |
| Used, Recreation & Other Vehicles | 470 | 490 |
| New Car Sales | 2,800 | 2,900 |
| Auto Parts & Accessories | 190 | 220 |
| Gasoline & Service Stations | 1,410 | 1,500 |
| General Merchandise | 960 | 980 |
| Department Stores | 720 | 750 |
| Other Retail Stores | 350 | 370 |
| **Subtotal: Retail Products** | **14,490** | **15,290** |
| **B. Retail Service Businesses** | | |
| Restaurants, Bars & Other Eateries* | 1,220 | 1,250 |
| Personal Care Businesses* | 215 | 225 |
| Sports, Recreation & Entertainment* | 1,455 | 1,500 |
| **Subtotal: Service Businesses** | **2,890** | **2,975** |
| **Grand Total: All Stores & Businesses** | **17,380** | **18,265** |

* **Estimated, and applies to spending everywhere (the TWP, UCPR, Ottawa, Rockland, etc.)**
1. Online spending is **not** included.

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

| Table 5.2<br>Estimates of Total Spending By Russell TWP Residents | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Trade Group** | **2018 ($M)** | **2020 ($M)** | **2021 ($M)** | **2023 ($M)** | **2028 ($M)** | **Average Annual Change: 18-28** | |
| **Population** | **17,170** | **17,900** | **18,200** | **18,900** | **20,430** | **Numeric ($M)** | **%** |
| **A. Retail Product Stores** | | | | | | | |
| Supermarkets | 44.6 | 46.5 | 47.3 | 49.1 | 53.1 | 0.85 | 1.9 |
| Convenience Stores | 4.3 | 4.5 | 4.6 | 4.7 | 5.1 | 0.08 | 1.9 |
| Specialty Food | 3.7 | 3.8 | 3.9 | 4.1 | 4.4 | 0.07 | 1.9 |
| Beer, Wine & Liquor | 12.2 | 12.7 | 12.9 | 13.4 | 14.5 | 0.23 | 1.9 |
| Drugs & Patent Medicine* | 18.0 | 18.8 | 19.1 | 19.8 | 21.5 | 0.35 | 1.9 |
| Clothing | 14.8 | 15.4 | 15.6 | 16.2 | 17.6 | 0.28 | 1.9 |
| Shoes, Jewellery & Accessories | 4.3 | 4.5 | 4.6 | 4.7 | 5.1 | 0.08 | 1.9 |
| Home Furnishings | 2.2 | 2.3 | 2.4 | 2.5 | 2.6 | 0.04 | 1.9 |
| Electronics & Appliances | 8.9 | 9.3 | 9.5 | 9.8 | 10.6 | 0.17 | 1.9 |
| Furniture | 5.1 | 5.4 | 5.5 | 5.7 | 6.1 | 0.17 | 1.9 |
| Building Materials, Hardware & Garden Supplies | 14.9 | 15.6 | 15.8 | 16.4 | 17.8 | 0.29 | 1.9 |
| Sporting Goods, Hobbies, Music & Books | 5.6 | 5.8 | 5.9 | 6.1 | 6.6 | 0.10 | 1.9 |
| Used, Recreation & Other Vehicles | 8.4 | 8.8 | 8.9 | 9.3 | 10.0 | 0.16 | 1.9 |
| New Car Sales | 49.8 | 51.9 | 52.8 | 54.8 | 59.2 | 0.94 | 1.9 |
| Auto Parts & Accessories | 3.8 | 3.9 | 4.0 | 4.1 | 4.5 | 0.07 | 1.9 |
| Gasoline & Service Stations | 25.7 | 26.9 | 27.3 | 28.3 | 30.6 | 0.49 | 1.9 |
| General Merchandise | 16.8 | 17.5 | 17.8 | 18.5 | 20.0 | 0.71 | 1.9 |
| Department Stores | 12.9 | 13.4 | 13.7 | 14.2 | 15.3 | 0.24 | 1.9 |
| Other Retail Stores | 6.4 | 6.6 | 6.7 | 7.0 | 7.6 | 0.12 | 1.9 |
| **Subtotal: Retail Products** | **262.5** | **273.7** | **278.3** | **289.0** | **312.4** | **5.0** | **1.9** |

* Estimated

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

**Table 5.2, continued**
**Estimates of Total Spending By Russell TWP Residents**

| Trade Group | 2018 ($M) | 2020 ($M) | 2021 ($M) | 2023 ($M) | 2028 ($M) | Average Annual Change: 18-28 | |
|---|---|---|---|---|---|---|---|
| | | | | | | Numeric | % |
| **B. Retail Service Businesses** | | | | | | | |
| Restaurants, Bars & Other Eateries* | 21.5 | 22.4 | 22.7 | 23.6 | 25.5 | 0.4 | 1.9 |
| Personal Care Businesses* | 3.9 | 4.0 | 4.1 | 4.2 | 4.6 | 0.07 | 1.9 |
| Sports, Recreation & Entertainment* | 25.7 | 26.9 | 27.3 | 28.4 | 30.6 | 0.5 | 1.9 |
| **Subtotal: Service Businesses** | **51.1** | **53.2** | **54.1** | **56.2** | **60.7** | **0.96** | **1.9** |
| **Grand Total: All Stores & Businesses** | **313.6** | **326.9** | **332.4** | **345.2** | **373.1** | **5.9** | **1.9** |

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

***Notes:***

1. ***The average annual percentage increases in spending are identical to the estimated population growth of 1.9% 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 spending growth are included in order to avoid possible over-estimation of demand for additional floor space.***
2. ***The above figures refer to spending by the residents of Russell TWP at businesses within, as well as outside the Township.***

Source: Shore-Tanner & Associates.

**Table 5.3**
**Estimates of Total Supportable Floor Space in Russell TWP: Square Feet**

| Trade Group | 2018 | 2020 | 2021 | 2023 | 2028 | Average Annual Change: 18-28 |
|---|---|---|---|---|---|---|
| **A. Retail Product Stores** | | | | | | |
| Supermarkets | | | | | | |
| • At $700/sq. ft. | 63,700 | 66,400 | 67,600 | 70,100 | 75,900 | 1,220 |
| • At $400/sq. ft. | 111,500 | 116,200 | 118,200 | 122,700 | 132,700 | 2,120 |
| Convenience Stores | | | | | | |
| • At $300/sq. ft. | 14,300 | 15,000 | 15,300 | 15,700 | 17,000 | 270 |
| • At $225/sq. ft. | 19,100 | 20,000 | 20,400 | 20,900 | 22,700 | 360 |
| Specialty Food | | | | | | |
| • At $450/sq. ft. | 8,200 | 8,400 | 8,700 | 9,100 | 9,800 | 160 |
| • At $300/sq. ft. | 12,300 | 12,700 | 13,000 | 13,700 | 14,700 | 240 |
| Beer, Wine & Liquor | | | | | | |
| • At $700/sq. ft. | 17,400 | 18,100 | 18,400 | 19,100 | 20,700 | 330 |
| • At $450/sq. ft. | 27,100 | 28,200 | 28,700 | 29,800 | 32,200 | 510 |
| Drugs & Patent Medicine* | | | | | | |
| • At $1,000/sq. ft. | 18,000 | 18,800 | 19,100 | 19,800 | 21,500 | 350 |
| • At $650/sq. ft. | 27,700 | 28,900 | 29,400 | 30,500 | 33,100 | 540 |
| Clothing | | | | | | |
| • At $350/sq. ft. | 42,300 | 44,000 | 44,600 | 46,300 | 50,300 | 800 |
| • At $250/sq. ft. | 59,200 | 61,600 | 62,400 | 64,800 | 70,400 | 1,120 |
| Shoes, Jewellery & Accessories | | | | | | |
| • At $400/sq. ft. | 10,700 | 11,200 | 11,500 | 11,700 | 12,700 | 200 |
| • At $250/sq. ft. | 17,200 | 18,000 | 18,400 | 18,800 | 20,400 | 320 |

**Table 5.3, continued**
**Estimates of Total Supportable Floor Space In Russell TWP: Square Feet**

| Trade Group | 2018 | 2020 | 2021 | 2023 | 2028 | Average Annual Change: 18-28 |
|---|---|---|---|---|---|---|
| Home Furnishings | | | | | | |
| • At $300/sq. ft. | 7,300 | 7,700 | 8,000 | 8,300 | 8,700 | 140 |
| • At $200/sq. ft. | 11,000 | 11,500 | 12,000 | 12,500 | 13,000 | 200 |
| Electronics & Appliances | | | | | | |
| • At $700/sq. ft. | 12,700 | 13,300 | 13,600 | 14,000 | 15,100 | 240 |
| • At $450/sq. ft. | 19,800 | 20,700 | 21,100 | 21,800 | 23,600 | 380 |
| Furniture | | | | | | |
| • At $300/sq. ft. | 17,000 | 18,000 | 18,300 | 19,000 | 20,300 | 330 |
| • At $200/sq. ft. | 25,500 | 27,000 | 27,500 | 28,500 | 30,500 | 500 |
| Building Materials, Hardware & Garden Supplies | | | | | | |
| • At $250/sq. ft. | 59,600 | 62,400 | 63,200 | 65,600 | 71,200 | 1,160 |
| • At $175/sq. ft. | 85,100 | 89,100 | 90,300 | 93,700 | 101,700 | 1,660 |
| Sporting Goods, Hobbies, Music & Books | | | | | | |
| • At $300/sq. ft. | 18,700 | 19,300 | 19,700 | 20,300 | 23,000 | 330 |
| • At $225/sq. ft. | 24,900 | 25,800 | 26,200 | 27,100 | 29,300 | 440 |
| Used, Recreation & Other Vehicles | | | | | | |
| • At $1,000/sq. ft. | 8,400 | 8,800 | 8,900 | 9,300 | 10,000 | 160 |
| • At $700/sq. ft. | 12,000 | 12,600 | 12,700 | 13,300 | 14,300 | 230 |
| New Car Sales | | | | | | |
| • At $2,000/sq. ft. | 24,900 | 25,900 | 26,400 | 27,400 | 29,600 | 470 |
| • At $1,400/sq. ft. | 35,600 | 37,100 | 37,700 | 39,100 | 42,300 | 670 |

| **Table 5.3, continued<br>Estimates of Total Supportable Floor Space In Russell TWP:<br>Square Feet** | | | | | | |
|---|---|---|---|---|---|---|
| **Trade Group** | **2018** | **2020** | **2021** | **2023** | **2028** | **Average Annual Change: 18-28** |
| Auto Parts & Accessories | | | | | | |
| • At $1,300/sq. ft. | 2,900 | 3,000 | 3,100 | 3,200 | 3,500 | 60 |
| • At $800/sq. ft. | 4,700 | 4,900 | 5,000 | 5,100 | 5,600 | 90 |
| Gasoline & Service Stations | | | | | | |
| • At $1,200/sq. ft. | 21,400 | 22,400 | 22,700 | 23,600 | 25,500 | 410 |
| • At $800/sq. ft. | 32,100 | 33,600 | 34,100 | 35,400 | 38,200 | 610 |
| General Merchandise | | | | | | |
| • At $350/sq. ft. | 48,000 | 50,000 | 50,900 | 52,900 | 57,100 | 910 |
| • At $225/sq. ft. | 74,700 | 77,800 | 79,100 | 82,200 | 88,900 | 1,420 |
| Department Stores | | | | | | |
| • At $250/sq. ft. | 51,600 | 53,600 | 54,800 | 56,800 | 61,200 | 960 |
| • At $200/sq. ft. | 64,500 | 67,000 | 68,500 | 71,000 | 76,500 | 1,200 |
| Other Retail Stores | | | | | | |
| • At $300/sq. ft. | 21,300 | 22,000 | 22,300 | 23,300 | 25,300 | 400 |
| • At $250/sq. ft. | 25,600 | 26,400 | 26,800 | 28,000 | 30,400 | 480 |
| **Subtotal: Retail Products** | 468,400 | 488,300 | 497,100 | 515,500 | 557,400 | 8,900 |
| **(rounded)** | 689,600 | 719,100 | 731,500 | 758,900 | 820,500 | 13,090 |
| **B. Retail Service Businesses** | | | | | | |
| Restaurants, Bars & Other Eateries | | | | | | |
| • At $600/sq. ft. | 35,800 | 37,300 | 37,800 | 39,300 | 42,500 | 670 |
| • At $350/sq. ft. | 61,400 | 64,000 | 64,900 | 67,400 | 72,900 | 1,150 |
| Personal Care Businesses | | | | | | |
| • At $225/sq. ft. | 17,300 | 17,800 | 18,200 | 18,700 | 20,400 | 310 |
| • At $175/sq. ft. | 22,300 | 22,900 | 23,400 | 24,000 | 26,300 | 400 |
| Sports, Recreation & Entertainment[1] | | | | | | |
| • At $250/sq. ft. | 102,800 | 107,600 | 109,200 | 113,600 | 122,400 | 1,960 |
| • At $200/sq. ft. | 128,500 | 134,500 | 136,500 | 142,000 | 153,000 | 2,450 |
| **Subtotal: Retail Services** | 155,900 | 162,700 | 165,200 | 171,600 | 185,300 | 2,940 |
| **(rounded)** | 212,200 | 221,400 | 224,800 | 233,400 | 252,200 | 4,000 |
| **Grand Total:** | 624,300 | 651,000 | 662,300 | 687,100 | 742,700 | 11,840 |
| **All Stores & Businesses** | **901,800** | **940,500** | **956,300** | **992,300** | **1,072,700** | 17,090 |
| Overall Average sq. ft./person | 36 | 36 | 36 | 36 | 36 | – |

[1] Includes cinemas, theatres, arenas and other recreational buildings.

***Note:***

***The above are estimates of the floor spaces within, as well as outside Russell TWP, supported by the spending of Russell TWP residents.***

Source: Shore-Tanner & Associates.

| **Table 5.4**<br>**Estimated Demand For Minimum Additional Floor Space**<br>**By the Spending of Russell TWP Residents** | |
|---|---|
| **Time Period** | **Floor Space (sq. ft.)** |
| 2018-2020 | 38,700 |
| 2020-2021 | 15,800 |
| 2021-2023 | 36,000 |
| 2023-2028 | 80,400 |
| **2018-2028** | **170,900** |

Notes:

1. Based on the expected population growth in Table 3.3, the spending of the Russell TWP residents is estimated to support a minimum of 170,900 sq. ft. of **additional** floor space within, as well as outside the Township by 2028.
2. At present, the total sq. ft. of all retail and service businesses combined in Russell TWP is 531,000 sq. ft. (Appendix A).
3. The difference between the existing total floor space of 531,000 sq. ft. and the minimum of 901,800 sq. ft. which the spending of Russell TWP residents supports in 2018 (Table 5.3), is 370,800 sq. ft.
4. If Russell TWP residents were to spend 100% of their shopping dollars at businesses within the TWP, at least 370,800 sq. ft. of **additional** floor space would have to be added to the existing inventory of 531,000 (Appendix A) now, and more by the year 2028.
5. The residents of the rest of the Prescott and Russell United Counties spend some of their shopping dollars at businesses within Russell TWP (leakage in). Based on this historical shopping habit, Russell TWP needs more retail floor space than what is needed only for its own residents.
6. However, due to the proximity of Rockland and Ottawa, some of the residents of Russell TWP shop at businesses there as well (leakage out). Therefore, the additional supportable floor space in Russell TWP is less than 370,800 sq. ft. in 2018. In conclusion:

***While there have been, and will continue to be, leakages of shopping dollars into, and out of Russell TWP, significantly more retail and service businesses can be supported in Russell TWP over the next 10 years, due to:***

- ***a) Expected population growth in the Township, as well as in the rest of the UCPR.***
- ***b) Increases in employment within and near the Township (e.g., Amazon's one million sq. ft. warehouse with 600 or more employees).***
- ***c) Increasing levels of affluence, and the resulting additional consumption of products and services.***

Source: Table 5.3.

# VI. Summary of Existing Businesses

## A. Scope of Research

Several days up to October 20, 2018 we carried out extensive field research in Russell Township. Every retail and service business was visited, its name and type identified, and its size visually estimated. In a few cases, there were stores which were not physically vacant, but may have been closed/not open for business.

The details of this research are presented in Appendix A.

## B. Major Findings

**As of October 2018, there was a total of 158 retail and service businesses in Russell Twp., occupying an estimated 531,000 sq. ft. of floor space.**

With an estimated 2018 population of 17,170 in Russell TWP, the overall average floor space per resident is 31 sq. ft. However, a significant part 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 31 sq. ft.

Based on the industry standard of 30 to 40 sq. ft. of retail and service floor space per capita, it is evident that the Russell TWP is currently under-stored for retail and service businesses, and the shortage will become more severe as the Township’s population increases.

If the residents of Russell TWP spend 100% of their shopping dollars at businesses within the TWP., at least a total of 901,800 sq. ft. of floor space could be supported in 2018, and more in future years (Table 5.3). Due to the proximity of Ottawa and its variety of businesses, there will always be some shopping there by the residents of Russell TWP. However, as its population grows, more retail and service businesses can be supported and will be attracted to Russell TWP (as it has been the case in the last 10-15 years).

**As indicated in Appendix A (last page), a total of 19 stores with a combined floor space of 35,000 sq. ft. or 6.7% of the total space of 531,000 sq. ft., are vacant in Russell TWP (industry standard vacancy rate is within 4% and 8%).**

## C. Distribution of the Existing Retail and Service Floor Space

**The majority of the total floor space of 531,000 sq. ft. (i.e., 382,600 sq. ft. or 72.1% of the total) is in Embrun, 115,000 sq. ft. or 21.6% is in the Village of Russell, and 33,400 sq. ft. or 6.3% is in Limoges.**

1. Businesses which sell products/goods (i.e., retail) account for 76 of the 158 businesses (or 48.1%), and 372,200 sq. ft. (70.1%) of the total floor space of 531,000 sq. ft. This is excellent, since in a good retail environment, at least 60% of the total retail businesses should be goods-selling (rather than providing services such as beauty salons or dry cleaning).
2. The overall distribution of the existing floor space is summarized in the last page of Appendix A.
3. As expected, food and convenience-type businesses account for most of the existing floor space. This is in part due to the approximately 33,600 sq. ft. Foodland Supermarket, which is new in Russell Village.
4. The numbers of the Home Improvement stores and the Automotive businesses are large for a township with a population of 17,170. This is most likely because these businesses support the needs of a much larger area than Russell TWP, offer their products on a wholesale basis, as well as to building contractors and truck drivers who work outside and inside the township. Another reason is the rapid growth of residential developments in Russell TWP. In recent years, new homes as well as those which are 5-10 years or older, require many of the products and services offered by these businesses. Furthermore, since we expect the development industry to continue to be strong in the TWP., we do not consider the number of these businesses to be too many. .
5. **The number of fashion stores seems too low, the variety and types of the eateries, and a number of other retail groups is limited, and generally, more modern and trendy businesses can be supported in Russell TWP.** These changes have already started to happen, and more of them, such as the ones recommended in this report, are market viable, and expected to be attracted to Russell TWP in the coming months and years.
6. Based on observations and discussions with the TWP staff, we realize that some of the existing businesses there are not performing well. There can be many reasons for

the success or lack of it in the retail industry. Service, competition, price, choice, presentation, and knowledge of the market demand are key factors in this regard.

**7.** Related to the above point is the existence of merchant associations or business improvement areas (BIAs). **Having carried out over 30 studies for these BIAs in the City of Ottawa and elsewhere in Ontario, we can confidently state that businesses within BIAs perform much better than those which are not in a BIA or other merchant associations.**

# VII. Executive Interviews

## A. Scope of Research

In 2017, a major economic study was carried out by Russell Township called

"Prescott and Russell Opportunities". One of its research components is interviews with 79 business owners from the retail, agriculture, industry, and tourism sectors. It is an excellent economic study, provides a great deal of useful information and recommendations for all sectors of the TWP.'s economy.

The current study is solely focussed on the TWP.'s retail sector. For this purpose, and as part of the retail study as a whole, more detailed, specific, and up-to-date input from retail and service business owners/managers was deemed to be necessary.

In late February and March 2019, we conducted in-person confidential interviews with 27 different business owners, managers, or owner-managers.

We first designed an interview guide, and jointly with the client, finalized it (Appendix B). Interview times were then arranged, all carried out by the study's Project Manager in person, questions from Appendix B were asked and discussed, and notes were taken. Interviews took as little as about 15 minutes to as long as an hour. The results were then reviewed, tabulated, and analyzed, resulting in the following findings and summaries.

## B. Executives Interviewed

Appendix C provides the names of the businesses whose owners/managers were interviewed. Selected characteristics of the businesses and interviewees are presented in Table 7.1. As shown:

1. The number of the male and female business owners/managers, at 15 and 12 respectively, were close. In our experience, this is unusually progressive, since often there are many more male business owners and managers than female.
2. The vast majority of the businesses (26 or 96%) had been at their current location for 6 or more years (including 23 or 85% who had been there 11 years or more).

3. The length of time in Russell TWP, and also in the current types of businesses are also close to those in number 2 above.
4. **Numbers 2 and 3 above, taken together with the rapid growth of population, indicate that Russell TWP's retail industry has not yet begun to attract "new blood" in a significant way. This, furthermore, indicates that in the next 5-10 years, there will likely be a significant number of new businesses, turnovers, renovations, and re-inventions in Russell TWP's retail market.**
5. Close to half of the businesses (12 or 44.6%) own their properties. By itself, this fact indicates that the ongoing cost of doing business is lower for them due to lack of rent (in shopping centres almost all, and outside, the vast majority of retail businesses rent their premises).
6. Of the 27 businesses, 9 or 33.3% are chain stores. While there are advantages and disadvantages for both chain and independently owned businesses, chain stores are in a much more advantageous position to renovate, expand, keep up with and introduce new trends, products and services.
7. Slightly more than half (14 or 51.8%) of the 27 businesses had 1.5 employees, eight or 29.6% had 6-20 employees, and the remaining five (18.5%) had more than 20. As the numbers, types, and diversity of businesses increases in Russell TWP in the next 5-10 years, the number of retail employees will also increase.

## C. Key Interview Findings

1. The interviewees were first asked what they liked about their business, locations, and Russell TWP. A total of 79 responses were provided to this question, the five most frequently mentioned of which are:

| | | |
|---|---|---|
| a. | Visibility | 26 mentions |
| b. | Easy access | 11 mentions |
| c. | Main Street | 9 mentions |
| d. | Good/supportive community | 9 mentions |
| e. | Close to other businesses | 5 mentions |

2. The focus on the positive aspects of their businesses directed their attention to the specific aspects and performance of their businesses (as intended in the design of the Interview Guide). They were next asked to identify challenges, difficulties, and any

other negatives regarding their own business, and/or the business community at large in the TWP. The total number of responses is 64, including the following five, which were most frequently mentioned:

| | | |
|---|---|---|
| a. | Residents' frequent shopping in Ottawa | 15 mentions |
| b. | Lack of parking | 13 mentions |
| c. | Too many old/unattractive stores | 7 mentions |
| d. | Rapidly increasing costs of doing business | 7 mentions |
| e. | Limited variety of businesses | 5 mentions |

3. The next question asked was what Russell TWP should do to further improve the business environment, in their opinion. The total number of responses to this question is 58, and the following are the most frequently mentioned five:

| | | |
|---|---|---|
| a. | Relax signage restrictions | 16 mentions |
| b. | Promote the township | 12 mentions |
| c. | Improve roads/transportation | 8 mentions |
| d. | Lower taxes | 7 mentions |
| e. | Encourage renovations, facelifts | 6 mentions |

**Complaints regarding the existing signage regulations were severe, emotional, and reflected high levels of frustration with the Township.**

4. The 15 businesses in rental properties were mostly happy with their landlords. Six of them wanted their landlords to renovate the rented properties, and three wanted rent reductions.

5. Business sale performance is, of course, a crucial factor in assessing the health of any industry. For the 27 businesses, the information obtained is as follows for the last two years:

| | | |
|---|---|---|
| a. | Sales increased | 12 or 44.4% |
| b. | Sales stayed the same | 8 or 29.6% |
| c. | Sales declined | 4 or 14.8% |
| d. | Sales not disclosed | 3 or 11.1% |

**Based on our knowledge from over 100 such studies, we consider Russell TWP's retail industry to be generally healthy in terms of total annual sales.** Of course, for the 8 businesses whose sales stayed the same, profits must have declined due to inflation. It is also true that sales losses, and sales stagnations can be due to numerous factors[12] other than the strength of market demand.

6. Another factor regarding business performance is the extent to which it attracts customers/sales from outside. **Out of the 27 businesses, 25 or 92.6% indicated that some of their sales in the last two years were from outside Russell TWP**. The percentage sales from outside is summarized below:

| | | |
|---|---|---|
| a. | Up to 10% | 6 or 22.2% |
| b. | 11 to 30% | 6 or 22.2% |
| c. | 31 to 50% | 7 or 25.9% |
| d. | Over 50% | 6 or 22.2% |

   **Based on our knowledge, these sales percentages are extraordinary, reflecting the strong business expertise of the owners, and the large market demand for retail products and services in the villages, towns and cities as far as Cornwall.**

7. Online sales is growing in Russell TWP. The number of businesses which sell, or take orders online, was 14. The remaining 13 do not offer this service yet, but many of them are thinking about offering it.

8. Business promotion is a major requirement for success in today's retail market. The five most frequently mentioned promotional activities by the 27 businesses are as follows (some use more than one):

| | | |
|---|---|---|
| a. | Facebook | 12 or 44.4% |
| b. | Newspapers | 11 or 40.7% |
| c. | Other social media | 10 or 37.0% |
| d. | Corporate/Head office | 6 or 22.2% |
| e. | Word of mouth | 6 or 22.2% |

9. When asked what else business owners themselves can do to improve their businesses, all but two mentioned nothing else, since they believe that they have done all they can.

[12] Poor locations, price, limited variety, poor service, outdated merchandizing, poor physical appearance, and lack of parking are some of these factors.

**It should be stated that we do not agree with this approach of the 25 businesses.** Some businesses thrive in poor markets, and others fail in excellent market conditions. Regardless of how well any business is performing, it can always do better. Promotion, new products, services, innovations, and customer appreciation are examples in this regard, based on our knowledge of the retail industry.

10. Another key question asked was what businesses, developments, or changes the interviewees would like to see in Russell TWP.

    A total of 92 suggestions were provided by the 27 interviewees. The five most frequently mentioned ones are:

| | | |
|---|---|---|
| a. | Good quality restaurants (includes 3 mentions for St. Hubert and Swiss Chalet restaurants) | 15 mentions or 55.5% |
| b. | Tourist-type businesses | 15 mentions or 55.5% |
| c. | More modern stores | 9 mentions or 33.3% |
| d. | More events/festivities | 7 mentions or 25.9% |
| e. | A hotel | 6 mentions or 22.2% |

11. At the end, we asked for any additional comments, opinions, and suggestions. The total number of comments made is 27. Six of the interviewees suggested that business owners should make themselves aware of other businesses in Russell TWP, and refer customers to one another. Some of the other unique and interesting comments are:

    a. The Mayor and Councillors should personally visit and support local businesses (1).
    b. Events such as Celt Fest and Winterlude should be attracted to Russell TWP (1).
    c. The Township should attract technology businesses to Russell (1).
    d. Improving the arena will help local businesses as well (1).
    e. The “land ownership monopoly” in Embrun should be weakened as it is a barrier to new industries (1).

**12. It should also be mentioned that at least half of the 27 interviewees were pleased to have the opportunity to discuss business improvement issues with us. They expressed satisfaction with the Township’s initiative to undertake this consultation process, and hope for positive changes in the local retail industry.**

**Table 7.1**
**Selected Characteristics of the Businesses**

| Characteristics | Number | % of Total |
|---|---|---|
| **1. Gender of Interviewees** | | |
| • Female | 12 | 44.4 |
| • Male | 15 | 55.6 |
| **2. Position** | | |
| • Owner | 13 | 48.1 |
| **3. Years in Current Business** | | |
| • Under 1 year | 1 | 3.7 |
| • 1-5 years | – | – |
| • 6-10 years | 3 | 11.1 |
| • 11-20 years | 6 | 22.2 |
| • 21-30 years | 13 | 48.1 |
| • 31 years or longer | 4 | 14.8 |
| **4. Years in Russell TWP** | | |
| • Under 1 year | 1 | 3.7 |
| • 1-5 years | 2 | 7.4 |
| • 6-10 years | 7 | 25.9 |
| • 11-20 years | 6 | 22.2 |
| • 21-30 years | 9 | 33.3 |
| • 31 years or longer | 2 | 7.4 |
| **5. Years at Present Location** | | |
| • Under 1 year | 2 | 7.4 |
| • 1-5 years | 3 | 11.1 |
| • 6-10 years | 9 | 33.3 |
| • 11-20 years | 7 | 25.9 |
| • 21-30 years | 4 | 14.8 |
| • 31 years or longer | 2 | 7.4 |
| **6. Tenure of the Property** | | |
| • Owner occupied | 12 | 44.4 |
| • Tenant occupied | 15 | 55.6 |
| **7. Businesses Outside Russell TWP** | | |
| • None | 18 | 66.7 |
| • 50 or more | 1 | 3.7 |
| • 100 or more | 8 | 29.6 |
| **8. Employment at This Business** | | |
| • Only 1 | 1 | 3.7 |
| • 2-5 | 13 | 48.1 |
| • 6-10 | 4 | 14.8 |
| • 11-20 | 4 | 14.8 |
| • 21-30 | 1 | 3.7 |
| • 31-50 | 2 | 7.4 |
| • 51 or more | 2 | 7.4 |

# APPENDIX A

| List of Retail and Service Businesses In Russell Township | | |
|---|---|---|
| **Business Name** | **Type** | **Area (sq. ft.)** |
| | **Embrun** | |
| **A. Retail Businesses** | | |
| Your Independent Grocer | Supermarket | 51,500 |
| Marché Bonihoix | Supermarket | 6,000 |
| Village Bakery | Bakery | 2,000 |
| M&M Food Market | Meat Shop | 2,000 |
| Depanneur du Projet | Convenience | 1,200 |
| C-Store | Convenience | 1,000 |
| Pierre et Fils | Convenience | 1,500 |
| Piché Fruits | Fruit Stand | 1,000 |
| LCBO | Liquor | 8,000 |
| The Beer Store | Beer | 2,000 |
| Jean Coutu | Pharmacy | 2,000 |
| IDA | Pharmacy | 2,000 |
| Shoppers Drug Mart | Pharmacy | 17,000 |
| Embrun Eyewear | Optical | 1,500 |
| Vagabond Clothing | Women's Clothing | 2,500 |
| JoMa | Women's Clothing | 2,000 |
| Cooperative Clothing | Children's Clothing | 2,000 |
| Foot Care Matters | Shoes | 1,200 |
| Longtin Jeweler | Jewellery | 1,200 |
| Photomania | Photography | 2,000 |
| Lalonde's Gifts | Gifts | 1,500 |
| Lady Jo | Gifts | 1,000 |
| Embrun Pottery | Pottery | 1,000 |
| Passiflora | Flowers | 1,500 |
| Earthly Essentials | Health & Beauty Products | 1,500 |
| Campbell Pool | Pools & Products | 5,000 |
| Porte Express Doors | Doors & Windows | 2,000 (retail section) |
| The Source | Electronics | 2,000 |
| RONA | Hardware | 31,000 |
| Embrun Floor Covering | Flooring | 10,000 |
| Seguin Plumbing | Plumbing | 2,000 |
| Bertrand Plumbing | Plumbing | 3,000 |

| List of Retail and Service Businesses In Russell Township, Continued | | |
|---|---|---|
| **Business Name** | **Type** | **Area (sq. ft.)** |
| Anchor Climate Care | Environmental | 2,000 |
| Latremouille | Tools | 2,500 |
| Home Hardware | Hardware | 12,000 |
| Velo Express | Bicycles | 2,000 |
| Loiselle Sports | Sporting Goods | 5,000 |
| Embrun Ford | Auto Dealer | 3,000 |
| Napa Auto Parts | Automotive | 3,000 |
| Auto Value | Automotive | 5,000 |
| Laplante's Chrysler Dodge Jeep RAM | Automotive | 3,000 |
| Embrun Collision | Automotive | 3,000 |
| Auto Tech Garage | Automotive | 2,000 |
| Benson Auto Parts | Automotive | 2,500 |
| Garage Loiselle | Automotive | 5,000 |
| Coop Garage | Automotive | 4,000 |
| Giant Tiger | General Merchandise | 25,000 |
| Dollarama | General Merchandise | 8,500 |
| Super Lucky Dollar | General Merchandise | 2,500 |
| Embrun Music | Music | 1,000 |
| Silicon Valley Computers | Computers | 1,000 |
| Papeterie Germain | Stationery | 1,500 |
| Game Store | Games | 1,500 |
| Floriste Embrun | Flower Shop | 1,200 |
| Embrun Post Office | Postal Products | 2,300 |
| Computer Doctor | Computer Products | 1,500 |
| Triangle Kitchen and Bath | Kitchen & Bath Products | 1,500 |
| Impressions | Gifts | 1,000 |
| **Total Retail** | **60** | **277,600** |
| **B. Service Businesses** | | |
| Embrun Barber | Barber Shop | 1,000 |
| First Choice | Barber Shop | 2,000 |
| Castor | Barber Shop | 2,000 |
| Shanthaly Salon | Beauty Salon | 2,500 |
| Genie Salon | Beauty Salon | 1,500 |
| Lynyasa Spa | Spa | 1,500 |
| Tesoro Spa | Beauty Salon | 1,500 |
| Love Salon | Beauty Salon | 1,500 |
| CIBC Bank | Financial | 2,000 |
| The Cooperators | Financial | 2,000 |
| RBC Bank | Financial | 3,000 |
| Lanthier Financial | Financial | 2,000 |
| Marlin Travel | Travel Services | 1,700 |

| List of Retail and Service Businesses In Russell Township, Continued | | |
|---|---|---|
| **Business Name** | **Type** | **Area (sq. ft.)** |
| Diane Roy | Financial | 1,500 |
| Gerard Accounting | Financial | 2,000 |
| Desjardins Bank | Financial | 3,000 |
| KC's Corner | Restaurant | 1,500 |
| Country Style | Restaurant | 1,200 |
| Subway | Restaurant | 1,500 |
| Boston Pizza | Restaurant | 2,500 |
| Dairy Queen | Restaurant | 2,000 |
| Tim Horton's | Restaurant | 2,000 |
| Dong Seng (Chinese) | Restaurant | 2,000 |
| Etienne Brûlé Brewery | Restaurant | 2,500 |
| Experience Café | Restaurant | 1,000 |
| Colonel's Pizza | Restaurant | 1,500 |
| Tiffany's Pizza | Restaurant | 1,500 |
| Homestead Pub | Restaurant | 2,000 |
| Sandee's Restaurant | Restaurant | 2,500 |
| Gabriel's Pizza | Restaurant | 2,000 |
| My Second Home (Chinese) | Restaurant | 2,500 |
| Shawarma Supreme | Restaurant | 1,500 |
| Mountain Boy | Restaurant | 2,000 |
| O P'tit Castor | Restaurant | 1,000 |
| Embrun Karate | Fitness | 3,000 |
| JR Fitness | Fitness | 3,000 |
| Visualize Fitness | Fitness | 2,000 |
| Beyond Fitness | Fitness | 2,000 |
| 100% Martial Arts | Fitness | 3,000 |
| Reps With Allison | Fitness | 1,500 |
| My Laundromat | Laundry | 1,000 |
| Dat Tran Laundromat | Laundry | 1,500 |
| Aux Pitous Adorables | Pet Grooming | 1,500 |
| Tuque de Broue Brewery | Restaurant | 3,800 |
| Tilia Esthetique | Beauty Salon | 1,300 |
| **Total Services** | **46** | **89,500** |

| List of Retail and Service Businesses In Russell Township, Continued | | |
|---|---|---|
| **Business Name** | **Type** | **Area (sq. ft.)** |
| **Russell Village** | | |
| **A. Retail Businesses** | | |
| Foodland (new) | Supermarket | 33,600 |
| Pronto | Convenience | 2,000 |
| C-Store | Convenience | 1,500 |
| IDA | Pharmacy | 1,500 |
| Russell Pharmacy | Pharmacy | 1,500 |
| Quilter's Barn and Gifts | Quilts | 2,000 |
| Corporate Gifts | Gifts | 1,500 |
| Urban Country Gifts | Gifts | 1,000 |
| RE Play Sports | Sporting Goods | 2,000 |
| Beyond the House | Plants & Gifts | 6,000 |
| Home Hardware | Hardware | 13,500 |
| Village Paws | Pet Shop | 2,000 |
| Post Office | Stamps | 1,000 |
| Duke's Garage | Automotive | 2,000 |
| SH Auto | Automotive | 1,000 |
| Piece & Quiet | Gifts | 1,500 |
| **Total Retail** | **16** | **73,600** |
| **B. Service Businesses** | | |
| Unik Hair | Beauty Salon | 2,000 |
| The Barber Shop | Barber Shop | 1,000 |
| Sunny Days | Travel Agency | 1,500 |
| H&R Block | Financial | 1,000 |
| JD Thompson Investments | Financial | 1,000 |
| Scotia Bank | Financial | 2,000 |
| Mill Street Massage | Massage Therapy | 1,200 |
| Russell Curling | Curling Club | 6,000 |
| RR Restaurant | Restaurant | 3,000 |
| Caribbean Chicken | Restaurant | 1,200 |
| Tim Horton's | Restaurant | 2,000 |
| Donairs & Pizza | Restaurant | 1,000 |
| Strength Craze | Fitness | 2,000 |
| Wever Financial | Financial | 1,400 |
| Dominion Lending | Financial | 1,000 |
| Bankley's Plumbing | Repair Shop | 1,600 |
| **Total Services** | **16** | **28,900** |

| List of Retail and Service Businesses In Russell Township, Continued | | |
|---|---|---|
| **Business Name** | **Type** | **Area (sq. ft.)** |
| **Limoges** | | |
| Jean-Claude Cayer Enterprises (De Walt) | Tools | 22,000 |
| Post Office Limoges | Postal Products | 3,500 |
| Joe's Pizza Shop | Restaurant | 3,800 |
| MD Autocare | Automotive | 4,100 |
| **Total** | **4** | **33,400** |

| List of Retail and Service Businesses In Russell Township, Continued | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Type of Business** | **Embrun** | | **Russell Village** | | **Limoges** | | **Total** | |
| | **No.** | **Area (sq. ft.)** | **No.** | **Area (sq. ft.)** | **No.** | **Area (sq. ft.)** | **No.** | **Area (sq. ft.)** |
| **Total Retail** | **58** | **273,100** | **16** | **73,600** | **2** | **25,500** | **76** | **372,200** |
| **Total Service** | **45** | **87,000** | **16** | **28,900** | **2** | **7,900** | **63** | **123,800** |
| **C. Other** | | | | | | | | |
| Vacant | 13 | 22,500 | 2 | 12,500 | – | – | 15 | 35,000 |
| Gasoline Stations | 3 | – | 1 | – | – | – | 4 | – |
| **Total Other** | **16** | **22,500** | **3** | **12,500** | **–** | **–** | **19** | **35,000** |
| **Grand Totals Combined** | **119** | **382,600** | **35** | **115,000** | **4** | **33,400** | **158** | **531,000** |
| **Vacancy Rates** | | **5.9%** | | **10.9%** | **–** | **–** | | **6.7%** |

Notes:

1. Sizes are based on visual estimation and measurements from outside, and are thus approximate. The total floor space for the above was 531,000 sq. ft. as of October 2018.
2. Some of the business (e.g., Porte Express Doors) are wholesale businesses, and/or serve contractors. In such cases, the portions for retail sales have been estimated and included in the above.
3. Building space for gasoline stations is considered to be negligible, unless there is a convenience store as well (e.g., C-Stores).

Source: Shore-Tanner & Associates based on field research and visual estimates in October 2018, and Russell Township's internal documents.

# APPENDIX B

## EXECUTIVE INTERVIEW GUIDE: RUSSELL TOWNSHIP

The following issues would be discussed with business owners and/or managers in Russell TWP. Interviews would be on an individual, in-person, and **confidential** basis, addressing issues relevant to retail business conditions and improvements in Russell.

1. Name of person interviewed.

2. Gender of person interviewed: a. male b. female

3. Position of person interviewed:

4. Name of his/her business:

5. Type of his/her business:

6. Number of years in this business:

7. Number of years in Russell TWP.:

8. Number of years at this location:

9. Owner occupied or tenant at this location:

10. Number of stores outside Russell TWP.

11. Number of employees at **this location:** FT__________ PT____________

12. What are the **strengths and positive attributes** of Russell? Why here rather than elsewhere? (probe)_____________________________________________

    _________________________________________________________________

13. What are some of the **challenges/problems** faced by your business at this location?

    _________________________________________________________________

14. In your opinion, what should **Russell TWP** do to further improve the business environment in Russell?

15. (For tenants): In your opinion, what should the **landlord do** to help your business perform better? ______________________________________________

________________________________________________________________________

16. In your estimation, approximately what percentage of your total annual sales are from **OUTSIDE Russell** TWP (probe)?__________________________________________

17. In the last two years, have your **total annual sales at this business**:

a- Increased b- Stayed the same c-Decreased d-Refused

18. What types of **advertising/promotion** do you normally do for this business?

a-Radio b-TV c-Newspaper d-Facebook e-Other Social Media______________

19- Do you offer your products/services **on-line?**

__________________________________________________

20. In your opinion, what else can **you** do to improve your business (probe):

21- What would make you **expand** your business at this location or elsewhere in Russell TWP?

22- What has been **your** experience with the supply, quality, and cost of **labour** for this business (probe)?

23. What **additional** retail or service businesses, or any other developments would **you** like to see attracted to Russell TWP.? (probe)

| | **Name** | **Type** |
|---|---|---|
| a) | | |
| b) | | |
| c) | | |
| d) | | |
| e) | | |

24. Any other **comments/suggestions** on how to further improve prospects for Russell businesses ? (probe)

# APPENDIX C

| Businesses Whose Owners/Managers Were Interviewed | |
|---|---|
| **Business Name** | **Location** |
| **A. Food & Convenience Businesses** | |
| 1. Pronto | Russell Village |
| 2. C-Store | Russell Village |
| 3. Russell Pharmacy | Russell Village |
| 4. R & R Restaurant-Bar | Russell Village |
| 5. Tim Horton's | Embrun |
| 6. Village Bakery | Embrun |
| 7. M & M Food Market | Embrun |
| 8. Subway Restaurant | Embrun |
| 9. Boston Pizza | Embrun |
| 10. Jean Coutu Pharmacy | Embrun |
| **B. Fashion Businesses** | |
| 11. Boutique JOMA Women's Clothing | Embrun |
| 12. Longtin Jewellers | Embrun |
| 13. Giant Tiger | Embrun |
| **C. Furniture, Furnishings, & Gifts** | |
| 14. Floriste Embrun | Embrun |
| 15. Urban Country Gifts | Embrun |
| 16. Beyond the House | Russell Village |
| **D. Home Improvement** | |
| 17. Anchor Climate Care | Embrun |
| 18. Latremouille Tools | Embrun |
| 19. Cayer Enterprises (De Walt Tools) | Limoges |
| **E. Specialty Businesses** | |
| 20. Photomania | Embrun |
| 21. Silicon Valley Computers | Embrun |
| 22. Papeterie Germain | Embrun |
| **F. General Merchandise** | |
| 23. Dollarama | Embrun |
| 24. Super Lucky Dollar | Embrun |
| **G. Service Businesses** | |
| 25. Embrun Barber | Embrun |
| 26. Scotia Bank | Embrun |
| 27. The New Barber Shop | Embrun |

Notes:
1. All 27 interviews by Barry Nabatian of Shore-Tanner & Associates were carried out on week days, in person, between 1:00 and 4:30 pm during February and March 2019.
2. Business owners for numbers 12 and 20 did not recall that they had been interviewed by OPRO before, and wished to be interviewed by Barry Nabatian in any case.

SHORE·TANNER & ASSOCIATES
REAL ESTATE APPRAISERS AND CONSULTANTS
148 COLONNADE ROAD SOUTH, SUITE 202, OTTAWA, ONTARIO K2E 7R4

# COMPANY PROFILE: MARKET RESEARCH DIVISION

Tel. 613 224-8484 ext.117 Fax. 613 224-8483

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

## *SERVICES PROVIDED BY OUR MARKET RESEARCH DIVISION*

| | |
|---|---|
| Public Consultations | Sales Forecasting |
| Focus Group Research | Financial Analysis |
| Executive Interviews | Feasibility Analysis |
| Consumer Surveys | Economic Studies |
| Mystery Shopping | Strategic Studies |
| OMB Services | Business Plan Development |

## SAMPLE OF PRIVATE SECTOR CLIENTS

| | |
|---|---|
| ***Business Community*** | ***Retail Sector*** |
| Ottawa Congress Centre (now Shaw) | Rideau Centre |
| Metro Richelieu (Montreal) | Glebe BIA |
| Panera Bread (U.S.A.) | Sparks Street BIA |
| ***High Technology Companies*** | ***Legal Firms*** |
| Corel Corporation | Gowlings |
| JDS Uniphase | Soloway-Wright |
| Cognos (now IBM) | GIBSONS LLP |
| ***Developers*** | ***Professional Groups*** |
| GreatWise (Toronto) | FoTenn Planning |
| DCR Phoenix Homes | SamCon Inc. (Montreal) |
| Junic Homes (Gatineau) | Colliza Architects |

## SAMPLE OF PUBLIC SECTOR CLIENTS

City of Ottawa, Clarence-Rockland, Carleton Place, Arnprior, Gananoque, Russell, and Brockville; Infrastructure ON, Salvation Army, University of Ottawa, Carleton Univercity, Royal Ottawa Hospital; PWGSC, and NCC.

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# BARRY NABATIAN, A.A.S., B.SC., M.SC.

## Director: Market Research Division

**Tel: 613 224-8484 ext. 117 Fax: 613 224-8483 E-Mail: barry@shore-tanner.com**

**SECURITY CLEARANCE AUTHORIZATION: RELIABILITY STATUS**

## SPECIALTY OVERVIEW

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

## CAREER SUMMARY

| | |
|---|---|
| July 2010 - present | **Director,** Shore-Tanner & Associates |
| 1997 - June 2010 | **General Manager**, Market Research Corporation |
| 1985-1997 | **Vice-President**, Corporate Research Group Limited |
| 1974-1985 | **Senior Market Analyst**, Planning Branch, City of Ottawa |
| 1973-1974 | **Market Analyst**, Decision Sciences Corporation, Philadelphia, U.S.A |

## CAREER PROFILE

**July 2010 – Present: Director, Market Research Division**

Under Barry's direction and full participation, major studies have been completed regarding the impacts of the City of Ottawa's planned Light Rail Transit (LRT) system on real estate developments; market demand and feasibility of various types of residential, retail, office and industrial development proposals, adaptive re-uses of very large government-owned former health care and industrial properties; business improvement areas, the University of Ottawa's future space needs; and OMB testimony. These studies have involved sites in the Cities of Ottawa, Brockville, Thunder Bay, and Kingston; Towns of Perth, Kemptville, Pembroke, Petawawa and Casselman (Ontario); Gatineau, Lacolle, St. Bernad (Quebec), Aldergrove, and Osoyoos (B.C.). A wide variety of quantitative forecasting as well as qualitative research techniques form the basis of these studies which have dealt with vacant land, as well as brown field developments, demand for built space by type, value, and return-on-investment.

**September 1997 – June 2010: General Manager, Market Research Corporation**

Barry Nabatian directed and participated in the completion of numerous studies involving market analysis, surveys, economic research, sales forecasting, public consultation, preparation of strategic plans, and policy documentation. These services were provided for a wide variety of private sector, municipal, provincial, federal and crown corporation clients, as well as for educational and health care institutions. As an experienced witness at different court levels, he appeared dozens of times at Ontario Municipal Board hearings, municipal councils, Assessment Review Board, and other public bodies. His approach to problem solving has been based on consensus building, strategic thinking and innovative solutions.

**September 1985 – April 1997: Vice-President, Corporate Research Group Limited**

Barry directed and contributed to the completion of hundreds of marketing, feasibility, financial and official plan studies related to the office, retail, industrial, and residential markets in Canada and Northeastern USA. Estimation of demand by market segments and time frame, absorption, rental rates, tenant inducements, and pricing strategies were one group of major studies. Another one was site analysis, evaluation and selection, review and/or critique of planning, strategy, and policy documents on behalf of both public and private sector clients. He also developed a number of econometric, simulation, and sales forecasting models for the commercial sector. As well, he appeared as an expert witness before numerous courts, panels of the OMB, the Québec Régie, municipal councils, and other governmental boards and commissions.

**Nov. 1974 – Sept. 1985: Senior Market Analyst, Planning Branch, City of Ottawa**

Barry was responsible for the design and implementation of a wide variety of commercial studies (e.g., Rideau Centre), research programs, development of property information systems, policy analysis, and positions for Ottawa City Council. He carried out numerous major office, shopping centre, housing studies and development strategies, with emphasis on the downtown core, including the development of a major database for the Ottawa Greater Central Area. Economic analysis and forecasting for the City were also his responsibilities, and he assisted in the creation of the City's Economic Development Department.

**April 1973 – November 1974: Market Analyst, Decision Sciences Corp., Philadelphia, USA**

Barry carried out market feasibility analyses for proposed new satellite communities for the US Department of Housing and Urban Development (HUD). Another major project was the determination of impacts of specific departmental renovations and expansions on total sales of a major supermarket chain with operations in several Northeastern States.

## PERSONAL INFORMATION

| | |
|---|---|
| Citizenship: | Canadian since 1976 |
| Languages: | Fluent in English, Persian, plus some French and Russian |

**Education:**

| | |
|---|---|
| May 1973 | **Masters of Science**, Urban Economics and Policy Planning<br>State University of New York at Stony Brook, U.S.A.<br>Master's thesis: Truck Routing |
| May 1971 | **Bachelor of Science**, Physics<br>State University of New York at Stony Brook, U.S.A. |
| May 1969 | **Associate of Applied Sciences**<br>New York City Community College<br>Brooklyn, NY, U.S.A. |

As well, Barry has completed numerous courses, special training, and attended seminars in the fields of economics and statistics related to real estate markets, lifestyle trends, various consumer products and services, financial and wealth management. He has made numerous presentations and given lectures on these topics to various groups, including at the Real Estate Forum of 2011 in Ottawa with well over 500 attendees.

**Interests**

**Cooking, swimming, hiking, yoga, dancing, and philosophy.**