Oxford County
Commercial Policy Review

Characteristics of Oxford's Retail Sector & Profile of The Commercial Structure
Module One

Prepared by

June 2009
Revised

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And

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1.0 INTRODUCTION

1.1 BACKGROUND

The County of Oxford is undertaking a Commercial Policy Review as input into its upcoming five year review of the Official Plan.

The County is faced with some significant challenges. It is anticipated to experience substantial population growth over the next 20 years; potentially as high as a 35% increase. However, in the short term, it is experiencing, along with the rest of Southern Ontario, a major stalling of the economy particularly in the manufacturing sector. Despite this short-term economic decline, it is also faced with ongoing interest and pressure for the designation of retail space in its urban centres.

Faced with these challenges, it is imperative for the County to continue to maintain commercial policy directives that remain relevant for the consumer, the industry and the County particularly as it relates to the proper planning and structure of its urban areas. As such, it is necessary to understand the future commercial needs of the County, the locational criteria and trends of the commercial industry, and the strengths and weaknesses of the current policy structure. It is also an opportune time to take stock of the County's current physical structure and seek opportunities to build upon and improve the existing built environment while capitalizing on current commercial demands and retail trends.

The County retained Sorensen Gravely Lowes Planning Associates in association with Robin Dee & Associates in 2008 to undertake the Commercial Policy Review. The study is separated into two interrelated modules. Module One (the subject of this report) looked at the inventory and characteristics of the retail industry in Oxford, reviewed the commercial policy structure, identified retail clusters based on the locations of existing commercial establishments, profiled the characteristics of the retail clusters, and forecasted growth in the retail industry over the next 22 years. Module Two will establish recommendations on retail space distribution, alternative policy approaches, structures and controls.

1.2 CONTENTS OF THIS REPORT

This report provides an overview of the commercial structure of Oxford County, and represents the findings of Module One of the Commercial Policy Review:

- Chapter 2 provides an overview of the commercial land use designations that exist in the County;
- Chapter 3 describes the commercial areas, commercial inventory, and health of each urban centre and serviced village (**Figure 1**);
- Chapter 4 takes into account commercial applications that are currently under review within the County, and in the surrounding municipalities;
- In light of the current retail and service space inventory discussed in Chapter 3, Chapter 5 discusses the retail/service levels measured in the form of space per capita for each urban centre and serviced village;
- Chapter 6 maps out the trade areas for each of the three large urban centres;

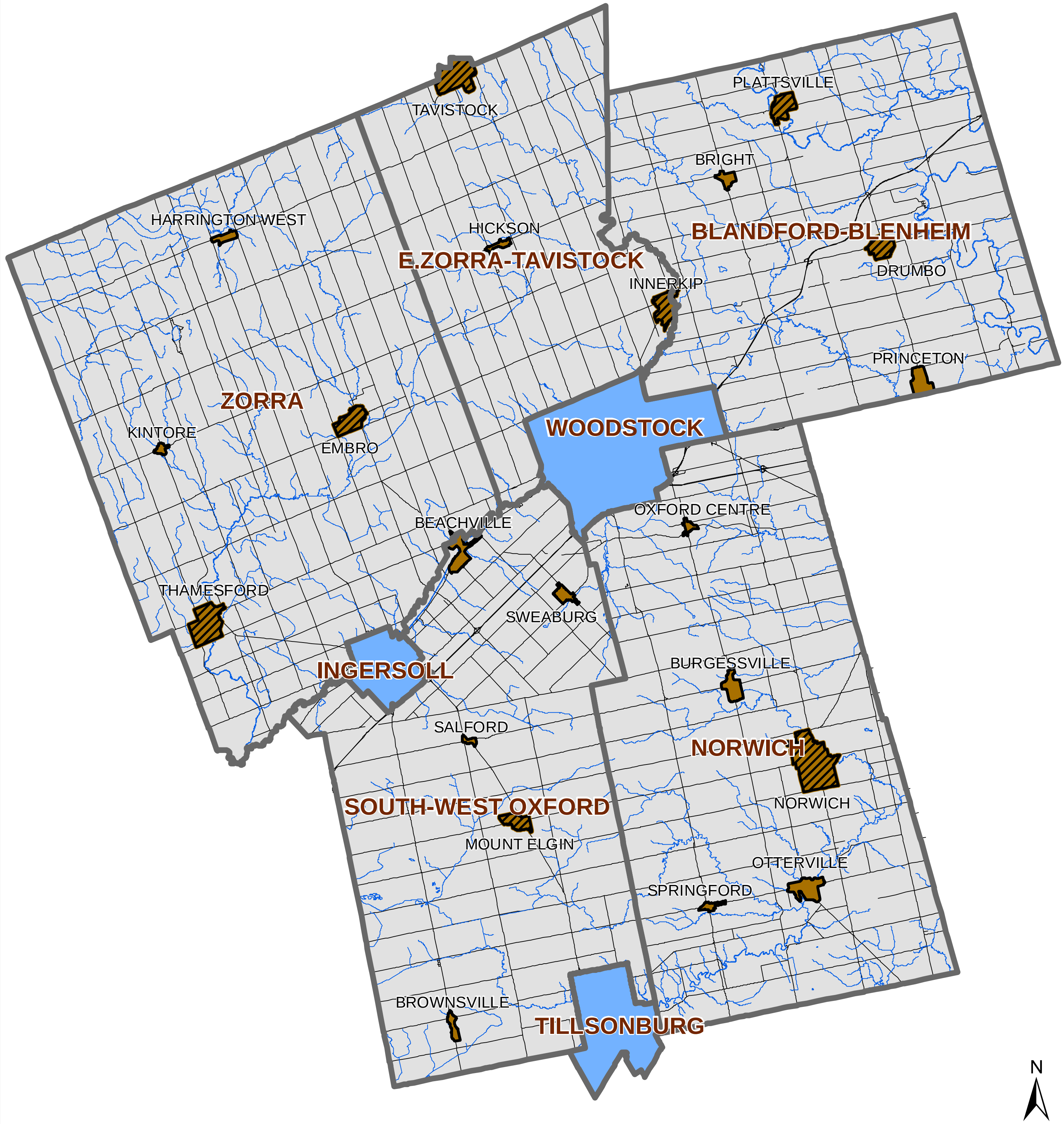

Figure 1 - County Structure

Commercial Policy Review

Township Boundaries
Urban Areas
Serviced Villages
Villages
Watercourses

0 5 10 20 Kilometers

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- Chapter 7 discusses two population scenarios, which sets up the discussions on capture rates in Chapter 8 and the projected retail and service space needs in Chapter 9;
- Chapter 10 provides a proposed retail space distribution amongst Woodstock, Tillsonburg, Ingersoll, and the Rural Settlements;
- In light of the previous 9 chapters, Chapter 11 provides a summary of the issues and opportunities in Oxford's commercial structure; and
- Finally, Chapter 12 closes the report with the next steps for this study.

2.0 COMMERCIAL DESIGNATIONS

The Oxford County Official Plan contains seven commercial designations. Their intended role and function are briefly discussed below.

2.1 CENTRAL BUSINESS DISTRICT

The Central Business District is intended to be the most intensive, functionally diverse and dominant business, cultural and administrative centre in each municipality in which it is located. The designation generally correlates to the traditional main street or downtown within each of the urban municipalities. A full range of commercial, office, administrative, cultural, entertainment, recreation, institutional and open space and accessory residential uses are permitted in recognition of this function.

2.2 ENTREPRENEURIAL DISTRICT

The Entrepreneurial District permits a limited range of non-retail commercial uses such as personal services, offices, business supply and services and repair shops as well as residential intensification. Entrepreneurial District areas are generally found in the area surrounding the Central Business Districts of the large urban centres (Woodstock, Ingersoll, and Tillsonburg).

2.3 REGIONAL COMMERCIAL NODE DEVELOPMENT

The Regional Commercial Node Development designation, found only in Woodstock, is intended to provide for a wide range of commercial uses that meet specialized service and comparison-shopping needs. It is regarded as a major activity centre that serves the County, and is intended to serve a trade area population of approximately 50,000. A wide range of retail and services are permitted, including a wide range of retail outlets, grocery and food stores, medical and dental offices and clinics, personal services, home and auto supply stores, and restaurants. Development proposals, particularly those for large footprint retail uses are to be evaluated through the requirement for site specific amendments to the County Official Plan and Area Zoning By-Law and various supporting studies. .

2.4 SERVICE COMMERCIAL

The Service Commercial designation is intended for commercial uses that cater to vehicular traffic, and single purpose shopping trips, where customers are typically generated from passing traffic or a wide ranging market area. Service Commercial areas are intended for uses that would not be suitable to be located within the Central Area, Village Core or Shopping Areas because of access requirements, large lot area, exposure requirements, or because of incompatibility conflicts with residential development. Some of the permitted uses are automotive sales and services, farm implement sales, convenience commercial uses, personal services, restaurants and fast food outlets, retail food stores, retail or wholesale uses which require large areas for on-site storage of goods or vehicles and other types of commercial uses that offer service to the traveling public, business and industry.

2.5 NEIGHBOURHOOD SHOPPING CENTRE

Neighbourhood Shopping Centre designated areas are intended to serve more localized needs such as meeting the daily or weekly convenience shopping and service needs of nearby residents. Neighbourhood Shopping Centre areas will generally have between 1,858 and 4,645 square metres of gross leasable commercial floor area. Some of the permitted uses are gas bars, grocery stores, personal services, medical and dental clinics and offices, personal services, drug stores, and hardware stores. The Neighbourhood Shopping Centre designation is exclusively used in the City of Woodstock, and is found on sites in predominantly residential areas, on or near a major road for convenient accessibility.

2.6 CONVENIENCE COMMERCIAL

Convenience Commercial uses are permitted by the policies for Woodstock, Ingersoll, and Tillsonburg. Convenience commercial uses are intended to provide the surrounding neighbourhood's every-day goods and services, and will generally be limited to a maximum of 930 square metres of gross leasable commercial floor area. Convenience Commercial uses are not delineated on the land use schedules but are permitted in the Residential Area designation in the three large urban centres subject to a zoning by-law amendment.

2.7 VILLAGE CORE

Village Cores are located in the serviced villages, i.e. Norwich, Mount Elgin, Tavistock and others. The Village Core represents a relatively compact area of predominantly commercial uses, which have historically functioned as a downtown shopping district. The role of Village Core areas is to function as the central business area serving both the village residents, and residents of the wider rural area. As such, a full range of retail uses is permitted.

2.8 UNSERVICED VILLAGES AND RURAL CLUSTERS

In the unserviced villages and rural clusters, no commercial designation or hierarchy applies. The permitted uses consist of commercial uses and cottage industries that are small scale and suitable on private services. These uses are intended to serve residents of the settlement, and residents of the surrounding agricultural area or the traveling public.

3.0 PROFILE OF THE COMMERCIAL STRUCTURE

A detailed inventory of occupied and vacant retail/service space (gross leaseable area) by major category throughout the County was conducted in January 2009. Each space has been classified by municipal address, size, and current use. The inventory is generally limited to ground floor activities.

Within each of the Large Urban Centres (Woodstock, Tillsonburg and Ingersoll) (**Figure 1**), the inventory has been assembled by a series of clusters. Within the Rural Settlements, because of the relatively smaller areas of commercial space, the entire area within the boundary of the serviced village has been treated as a commercial cluster. Clusters are geographical areas containing a concentration of retail/service activity.

3.1 WOODSTOCK

The overall structure of Woodstock's commercial designated areas can be categorized into eight distinct commercial clusters (**Figure 2**). The role of each commercial cluster, and the function of the commercial designations within each cluster are discussed below. Some commercial establishments exist outside of the commercial clusters identified in this study. Those commercial spaces are noted in the commercial inventory, and classified in the "Other Woodstock" category (see **Table 1**).

3.1.1 The Central Area Cluster

The Central Area is the downtown of the City, where retail, office, and administrative uses are focused. In fact, the Central Area is intended to be the most intense and diverse commercial, cultural and entertainment area for the County, while all other commercial areas in the City and County play a lesser commercial role.

Land Use Designations
There are two commercial designations within the Central Area: the Central Business District (CBD) and the Entrepreneurial District (**Figure 3**). The Central Business District is intended to be the most intensive, functionally diverse and dominant business, cultural and administrative centre within the County. Therefore, a full range of commercial, office, administrative, cultural, entertainment, recreation, institutional and open space and accessory residential uses are permitted.

The Entrepreneurial District permits a more limited range of commercial uses, with less focus on retail uses. Permitted uses consist of personal services, offices, business supply and services, repair shops, and residential intensification. The Entrepreneurial District areas are found north and south of Dundas Street, surrounding the Central Business District designated areas.

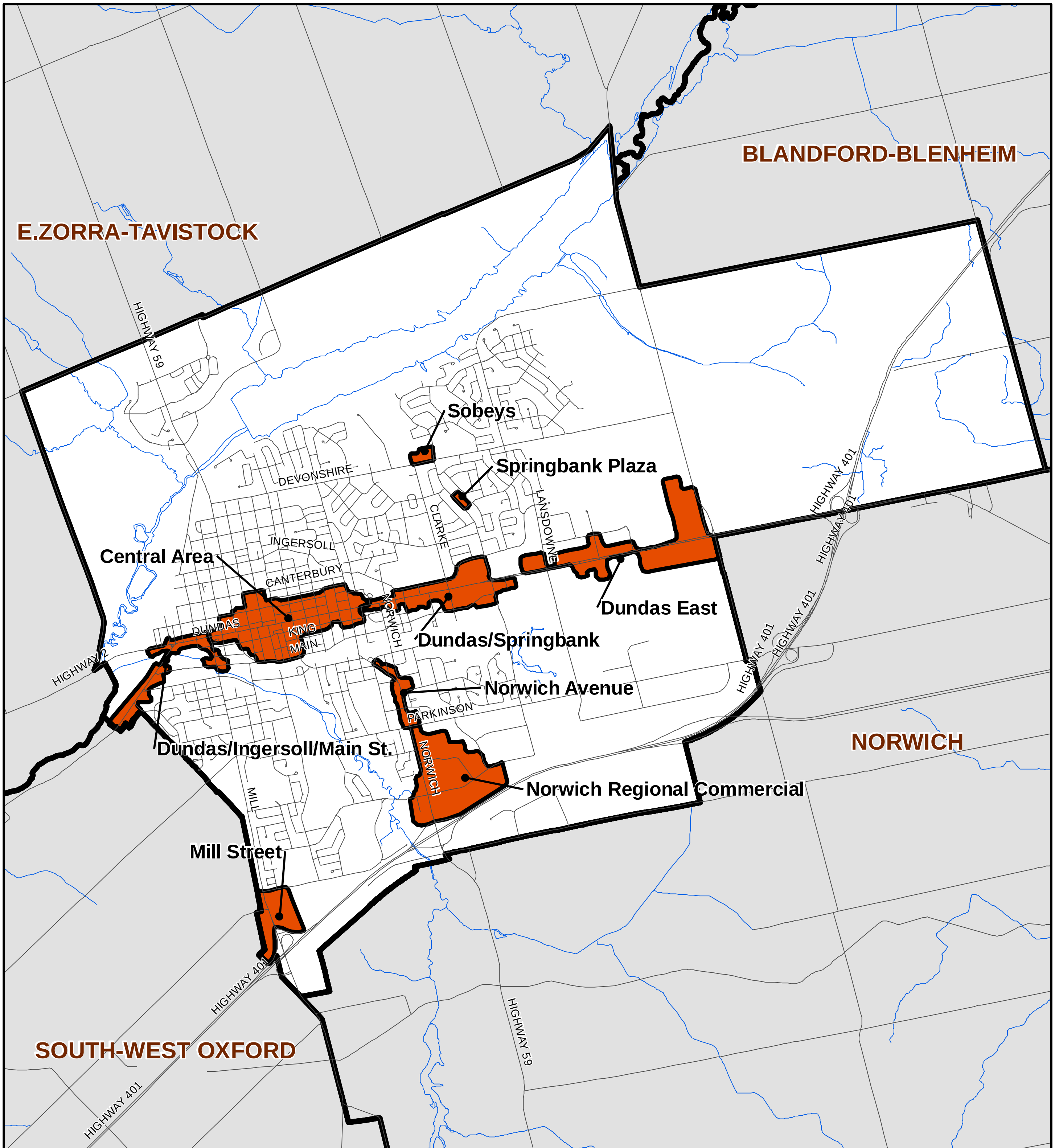

Figure 2 - Woodstock Commercial Clusters

Commercial Policy Review

Municipal Boundaries

Commercial Clusters

Watercourses

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TABLE 1
CITY OF WOODSTOCK
RETAIL/SERVICE SPACE INVENTORY
(Square Feet)

RETAIL/SERVICE CATEGORIES	Central Area	Dundas East	Dundas / Springbank	Norwich Ave	Norwich Regional Comm	Sobeys Plaza	Springbank Plaza	Dundas / Ingersoll / Main St	Mill St	Other Woodstock	TOTAL WOODSTOCK
FOOD RETAIL STORES											
Supermarket / Grocery Stores	22,000	0	109,700	0	0	32,000	0	0	0	0	163,700
Specialty Food Stores	12,000	11,100	6,000	2,500	5,900	0	0	8,500	0	17,500	63,500
Total FRS	34,000	11,100	115,700	2,500	5,900	32,000	0	8,500	0	17,500	227,200
NON FOOD RETAIL STORES											
Department Stores	65,000	0	0	0	130,000	0	0	0	0	0	195,000
Specialty Stores	179,600	27,300	50,600	22,000	92,200	5,100	4,000	1,000	0	68,600	450,400
Pharmacy And Personal Care Stores	23,100	0	12,500	2,900	3,500	2,400	0	0	0	3,600	48,000
Other NFSR	49,000	55,200	20,600	11,900	188,800	0	1,200	19,700	0	60,900	407,300
Total NFRS	316,700	82,500	83,700	36,800	414,500	7,500	5,200	20,700	0	133,100	1,100,700
Liquor/Beer/Wine Stores	2,500	0	9,900	0	0	0	2,100	0	0	0	14,500
TOTAL RETAIL	353,200	93,600	209,300	39,300	420,400	39,500	7,300	29,200	0	150,600	1,342,400
SERVICES:											
Eating/Drinking	80,300	7,500	37,600	9,000	58,400	2,800	900	2,500	22,400	15,300	236,700
Personal Services	48,900	0	8,500	3,500	5,100	1,500	2,900	1,000	0	6,600	78,000
Finance/Insurance/Real Estate	108,000	0	23,300	0	0	3,600	3,600	1,000	0	10,800	150,300
Medical/Dental/Health Services	42,400	0	2,000	2,000	2,000	1,200	0	5,700	0	23,000	78,300
Business Services	12,800	1,800	13,500	0	0	0	0	0	0	1,300	29,400
Entertainment	44,900	0	65,000	0	10,000	0	3,000	17,500	0	0	140,400
Other Services	112,000	23,800	25,300	5,900	2,700	0	6,000	18,400	0	64,200	258,300
Miscellaneous Office	89,900	0	42,000	4,200	0	0	0	0	0	21,000	157,100
TOTAL SERVICES	539,200	33,100	217,200	24,600	78,200	9,100	16,400	46,100	22,400	142,200	1,128,500
VACANT SPACE	197,900	0	12,200	0	0	0	10,100	15,000	0	3,800	239,000
VACANCY RATE	18.2%	0.0%	2.8%	0.0%	0.0%	0.0%	29.9%	16.6%	0.0%	1.3%	8.8%
TOTAL RETAIL/SERVICES AND VACANT SPACE	1,090,300	126,700	438,700	63,900	498,600	48,600	33,800	90,300	22,400	296,600	2,709,900

Source: Dalvay Group Winter 2008/2009

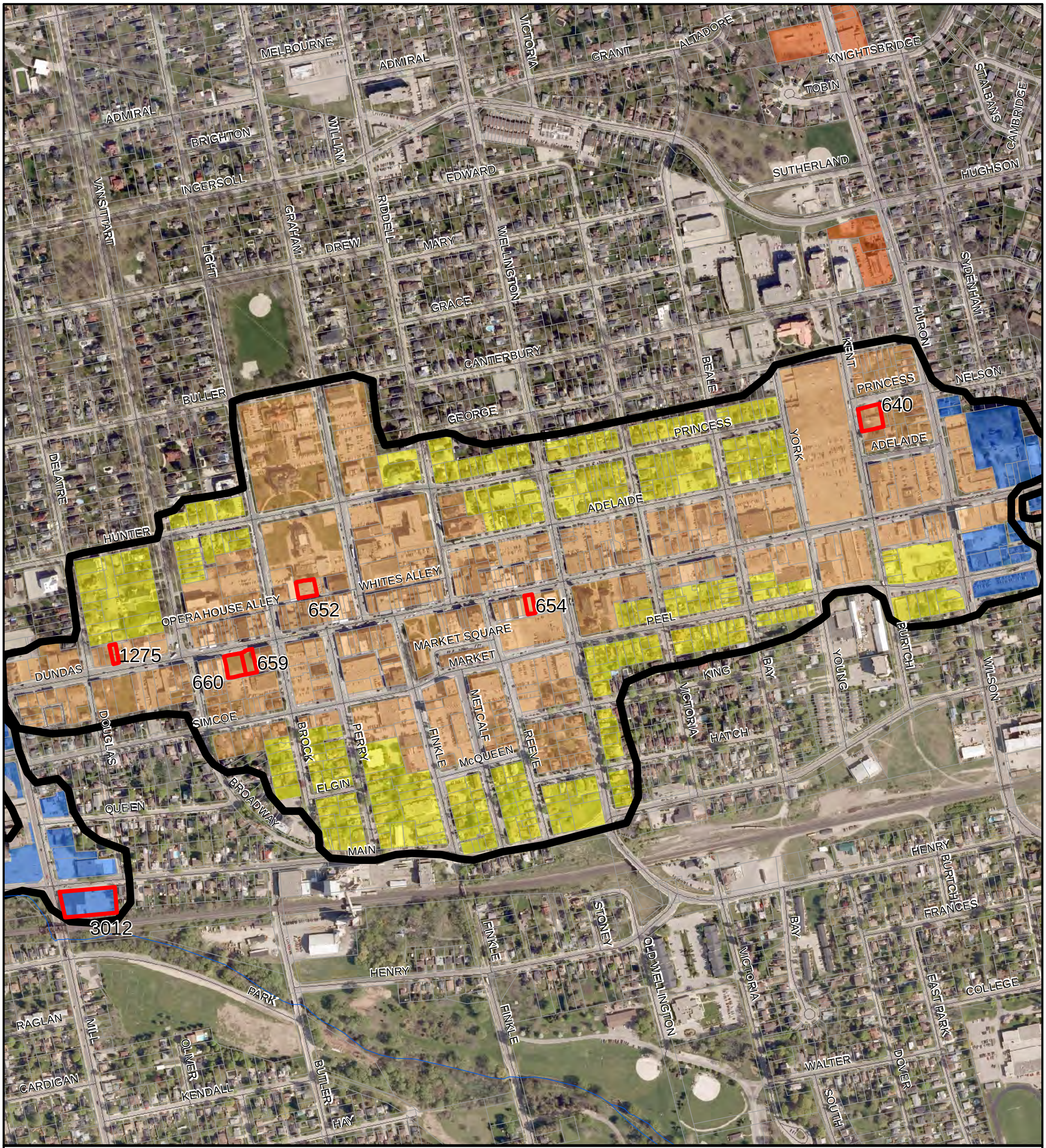

Figure 3 - Woodstock - Central Area Cluster

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

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Watercourses
Commercial Clusters
Vacant Commercial Sites

Commercial Designations

Central Business District
Entrepreneurial District
Neighbourhood Shopping Centre
Regional Commercial Node Development
Service Commercial

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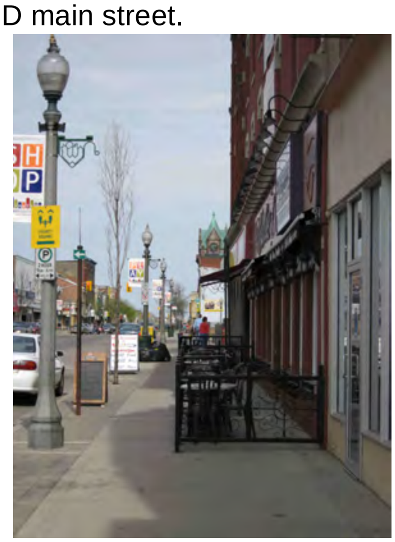
Retail Space Characteristics

The Central Area contains a broad range of retail and service space. Zellers, one of the two department stores in Woodstock is located within the CBD designated area, and shares a building with a Foodland Grocery Store. It anchors the eastern end of the CBD designated area at Dundas and Wilson Streets. The buildings in the east end of the Central Area appear newer, and are more spread-out. There is also more on-site parking between stores and the street, compared to the western sector, and there is no on-street parking east of York Street. As a result, the streetscape design and building orientation is less pedestrian friendly. A stronger pedestrian main-street character begins at Beale Street. However, the more vibrant component of the downtown begins at Wellington Street and runs to Light Street. In this area of Dundas Street, retail becomes more specialized but with predominantly local shops verses national chains.

West of Vansittart Avenue, the character changes with a steep grade, buildings spread out and more residential buildings are intermixed. Although the new Shoppers Drug Mart is considered a significant anchor tenant, the store is separated from the sidewalk by a parking lot and doesn't add to or extend the pedestrian main street character. Also, the adjacent Mac's Convenience Store is at a significantly higher elevation from the sidewalk, requiring a retaining wall along the sidewalk. This section of Dundas Street becomes less pedestrian friendly, similar to the eastern sector of the Central Area. Despite the new Shoppers Drug Mart and the Mac's Convenience Store, repeated vacant storefronts and quieter street activity makes this area feel separate from the core part of the CBD main street.



Despite the high concentration of commercial space, Woodstock's Central Area does not lead in retail space. In total, 35% (317,000 square feet) of the commercial establishments are non-food retail stores comprised mostly of specialty stores, and the Zellers and Shoppers Drug Mart; and only 4% (34,000 square feet) is food related, represented by the Foodland Grocery Store and some smaller specialty food stores. The Central Area is second in terms of retail activity, following the Norwich Regional Commercial cluster. The majority of the commercial space in the Central Area is service oriented. Commercial services such as restaurants, medical offices, professional services, and banks make up 60% (or 539,200 square feet) of the occupied commercial space in the Central Area. Professional services such as finance, insurance, and real estate service are also a significant component of the Central Area, making up some 108,000 square feet (**Table 1**).

Many of the commercial services are located in the Entrepreneurial District, north of Dundas Street. Significant government and institutional uses are located here, such as the Oxford County Court House, a public school, and a high school. In addition, several professional commercial services are also located north of Dundas Street, housed in stately former residential buildings, such as medical clinics, insurance, legal and accounting services. The northern Entrepreneurial District is vibrant with activity, being occupied by a number of commercial services and institutional uses, and complemented by a major public park and stately residential buildings.

In contrast, the Entrepreneurial District located south of Dundas Street is occupied by smaller residential building stock, and contains less office and commercial service uses than the Entrepreneurial District located north of Dundas Street. Unlike the northern Entrepreneurial District, the southern Entrepreneurial District has not yet evolved into a commercial services district. This is particularly evident as one moves further south away from Dundas Street. While both areas have commercial uses intermingled with residential uses, the southern Entrepreneurial District is predominantly residential.

Relative Health

In terms of the health of the Central Area cluster, vacant space amounts to 197,900 square feet (see **Table 1**). This equates to a vacancy rate of 18%, which is more than double of what would be considered a "healthy" market. A range of 6% to 8% is considered normal for an efficient market. Much of the vacant space is found on Dundas Street, and predominantly in the far west end where vacant storefronts become more frequent. In fact, most of the vacancies appear west of Light Street. Vacancies within existing buildings located west of Light Street amount to 52,700 square feet. If the vacancies of this area were excluded from the Central Area, the vacancy rate would drop to 13%.

In terms of commercial designated lands, there are approximately 48 hectares of commercial designated lands in the Central Area (not including environmental constraint areas). However, there is only a very small amount of vacant commercial designated lands in the Central Area (not including environmental constraint areas), amounting to approximately 0.47 hectares on a series of small properties as illustrated on **Figure 3** and in **Table 2**.

Table 2. Woodstock Central Area Cluster Vacant Commercial Designated

Map ID	Official Plan Designation	Zone	Net Area (ha)
640	Central Area	C3	0.13
651	Central Area	C5	0.11
654	Central Area	C5	0.04
659	Central Area	C5	0.07
660	Central Area	C5	0.10
1275	Central Area	C5	0.03
Woodstock Central Area Total			**0.47**

Planned Function

The Central Area contains a significant amount of retail space occupying 40% of the occupied space in the Central Area, and with significantly more specialty stores (apparel, home furnishings, and miscellaneous retail), when compared to the other commercial clusters in Woodstock at 84,800 square feet. This compares with Tillsonburg at 60% retail and with Ingersoll at 52%. This characteristic contributes to the Central Area's function as a discretionary shopping area. The real dominance of the Woodstock Central Area is found in the amount of Service space; it accommodates some 540,000 square feet, including eating/drinking, finance/insurance/real estate, and entertainment (see **Table 1**). As such, the Central Area is achieving its planned function in terms of being the focal area for cultural activities, entertainment, and professional services. However, additional higher end restaurants, and specialty retail stores would help improve its function as a discretionary shopping area providing residents with a unique shopping experience.

Uniqueness of Location

The Central Business District in Woodstock is centrally located in the City. It is easily accessible for patrons traveling from Highway 401, via Mill Street or Norwich Avenue, which bookend the downtown. Additionally, the historic architecture, Museum Square and Market Square create a picturesque setting for patrons. While the Central Area benefits from being anchored by a Zellers, this major tenant is located at the far eastern end of the shopping area, and beyond comfortable walking distance from the western sector of the Central Area.

The downtown is almost 1,550 metres long (between Mill Street and Wilson Street). Most successful downtowns or main streets are in the range of 400 to 600 metres long. Focal shopping areas tend to be more compact to maintain a walkable and convenient shopping experience.

However, despite its length, the Central Area is well connected to the surrounding residential neighbourhoods, although the railway separates it somewhat from the neighbourhoods to the south. In addition, the Central Area benefits from being located adjacent to a higher-end residential area to the north. This attribute supports walkability, and presents opportunity to meet the convenience needs of local residents, and entertainment for evening patrons.

In addition to the advantage of being surrounded by residential neighbourhoods, the Central Area contains a significant number of institutional uses including a cluster of such uses between Riddell and Light Streets, from Adelaide Street to Buller Street to the north of Dundas Street as well as the City Hall and the County Administration Building on the south side of Dundas Street. These institutional uses, their patrons and employees help to support the downtown shops and services during the day.

3.1.2 Norwich Regional Commercial Cluster

The second most significant commercial cluster in Woodstock is the Norwich Regional Commercial cluster, located at the highway interchange of Highway 401 and Norwich Avenue (**Figure 2**).

Land Use Designation

This cluster represents the Regional Commercial Node (RCN) and a small portion of the Service Commercial designated area along Norwich Avenue (**Figure 4**). The Regional Commercial Node designation is intended to provide for a wide range of commercial uses that meet

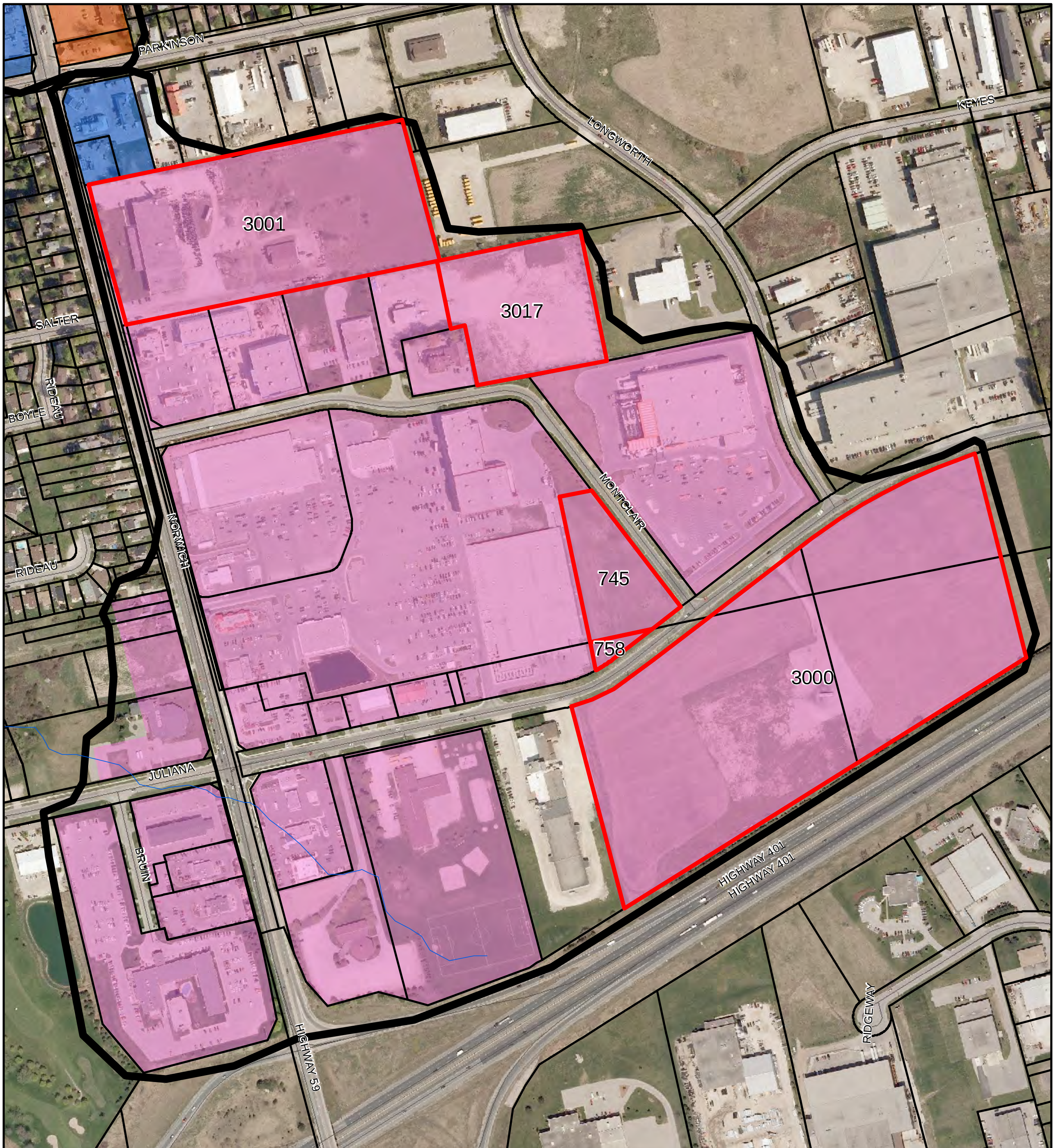


Figure 4 - Woodstock - Norwich Regional Commercial Cluster

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

N

Watercourses

Commercial Clusters

Vacant Commercial Sites

Commercial Applications

Commercial Designations

Central Business District

Entrepreneurial District

Neighbourhood Shopping Centre

Regional Commercial Node Development

Service Commercial

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specialized service and comparison-shopping needs. It is the major activity centre that serves the County, intended for a trade area population of approximately 50,000. A wide range of retail and services are permitted, including a wide range of retail outlets, grocery and food stores, medical and dental offices and clinics, personal services, home and auto supply stores, and restaurants. Development proposals, particularly those for large footprint retail uses, are evaluated through the requirement for site specific amendments to the County Official Plan and Area Zoning By-Law and various supporting studies. Only one Regional Commercial Node exists in the County.

Retail Space Characteristics
The Norwich RCN is a power centre of recent vintage and the only power centre in the County. The Wal-Mart Centre department store (130,000 square feet), and the other non-food specialty retailers such as Canadian Tire, Winners, and Home Depot (190,000 square feet) are the major tenants, and make up 83% of retail space in this commercial cluster (**Table 1**). Specialty retailers include Marks Work Wearhouse, Payless Shoes, Claires, Staples, and The Source By Circuit City. Commercial services are also located here, such as Pearl Vision, First Choice Hair Cutters, and Tan Factory, but comprise only 16% of the commercial space. The RCN is relatively new, with plenty of parking. A hotel is also currently under construction on a site located along the west side of Norwich Avenue, just north of Juliana Drive.

Relative Health
There are no vacancies within the built commercial space but there appears to be a closed industry at the north end, which occupies 5.10 hectares (property 3001 in **Figure 4**).

In total, there are 19.05 hectares of vacant designated lands located in the RCN (**Figure 4** and **Table 3**). However, it's noted that the two largest vacant properties identified on **Figure 4** as numbers 3000 and 3001 are zoned Industrial.

Table 3. Woodstock Norwich Regional Commercial Cluster Vacant Commercial Designated Lands

Map ID	Official Plan Designation	Zone	Net Area (ha)
745	Regional Commercial	C6	1.08
758	Regional Commercial	C6	0.11
3000	Regional Commercial	M4	10.75
3001*	Regional Commercial	M1/M2	5.11
3017	Regional Commercial	M2	2.01
Norwich Regional Total			**19.06**

* Closed factory that is designated Regional Commercial.

Planned Function
The Norwich Regional Commercial cluster functions as a regional commercial cluster in the context of Oxford County and provides for large box retailers.

Uniqueness of Location
Located at the Highway 401 and Norwich Avenue interchange, this commercial cluster benefits from having a highly accessible location and coveted visibility from the highway and from Norwich Avenue, which is a major County road. Norwich Avenue is also well connected to the downtown, and the commercial services located along Dundas Street.

3.1.3 Norwich Avenue Cluster

Located north of the Norwich Regional Commercial cluster, the Norwich Avenue cluster is smaller in scale (**Figure 5**).

Land Use Designation
The Norwich Avenue cluster is designated predominantly Service Commercial with one Neighbourhood Shopping Centre designated property at the northeast corner of Parkinson Road and Norwich Avenue (**Figure 5**). Service Commercial designated lands are intended for highway commercial type uses that cater to the traveling public, or for specialized uses that cater to a wide-ranging market area. The Neighbourhood Shopping Centre designation is intended for meeting more localized shopping needs.

Retail Space Characteristics
There are convenience commercial establishments that service the immediate residential neighbourhood, such as a laundromat, a hair salon, variety stores and fast food restaurants with a number of these uses concentrated in the plaza located at the northeast corner of Norwich Avenue and Parkinson Road. There are also some scattered commercial uses directed to the drive by traffic including automotive uses and specialty retail stores such as a sporting equipment store. The amount of commercial uses is relatively small, offering 2,500 square feet of specialty food retail, 37,000 square feet of non-food retail, and 25,000 square feet of commercial services (**Table 1**). The remainder of the Cluster is primarily residential, with some office use.

Relative Health
There are no vacancies, however, this cluster remains predominantly residential.

Planned Function
The Norwich Avenue cluster plays a minor convenience function to the surrounding neighbourhoods. It also provides an arterial commercial function serving the drive by trade on Norwich Avenue.[1]

3.1.4 Dundas East Cluster

Located in the east end of the City, the Dundas East cluster is surrounded by Industrial areas, including the new Toyota manufacturing plant (**Figure 2** and **6**).

Land Use Designation
The commercial areas within this cluster are designated Service Commercial (**Figure 6**). This is an appropriate designation given its accessible location, and character of surrounding areas. The role of the Service Commercial designation is to provide for a broad range of commercial uses that are not suitable for the Central Area because of their site area, access, or exposure requirements. These areas are not intended to accommodate retail activities that are characteristic of, or directly compete with the Central Area. Generally, Service Commercial Areas are intended for uses that cater to the vehicular traveling public, or for specialized uses that cater to a wide-ranging market area. Some of the permitted uses include commercial recreational establishments, automotive oriented uses, hotels, motels, automotive dealerships,

[1] Arterial/service commercial function means retail stores and services largely serving the drive by trade with automotive services, convenience goods, prepared foods, and other stores and services occupying large properties on major arterial roads.

Figure 5 - Woodstock - Norwich Avenue Cluster

Commercial Policy Review

0 0.025 0.05 0.1 Kilometers

N

Watercourses

Commercial Clusters

Vacant Commercial Sites

Commercial Applications

Commercial Designations

Central Business District

Entrepreneurial District

Neighbourhood Shopping Centre

Regional Commercial Node Development

Service Commercial

June 2009

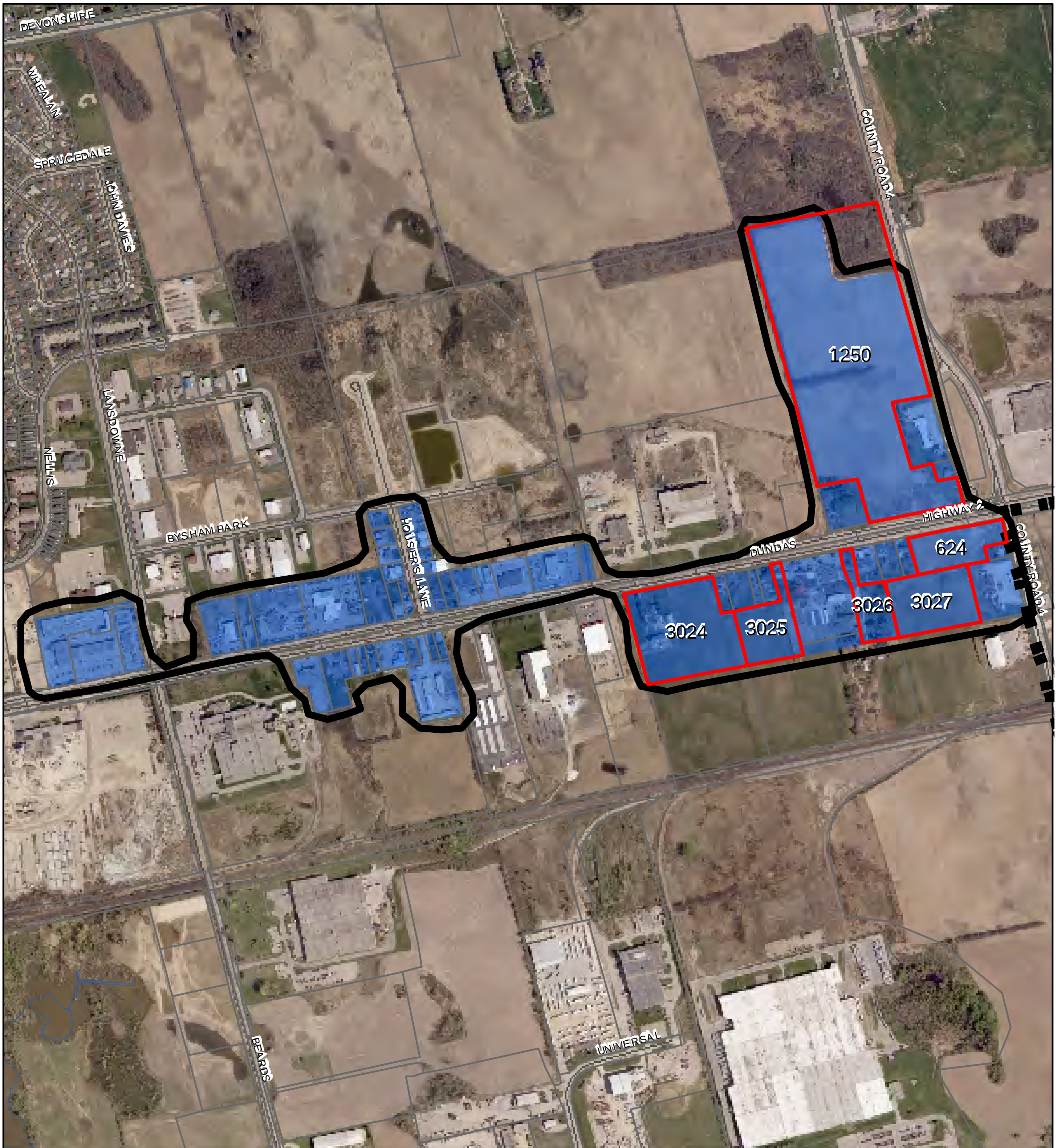

Figure 6 - Woodstock - Dundas East Cluster

Commercial Policy Review

Watercourses

Municipal Boundaries

Commercial Clusters

Vacant Commercial Sites

Commercial Designations

- Central Business District
- Entrepreneurial District
- Neighbourhood Shopping Centre
- Regional Commercial Node Development
- Service Commercial

0 0.05 0.1 0.2 Kilometers

N

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furniture and home furnishing stores, and nurseries and garden centres. However, particular to the northwest corner of Dundas Street and County Road 4, site-specific policy 7.3.4.3.5 limits the range of Service Commercial uses permitted at this site, but permits some industrial uses. Specifically, retail food stores, building supply outlets, hardware stores, furniture stores and home furnishing stores are not permitted, but permits a range of light industrial uses involving assembly, fabrication, distribution, packaging, printing and storage.

Retail Space Characteristics

The Dundas Street clusters represent the major cluster of Service Commercial designated lands. Historically, this area has served as the main entrance to Woodstock from Highway 401. In the Dundas East cluster, large footprint non-food commercial establishments dominate the commercial inventory. In fact, non-food retail stores make up 72% of commercial space in this commercial cluster (**Table 1**). Retail stores are mostly specialty stores typical of a service commercial location (Fabricland, Bell World, and Koch's Home Furnishings, and non-food specialty retailers such as Pine Variety, Home Building Centre, Turkstra Lumber, Van Dykes Green Houses, TSC Store, and Haights Garden Center). In contrast to the Dundas cluster (discussed below), there are no food stores, pharmacy/personal care stores, personal services, professional services, or health services. As well, the cluster includes a number of car dealerships and automobile services.

Large tracts of vacant lands also exist in this cluster, in particular, at the northwest and southwest corners of Dundas and Oxford Road 4.

Relative Health

The Dundas East cluster appears to be well occupied, however, there is opportunity for considerable additional development, on the large vacant properties. It is noted that properties 3027, 3026, 3025, and 3024 are occupied with existing operations, i.e. 3026 are partially occupied by Haights Garden Centre. However, these properties contain a significant amount of underutilized area. As such, the underutilized portion of each property is included in the inventory of vacant commercial designated lands. As illustrated in **Figure 6** and summarized in **Table 4**, vacant commercial designated lands amount to 23.49 hectares.

Table 4. Woodstock Dundas East Cluster Vacant Commercial Designated Lands

Map ID	Official Plan Designation	Zone	Net Area (ha)
624	Service Commercial	C4-47	1.44
1250	Service Commercial	A2	14.41
3027*	Service Commercial	C4-47	2.14
3026*	Service Commercial	C4-47	1.10
3025*	Service Commercial	C4-47	1.59
3024*	Service Commercial	C4-47	2.81
Dundas East Total			**23.49**

* Occupied with existing operations, but contain significant areas of underutilized space. The net areas are approximate and represent the underutilized Service Commercial designated portion of the property only.

Planned Function

This area serves an arterial/service commercial function providing automotive related sales and services, services to the drive by public as well as large footprint destination retailers. However, it is recognized that many of the existing large footprint retailers were allowed through site-specific amendments.

3.1.5 Dundas/Springbank Cluster

The Dundas/Springbank cluster is centrally located in the City, between the arterial commercial establishments of the Dundas East cluster to the east, and the Central Area cluster to the west (**Figure 2**).

Land Use Designation
The lands within this commercial cluster are designated Service Commercial, with the exception of one property located along Clarke Street that is designated Neighbourhood Shopping Centre (**Figure 7**).

Retail Space Characteristics
The Dundas/Springbank Cluster is surrounded by residential, some Industrial designated lands, and the Woodstock Raceway, Casino and Fairgrounds. In general, this Cluster is an older service commercial area compared to the Dundas East Cluster and is typical of older strip commercial developments with predominantly single user buildings and multiple and frequent driveway entrances. The character changes from newer, large format retailers at the eastern end, to older style strip commercial on smaller properties in the western end. The area lacks landscaping, a coordinated character and generally does not provide a comfortable environment for pedestrians.

The area contains a broad range of food stores, service commercial uses, fast food restaurants, and automotive services, but no department stores. Commercial services make up 51% of the commercial space (**Table 1**), which includes large footprint entertainment uses such as the YMCA and the Woodstock Raceway, Casino and Fairgrounds. Neighbourhood serving retail space is also located in this cluster including a relatively new complex located at Springbank and Dundas, which is occupied by an LCBO, The Beer Store, Shoppers Drug Mart, and M&M Meat shop. The grocery stores: Food Basics and Zehrs are other dominant tenants in the cluster. Combined with some specialty food stores, food related stores make up 115,700 square feet, or 27% of the commercial space in this cluster (**Table 1**). The remainder of the commercial landscape is comprised of specialty retailers that offer specialty goods and services, such as Mostly Roses, Bartley Electronics, Sound Electronics, Coops Computing Nextar Communications, Goodwill Store, Guy’s Vac Shop, Leons Furniture Store, Easy Home, and Pet Value.

Relative Health
This cluster appears to be vibrant, with little to no commercial space vacancies. There are a number of small vacant commercial parcels that amount to a total of 1.67 hectares, as illustrated in **Figure 7** and summarized in **Table 5**.

Table 5. Woodstock Dundas/Springbank Cluster Vacant Commercial Designated Lands

Map ID	Official Plan Designation	Zone	Net Area (ha)
634	Service Commercial	C4	0.22
637	Service Commercial	C4	0.35
638	Service Commercial	C4	0.05
639	Service Commercial	C4	0.05
646	Service Commercial	C4	0.04
3002	Service Commercial	C4	0.80
3017	Service Commercial	C4-12	0.17
Dundas/Springbank Total			**1.67**

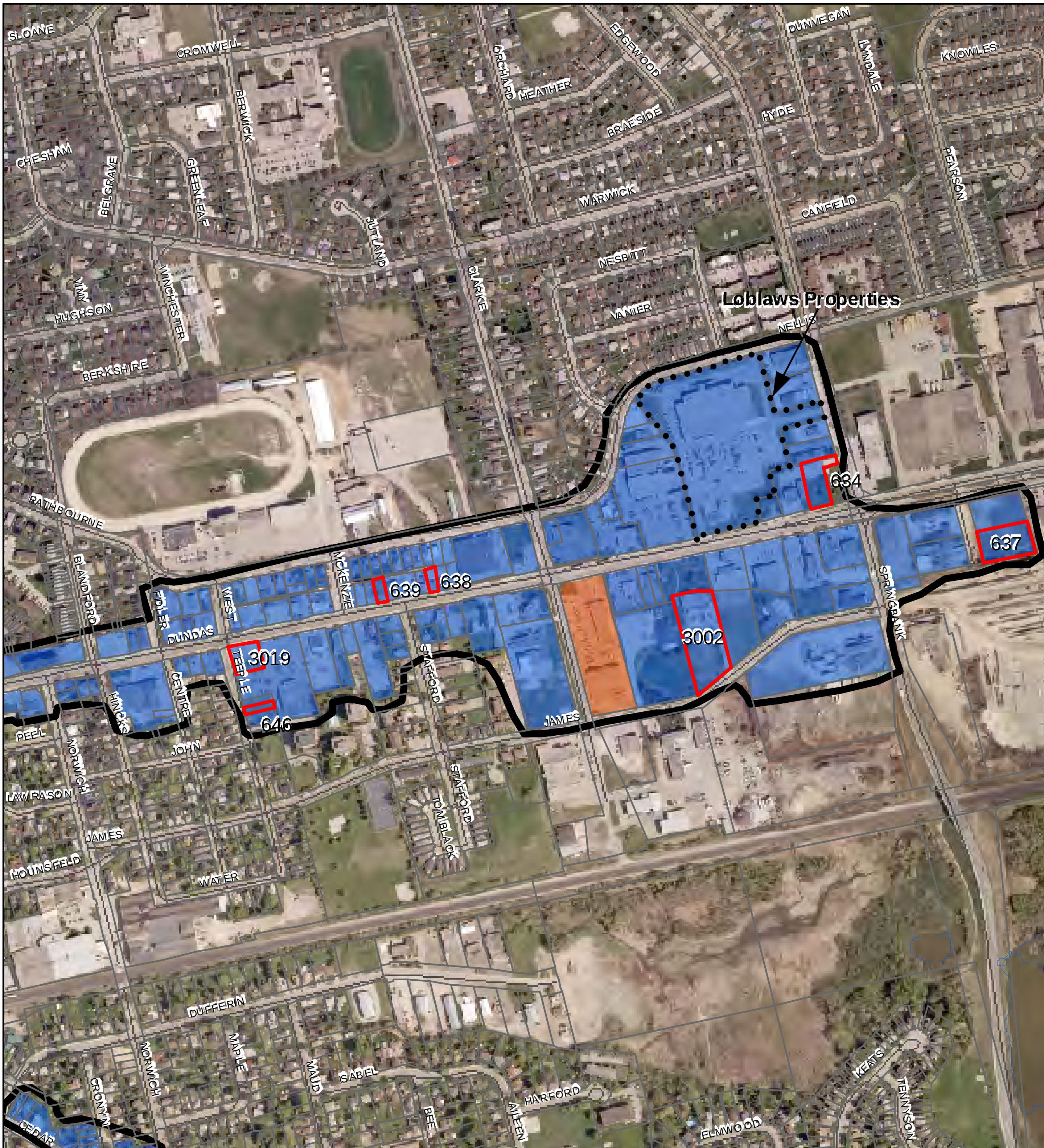

Figure 7 - Woodstock - Dundas/Springbank Cluster

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

N

Watercourses

Commercial Clusters

Vacant Commercial Sites

Commercial Applications

Commercial Designations

Central Business District

Entrepreneurial District

Neighbourhood Shopping Centre

Regional Commercial Node Development

Service Commercial

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Planned Function

Both the Dundas East cluster and the Dundas/Springbank cluster provide an arterial/service commercial function. However, the function of this cluster is somewhat different from the Dundas East cluster attributed partly to the surrounding residential uses. This cluster also serves a neighbourhood commercial function that provides day-to-day retail and food shopping needs to the adjacent residential areas. [2]

3.1.6 Dundas/Ingersoll/Main St Cluster

The Dundas/Ingersoll/Main St. cluster is located between the western municipal boundary and Mill Street, which is the western boundary of the Central Area cluster (**Figure 2**). Commercial designated lands are located along the western end of Dundas Street, adjacent to the Thames River, along Ingersoll Road and along Main Street.

Land Use Designation

The commercial areas within this cluster are designated Service Commercial (**Figure 8**).

Retail Space Characteristics

The western end of Dundas Street contains scattered commercial establishments. There are some offices in converted dwellings, a gas station, a convenience store, and convenience food stores, with most of the commercial space located east of the railway. The rest of Dundas Street, between the Thames River and the railway is residential, with the exception of an art/framing gallery.

In contrast, Ingersoll Road is occupied with more commercial establishments based on the inventory, but these uses are more spread-out, which affects the vibrancy of this section of the cluster. The commercial establishments here are arterial/service commercial in nature. Existing commercial uses are predominantly local repair and service shops and auto service, in addition to a lawn and marine store, lawn and garden establishment, and a brick and stone establishment. A feed mill and health food store is also located in this cluster as well as a large vacant property that was formerly a bingo hall.

The commercial establishments on Main Street are also sparse, and consist of a bowling alley, tire store, and auto repair among others.

In general, the commercial establishments in this commercial cluster are predominantly commercial services, most of which are auto-oriented services such as car rental, and auto repair (18,400 square feet in total). Entertainment establishments also make up significant real estate, which include a bowling alley, making up 17,500 square feet. In total, the commercial services make up 61% of the occupied commercial space. Other significant commercial uses are non-food specialty retail, such as O'Connor Lawn & Marine, Jim's Lawn & Gardens, Cantario Brick & Stone, and OK Tire, making up 23% of the total commercial space.

Relative Health

As mentioned earlier, commercial establishments are sporadic, and some vacant buildings and sites exist. The Dundas/Ingersoll/Main St. Cluster has a high vacancy rate of 16.6% in existing buildings, which is noticeable and affects the commercial vibrancy of the area. In addition,

[2] Neighbourhood commercial uses cater to the day-to-day shopping and service needs of residents from nearby residential areas, and are located adjacent to residential areas for the convenience of local residents. Examples are milk stores, variety stores, grocery stores, and hair salons.

Figure 8 - Woodstock - Dundas/Ingersoll/Main Street Cluster

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

N

Watercourses

Commercial Clusters

Vacant Commercial Sites

Commercial Applications

Commercial Designations

Central Business District

Entrepreneurial District

Neighbourhood Shopping Centre

Regional Commercial Node Development

Service Commercial

vacant commercial designated sites amount to 2.93 hectares, and are shown in **Figure 8**, and listed in **Table 6**.

Table 6. Woodstock Dundas/Ingersoll/Main St Cluster Vacant Commercial Designated Lands

Map ID	Official Plan Designation	Zone	Net Area (ha)
671	Service Commercial	C4	0.25
693	Service Commercial	C4	0.46
717	Service Commercial	C4	0.43
722	Service Commercial	C4	0.34
3003	Service Commercial	C4	0.8
3012	Service Commercial	C4-29	0.34
3013	Service Commercial	C4	0.25
661	Service Commercial	C4	0.09
Ingersoll Road Total			**2.93**

Planned Function
This commercial cluster serves as a lower order service / arterial commercial function providing mostly repair and automobile services and some convenience commercial.

3.1.7 Mill Street Cluster

The Mill Street cluster is the second commercial area adjacent to a Highway 401 interchange. This cluster is located on the north side of Highway 401, at Mill Street (**Figure 2**).

Land Use Designations
These lands are all designated Service Commercial (**Figure 9**).

Retail Space Characteristics
This cluster contains only one occupied establishment - a 22,400 square feet truck stop with associated retail, located on the east side of Mill Street. A vacant commercial building is located to the south with frontage onto the Highway 401 exit ramp. The vacant site is subject to an approved site plan for a 4-storey motel. The west side of Mills Road is occupied by an active gravel pit operation with the unoccupied frontage designated Service Commercial.

Planned Function and Relative Health
The cluster at this point is just one establishment that services a highway commercial function specific to the trucking industry. However, the vacant lands provide an opportunity for significant expansion of this function. It is noted its proximity to the highway may be seen as a challenge for some potential uses, or perceived as an access and visibility opportunity for others.

Total vacant commercial designated lands amount to 8.72 hectares (see **Figure 9** and **Table 7**).

Figure 9 - Woodstock - Mill Street Cluster

Commercial Policy Review

0 0.015 0.03 0.06
Kilometers

N

- Watercourses
- Municipal Boundaries
- Commercial Clusters
- Vacant Commercial Sites

Commercial Designations

- Central Business District
- Entrepreneurial District
- Neighbourhood Shopping Centre
- Regional Commercial Node Development
- Service Commercial

June 2009

Table 7. Woodstock Mill Street Cluster Vacant Commercial Designated Lands

Map ID	Official Plan Designation	Zone	Net Area (ha)
845	Service Commercial	D	0.46
1004	Service Commercial	C4	5.38
3004	Service Commercial	C4	2.90
Mill Street Total			**8.72**

Uniqueness of Location
These lands enjoy excellent highway visibility and accessibility.

3.1.8 Sobeys Plaza

Sobeys Plaza is the most significant commercial area that services the northern portion of Woodstock (**Figure 2**).

Land Use Designation
This commercial cluster is designated Neighbourhood Shopping Centre (**Figure 10**). The Neighbourhood Shopping Centre designation is intended to serve more localized needs such as meeting the daily or weekly convenience shopping and service needs of nearby residents. Neighbourhood Shopping Areas are permitted to have between 1,858 and 4,645 square metres of gross leasable commercial floor area. Some of the permitted uses are gas bars, grocery stores, personal services, medical and dental clinics and offices, personal services, drug stores, and hardware stores.

Retail Space Characteristics
The Sobeys Plaza is primarily occupied by the grocery store, making up 66% of the retail space (**Table 1**). In addition to the Sobeys store, the plaza contains stores and personal services typical of a neighbourhood centre such as a pet food store, card store, bank, hair salon and drug store. Also in the plaza are services such as restaurants and a dentist's office, which make up 19% of the plaza. The Sobeys Plaza contains 39,500 square feet of retail space, and 9,100 square feet of service space, totaling 48,600 square feet.

Relative Health
The Sobeys Plaza serves the northern sector of the City of Woodstock. This area is primarily residential, which would demand commercial establishments that can meet daily and weekly needs such as food stores, and personal services. With no vacancies, the Sobeys Plaza is proving to be successful in meeting demand.

Function
The Sobeys Plaza is serving its designated neighbourhood commercial function.

Uniqueness of Location
From a daily needs perspective, Sobeys Plaza is located centrally within this residential area, meeting the everyday shopping needs of nearby residents.

3.1.9 Springbank Plaza

Located on Springbank Avenue, south of Devonshire Avenue, this plaza is located near the Sobeys Plaza (**Figure 2**).

Figure 10 - Woodstock - Sobeys Plaza and Springbank Plaza Clusters

Commercial Policy Review

0 0.025 0.05 0.1 Kilometers

N

Watercourses

Commercial Clusters

Commercial Designations

- Central Business District
- Entrepreneurial District
- Neighbourhood Shopping Centre
- Regional Commercial Node Development
- Service Commercial

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Land Use Designation
Similar to the Sobeys Plaza, this plaza is also designated Neighbourhood Shopping Centre (**Figure 10**).

Retail Space Characteristics
The Springbank Plaza is located just a few blocks south of Sobeys Plaza, and is mostly occupied with services that meet everyday needs such as a bank, gym, tanning salon, and pizza restaurant. Commercial services total 16,400 square feet, and make up 69% of the plaza. The remainder of the plaza is occupied with specialty stores, such as the A Kountry Junction and Carmen Photo. There is no food store in this plaza; however, grocery needs are likely met by Sobeys Plaza (**Table 1**).

Relative Health
A former Home Hardware Store is currently vacant; and the large vacant space affects the character and vibrancy of this neighbourhood plaza. However, all other storefronts are occupied.

Planned Function
This little plaza serves a neighbourhood convenience function, and complements the Sobeys Plaza. However, due to its size, it serves a limited area.

3.1.10 Opportunities and Challenges

There are a number of opportunities and challenges that will need to be considered during the next part of the study. These include:

- The high vacancy rate in the downtown;
- How to strengthen the function of the Central Area while capitalizing on its strong physical character;
- Determining appropriate phasing for growth in the remainder of the Regional Commercial Node;
- Providing for additional neighbourhood commercial uses in the growing residential areas; and
- Addressing the role, function and necessity for the large areas of vacant designated service commercial lands.

3.2 TILLSONBURG

The commercial structure of Tillsonburg is centered on the downtown, where the Tillsonburg Town Centre mall and Zellers (which is part of the mall) are located. The commercial structure can be categorized into six commercial clusters, including the Norfolk Mall, which is located just outside of the County boundary (**Figure 11**). Although Norfolk Mall is in the County of Norfolk, its proximity to Tillsonburg makes it an influential element in Tillsonburg's commercial structure.

3.2.1 The Central Area Cluster

The Central Area including the Tillsonburg Town Centre mall makes up the central and largest commercial cluster in Tillsonburg. The Central Area cluster serves as the focal point within the Town for its business, cultural and administrative services. It is also intended to act as a regional shopping district, to serve the Town, and the southern part of Oxford County, as well as portions of Elgin and Norfolk Counties.

Land Use Designations
Within the Central Area are two commercial land use designations, the Central Business District and the Entrepreneurial District (**Figure 12**). Since the Central Area is the "downtown", a wide range of commercial uses to serve day-to-day and specialty needs are permitted, including the provision of specialized services and comparison-shopping opportunities. New commercial proposals are not restricted by floor area, but are subject to design compatibility conditions with the existing built form.

The CBD designated area is centered at the intersections of Broadway and Oxford Street, which are major roads that lead into Town. The CBD designated area is intended to be the most diverse and intensive cultural and administrative centre in the Town. A full range of commercial, office, administrative, cultural, entertainment, recreational, institutional, open space and multiple residential uses are permitted.

The Entrepreneurial District exists off Broadway, to the east and west of the Central Business District, and acts as a buffer between the Central Business District and the surrounding residential areas. The designation permits a limited range of commercial uses that are service oriented, less intense, and intermingled with residential uses. The uses in the Entrepreneurial District are to occur primarily through the conversion of existing residential dwellings. Permitted commercial uses include office conversions, personal services, business supply and services, repair and service shops, clinics, studios, galleries, commercial schools, and small scale businesses such as home based retail.

Retail Space Characteristics
Direct access from major regional roads offer excellent accessibility for patrons of neighbouring counties, and supports the function of the Central Area as a regional-serving commercial area. Currently, restaurants, travel agents, boutique retailers, and furniture stores are examples of what exists along Broadway. National chain brands associated with the Tillsonburg Town Centre mall include Zellers, Canadian Tire, Mark's Work Wearhouse, LCBO, The Source, and Shoppers Drug Mart.

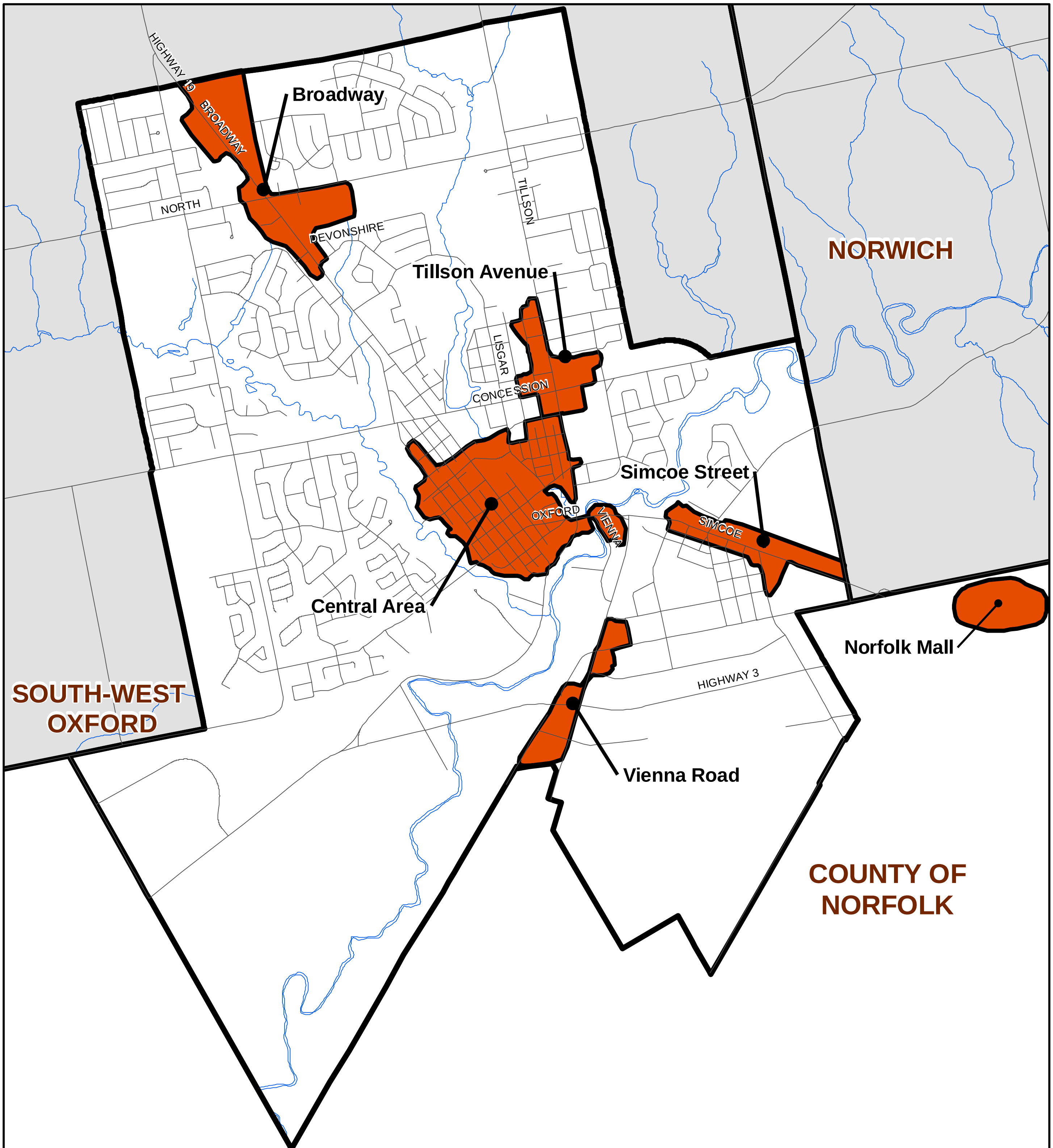

Figure 11 - Tillsonburg Commercial Clusters

Commercial Policy Review

0 0.25 0.5 1 Kilometers

N

Municipal Boundaries

Commercial Clusters

Watercourses

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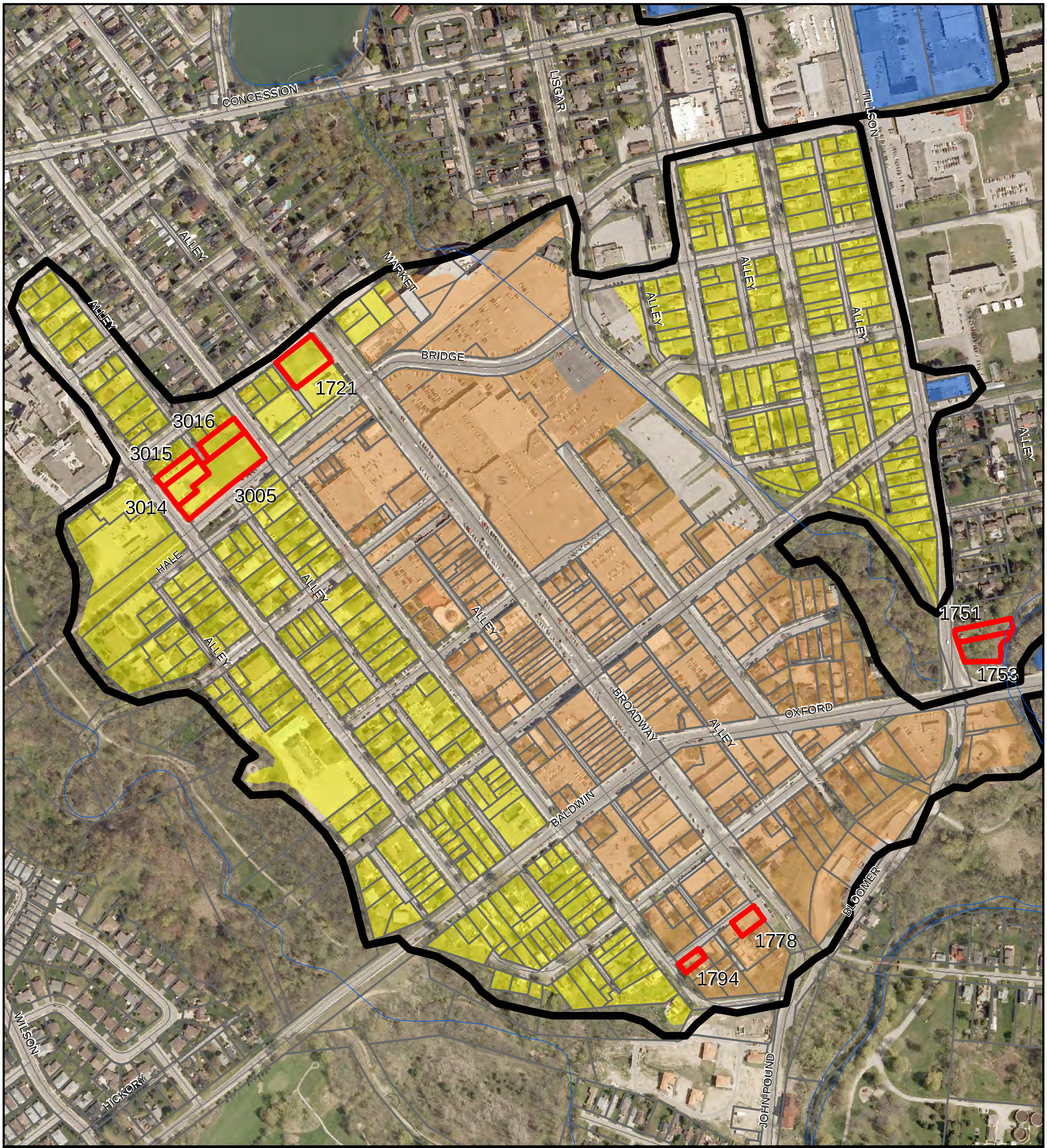

Figure 12 - Tillsonburg - Central Area Cluster

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

N

Watercourses

Municipal Boundaries

Commercial Clusters

Vacant Commercial Sites

Commercial Designations

Central Business District

Entrepreneurial District

Neighbourhood Shopping Centre

Regional Commercial Node Development

Service Commercial

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An A&P Grocery Store, one of the two supermarkets found in Tillsonburg also anchors the CBD cluster, which is an essential attraction in a downtown. In total, food retail stores make up approximately 34,000 square feet, or 5% of the Central Area (**Table 8**). The most predominant commercial category is non-food retail stores, especially specialty stores, which make up 51% of the retail space in the Central Area. The second most predominant commercial uses are services, especially professional services in the finance, insurance, and real estate industries; and other administrative/professional services such as law offices. Commercial services make up 42%, or approximately 268,000 square feet of the Central Area (**Table 8**).

Most of the services are located in the Entrepreneurial District, and west of Broadway. Professional offices, medical clinics, and personal services such as hair salons in former residential buildings occupy the area west of Broadway, although largely on the first block facing the downtown. The remaining portion of the Entrepreneurial District on the west side of the CBD is mostly residential. The Entrepreneurial District east of the mall is also primarily residential in the form of smaller dwellings, but does also contain the Town's Customer Service Centre and the Upper Deck Youth Centre.

With regards to streetscape character, Broadway Street is an attractive street with wide sidewalks and many three-storey buildings. The taller buildings are in scale with the width of Broadway, which creates a balanced and comfortable pedestrian promenade.

Relative Health

The Central Area cluster contains the largest concentration of retail and service space, but the vacancy rate in existing buildings is relatively high at 10.9% (75,200 square feet), above the optimal range of 6% to 8% (**Table 8**). Many of the vacant properties are located on Broadway although the high vacancy rate is not outwardly noticeable and the core remains vibrant. A significant portion of the vacant space is located within the mall, including second level space, at 20,300 square feet. The vacancy rate for the Central Area would be reduced to 8% if mall vacancy were not included.

There are approximately 0.92 hectares of vacant commercial designated lands located on a number of small sites (see **Figure 12** and **Table 9**).

Table 9. Tillsonburg Central Area Cluster Vacant Commercial Designated Lands

Map ID	**Official Plan Designation**	**Zone**	**Net Area (ha)**
1721	Entrepreneurial District	EC-2	0.19
1778	CBD	CC	0.06
1794	CBD	CC	0.04
3005	Entrepreneurial District	RH-1	0.34
3014	Entrepreneurial District	EC	0.12
3015	Entrepreneurial District	EC	0.07
3016	Entrepreneurial District	EC	0.10
Tillsonburg Central Area Total			**0.92**

TABLE 8
TOWN OF TILLSONBURG
RETAIL / SERVICE SPACE INVENTORY
(Square Feet)

RETAIL SERVICE CATEGORIES	Central Area	Broadway	Simcoe St.	Tillson Ave.	Vienna Rd.	Other Tillsonburg	TOTAL TILLSONBURG	Norfolk Mall	TILLSONBURG PLUS NORFOLK MALL
FOOD RETAIL STORES									
Supermarket / Grocery Stores	27,000	40,000	0	0	0	0	67,000	61,100	128,100
Specialty Food Stores	7,200	12,400	3,600	1,900	0	5,000	30,100	0	30,100
Total FRS	34,200	52,400	3,600	1,900	0	5,000	97,100	61,100	158,200
NON FOOD RETAIL STORES									
Department Stores	79,600	0	0	0	0	0	79,600	58,600	138,200
Specialty Stores	124,900	38,000	25,600	9,200	0	20,100	217,800	7,100	224,900
Pharmacy And Personal Care Stores	29,600	1,900	3,400	0	0	0	34,900	0	34,900
Other NFSR	87,800	6,000	8,400	67,000	1,200	85,100	255,500	17,000	272,500
Total NFRS	321,900	45,900	37,400	76,200	1,200	105,200	587,800	82,700	670,500
Liquor / Beer / Wine Stores	7,800	0	0	6,600	0	0	14,400	0	14,400
TOTAL RETAIL	363,900	98,300	41,000	84,700	1,200	110,200	699,300	143,800	843,100
SERVICES:									
Eating/Drinking	50,000	13,100	23,900	10,700	0	2,900	100,600	9,800	110,400
Personal Services	27,800	0	3,100	4,300	0	3,500	38,700	900	39,600
Finance/Insurance/Real Estate	68,900	6,600	1,500	1,300	0	1,900	80,200	0	80,200
Medical/Dental/Health Services	30,700	6,600	0	2,800	0	0	40,100	0	40,100
Business Services	3,700	0	0	0	0	0	3,700	0	3,700
Entertainment	19,100	9,600	0	0	0	0	28,700	0	28,700
Other Services	52,200	9,000	14,700	13,200	0	24,000	113,100	0	113,100
Miscellaneous Office	0	0		0	0	2,400	2,400	0	2,400
TOTAL SERVICES	252,400	44,900	43,200	32,300	0	34,700	407,500	10,700	418,200
VACANT SPACE	75,200	9,100	4,000	6,200	0	24,700	119,200	0	119,200
VACANCY RATE	10.9%	6.0%	4.5%	5.0%	0.0%	14.6%	9.7%	0.0%	8.6%
TOTAL RETAIL / SERVICES AND VACANT SPACE	691,500	152,300	88,200	123,200	1,200	169,600	1,226,000	154,500	1,380,500

Source: Dalvay Group Winter 2008 / 2009

Planned Function
The Central Area is the highest order commercial area in the Town, and is intended to act as a regional shopping district, to serve the Town, and the southern part of Oxford County, as well as portions of Elgin and Norfolk Counties. The Central Area appears to be serving this function well, notwithstanding the high vacancy rate.

Uniqueness of Location
The Tillsonburg Central Area has a number of unique features. For example, the Tillsonburg Town Centre is a main feature of the downtown and is unique to the Tillsonburg Central Area, compared to other downtowns in the County.

Another unique feature is the walkability of the downtown. Tillsonburg's Central Area is compact, spanning five blocks, or a distance of approximately 900 metres, which is a manageable distance for pedestrians. Furthermore, the core part of the downtown extends only four blocks generally north of Oxford Street. A further advantage of the Central Area is convenient on-street parking, in addition to considerable public off-street parking discretely located behind buildings, accessed either via Fox Alley or Cat Alley as well as the large parking areas at the Mall and the Canadian Tire. Another unique characteristic is the pedestrian oriented streetscape with wide sidewalks along Broadway, and the integration with the surrounding residential area, which includes some high density residential areas.

3.2.2 Broadway Cluster

The Broadway cluster represents the cluster of service commercial designated lands in the north end of the Town (**Figure 11**).

Land Use Designation
Similar to the Service Commercial designation of Woodstock and Ingersoll, the role of the Service Commercial designation is to accommodate commercial uses that would not be appropriate or suitable to be located in the Central Area (**Figure 13**). Service Commercial designated areas are intended for uses that cater to vehicular traffic, single purpose shopping trips, catering to a wide ranging market area. Since most of the Service Commercial areas are surrounded by residential, they are also intended to meet the day-to-day needs of adjacent residential neighbourhoods. Some of the permitted uses include hotels, motels, automotive sales and services, furniture warehouses, farm implement sales, personal services, convenience commercial uses, video rental establishments, automobile service stations, gas bars, car wash facilities, retail sales of automobile supplies, tourism information outlets, recreation and entertainment uses, restaurants, retail food stores, uses which require large areas for on-site storage of goods or vehicles and other types of commercial uses that offer service to the traveling public, business and industry. Service Commercial areas are located on major roads.

Retail Space Characteristics
As mentioned earlier, there are two grocery stores in Tillsonburg, one of which is the A&P in the Central Area. The second grocery store is a Sobeys, located at the north end of the Broadway cluster. The Sobeys and smaller specialty food retailers make up approximately 52,400 square feet, or 37% of the commercial space in the Broadway Cluster, making food retail the predominant commercial use in the Broadway cluster (**Table 8**). The second predominant use is non-food retail, making up some 46,000 square feet, or 32% of this commercial cluster,

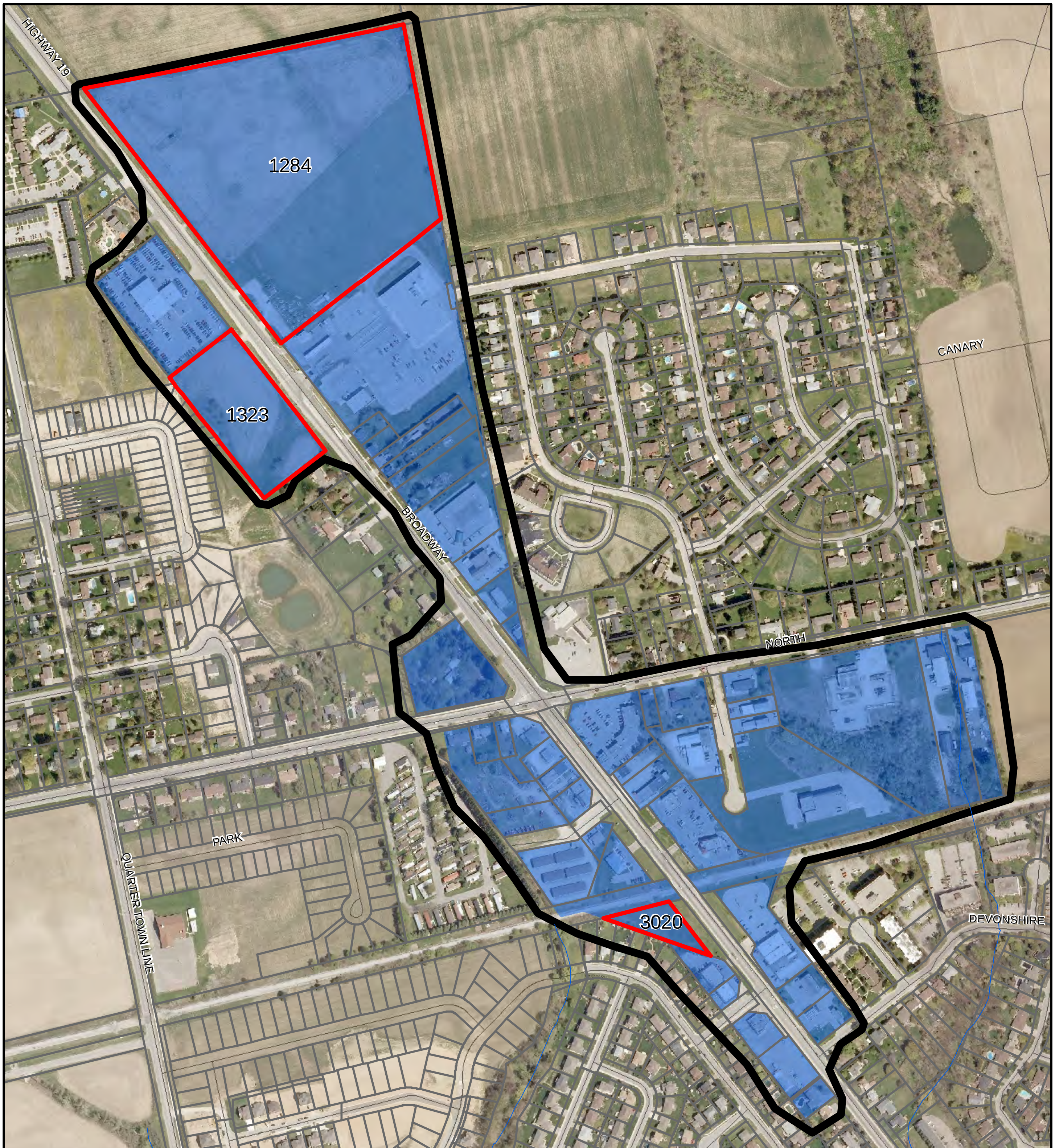

Figure 13 - Tillsonburg - Broadway Cluster

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

N

- Watercourses
- Commercial Clusters
- Vacant Commercial Sites
- Commercial Applications

Commercial Designations

- Central Business District
- Entrepreneurial District
- Neighbourhood Shopping Centre
- Regional Commercial Node Development
- Service Commercial

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comprised mainly of one large footprint furniture and appliance store). Lastly, commercial services make up 31% (44,900 square feet) of all commercial establishments, including a movie theatre, health and dental clinics, and offices (**Table 8**).

The lands south of North Street are occupied by some service commercial uses, albeit at a low concentration. Increased activity could be achieved through intensification of these uses. A number of residential uses are located in the commercial cluster north of North Street.

Relative Health
The vacancy rate in existing buildings in the Broadway cluster is 6.0%.

In addition, there are three vacant commercial designated parcels amounting to 11.14 hectares at the north end of the Broadway cluster (see **Figure 13** and **Table 10**).

Table 10. Tillsonburg Broadway Cluster Vacant Commercial Designated Lands

Map ID	Official Plan Designation	Zone	Net Area (ha)
1284	Service Commercial	FD	9.16
1323	Service Commercial	HC	1.69
3020	Service Commercial	SC-E	0.30
Tillsonburg Broadway Cluster Total			**11.14**

Planned Function
Although the Broadway cluster is designated Service Commercial, it is primarily serving the day-to-day shopping and service needs of Tillsonburg residents

Uniqueness of Location
The Broadway Cluster is located on a main arterial road at the northern edge and entrance to the Town.

3.2.3 Tillson Avenue Cluster

The Tillson Avenue cluster represents the service commercial designated cluster at Concession Street and Tillson Avenue (**Figure 11**).

Land Use Designation
These lands are also designated Service Commercial (**Figure 14**).

Retail Space Characteristics
The Tillson Avenue cluster is relatively small, comprised of approximately 123,000 square feet of commercial space. The retail characteristics of the Tillson Avenue cluster is mostly made up of non-food related retail (65%), followed by services (28%), and only 2% is food related (**Table 8**). Stores include the TSC store, building and home supply, a beer store, a hunting and fishing store, sports equipment, and pet food. Also located in the Tillson Avenue cluster are restaurants, a drive test centre, the police station and fire hall, personal services such as a hair salon and dry cleaners, insurance companies, and the Home Hardware Building Centre located at the southwest corner of Tillson Avenue and Concession Street East, which is currently undergoing an expansion.

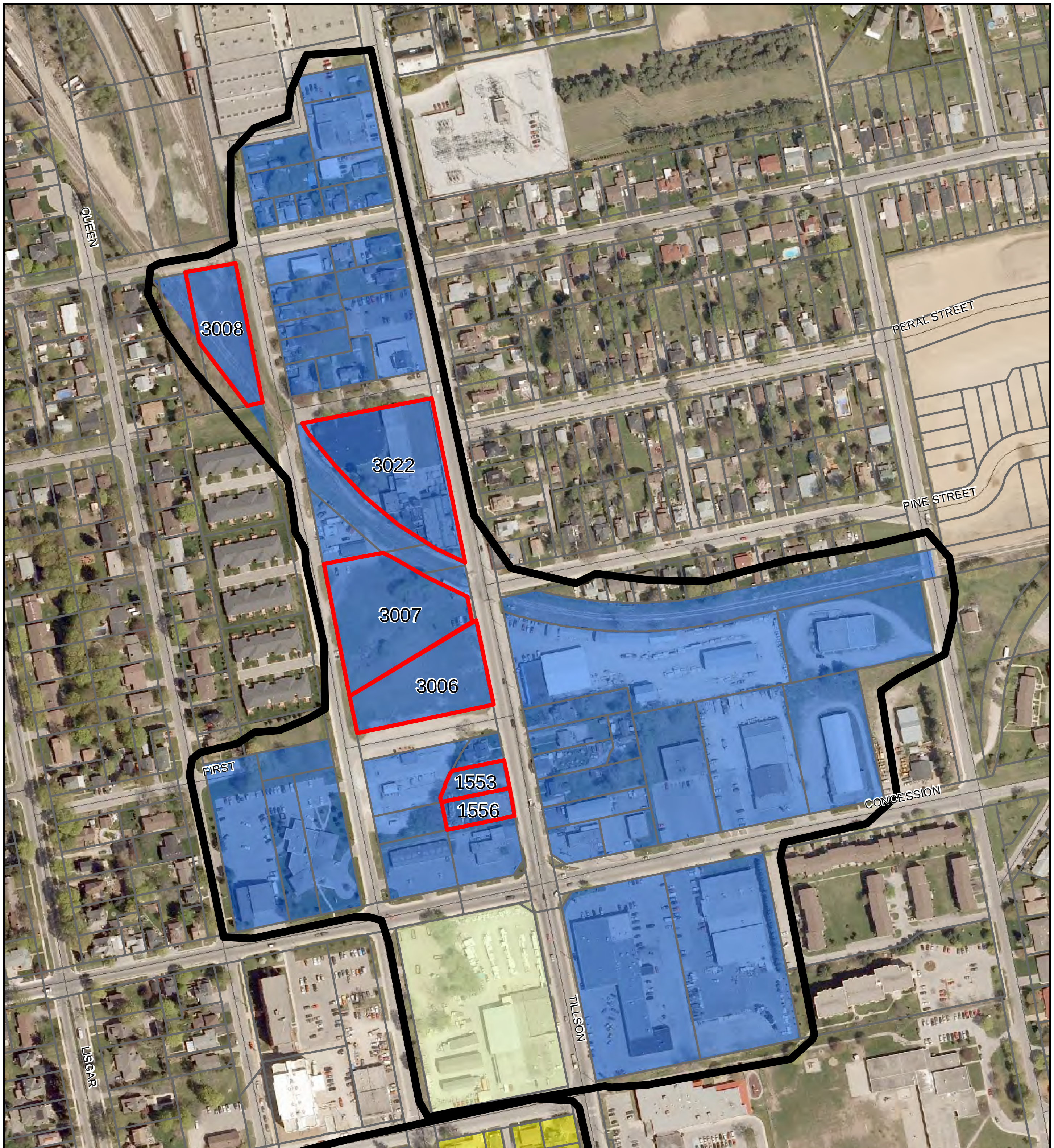

Figure 14 - Tillsonburg - Tillson Avenue Cluster

Commercial Policy Review

0 0.025 0.05 0.1 Kilometers

N

- Watercourses
- Municipal Boundaries
- Commercial Clusters
- Vacant Commercial Sites

Commercial Designations

- Central Business District
- Entrepreneurial District
- Neighbourhood Shopping Centre
- Regional Commercial Node Development
- Service Commercial
- Residential

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Most of these activities are located in the southern part of the cluster, south of the railway. North of the railway is an abandoned factory, residential buildings and scattered service commercial and industrial uses.

The streetscape aesthetic of the area is poor, giving the area a quasi-industrial appearance.

Relative Health
The vacancy rate is 5.0%, and evident by the lack of vacant commercial space. However, there are five vacant commercial designated properties. The vacant designated lands total 2.21 hectares (see **Figure 14** and **Table 11**).

Table 11. Tillsonburg Tillson Avenue Cluster Vacant Commercial Designated Lands

Map ID	Official Plan Designation	Zone	Net Area (ha)
1553	Service Commercial	SC-6	0.09
1556	Service Commercial	SC-6	0.10
3006	Service Commercial	SCH	0.4
3007	Service Commercial	SCH	0.6
3008	Service Commercial	SCH	0.3
3022*	Service Commercial	SCH	0.66
Tillsonburg Tillson Avenue Total			**2.21**

* Closed factory.

Planned Function
The cluster serves both a neighbourhood commercial and an arterial/service commercial function.

3.2.4 Simcoe Street Cluster

This cluster represents the cluster of Service Commercial designated lands generally located between the Norfolk Mall and Big Otter Creek (**Figure 11**).

Land Use Designation
These lands are designated Service Commercial (**Figure 15**).

Retail Space Characteristics
The Simcoe Street clusters made up mostly of commercial services (51% at 43,200 square feet), followed by non-food related retail space (44% at 37,400 square feet) (**Table 8**). Most of the services are fast food restaurants typical of highway commercial settings including Pizza Hut, McDonalds, KFC, Subway, and Dairy Queen. Other services are auto-oriented, such as Lubricare, Midas Muffler, Enterprise Rental Car, and Discount Car Rental. The non-food related retail establishments are comprised of only a handful of large footprint retailers such as building supply and home improvement stores, which are the basis for its large share of this cluster's commercial profile. Four percent of the commercial space is food related, but these are comprised of convenience stores such as Hasty Market, and those that are accessory to a gas station.

The Simcoe Street cluster is an older historic commercial strip, and the streetscape character is auto-oriented.

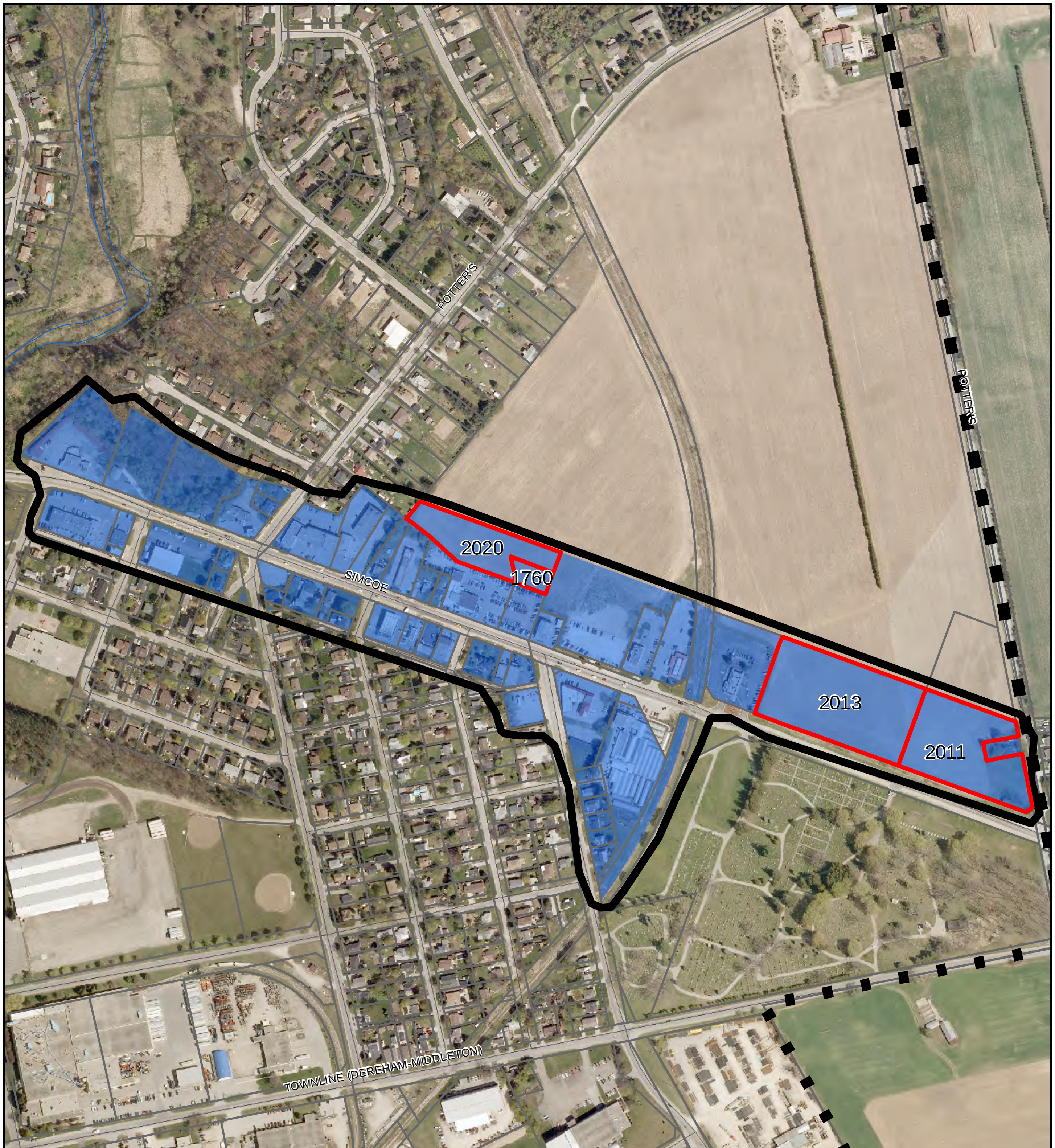

Figure 15 - Tillsonburg - Simcoe Street Cluster

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

N

Watercourses

Municipal Boundaries

Commercial Clusters

Vacant Commercial Sites

Commercial Designations

Central Business District

Entrepreneurial District

Neighbourhood Shopping Centre

Regional Commercial Node Development

Service Commercial

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Relative Health
Commercial space vacancy in existing buildings is relatively low at 4.5% and is not prominent. In addition, a number of relatively large vacant parcels exist in the cluster, adjacent to the Town of Tillsonburg/County of Norfolk boundary, and adjacent to the railway. In total, vacant commercial designated lands account for 3.46 hectares (see **Figure 15** and **Table 12**).

Table 12. Tillsonburg Simcoe Street Cluster Vacant Commercial Designated Lands

Map ID	**Official Plan Designation**	**Zone**	**Net Area (ha)**
1760	Service Commercial	FD	0.11
2011	Service Commercial	SC	1.14
2013	Service Commercial	SC	1.56
2020	Service Commercial	FD	0.65
Tillsonburg Simcoe Street Total			**3.46**

Planned Function
This cluster is serving an arterial/service commercial function providing for automotive services and catering to the drive by trade.

3.2.5 Vienna Road Cluster

The Vienna Road cluster represents the group of Service Commercial designated lands located from Townline Road to the southern municipal boundary (**Figure 11**).

Land Use Designation
This cluster is designated Service Commercial (**Figure 16**).

Retail Space Characteristics and Relative Health
Little commercial use exists in this cluster. The most significant tenant is an autoparts retailer, Carquest that occupies 1,200 square feet. Some small-scale offices and institutional uses also exist. Three vacant commercial designated parcels exist, that amount to 2.68 hectares (**Figure 16** and **Table 13**). However it's noted that property 3009 (1 hectare) is the subject an active site plan application for a proposed church.

Table 13. Tillsonburg Vienna Road Cluster Vacant Commercial Designated Lands

Map ID	**Official Plan Designation**	**Zone**	**Net Area (ha)**
1859	Service Commercial	SC	0.21
1931	Service Commercial	SC	1.50
3009	Service Commercial	SC	1.00
Tillsonburg Vienna Road Cluster Total			**2.68**

Uniqueness of Location
This commercial cluster is located adjacent to an Industrial area, which is a potential market. It is also located on a major road and the junction of Highway 3, making it an attractive location for service commercial uses serving the drive by traffic on Highway 3.

Figure 16 - Tillsonburg - Vienna Road Cluster

Commercial Policy Review

0 0.035 0.07 0.14 Kilometers

N

Watercourses

Municipal Boundaries

Commercial Clusters

Vacant Commercial Sites

Commercial Designations

Central Business District

Entrepreneurial District

Neighbourhood Shopping Centre

Regional Commercial Node Development

Service Commercial

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3.2.6 Norfolk Mall Cluster

Located just outside the eastern Town boundary, the Norfolk Mall is an influential part of Tillsonburg's commercial structure (**Figure 11** and **17**). Therefore, it is pertinent to recognize the influence of the neighbouring Norfolk Mall on the health of Tillsonburg's commerce.

Retail Space Characteristics

The Norfolk Mall was recently de-malled and left with four or five tenants, and one outbox – Swiss Chalet restaurant. The main tenants include a small Wal-Mart and a Zehrs supermarket. The Norfolk Mall alone contains almost the same amount of supermarket space as the entire Town of Tillsonburg (61,100 square feet). However, it contains very little services space at 10,700 square feet (7%), and is mostly non-food related retail at 82,700 square feet (54%) and food related retail at 61,100 square feet (40%) (**Table 8**).

The de-malling of Norfolk Mall reduced the central mall area from approximately 50,000 square feet to approximately 25,000 square feet. The mall is aesthetically dated, despite the outbox Swiss Chalet which is of more recent vintage.

Relative Health

The mall is successfully operating with no vacancies.

Planned Function

The Norfolk Mall, including the Wal-Mart and Zehrs serves a community commercial and small regional function.

3.2.7 Opportunities and Challenges

There are a number of opportunities and challenges that will need to be considered during the next part of the study. These include:

- Maintaining the success and vibrancy of the downtown;
- Determining the appropriate function and boundaries of the Tillson Avenue cluster;
- Addressing the likely long term need for an expanded Wal-Mart;
- Determining the role of Norfolk Mall in accommodating future retail needs; and
- Addressing the role, function and necessity for the vacant designated service commercial areas.

Figure 17 - Norfolk Mall

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

N

Municipal Boundaries

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3.3 INGERSOLL

Ingersoll's commercial structure geographically forms into five clusters, as illustrated on **Figure 18**.

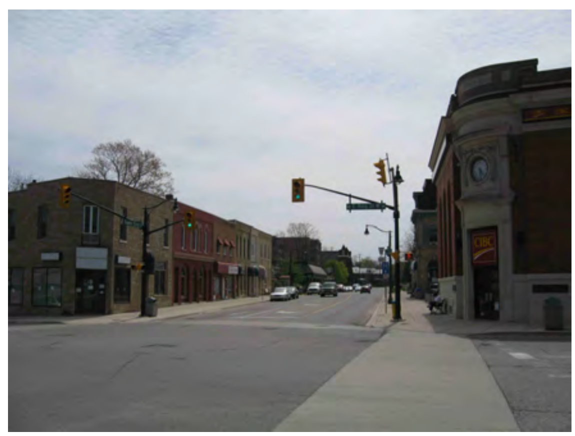
3.3.1 Central Area Cluster

Much like Woodstock and Tillsonburg, commercial activity is centred on the downtown, identified as the Central Area.

Land Use Designations
The Central Area is the highest order retail shopping district in the Town. According to the Official Plan, it's viability and stability will be achieved partly through increasing the number of people who work and live there.

As with the other urban centres, the Central Area is comprised of the Central Business District and the Entrepreneurial District (**Figure 19**). The Central Business District (CBD) reflects the existing historical pedestrian area along Thames Street. Like the other urban centres, the CBD is the focal area for cultural, administrative, and retail uses, while the Entrepreneurial District is focused on commercial services. Similar to the Entrepreneurial District policy of the other Urban Centres, small-scale industrial uses are permitted such as studios, galleries, cottage industries and associated retail. The scale of establishments is to be small, and preserve and maintain the character of this area. Uses that would be incompatible with the residential character of the area are prohibited, including stand alone retail uses, and uses that require large loading or parking facilities, or outdoor storage.

Retail Space Characteristics
Fulfilling its planned function, the Central Area contains the greatest concentration of retail and service space in the Town (243,600 square feet and 229,100 square feet respectively). The Central Area is comprised of 48% services (229,100 square feet), 46% non-food retail (217,500 square feet), and only 4% food related retail (19,400 square feet); 1% of the commercial space is liquor / beer / wine retail (6,700 square feet) (**Table 14**). Retail in the Central Area is diverse, spanning a large cross section of commercial services and retailers, with limited food shopping. The majority of the services found in the Central Area are professional services, auto services, personal services, and some bakeries, cafes, and restaurants. Most of the retailers found in the Central Area are specialty boutique shops such as craft stores, clothing stores, jewelry stores, pawnshops, and florists. However, large footprint retailers including Liquidation World, Giant Tiger, Canadian Tire, and Dollarama can also be found off the main street (Thames Street). Local administration uses are also located in the Central Area, including the Town Administration Building, and library.



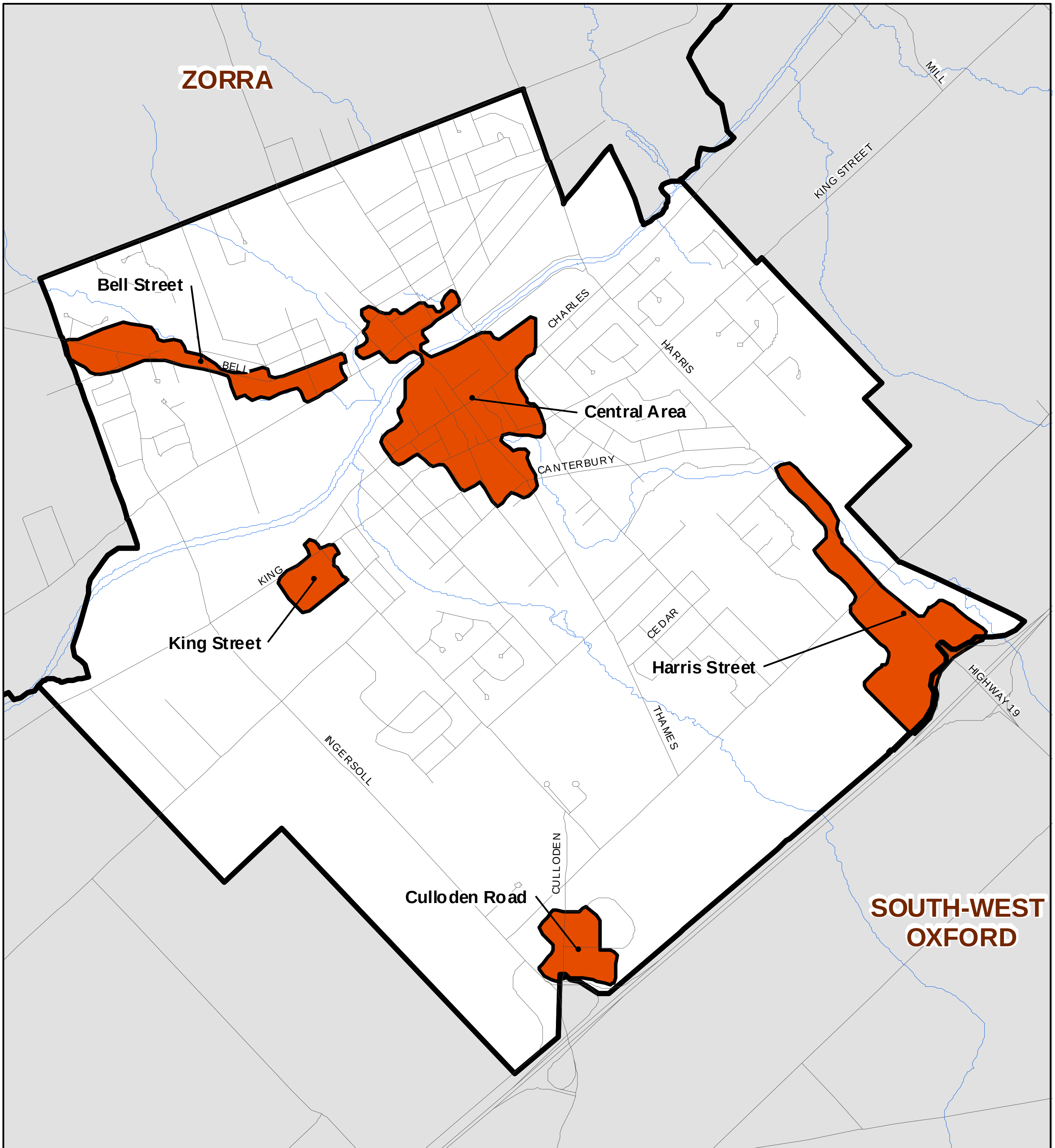


Figure 18 - Ingersoll Commercial Clusters

Commercial Policy Review

- Municipal Boundaries
- Commercial Clusters
- Watercourses

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Figure 19 - Ingersoll - Central Area Cluster

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

N

Watercourses

Municipal Boundaries

Commercial Clusters

Vacant Commercial Sites

Commercial Designations

Central Business District

Entrepreneurial District

Neighbourhood Shopping Centre

Regional Commercial Node Development

Service Commercial

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TABLE 14
TOWN OF INGERSOLL
RETAIL/SERVICE SPACE INVENTORY
(Square Feet)

RETAIL SERVICE CATEGORIES	Central Area	Bell St	King St	Harris St	Culloden Rd	Other Ingersoll	TOTAL INGERSOLL
FOOD RETAIL STORES							
Supermarket / Grocery Stores	10,200	0	79,700	0	0	0	89,900
Specialty Food Stores	9,200	4,200	0	0	0	4,000	17,400
Total FRS	19,400	4,200	79,700	0	0	4,000	107,300
NON FOOD RETAIL STORES							
Department Stores	0	0	0	0	0		0
Specialty Stores	84,800	14,000	0	0	0	0	98,800
Pharmacy And Personal Care Stores	22,700	0	0	0	0	0	22,700
Other NFSR	109,700	8,900	0	0	26,100	33,800	178,500
Total NFRS	217,200	22,900	0	0	26,100	33,800	300,000
Liquor/Beer/Wine Stores	6,700	0	0	0	0	0	6,700
TOTAL RETAIL	243,300	27,100	79,700	0	26,100	37,800	414,000
SERVICES:							
Eating/Drinking	41,500	3,100	0	6,200	3,300	0	54,100
Personal Services	27,300	0	0	0	0	0	27,300
Finance/Insurance/Real Estate	42,700	0	0	0	0	0	42,700
Medical/Dental/Health Services	20,900	0	2,400	0	0	0	23,300
Business Services	3,400	0	0	0	0	0	3,400
Entertainment	14,100	0	0	0	0	0	14,100
Other Services	53,500	2,800	0	0	0	0	56,300
Miscellaneous Office	26,000	0	0	0	0	0	26,000
TOTAL SERVICES	229,400	5,900	2,400	6,200	3,300	0	247,200
VACANT SPACE	76,200	1,500	0	0	0	0	77,700
VACANCY RATE	13.9%	4.3%	0.0%	0.0%	0.0%	0.0%	10.5%
TOTAL RETAIL/SERVICES AND VACANT SPACE	548,900	34,500	82,100	6,200	29,400	37,800	738,900

Source: Dalvay Group Winter 2008/2009

An interesting feature of the downtown is that it is split by the Thames River, and railway tracks, which creates two very different components to the downtown. The northern component is more neighbourhood commercial oriented, whereas the southern component is more specialty retail and services oriented.

Relative Health

The Central Area suffers from a high vacancy rate of 14%. Most of the vacant spaces are found along Thames Street. In addition, there is one vacant commercial designated property amounting to 0.64 hectares.

Planned Function

The Central Area is the highest order commercial area in the Town. The diverse range of retail and services available in the Central Area proves it is meeting the Official Plan's planned local and regional commercial function for the west part of the County.

Uniqueness of Location

The Central Area is centrally located, and well connected to the surrounding residential neighbourhoods. South of the river and rail tracks, the Central Area is a compact downtown, spanning approximately 450 metres (about a 5 to 10 minute walk from end-to-end). While the river provides interest to the downtown, it also splits the downtown into two distinct areas. The separation is evident in the built-form character. The area south of the railway is predominantly comprised of small storefronts, original building stock, and a main street element, with the exception of the Canadian Tire, Giant Tiger, and an Arena around Charles and Pemberton Street at the east end of the Central Area. The northern section, on the other hand, is comprised of two commercial plazas, a church, and a restaurant. There is also a youth centre, gas bar, and affordable housing.

A unique opportunity exists on the parcels located on the west and east sides of Thames Street between the two railways, and south of the Thames River. The parcel on the west side of Thames Street is occupied by Liquidation World with an expansive parking area, and the parcel on the east side is occupied by vacant buildings which are currently for sale. These parcels offer an opportunity for future redevelopment that could take advantage of both a main street and a riverside location, subject to floodplain development constraints.

3.3.2 Bell Street Cluster

The Bell Street cluster is located north of the Thames River, and represents a stretch of Service Commercial designated lands that span from west of Thames Street to the western Town boundary (**Figure 18**).

Land Use Designation

Bell Street is a major road that becomes County Road 119. As such, the designation of these commercial lands is Service Commercial, catering to passing vehicular traffic (**Figure 20**). Uses that require large sites are intended for these areas.

Retail Space Characteristics

The Bell Street cluster is long and linear, and is comprised of two distinct clusters of Service Commercial designated lands. The southeastern cluster is a mix of automotive sales, utility, service commercial, auto services, and residential. The central portion is largely residential. Moving westward towards the town boundary, the commercial uses become more scattered, and remains mostly residential, mixed with a car dealership and some trucking companies. As well, two retail uses: Ricks Carpet and McNab Motors are located just outside the Ingersoll boundary. While it's recognized that residents of Ingersoll may shop at these locations, for the purposes of this study, they are located outside of the Bell Street cluster, and are included in the "Other Oxford" commercial category in **Table 18**. The "Other Oxford" category addresses commercial establishments that are located outside of the three large urban centres, and the rural settlements.

In total, only seven commercial establishments exist in this commercial cluster, amounting to 27,100 square feet of retail space, and 5,900 square feet of services (**Table 14**). In particular, non-food retail is the dominant commercial use, comprised of Ricks United Flooring, a variety store, and Tire Craft – making up 67% of the total occupied commercial space. Louie's Restaurant and an auto-oriented establishment, Fast Lane, make up the Commercial Services in this cluster, which comprises 18% of the total occupied space. Laziz Meat Packers makes up 15% of the commercial space (**Table 14**).

Planned Function and Relative Health

The existing commercial automobile-oriented and trucking establishments cater specifically to vehicular traffic, and serve an arterial/service commercial function. The commercial uses are scattered along Bell Street, and are not reflective of the continuous Service Commercial designation. In total, vacant commercial designated lands in this area amount to 0.65 hectares (see **Figure 19** and **Table 15**). There is also a large underutilized parcel occupied in part by a small trucking firm.

Table 15. Ingersoll Bell Street Cluster Vacant Commercial Designated Lands

Map ID	Official Plan Designation	Zone	Net Area (ha)
2133	Service Commercial	HC	0.17
2143	Service Commercial	HC	0.28
2147	Service Commercial	HC	0.20
Ingersoll Bell Street Total			**0.65**

Unique Characteristics

A significant obstacle to the development of this cluster is the steep grade on the south side of Bell Street, which limits development possibilities in the central part of the Cluster.

Figure 20 - Ingersoll - Bell Street Cluster

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

N

- Watercourses
- Municipal Boundaries
- Commercial Clusters
- Vacant Commercial Sites

Commercial Designations

- Central Business District
- Entrepreneurial District
- Neighbourhood Shopping Centre
- Regional Commercial Node Development
- Service Commercial

June 2009

3.3.3 King Street Cluster

The King Street Cluster represents three corners of the intersection of King and Whiting Streets (**Figure 18**).

Land Use Designation
These lands are also designated Service Commercial, intended for single purpose shopping trips and uses that generate significant amounts of traffic (**Figure 21**).

Retail Space Characteristics
The predominant tenant in this cluster is a large grocery store, Hurley's Independent. The grocery store is relatively new, with a large parking area that extends up to the street along King and Whiting Streets. A gas station is also located on the grocery store site. The southeast corner is occupied by a chiropractic practice. The northwest corner is occupied by a vacant building.

Planned Function and Relative Health
The grocery store and chiropractic office serves a neighbourhood and community function rather than a service commercial function.

Although a Foodland store already exists a few minutes drive away in the Central Area, Hurley's Independent is significantly larger, and newer. Its larger parking space is also a significant convenience factor.

In addition, there is one vacant building at the northwest corner of King and Whiting Streets.

3.3.4 Harris Street Cluster

The Harris Street cluster represents the linear strip of service commercial designated lands that spans from Highway 401 to Canterbury Street (**Figure 18** and **22**).

Land Use Designation
These lands are designated Service Commercial, permitting uses that cater to the traveling public, such as hotels and motels, auto-oriented uses, restaurants, uses which require large areas for on-site storage, and farm implement sales.

Retail Space Characteristics
This commercial cluster is largely undeveloped, including a large parcel, located at the northwest corner of the Highway 401/Harris Street interchange (**Figure 22**). The most significant commercial category use in this cluster is Eating/Drinking, comprised by the Elmhurst Inn and restaurant, and Ram's Horn Family Dining. These two restaurants make up 6,200 square feet of commercial space (**Table 14**). Other uses found in this cluster, but not included in the

Figure 21 - Ingersoll - King Street Cluster

Commercial Policy Review

0 0.025 0.05 0.1 Kilometers

N

Commercial Designations

Watercourses

Commercial Clusters

Central Business District

Entrepreneurial District

Neighbourhood Shopping Centre

Regional Commercial Node Development

Service Commercial

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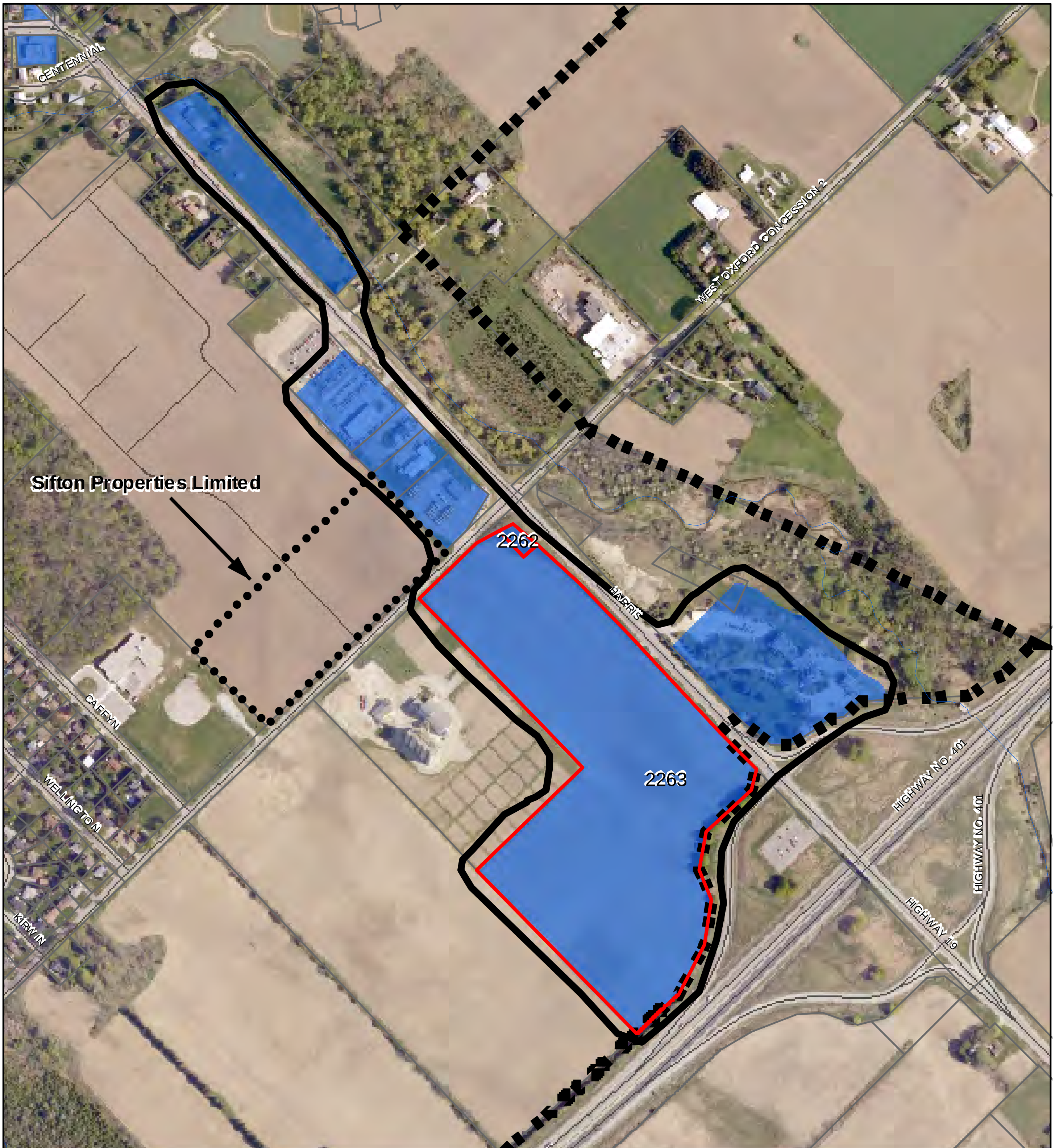

Figure 22 - Ingersoll - Harris Street Cluster

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

N

- Watercourses
- Municipal Boundaries
- Commercial Clusters
- Vacant Commercial Sites
- Commercial Applications

Commercial Designations

- Central Business District
- Entrepreneurial District
- Neighbourhood Shopping Centre
- Regional Commercial Node Development
- Service Commercial

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June 2009

Revised

commercial inventory are an automotive establishment, garden centre, restaurant, and car dealerships.

Planned Function and Relative Health
As noted earlier, this commercial cluster remains mostly undeveloped, and offers significant potential for further development; particularly the large parcel that front onto the interchange (**Figure 22**). As shown on **Figure 22**, vacant commercial designated lands amount to 13.70 hectares (**Table 16**).

Table 16. Ingersoll Harris Street Cluster Vacant Commercial Designated Lands

Map ID	Official Plan Designation	Zone	Net Area (ha)
2262	Service Commercial	HC	0.10
2263	Service Commercial	HC	13.60
Ingersoll Harris Street Total			**13.70**

3.3.5 Culloden Road Cluster

Lastly, the Culloden Road cluster represents the second commercial designation at a highway interchange at the intersection of Highway 401, Culloden Road, and Ingersoll Street (**Figure 18**).

Land Use Designation
The lands in this cluster are designated Service Commercial and Industrial (**Figure 23**). The Service Commercial designation permits highway oriented uses, such as hotels, motels, automotive sales and service; regional serving uses, such as furniture and appliance sales and service, farm implement sales, and business services; and local serving uses such as convenience commercial uses, retail food stores, and restaurants. However, it is intended that new Service Commercial uses occur through infilling to occupy existing vacant designated lands prior to expanding into non-designated areas.

The Home Hardware Building Centre on Samnah Crescent is designated Industrial. The building centre is permitted through site-specific policy 9.3.4.5.4 of the Official Plan.

Retail Space Characteristics
Given its highway location, this cluster is very much tailored towards vehicular traffic. Currently, a motel, gas station, car dealership, and new Home Hardware Store occupy this cluster. The Home Hardware Store is the predominant use, providing 26,000 square feet of retail space, and alone makes up 90% of the total retail/service space inventory of this commercial cluster. The other use is a Tim Horton's, representing approximately 10% of the commercial space (**Table 14**).

Relative Health
This commercial cluster is relatively small, with no vacancies. Only two vacant commercial designated properties remain in this cluster, equivalent to 1.59 hectares (see **Figure 23** and **Table 17**). Property 3023 is occupied by a single detached dwelling on 0.93 hectares, and the dwelling is located on one side of the parcel. Although it is not vacant, its large size qualifies it to be included in the vacant lands inventory.

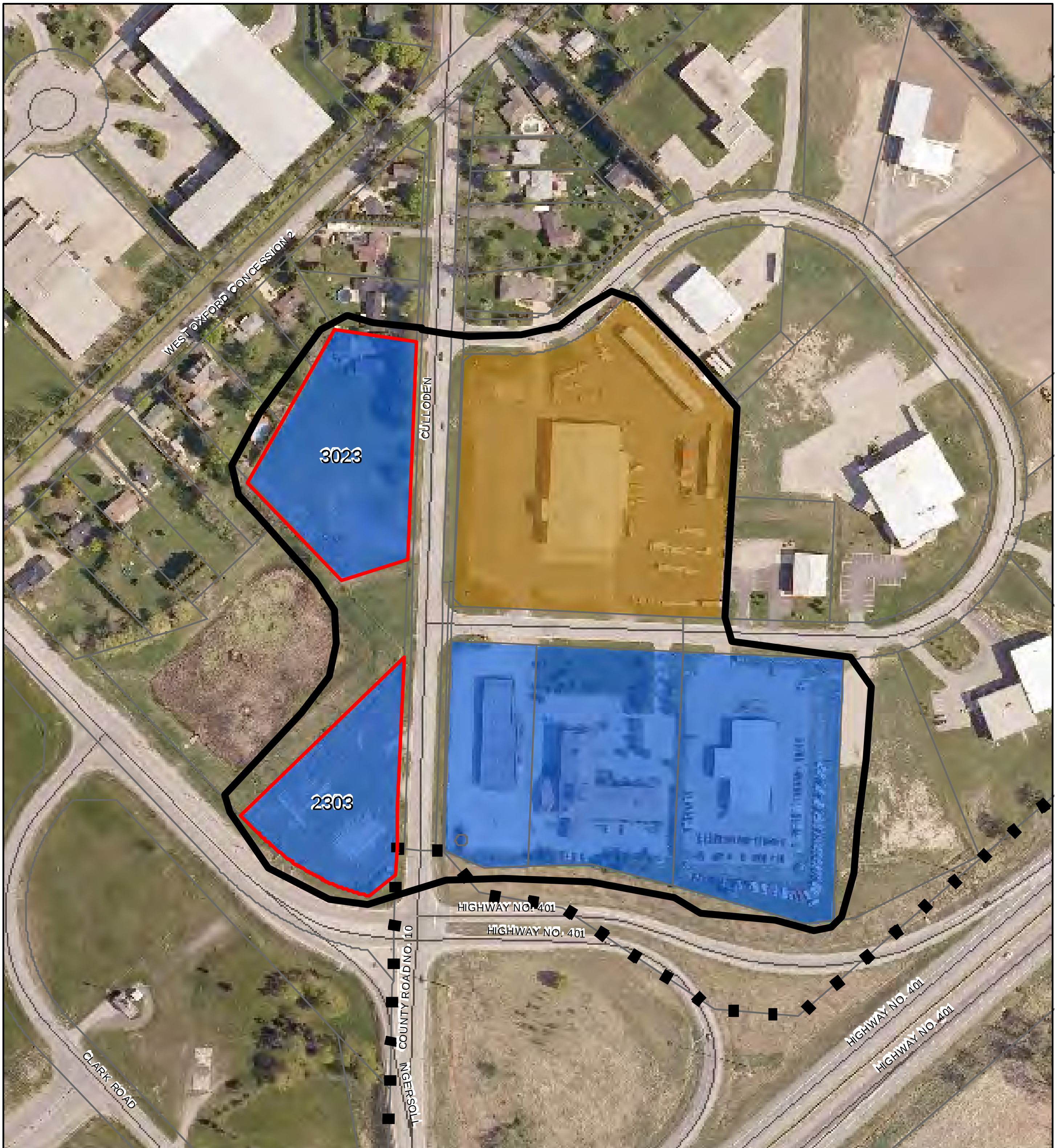

Figure 23 - Ingersoll - Culloden Road Cluster

Commercial Policy Review

0 0.025 0.05 0.1 Kilometers

N

Watercourses

Municipal Boundaries

Commercial Clusters

Vacant Commercial Sites

Commercial Designations

Central Business District

Entrepreneurial District

Neighbourhood Shopping Centre

Regional Commercial Node Development

Service Commercial

Industrial

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Table 17. Culloden Road Cluster Vacant Commercial Designated Lands

Map ID	Official Plan Designation	Zone	Net Area (ha)
2303	Service Commercial	HC	0.67
3023	Service Commercial	R1	0.93
Ingersoll Harris Street Total			**1.59**

3.3.6 Opportunities and Challenges

There are a number of opportunities and challenges that will need to be considered during the next part of the study. These include:

- Addressing the high vacancy rate in the downtown;
- Determining the potential for redevelopment within the downtown;
- Addressing the role, function and potential impact of development on the large vacant service commercial property in the Harris Street cluster; and
- Addressing the role, function and necessity for the other vacant designated service commercial sites.

3.4 RURAL SETTLEMENTS

The Official Plan provides that the purpose of commercial uses in rural settlements is to, "…*promote the designated rural settlements as service centres to the wider rural community."* (page 6.3-1). In the serviced villages, commercial designations are limited to two: Village Core and Service Commercial.

Because of the smaller scale of the rural settlements, each serviced village is categorized as an individual commercial cluster for the purposes of this study.

3.4.1 Drumbo

Drumbo has a small main street, with a commercial inventory that is almost evenly split between non-food retail and commercial services; each component makes up 46% of the commercial inventory (12,300 square feet each) (**Table 18**). Non-food retail offered in Drumbo consists of variety stores such as Drumbo Variety and Morrow's Barrel of Bargains, and Drumbo Tent Company. Commercial services include restaurants (Kobblers Kitchen, Drumbo Pub, and Harvest Café), BMO Bank, a hair salon, and two gas stations. Drumbo also contains 2,000 square feet of specialty food retail (Big Mike Food & Gas), which makes up 8% of the inventory (**Figure 24** and **Table 18**).

3.4.2 Embro

Embro's commercial area consists of food stores (Embro Grocery, Matheson's Foodmart, and Miedema's Meat Market), an LCBO outlet combined with Matheson's Foodmart, an RBC bank located in a historic building, a feed supply store with a Sears Catalogue service, and a restaurant. In total, Embro's commercial space consists of 9,100 square feet of specialty food retail (27%), 240 square feet (1%) of liquor/beer/wine retail, and 18,200 square feet (55%) of non-food retail. Commercial services make up 5,700 square feet, or 17% of the commercial space (**Table 18**). There are no vacant commercial designated lands in Embro (**Figure 25**).

3.4.3 Innerkip

The commercial space in Innerkip is scattered through the Village Core, which is predominantly residential (**Figure 26**). Despite the scattered commercial pattern, no commercial vacancies were found. The commercial inventory of Innerkip consists of 5,500 square feet (30%) of specialty food store space (Buzzy's Bakery and Innerkip Community Market), 500 square feet (3%) of liquor/beer/wine retail combined with the Innerkip Community Market, 7,000 square feet (38%) of non-food retail (Schilling Stained Glass, Main St. Embroidery, and House & Craft Store), and 5,500 square feet (30%) of service space (Ingles Road Rouse Restaurant) (**Table 18**).

TABLE 18
RURAL SETTLEMENTS
RETAIL/SERVICE SPACE INVENTORY
(Square Feet)

RETAIL/SERVICE CATEGORIES	Drumbo	Embro	Innerkip	Mt Elgin	Norwich	Plattsville	Tavistock	Thamesford	Other Oxford	TOTAL VILLAGES
FOOD RETAIL STORES										
Supermarket / Grocery Stores	0	0	0	0	15,900	0	11,500	0	0	27,400
Specialty Food Stores	2,000	9,100	5,500	4,200	13,800	0	5,300	5,700	7,400	53,000
Total FRS	2,000	9,100	5,500	4,200	29,700	0	16,800	5,700	7,400	80,400
NON FOOD RETAIL STORES										
Department Stores	0	0	0	0	0	0	0	0	0	0
Specialty Stores	2,000	1,500	3,700	0	42,100	0	41,000	2,300	0	92,600
Pharmacy And Personal Care Stores	0	0	0	0	5,700	0	2,400	1,100	0	9,200
Other NFSR	10,300	16,700	3,300	2,300	27,500	5,400	54,100	11,200	19,700	150,500
Total NFRS	12,300	18,200	7,000	2,300	75,300	5,400	97,500	14,600	19,700	252,300
LIQUOR BEER WINE STORES (1)	0	240	500	0	2,700	0	3,000	512	0	6,952
TOTAL RETAIL	14,300	27,540	13,000	6,500	107,700	5,400	117,300	20,812	27,100	339,652
SERVICES:										
Eating/Drinking	7,000	2,700	3,500	0	13,700	7,900	23,300	9,800	0	67,900
Personal Services	600	0	0	0	11,100	900	2,500	0	0	15,100
Finance/Insurance/Real Estate	2,500	3,000	0	0	18,300	1,700	19,700	13,800	0	59,000
Medical/Dental/Health Services	0	0	0	0	2,600	0	5,700	2,500	0	10,800
Business Services	0	0	0	0	0	0	0	0	0	0
Entertainment	0	0	0	0	0	0	2,100	0	0	2,100
Other Services	1,000	0	2,000	0	15,200	9,500	30,700	13,300	0	71,700
Miscellaneous Office	1,200	0	0	0	0	0	0	0	0	1,200
TOTAL SERVICES	12,300	5,700	5,500	0	60,900	20,000	84,000	39,400	0	227,800
VACANT SPACE	0	0	0	0	8,500	900	2,400	14,600	0	26,400
VACANCY RATE	0.0%	0.0%	0.0%	0.0%	4.8%	3.4%	1.2%	19.5%		4.4%
TOTAL RETAIL/SERVICES AND VACANT SPACE	26,600	33,240	18,500	6,500	177,100	26,300	203,700	74,812	27,100	593,852

Source: Dalvay Group Winter 2008/2009

(1) The Liquor/Beer/Wine Stores in Embro, Innerkip, and Thamesford are part of larger convenience and food stores.

Figure 24 - Village of Drumbo

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

N

Watercourses

Serviced Village Boundary

Commercial Designations

Village Core

Service Commercial

Sorensen Gravely Lowes Planning Associates Inc.

June 2009

Figure 25 - Village of Embro

Commercial Policy Review

N

0 0.05 0.1 0.2 Kilometers

Watercourses

Serviced Village Boundary

Commercial Designations

Village Core

Service Commercial

Sorensen Gravely Lowes Planning Associates Inc.

June 2009

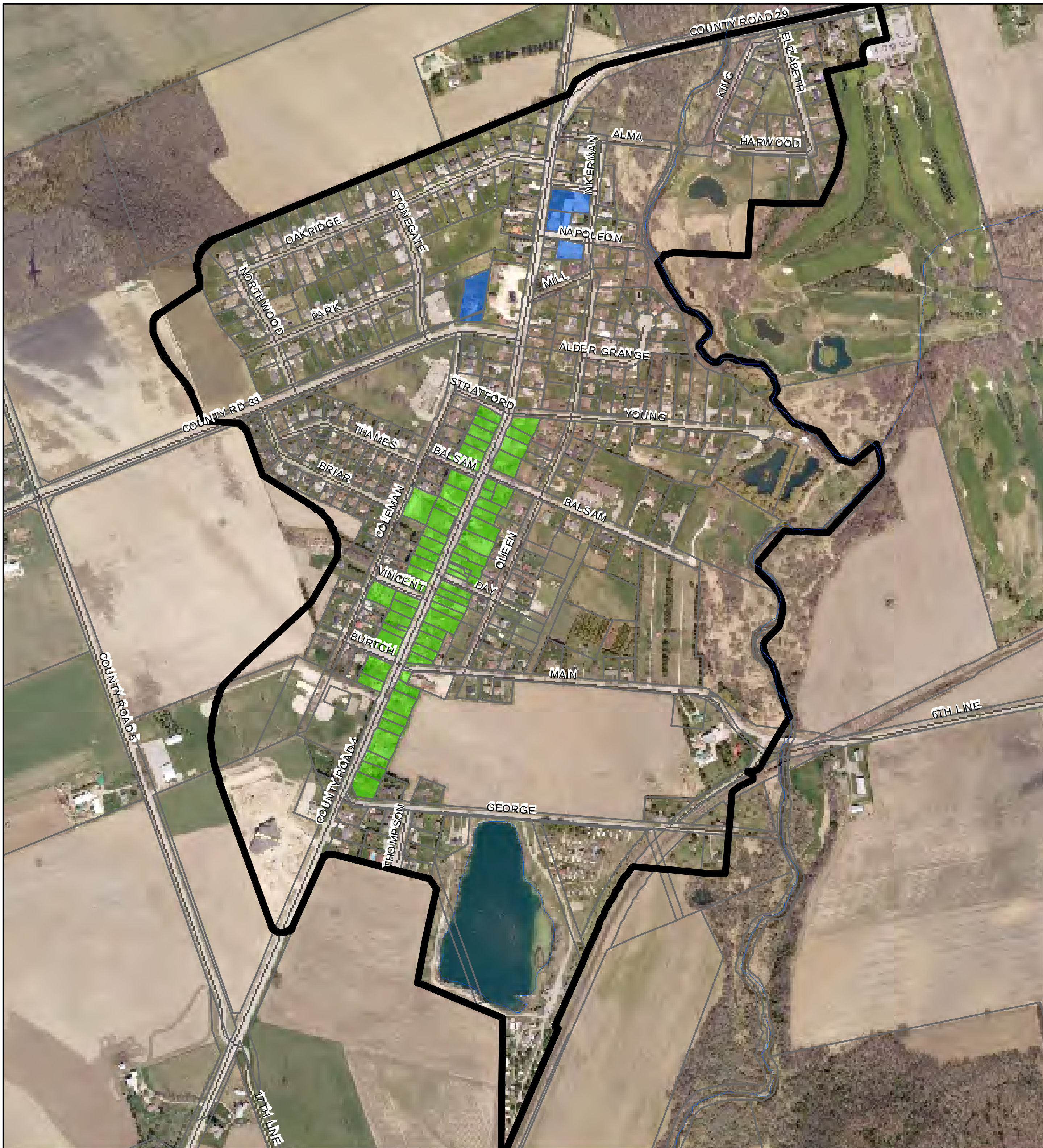

Figure 26 - Village of Innerkip

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

N

Watercourses

Serviced Village Boundary

Commercial Designations

Village Core

Service Commercial

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3.4.4 Mt. Elgin

Mt. Elgin contains Village Core and Service Commercial designated lands, but the amount of commercial space is the smallest of the serviced villages, at only 6,500 square feet (**Figure 27** and **Table 18**). The commercial area of Mt. Elgin is relatively small, with little retail and commercial service space, and no commercial space vacancies. The Village Core is mostly residential, but also has a farm supply store, a trucking establishment, and a church. The Service Commercial designated area is occupied with a gas station, a post office, and a library. In total, Mt. Elgin has 4,200 square feet (65% of total occupied space) of specialty food retail, and 2,300 square feet (35% of total occupied space) of non-food retail (**Table 18**). One vacant designated parcel of 0.67 hectares is situated in the Service Commercial designation on Plank Line (**Figure 27**).

3.4.5 Norwich

Norwich is relatively larger in geographical area, compared to the other serviced villages, and has significantly more commercial space. It contains both Village Core and Service Commercial designated lands (**Figure 28(a)** and **28(b)**). The Village Core is compact, and contains a Foodland grocery store, two banks, local neighbourhood-serving commercial types i.e. laundromat, hair salon, bakery, and deli, professional offices, antique stores, post office, LCBO, a park, and residential buildings. Most of the Village Core commercial uses are located on Main Street. The Service Commercial areas are located primarily on Stover Street, south of Main Street. Larger footprint retailers such as a Beer Store, Home Hardware, Liquidation City, and carpet retailer are located here.

In total, Norwich has 29,700 square feet of food retail (18% of total occupied commercial space), 2,700 square feet (2%) of liquor/beer/wine retail, 75,300 square feet of non-food retail (45%) which is largely attributed to the large footprint retailers in the Service Commercial designated areas, and 65,700 square feet (36%) of services (**Table 18**). The village contains the greatest concentration of food-related retail space, compared to other rural settlements. Unlike the previous four serviced villages discussed thus far, Norwich has a vacancy rate of 4.8%, which does not noticeably affect the vibrancy of the Village Core. In addition, 1.59 hectares of commercial designated or zoned lands remain vacant on a number of small to medium sized properties (**Figure 28(a), 28(b)** and **Table 19**).

Table 19. Norwich Vacant Commercial Designated or Zoned lands

Map ID	Official Plan Designation	Zone	Net Area (ha)
2592	Low Density Residential	HC	0.35
2681	Village Core	CC	0.10
2689	Village Core	CC	0.08
2690	Village Core	CC	0.10
2691	Village Core	CC	0.03
2760	Industrial	HC	0.70
2874	Village Core	CC	0.14
2875	Village Core	CC	0.03
2876	Village Core	CC	0.02
2877	Village Core	CC	0.08
Norwich Total			**1.59**

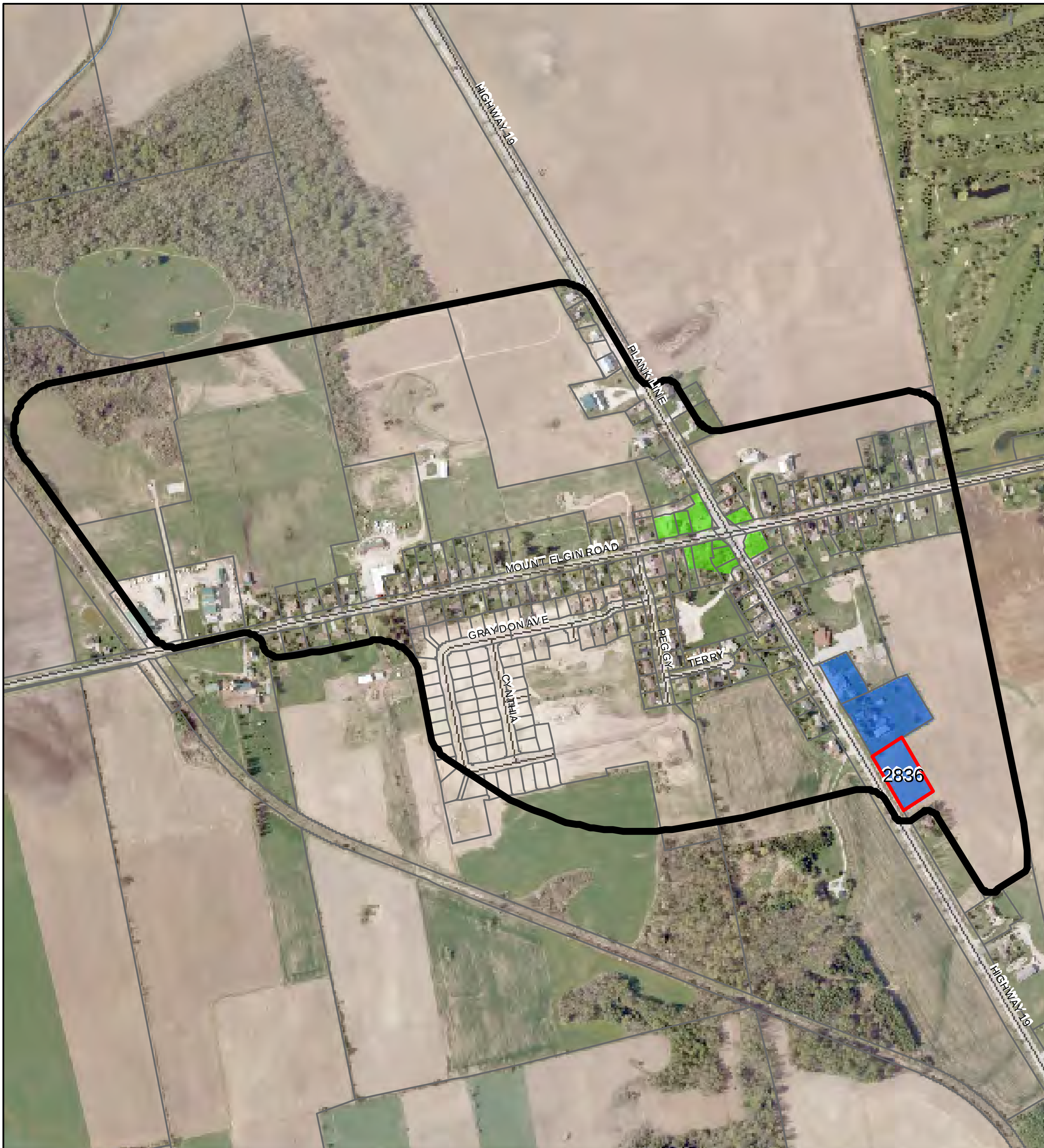

Figure 27 - Village of Mount Elgin

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

N

Watercourses

Serviced Village Boundary

Vacant Commercial Sites

Commercial Designations

Village Core

Service Commercial

Sorensen Gravely Lowes Planning Associates Inc

June 2009

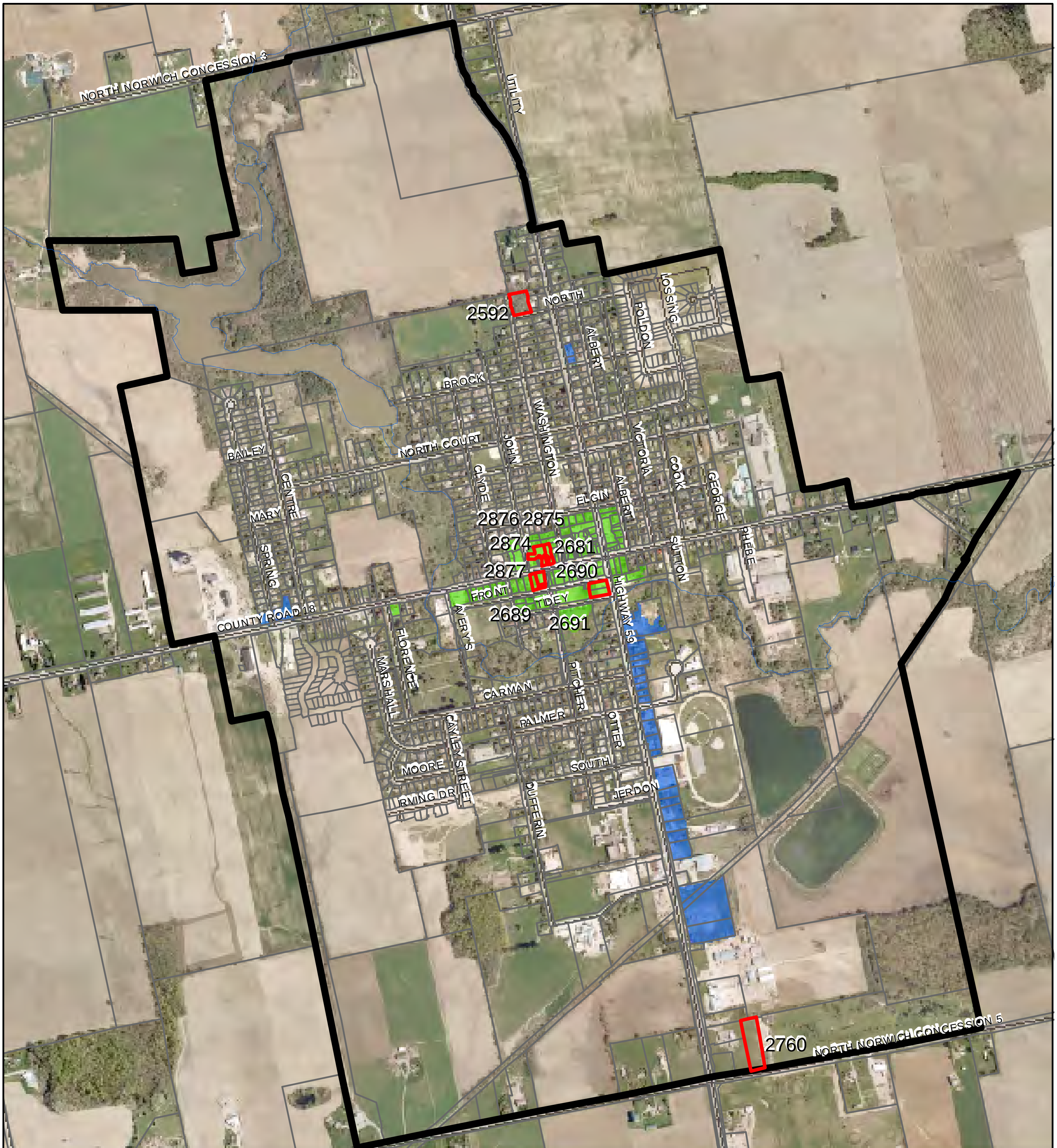

Figure 28(a) - Village of Norwich

Commercial Policy Review

N

0 | 0.25 | 0.5 | 1 Kilometers

Watercourses

Serviced Village Boundary

Vacant Commercial Sites

Commercial Designations

Village Core

Service Commercial

Sorensen Gravely Lowes Planning Associates Inc.

June 2009

Revised

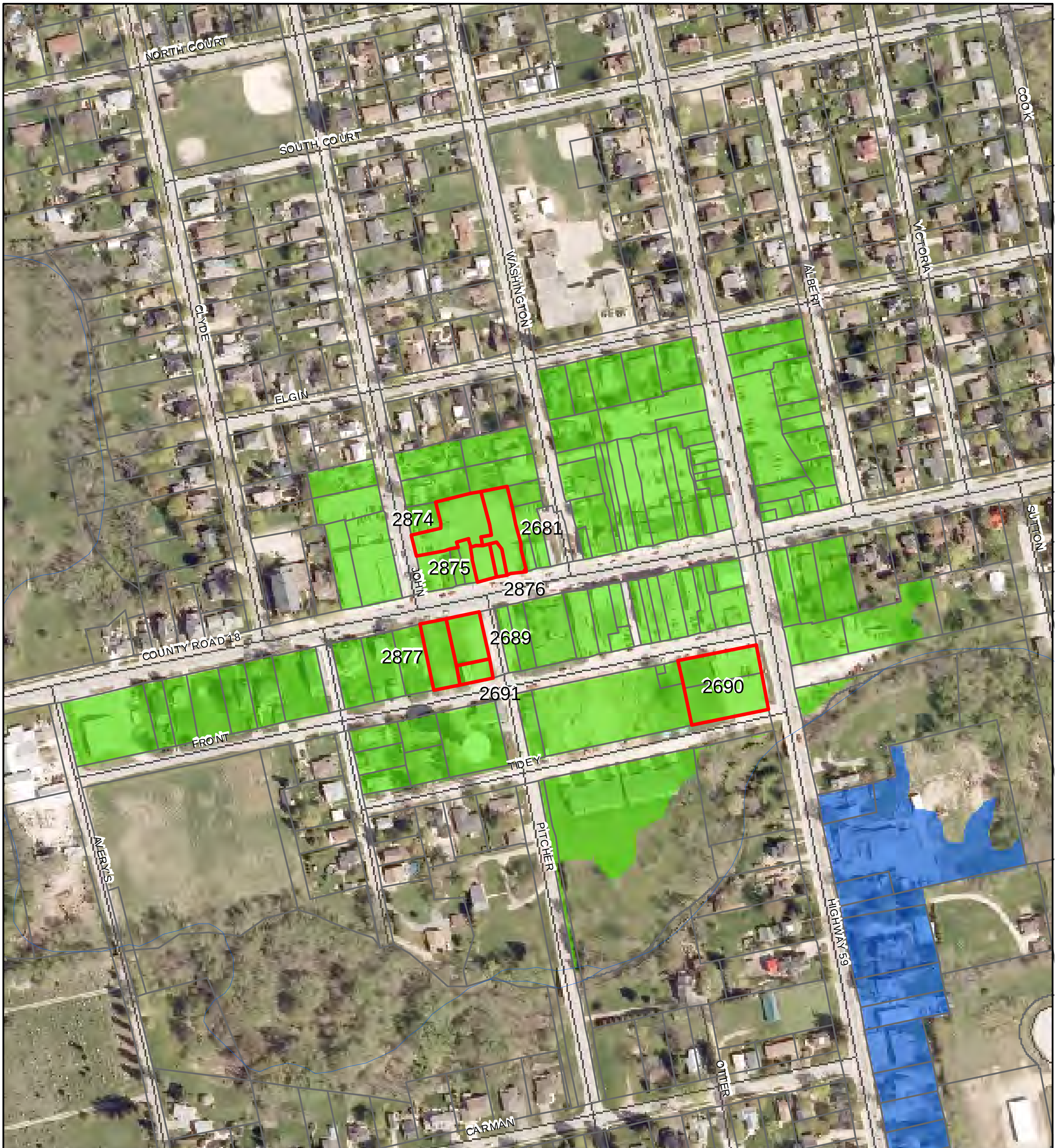

Figure 28(b) - Village of Norwich

Commercial Policy Review

0 0.025 0.05 0.1 Kilometers

N

Watercourses

Serviced Village Boundary

Vacant Commercial Sites

Commercial Designations

Village Core

Service Commercial

June 2009

Revised

3.4.6 Plattsville

Plattsville also has a two-tiered commercial structure comprised of Village Core and Service Commercial designated areas (**Figure 29**). The Village Core is concentrated in the western end of the Village, however, the character is not compact and the properties have multiple entrances onto Albert Street. Plattsville is not serviced with any food stores, but there are 5,400 square feet of non-food retail (21% of total occupied space), and 20,000 square feet (79%) of service space (**Table 18**). The largest Service Commercial designated property is currently used for agriculture; the other commercial designated sites appear occupied.

In Plattsville, the vacancy rate is low at 3.4%. The community also contains two large undeveloped commercial designated parcels that total 1.17 hectares at the eastern side of the Village (**Figure 29** and **Table 20**).

Table 20. Plattsville Vacant Commercial Designated Lands

Map ID	Official Plan Designation	Zone	Net Area (ha)
2838	Service Commercial	D	0.79
3011	Service Commercial	D	0.40
Plattsville Total			**1.17**

3.4.7 Tavistock

Like the other serviced villages Tavistock also has a two-tiered commercial structure (**Figure 30**). The Village Core contains the bulk of the commercial space, followed by a smaller cluster of Service Commercial designated land on Highway 59.

The Village Core is fairly extensive and attractive. It contains a Beer Store, a Valu-Mart, a car wash, a bridal boutique and institutional uses on the west side of Highway 59/Woodstock Street. On the east side, there are automobile services, a post office, a pharmacy, and a pizza restaurant. The uses and character north of Hope Street are more service and auto oriented. South of Hope Street, the character is typical of a traditional mainstreet. Unique features of the Village Core are the existence of a large feed mill in the downtown, and interesting streetscape features such as the angled intersection and fountain. Overall, the Village Core appears to be vibrant, and meets the daily retail and service needs of surrounding residents.

In contrast, further south along Highway 59, the Service Commercial designated areas are less utilized. A fire hall and vacant lands occupy the Service Commercial areas.

In total, Tavistock contains 16,800 square feet of food retail space (8% of occupied space), 97,500 square feet (48%) of non-food retail, and 84,000 square feet (42%) of service space (**Table 18**). Compared to other serviced villages, Tavistock contains the greatest concentration of non-food retail and service space.

As well, Tavistock enjoys a low vacancy rate of 1.2%. In addition, 0.05 hectares of commercial designated lands remain vacant (one parcel) (**Figure 30**).

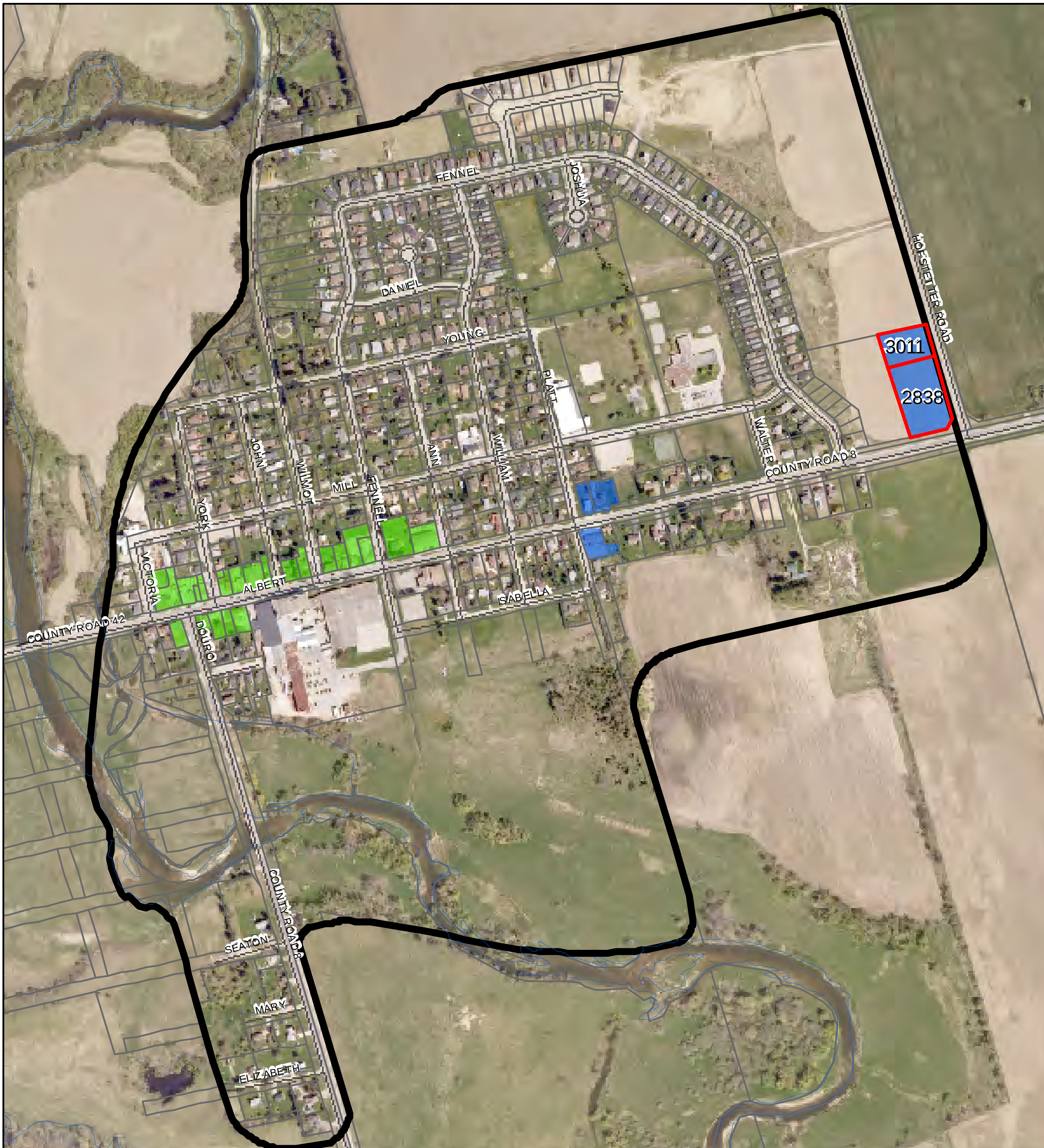

Figure 29 - Village of Plattsville

Commercial Policy Review

N

0 0.05 0.1 0.2 Kilometers

Watercourses

Serviced Village Boundary

Vacant Commercial Sites

Commercial Designations

Village Core

Service Commercial

Sorensen Gravely Lowes Planning Associates Inc.

June 2009

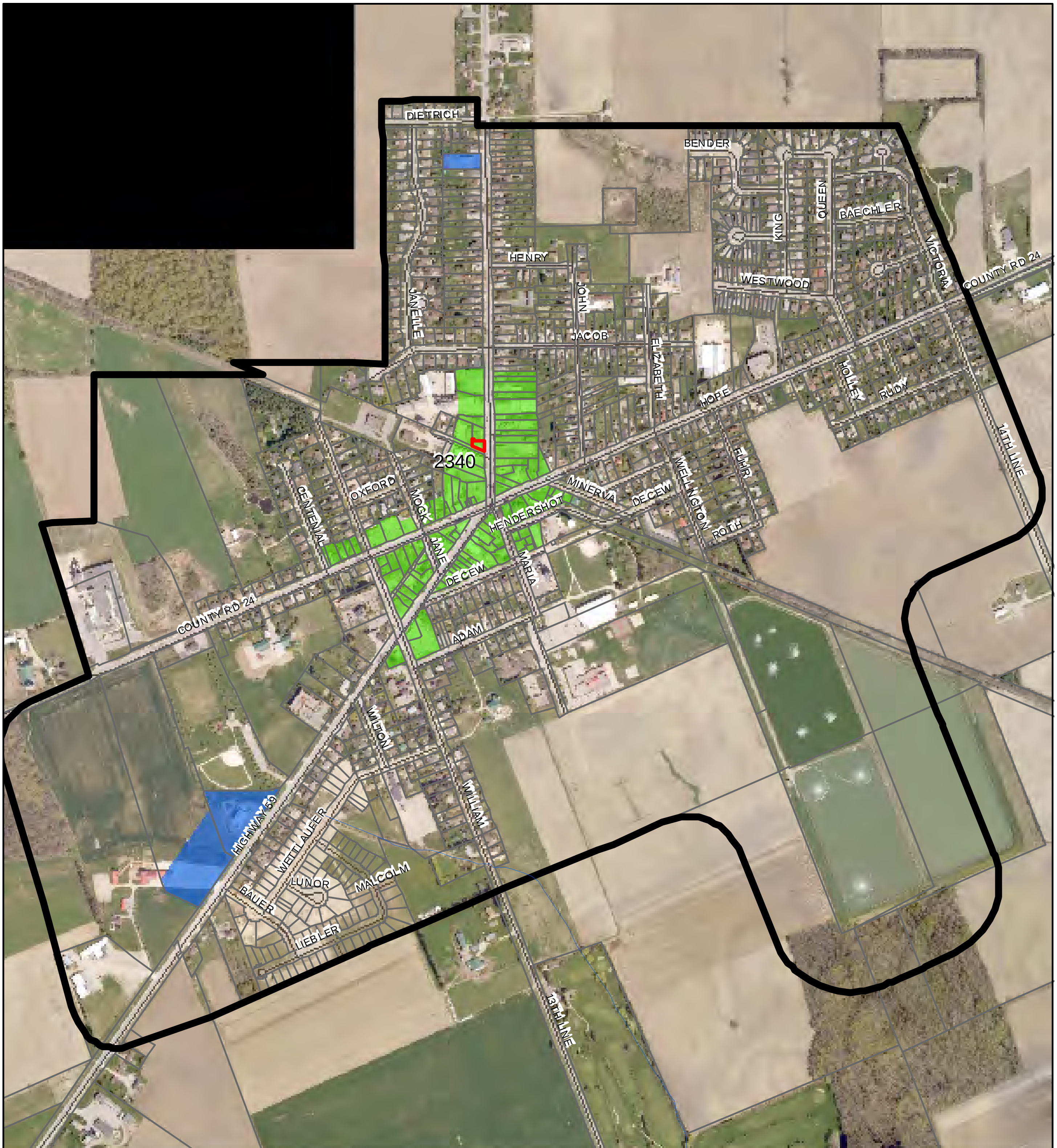

Figure 30 - Village of Tavistock

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

N

Watercourses

Serviced Village Boundary

Vacant Commercial Sites

Commercial Designations

Village Core

Service Commercial

Sorensen Gravely Lowes Planning Associates Inc.

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3.4.8 Thamesford

Thamesford contains two commercial designations: Village Core and Service Commercial (**Figure 31**). Located in the Village Core are a library, a pharmacy, and a Tim Horton's. The density in the Village Core is relatively low, with the occupied retail and service commercial uses scattered throughout. The Village Core is oriented more towards vehicular traffic, with on-site parking in front of buildings, and few pedestrian amenities, rather than being focused around a historic pedestrian oriented main street.

Further to the west are the Service Commercial areas. The western sector also has a low concentration of commercial uses. It also contains two large vacant parcels that are adjacent to one another, in the amount of 1.34 hectares and 2.27 hectares.

Food retail space is relatively low, consisting of 5,700 square feet of food-related retail (9% of the total occupied commercial space), 14,600 square feet of non-food retail (24%), and 512 square feet of liquor/beer/wine retail contained within a Mac's milk store (1%). The predominant commercial use is services, which make up 39,400 square feet (65%) of the commercial inventory (**Table 18**).

Vacancies are noticeable in the Village Core. Thamesford suffers from a relatively high vacancy rate of 19.5% within built space, which noticeably affects the vibrancy of the Village core. There are also 3.71 hectares of vacant service commercial designated lands (**Figure 31** and **Table 21)**.

Table 21. Thamesford Vacant Commercial Designated Lands

Map ID	Official Plan Designation	Zone	Net Area (ha)
2507	Village Core	CC	0.10
2512	Service Commercial	HC	1.34
2513	Service Commercial	D	2.27
Thamesford Total			**3.71**

3.4.9 Other Rural Settlements

Commercial land use designations do not apply in the unserviced villages (**Figure 1**). Instead, they are recognized as settlements that serve the surrounding rural, agricultural community, and traveling public. In total, the remaining rural settlements provide 7,400 square feet of food retail stores (27% of total occupied commercial space), 19,700 square feet of non-food retail (73%), and no services (**Table 18**).

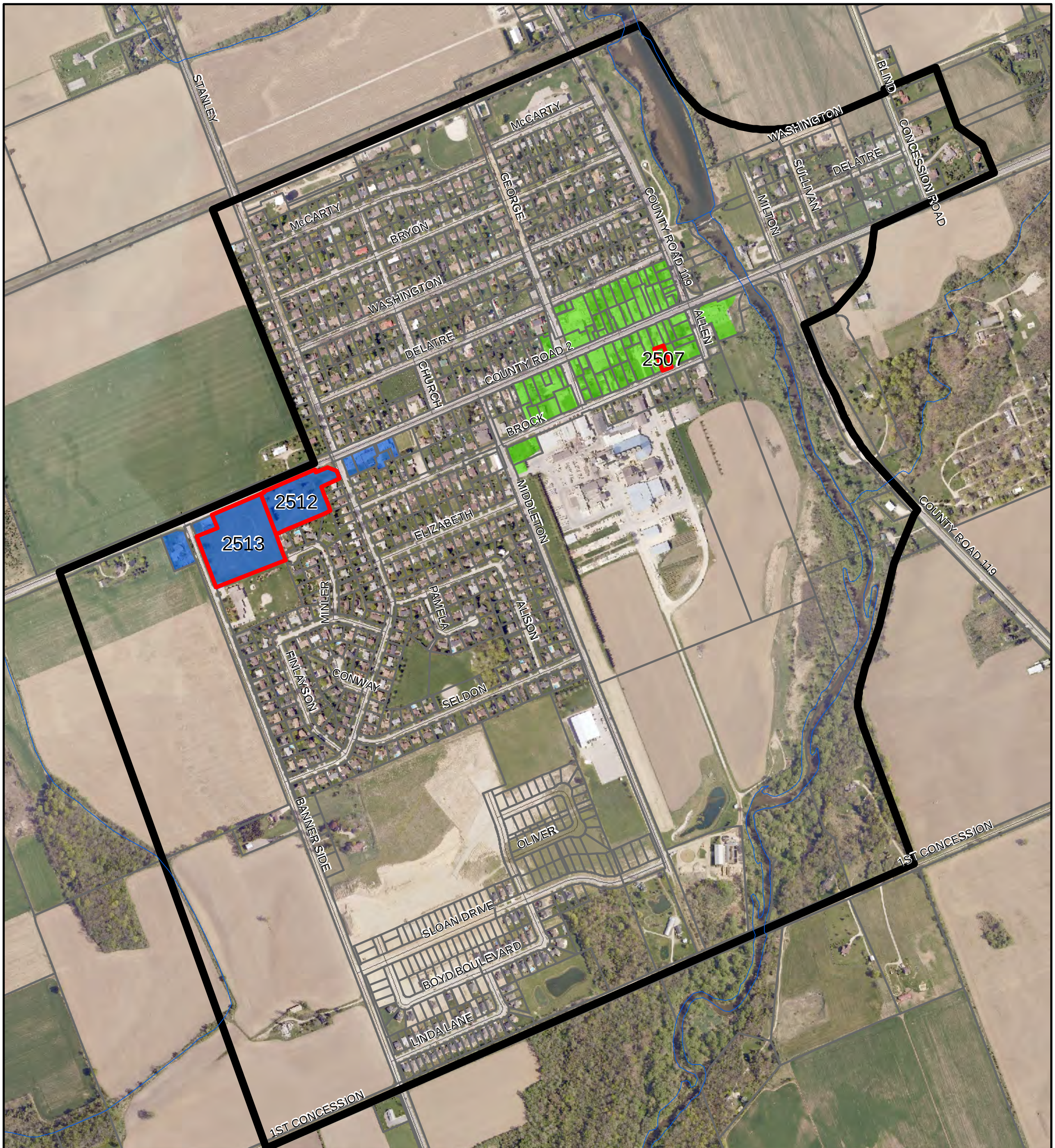

Figure 31- Village of Thamesford

Commercial Policy Review

0 0.05 0.1 0.2 Kilometers

N

Watercourses

Serviced Village Boundary

Vacant Commercial Sites

Commercial Designations

Village Core

Service Commercial

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June 2009

3.4.10 Agriculture-Related Commercial Uses

There are additional agricultural related uses within the rural area outside of the serviced and unserviced villages including farm machinery sales and services, feed and farm supply stores and large and small-scale farm product sales.

Increasingly the Province is encouraging and directing the larger commercial establishments to locate within the serviced and unserviced villages. The need for additional farm equipment and supply is not dependent on population growth within Oxford County but rather by the success of the agricultural industry itself. As such the need for additional commercial uses of this nature are not addressed in this study and should not be constrained by the results of this study. Additional commercial uses serving the farm industry should be encouraged and promoted in accordance with the County's policies for agriculturally related commercial/industrial uses, or in appropriate settlement area locations, as the success of the industry dictates.

Similarly, it is difficult to quantify the market need for agricultural related uses including farm product sales. These value added sales outlets are an important economic generator in the rural areas and should continue to be permitted and encouraged, in appropriate locations, and should not be constrained by the results of this study.

3.4.11 Opportunities and Challenges

For the villages, the opportunities and challenges are:

- Maintaining and strengthening the Village Cores;
- Attracting new retail and services to serve the residents particularly where low population growth is being experienced; and
- Addressing the role, function and necessity for the vacant designated service commercial areas in some of the villages.

4.0 APPLICATIONS AND APPROVALS

4.1 CURRENT APPLICATIONS IN OXFORD COUNTY

In addition to the existing commercial inventory discussed in Chapter 3, it is important to also take note of recently approved commercial applications and those that are currently under review. These commercial applications are discussed according to the municipality and commercial cluster in which they are located.

4.1.1 Woodstock

Dundas Cluster

Loblaw Properties

The City of Woodstock recently approved an application by Loblaw Properties Limited to expand an existing retail food store from 76,700 sq.ft. to a total gross floor area (GFA) of 146,000 sq.ft. The subject site is located at 969 Dundas Street, on the northwest corner of Dundas Street and Springbank Avenue (**Figure 7**). In order to expand the site, Loblaw Properties Limited needed to amend the City of Woodstock Zoning By-law for the subject properties to a Special Highway Commercial Zone. Expansion of the area would allow for new uses as part of the non-grocery portion of the building. However, such areas were not intended to accommodate retail activities that are characteristic of the Central Area. It was staff's opinion that the proposed expansion was appropriate and maintained the intent and purpose of the Official Plan. Staff recommended that special provision be included in the amending Zoning By-law, which limits the total gross floor area for general merchandise sales to no more than 23,800 sq.ft.[3]

The expansion was not yet constructed, at the time of this report.

Dundas/Ingersoll/Main St Cluster

2141076 Ontario Inc.

An application to amend the City of Woodstock Official Plan has been made by 2141076 Ontario Inc. to redesignate 62 Mill Street from Service Commercial to Medium Density Residential. The redesignation would allow for the development of a 3 storey, 39 unit apartment building. The subject land remains vacant according to the County's 2008 Vacant Land's Study.[4]

This application has been approved.

[3] More information may be obtained from the Woodstock Planning Memo: Zoning Amendment, File # WZON 06-13, dated September 7, 2006.

[4] More information may be obtained from Planning Report OPA 11-159, Woodstock – Official Plan Amendment Report # C-3 2008-101 dated April 9, 2008.

4.1.2 Ingersoll

Harris St. Cluster

Sifton Development
Sifton Properties Limited has retained Tate Economic Research Inc. to undertake a market demand and impact report for lands located at the northwest quadrant of Harris Street/Plank Line and Clarke Road, approximately 100 metres west of Harris Street (**Figure 22**). The report is in support of Sifton's interest to build a 200,000 sq.ft. retail development. The site is accessible from Highway 401 and local area road networks. Tate Economic Research Inc. has delineated primary and secondary trade market areas for the proposed retail development. The primary trade zone consists of the Town of Ingersoll. The secondary zone consists of Zorra Township and a portion of Southwest Oxford Township and Thames Centre Township.

In order to facilitate Sifton's proposal, an Official Plan Amendment and Zoning By-law Amendment will need to be made to the County of Oxford. Sifton has informally requested that the land be redesignated to Service Commercial. A formal application has not yet been submitted to the County.

Other Woodstock Areas
Forecast (Woodstock Devonshire) Inc.
A zone change application has been submitted by Forecast (Woodstock Devonshire) Inc. for the lands located at 1185 Devonshire Avenue and the adjacent property to the east (located on the north side of the street, lying between Lansdowne Avenue and Highway 4) (**Figure 32**). The application is to rezone the property from Residential to Shopping Centre Commercial with special parking and setback provisions.

The applicant proposes to demolish the existing buildings and develop up to 10,000 sq.ft. of drug store use on the subject property.[5]

This application is currently under appeal to the Ontario Municipal Board.

Lunor Group Inc.
An application has been submitted by MHBC Planning on behalf of Lunor Group Inc. to amend the City of Woodstock Official Plan and Zoning By-law on Part of Lots 14 and 15, Concession 1 (Devonshire Avenue, south side of the street, lying between Lansdowne Street and County Road 4) (**Figure 32**). The proposal is to build 37 'lotless' blocks for low density residential use, two commercial blocks, and two park blocks. The subject property is designated Low and Medium Density Residential, Environmental Protection and Open Space. The applicant proposes to amend the designations to be largely Low Density Residential with a portion of the property to be designated Open Space for a Stormwater Management (SWM) facility. It has also been requested that the northeast corner of the property be designated for neighbourhood commercial use.

The property is currently zoned Restricted Agricultural. The applicant proposes to rezone the property to residential types R3, R2, Local Commercial, Shopping Centre Commercial and Open Space. Further requests have been made to permit single, semi-detached and townhomes in the R3 zone as well as flexible setbacks in the R3 and R2 zones.

[5] See ZBLA Circulation Notice, Woodstock: Request ZBLA File # WZON 08-8 dated June 20, 2008 for more information.

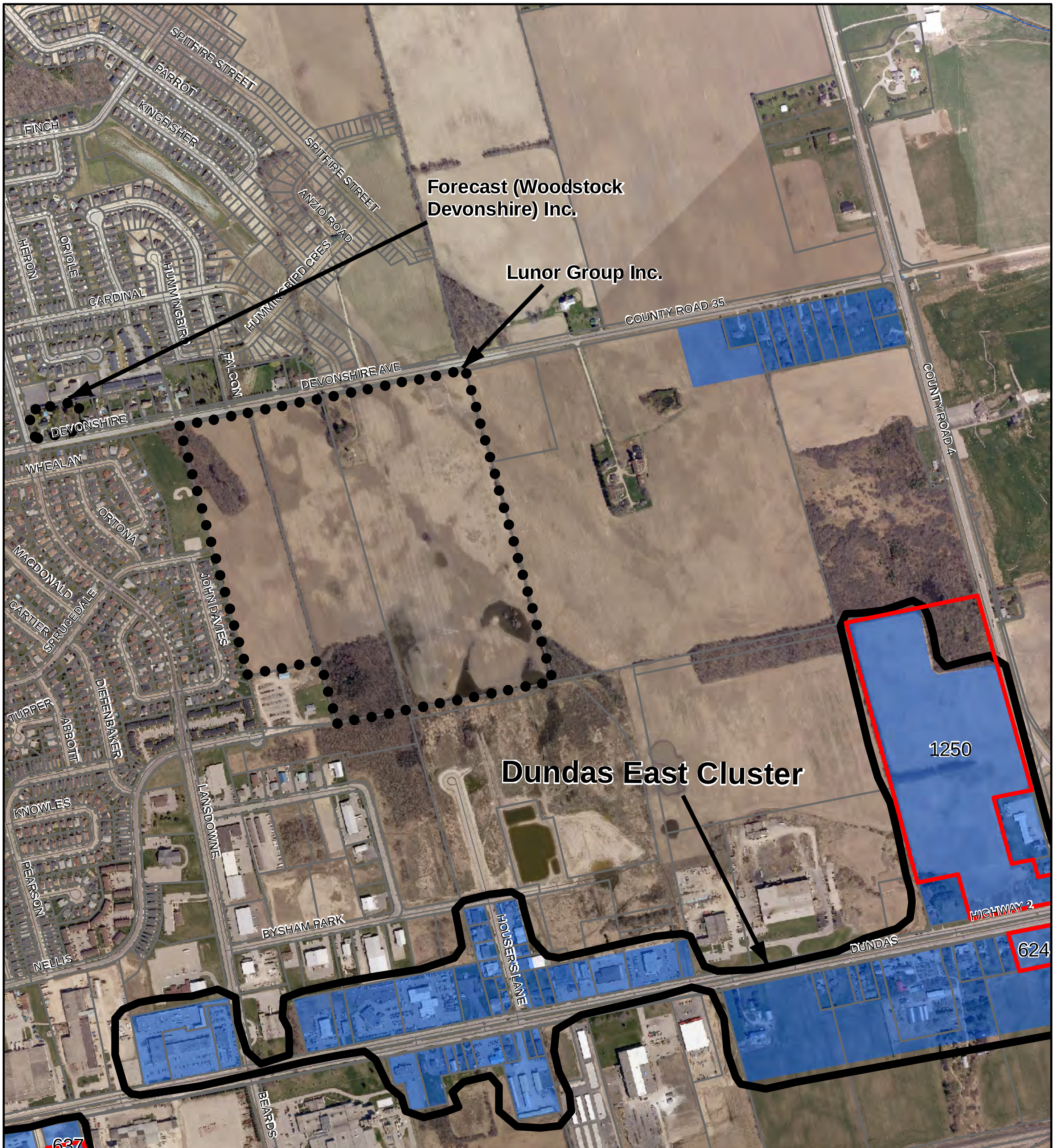

Figure 32 - Woodstock - Commercial Applications: Other Woodstock Areas

Commercial Policy Review

0 0.045 0.09 0.18 Kilometers

N

Watercourses

Commercial Clusters

Vacant Commercial Sites

Commercial Applications

Commercial Designations

Service Commercial

Sorensen Gravely Lowes Planning Associates Inc.

June 2009

The City of Woodstock has requested public comment on the proposed changes to the land designations and zones.[6] This application was still in agency circulation at the time of this report.

4.2 APPLICATIONS IN SURROUNDING MUNICIPALITIES

Commercial applications in surrounding municipalities outside of the County could potentially impact the local market, so are worthy of consideration in the commercial review. For the purposes of this study, only commercial applications that exceed 100,000 square feet of retail space were of interest, since commercial establishments of this size could potentially capture some of Oxford's outflow expenditures. Commercial establishments less than 100,000 square feet would likely cater to the local market. Commercial applications that comprise at least 100,000 square feet of retail space were found only in the City of London and the City of Stratford. The proposals are summarized below.

4.2.1 City of London

Proposed Community Shopping Area and Mixed Residential

An application has been submitted for the property located at 3080 Bostwick Road and 491-499 Southdale Road West (southeast corner of Bostwick Road and Southdale Road West). The application is to amend the Official Plan designation from Urban Reserve-Community Growth and Environmental Review to Community Shopping Area, and a range of residential designations. In addition, it is proposed to amend the zoning from a Rural Holding Zone, Buffer Agricultural Zone, Urban Reserve and Environmental Review Zone to a Community Shopping Area with a mix of residential zones. The Official Plan and Zoning amendments would permit the development of a range of retail, service and financial institutions within a maximum GFA of 107,600 sq.ft. shopping centre format building.

As of November 10, 2008, Council has deferred the application pending the adoption of the Southwest London Area Study. The applicants have also requested a deferral so as to avoid a potential hearing on this application.[7]

Commissioners Centres Limited

An application has been submitted for 168 Meadowlily Road South to change the Official Plan designation from Urban Reserve, Community Growth to Associated Shopping Area Commercial and to amend the Zoning By-Law from a Holding Urban Reserve to an Associated Shopping Area Commercial Special Provision. The subject applications are to permit the development of 275,000 sq.ft. of retail commercial floor space comprised of an anchor retail store and five smaller buildings. The Planning Committee recommended that the application be referred back to staff to work with the applicant on a concept plan and a guideline document for the entire Urban Reserve Area, referred to as the Meadowlily Area Study.

In January 2009, the Planning Committee recommended approval of a Terms of Reference for the Meadowlily Area Study.[8]

[6] See OPA Circulation Notice, OPA 11-165 Woodstock: OPA, ZBLA and Draft Plan of Subdivision File # WZON 08-9 32T-08003 received July 17, 2008 for more information.

[7] For more information, refer to application file number Z-6662.
[8] For more information, refer to File number OZ-7430.

Smartcentres
An application has been submitted by Smartcentres for 1280 Fanshawe Park Road West, and 1875 and 1965 Hyde Park Road to amend the Fanshawe Park Road/Hyde Park Commercial Node (section 4.7.1.5) to change the permitted maximum gross floor area for retail commercial uses from 113,620 sq.m. to 114,452 sq.m. in the node and a maximum gross floor area on the southeast corner from 53,890 sq.m. to 54,732 sq.m. A request to amend the Zoning By-law has also been submitted to the remove the Holding provision of the current zone, and amend the zoning to Associated Shopping Area Special Provision which permits commercial uses in a shopping centre or stand alone building with a maximum gross floor area of 54, 723 sq.m.[9]

The proposed by-law for 1280 Fanshawe Park Road West and 1875 and 1965 Hyde Park Road was subsequently introduced at the November 5, 2007 Council meeting. However, the application was referred back to the Planning Department due to conflicting gross floor areas cited. The City is still waiting for confirmation by Canadian Tire of the proposed gross floor area.

4.2.2 City of Stratford

Smart Centres (as Avonwood Shopping Centres) has proposed redesignating & rezoning industrial land for a new retail development of 245,000 sq.ft. consisting of:
- a Wal-Mart store of 135,000 sq.ft.;
- a Home Depot of 90,000 sq.ft.; and
- other retail/service uses of 20,000 sq.ft.

This proposal was refused by the City of Stratford, and is currently before the Ontario Municipal Board on appeal. The hearing began in early 2009, and is now in recess. It is scheduled to continue later this year. The appellant (Avonwood) is opposed by the City and by the downtown Stratford BIA (the “City Centre Committee”).

It is primarily the location of this development, rather than its component uses or size, that is the issue.

[9] For more information refer to file number OZ 7401.

5.0 RELATIVE OCCUPIED RETAIL / SERVICE LEVELS

Retail/service levels are measured in the form of space per capita for each Urban Centre as well as for the Serviced Villages in the aggregate. They are presented in **Table 22** for each Urban Centre, the combined Rural Settlements and the County by major retail/service category.

For the County at large, the total retail/service space per capita service level is 48.25 square feet. This compares to a normal service level for a more self-contained market area ranging between 30 and 35 square feet per capita. The significantly higher than normal per capita service level attests to the central place role that County facilities play in also serving some of the needs of people who reside outside the Oxford County boundary in neighbouring counties.

The significance of this central place role is even more identifiable in the relative service levels enjoyed by the three Urban Centres. For Tillsonburg and Woodstock, the computed service levels are in the 75 to 76 square feet per capita range. For Ingersoll, the relative service level at some 60.41 square feet per capita is well above the Oxford County service level.

In **Table 22**, where the service level in the Urban Centres or the combined Rural Settlements is greater than the average service level for Oxford County as a whole, it is printed in bold. Notably in Woodstock, the relative service levels in every single retail/service category exceed the County level. In Tillsonburg, the service levels exceed the County level in all but two of the Services categories (note that the adjacent Norfolk Mall inventory is not included in these calculations for Tillsonburg). Even in Ingersoll, the smallest of the Urban Centres, the service levels exceed the County levels at the group level (e.g. FRS, NFRS, LBW and SERVICES), albeit in six sub-categories within the groups the service levels are below the County level.

In the combined Rural Settlements, the service levels in all retail/service categories are below the County level. The amount of commercial space provided in the Rural Settlements is reflective of the village population size. The commercial space provided in these villages focus on the most convenience oriented of retail and service facilities. The local residents therefore look to the three Urban Centres to meet the greater part of their retail and service needs.

TABLE 22
COUNTY OF OXFORD
RETAIL / SERVICE SPACE PER CAPITA SERVICE LEVELS

RETAIL / SERVICE CATEGORIES	WOODSTOCK		INGERSOLL		TILLSONBURG		RURAL TOWNSHIPS		TOTAL OXFORD	
	Population	35,550	Population	12,820	Population	16,320	Population	45,250	Population	109,940
	Space - Square Feet		Space - Square Feet		Space - Square Feet		Space - Square Feet		Space - Square Feet	
	Total	Per Capita	Total	Per Capita	Total	Per Capita	Total	Per Capita	Total	Per Capita
FOOD RETAIL STORES										
Supermarket	163,700	4.60	89,900	7.01	67,000	4.11	27,400	0.61	348,000	3.17
Grocery/Other Food Stores	63,500	1.79	17,400	1.36	30,100	1.84	53,000	1.17	164,000	1.49
Total FRS	227,200	6.39	107,300	8.37	97,100	5.95	80,400	1.78	512,000	4.66
NON FOOD RETAIL STORES										
Department Stores	195,000	5.49	0	0.00	79,600	4.88	0	0.00	274,600	2.50
Specialty Stores	450,400	12.67	98,800	7.71	217,800	13.35	92,600	2.05	859,600	7.82
Pharmacy And Personal Care Stores	48,000	1.35	22,700	1.77	34,900	2.14	9,200	0.20	114,800	1.04
Other NFSR	407,300	11.46	178,500	13.92	255,500	15.66	150,500	3.33	991,800	9.02
Total NFSR	1,100,700	30.96	300,000	23.40	587,800	36.02	252,300	5.58	2,240,800	20.38
Liquor / Beer / Wine Stores	14,500	0.41	6,700	0.52	14,400	0.88	6,952	0.15	42,552	0.39
TOTAL RETAIL	1,342,400	37.76	414,000	32.29	699,300	42.85	339,652	7.51	2,795,352	25.43
SERVICES:										
Eating/Drinking	236,700	6.66	54,100	4.22	100,600	6.16	67,900	1.50	459,300	4.18
Personal Services	78,000	2.19	27,300	2.13	38,700	2.37	15,100	0.33	159,100	1.45
Finance/Insurance/Real Estate	150,300	4.23	42,700	3.33	80,200	4.91	59,000	1.30	332,200	3.02
Medical/Dental/Health Services	78,300	2.20	23,300	1.82	40,100	2.46	10,800	0.24	152,500	1.39
Business Services	29,400	0.83	3,400	0.27	3,700	0.23	0	0.00	36,500	0.33
Entertainment	155,400	4.37	14,100	1.10	28,700	1.76	2,100	0.05	200,300	1.82
Other Services	258,300	7.27	56,300	4.39	113,100	6.93	71,700	1.58	499,400	4.54
Miscellaneous Office	157,100	4.42	26,000	2.03	2,400	0.15	1,200	0.03	186,700	1.70
TOTAL SERVICES	1,143,500	32.17	247,200	19.28	407,500	24.97	227,800	5.03	2,026,000	18.43
VACANT SPACE	224,000	6.30	77,700	6.06	119,200	7.30	26,400	0.58	447,300	4.07
TOTAL RETAIL / SERVICES AND VACANT SPACE	2,709,900	76.23	738,900	57.64	1,226,000	75.12	593,852	13.12	5,268,652	47.92

Source: RDA estimates based on Table 1, Scenario A, 2008 population estimate.

6.0 LARGE URBAN CENTRE TRADE AREAS

The three Large Urban Centres each have their respective trade areas from which they obtain on a regular and consistent basis the majority (75% to 95%) of the sales support for their locally based retail/service facilities. For each Large Urban Centre, the local residents within the boundaries of the defined urban area comprise the primary source of support for local facilities, i.e. they represent the Primary Trade Area for that Large Urban Centre. However, each Large Urban Centre's retail/service facilities obtain support from beyond the defined limits of the urban area or the Primary Trade Area, which is referred to as the Secondary Trade Area. In each instance, the Secondary Trade Area is governed by the amount and composition of the retail/service inventory in each of the Large Urban Centres and influenced by the size, composition and proximity of competing centres of retail/service activity.

6.1 WOODSTOCK

Woodstock, the largest of the Large Urban Centres in terms of base year 2008 population (approximately 38,000), also has the largest and most diversified inventory of retail/service space. Its Trade Area (Primary and Secondary zones combined, as illustrated in **Figure 33**), as defined in recent market studies based on detailed origin/destination surveys, encompasses virtually all of Oxford County except for the areas of South-West Oxford and Norwich townships lying south of the Mount Elgin Road/Norwich Road alignment.

6.2 TILLSONBURG

Tillsonburg, with a base year resident population of approximately 16,000, just over 42% the size of Woodstock, is the second largest of the Large Urban Centres. Although the Town of Tillsonburg itself only has one department store, a Zellers in the Town Centre complex, the extent of its trade area is uniquely influenced by the existence of a Wal-Mart department store in Norfolk Mall, which is located to the east just outside the Tillsonburg town limit in Norfolk County (**Figure 34**). Again drawing on recent origin/destination surveys in Tillsonburg plus Norfolk Mall, the effective Trade Area for the Tillsonburg/Norfolk Mall retail/service facilities extends from the Mount Elgin Road/Norwich Road alignment in Oxford County south through the eastern part of Elgin County and the western part of Norfolk County all the way south to the shores of Lake Erie.

6.3 INGERSOLL

The Town of Ingersoll has a base year population of some 12,500. It has the smallest and least diversified base year inventory of retail/service facilities and, because of its proximity to Woodstock, its Trade Area, save for a small portion extending into the Township of Malahide in Elgin County, is wholly contained within Oxford County and hence also within the defined Woodstock Trade Area (**Figure 35**).

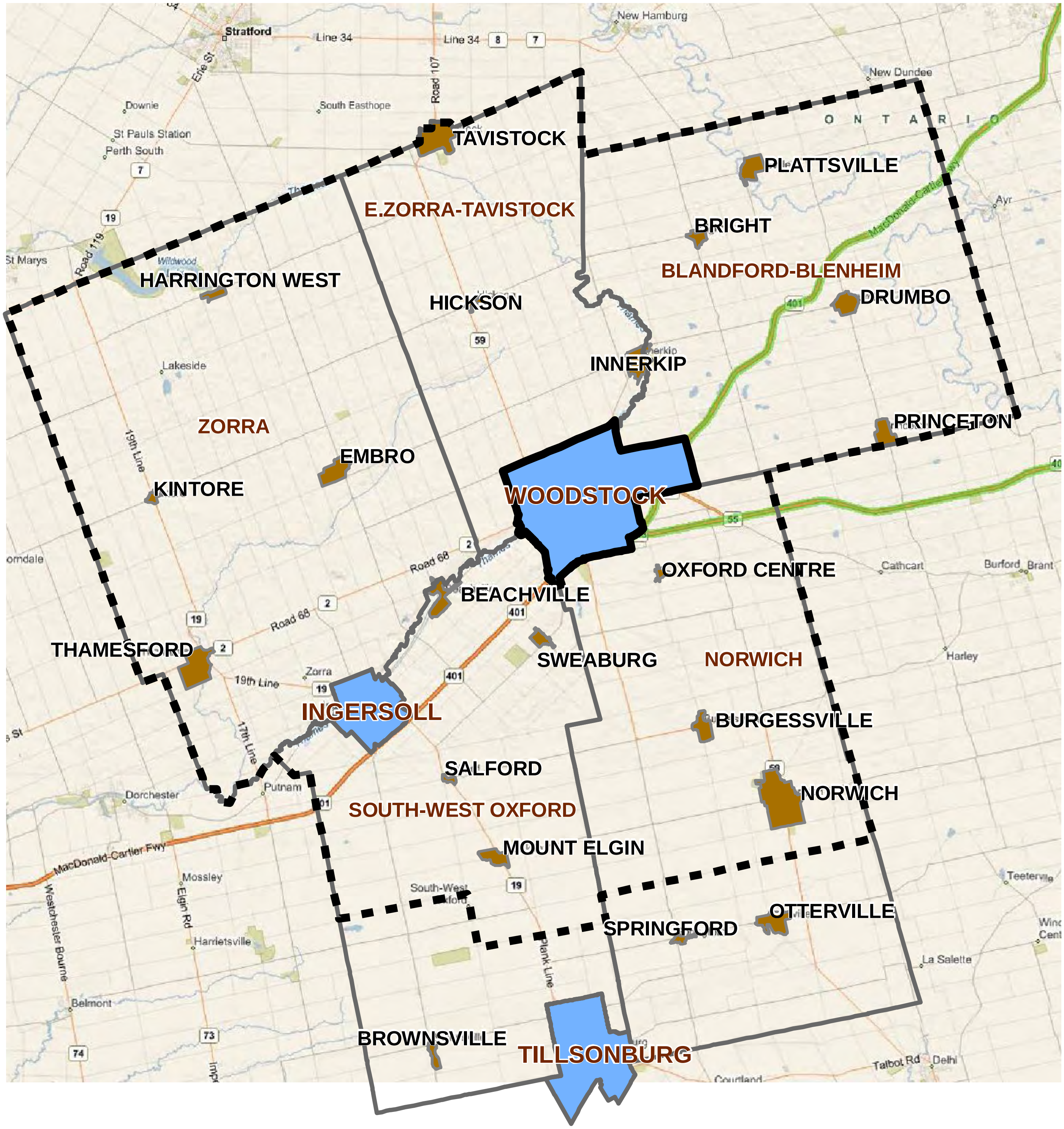

Figure 33 - Woodstock Trade Areas

Commercial Policy Review

- Primary Trade Area
- Secondary Trade Area
- Urban Areas
- Villages

0 5 10 20 Kilometers

N

Sorensen Gravely Lowes Planning Associates Inc.

June 2009

Figure 34 - Tillsonburg Trade Areas

Commercial Policy Review

Primary Trade Area

Secondary Trade Area

Urban Areas

Villages

N

0 5 10 20 Kilometers

Sorensen Gravely Lowes Planning Associates Inc.

June 2009

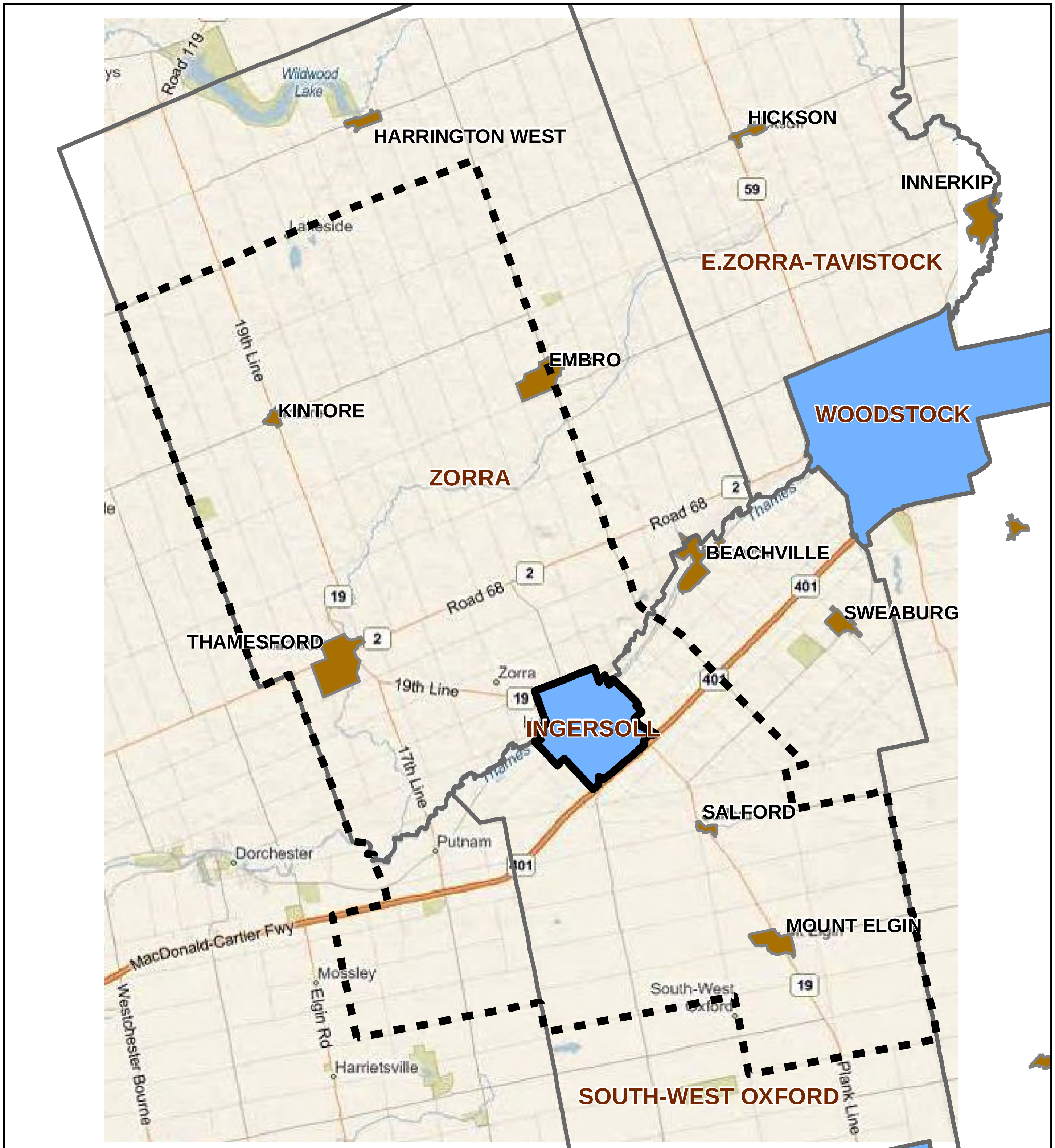

Figure 35 - Ingersoll Trade Areas

Commercial Policy Review

- Primary Trade Area
- Secondary Trade Area
- Urban Areas
- Villages

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7.0 OXFORD COUNTY POPULATION FORECASTS

In April 2006, Hemson Consulting Ltd. (Hemson) released their report "Population, Households & Employment Forecasts 2001-2031, Oxford County". In the Introduction to this report Hemson notes that partly as a result of the County's strategic location at the confluence of Highway 401 and Highway 403 "there has been significant recent activity in the manufacturing sector including expansion of the CAMI automotive plant and the announcement by the Toyota Corporation to construct a new automotive assembly plant in Woodstock. The recent investments are indicators that future growth levels may increase substantially, especially in the next ten years". In light of the current economic recession and the major restructuring taking place within the automotive industry, an alternative more conservative population growth scenario has been prepared to provide an indication of the sensitivity of the future demand for additional retail/service space in the County to lower population growth expectations.

7.1 SCENARIO A: HEMSON FORECAST 2001 - 2031 (EXCLUDES POPULATION UNDERCOUNT)

Starting with the Census population figure of 99,300 for the County in 2001, Hemson projects the population increasing to 106,200 in 2006 and continuing to rise to a level of 143,700 by 2031 (see **Appendix A, Table 1**).

7.2 SCENARIO B: MODIFIED HEMSON FORECAST 2001 – 2031 (EXCLUDES POPULATION UNDERCOUNT)

The 2006 Census population figure for Oxford County is 102,756, some 3.3% lower than the Hemson estimate. For the purposes of constructing an alternative County population forecast, we have reviewed the relative decline in average absolute annual growth between 2001 and 2006 for each of the Large Urban Centres and the Rural Area as a whole by comparing actual Census data with the Hemson forecast data. Drawing on the observed lower actual absolute average annual growth rates for each of the Large Urban Centres and the Rural Area as a whole for the 2001 to 2006 period, we have prepared an alternative forecast for the County. Under this scenario the County population in 2031 is projected to reach a level of approximately 129,750, almost 10% lower than the Hemson forecast (see **Appendix B, Table 1**).

7.3 POPULATION FORECASTS INCLUDING POPULATION UNDERCOUNT

For the purpose of estimating the demand for additional retail/service facilities in the County of Oxford between the base year 2008 and the horizon forecast year 2031, it is appropriate to include in the population forecasts under both Scenario A and Scenario B a factor to compensate for the inevitable undercount underlying the Census counts, which are the stepping off point in typical population forecast models such as that employed by Hemson in their study for Oxford County in April 2006.

The Scenario A and Scenario B population forecasts employed for projecting the demand for additional retail/service space in Oxford County beyond the base year 2008 are presented in the attached **Table 1** of **Appendices A** and **B**. A summary comparison of the population forecasts under the two scenarios is presented below in **Table 23**:

Table 23. Population Forecasts

	SCENARIO A				**SCENARIO B**		
	2008	**2031**	**INCREASE**		**2008**	**2031**	**INCREASE**
Woodstock	38,550	54,080	15,530		37,700	49,540	11,840
Ingersoll	12,820	17,580	4,760		12,480	16,210	3,730
Tillsonburg	16,320	22,230	5,910		15,640	19,440	3,800
Rural Settlements	45,240	54,590	9,350		42,740	48,970	6,230
TOTAL OXFORD	**112,930**	**148,480**	**35,550**		**108,560**	**134,160**	**25,600**

The difference in projected total population growth under the two scenarios over the forecast interval is some 10,000 persons. The largest increase is anticipated in Woodstock, ranging between 11,840 under Scenario B and 15,530 under Scenario A (**Table 23**).

8.0 CURRENT SHOPPING PATTERNS AND CAPTURE RATES

A key task in the determination of future retail/service space needs and opportunities in the County of Oxford is identifying the current shopping patterns of County residents and the County capture rates by major retail category. Capture rates are defined as the share of retail expenditure potential in the hands of County residents which in fact accrues to or is captured by facilities located within the County. Retail potential not captured by County facilities is defined as outflow. Future retail space opportunities in the County will be a function not only of population growth and real increases in per capita expenditures but also the extent to which current outflow rates can reasonably be expected to be reduced over time and the County become more self sufficient in meeting residents' retail needs.

In order to obtain a measure of current base year capture rates and thereby provide a point of departure for evaluating the prospects of reducing outflow rates in the future, it is typical to conduct a random survey of study area residents shopping patterns by major retail category. In this instance, however, we have drawn on the availability of telephone survey data from random surveys conducted in the trade areas of each of the three Large Urban Centres to estimate Oxford County capture rates for residents in each of the Large Urban Centres and in the Rural Settlements at large. [10]

In general terms, capture rates by retail category vary according to whether a retail category is basically convenience or comparison-shopping oriented. For convenience oriented shopping categories that serve frequent needs, the capture rates are typically 90% or higher. For comparison-shopping categories, the capture rates are typically much lower and are influenced by the choices available in the local inventory and the distances to alternative shopping opportunities outside the local market area. As such, in Oxford County, the capture rates for Food Oriented Stores (FOR) and pharmacies are well above 90%. However, in the case of major department stores (Sears and The Bay) and warehouse membership clubs (WMCs), because there are none of these facilities in the County, the capture rates are 0%. For Specialty Stores (apparel, home furnishings and miscellaneous stores), the capture rates range between 45% and 60%) (see **Tables 4 to 7 of Appendix A**).

[10] The market studies drawn upon include the following:

1. "Peer Review, Feasibility and Impact Study For A Norwich Avenue Property, Woodstock" prepared by Robin Dee & Associates (June 2004)
2. "Retail Market Demand and Impact Analysis, Town of Ingersoll" prepared by Tate Economic Research Inc. (Revised May, 2006).
3. "Market Evaluation & Impact Study, Proposed Wal-Mart Expansion, Norwich Avenue and Juliana Drive, City of Woodstock" prepared by Malone Given Parsons Ltd. (June 2007).
4. "Retail Market Demand and Impact Analysis, Town of Tillsonburg" prepared by Tate Economic Research Inc. (June 2007).
5. A consumer survey conducted by The Climans Group in 2008 in the Tillsonburg trade area as part of a market study they are preparing.

9.0 RETAIL / SERVICE SPACE NEEDS

It is necessary to know the nature and scale of warranted additional retail/service space in the County in order to consider alternative distributions of that space within the County to serve both the County's residents in the future and those outside the County who nevertheless rely on the County to meet a portion of their retail/service needs. Following consideration of alternative future distribution alternatives in Chapter 10 of this report, a preferred future retail/service land use distribution pattern will emerge, together with policy recommendations to implement the selected future retail/service structure scenario.

9.1 METHODOLOGY AND FORMAT

The basic approach adopted in the market analysis is similar to that used by the consultant in numerous other commercial policy review market studies across Ontario for many years, employing both quantitative and qualitative assessments. The initial task is to assess the current and future sales/space demand potential by major retail/service category in the County. The increase in future demand over base year demand is defined as the residual sales/space potential. Where the analysis is in terms of residual sales potential, as is the case for the various retail categories, the residual sales potential is converted into estimates of warranted additional space employing appropriate sales per square foot productivity factors for the additional space. For service categories, the demand estimates are generated directly in terms of square feet of space and hence the warranted additional space is simply future demand minus current demand.

Much of the statistical background material contained in this report is based on federal, provincial and local municipal statistics. Such data are supplemented by original research undertaken in studies for various projects in Oxford County in recent years as noted earlier, which included origin/destination surveys and random telephone surveys of residents in the County to identify shopping patterns. And as noted earlier, a detailed inventory of retail/service space in the County was specifically assembled for this study in January of this year.

9.2 ASSUMPTIONS

In any analysis requiring estimates of future conditions, it is necessary to make certain assumptions. The basic or underlying assumptions in this study are set out below. Other assumptions are noted at appropriate points in the study text and tables.

1. Given current economic conditions we have assumed that per capita expenditure levels in the County of Oxford will remain constant between the base year 2008 and 2011. This assumption allows for an initial decline in 2009 and an increase by 2011 back to 2008 levels. Beyond 2011, per capita Food Store Related (FSR) expenditures in the County are assumed to increase at an annual compound rate of 0.25%. The equivalent increase assumed for the Non-Food Store Related (NFSR) per capita expenditures is 1.0%.

2. The estimates of future population for the County under Scenarios A and B provide a reasonable range within which the actual population count in future is expected to fall.

3. The various data sources employed to develop figures on population, income, selected retail category expenditures, base year capture rates, the selected retail/service space inventory, and future sales per square foot performance levels for the various retail categories are considered sufficiently reliable for the purposes of this assignment.

4. All dollar references are in terms of the 2008 value of the Canadian dollar. Inflation is factored out of the analysis and only real increases in expenditures are recognized.

If for any reason there is a major departure from any of these assumptions, it may be necessary to re-examine the market analysis findings and conclusions.

The detailed market analysis under each scenario is presented separately in a series of tables in **Appendix A and B** at the end of the report. The report text throughout is referenced as appropriate to these analytical tables and focuses on the Scenario A analysis. A comparison of the warranted additional retail/service space in the County under the two scenarios is presented in the last section of the report.

9.3 STUDY AREA

In this analysis we have adopted the County of Oxford as the study area. For purposes of calculating base year and future sales accruing to facilities in the County, the analysis focuses on the three Large Urban Centres plus the Rural Settlements collectively. These are identified for the purpose of the analysis as follows: ZONE A: WOODSTOCK; ZONE B: INGERSOLL; ZONE C: TILLSONBURG; and ZONE D: RURAL SETTLEMENTS. In the case of Tillsonburg, because the Norfolk Mall, which is located in Norfolk County on the boundary of the town, serves a significant portion of Tillsonburg residents retail/service needs and in turn is critically dependent on those residents for its viability, we have treated Norfolk Mall as part of Tillsonburg's retail/service fabric.

Sales accruing to the County from beyond the County boundaries are accounted for by way of an addition of a sales inflow factor as a percentage of estimated total County sales.

9.4 POPULATION FORECASTS (APPENDICES A AND B TABLE 1)

As noted earlier, two population scenarios have been selected for the retail/service space demand analysis to provide a measure of the sensitivity of the demand for additional facilities in the County to the rate of population growth over the forecast interval. Scenario A (see **Appendix A**), based on the April 2006 Hemson study for the County, represents the reference population forecast projecting total County population to increase from a base year 2008 estimate of 113,480 to a 2031 count of 149,200, an increase of 35,720. Scenario B (see **Appendix B**) represents the more conservative forecast with County population rising from a 2008 estimate of 108,560 to 134,160 in 2031, an increase of 25,600 persons.

9.5 RETAIL / SERVICE SPACE INVENTORY (APPENDICES A AND B TABLE 2)

As noted earlier, base year total retail/service space in the County amounts to some 5.30 million square feet including some 462,300 square feet of vacant space for a vacancy rate of 8.7%. Over half of the total space is devoted to retail activities. The City of Woodstock contains the largest concentration of retail/service space, some 2.71 million square feet or 47% of the County total. The Woodstock inventory is split almost evenly between retail and service uses. In Tillsonburg (1.23 million square feet) and Ingersoll (0.77 million square feet), more than half of the total space is related to retail activities. The Rural Settlements combined account for a total of 593,900 square feet or retail/service space, again with more than half taken up with retail uses.

The County contains a wide variety of retail chains and stores, including most of the large format stores. The notable exceptions are major department stores (Sears and The Bay) and warehouse membership clubs (Costco).

9.6 PER CAPITA EXPENDITURES (APPENDICES A AND B TABLE 3)

Expenditures by County residents on retail goods are a function in part of their incomes. To determine the relative income levels in the County, reference is made to the 2006 Census from which income data on a census subdivision and enumeration area basis can be extracted. We note in **Table 2 (Appendices A** and **B)** that per capita income indexes in the County in the Urban Centres and in the Rural Settlements combined are all below the Ontario base of 100.00.

Per capita annual expenditure factors for the County in 2008 are set out in **Table 2 (Appendices A** and **B)** for the Food Store Retail (FSR), Non-Food Store Retail (NFSR) and Liquor/Beer/Wine (LBW) retail groups. These are derived from retail trade expenditure statistics from Statistics Canada for Ontario.

9.7 FOOD STORE RELATED ANALYSIS (APPENDICES A AND B TABLES 4 THROUGH 7)

The FSR analysis covers the estimation of warranted space above the base year inventory for supermarkets, grocery/specialty food stores and warehouse membership clubs (WMCs). We tested the opportunity for a WMC outlet in the County based on the somewhat sparse available consumer survey data in the County for that retail category and reached the conclusion that there does not appear to be sufficient market available to support such an operation over the forecast interval. However, by 2031, there is a need identified for an additional 131,500 square feet of supermarket space. This will support 2 to 4 new supermarket units, depending on size and the local markets they are intended to serve. The small amount of additional grocery/specialty food store space projected, some 4,800 square feet, recognizes that virtually all those uses are today being incorporated within the four walls of the large format supermarkets that are expected to dominate in the future.

9.8 NON-FOOD STORE RELATED ANALYSIS (APPENDICES A AND B TABLES 8 THROUGH 12)

The NFSR analysis examines the warranted additional space in the County for Department Stores, Specialty Stores (apparel/accessories, home furnishings and miscellaneous stores), Pharmacies and Personal Care Stores, and Other NFSR Stores (other general merchandise including non food portion of WMCs, Canadian Tire, building and outdoor home supply stores and TBA (tires, batteries and accessories) stores).

a. Department Stores **(APPENDICES A AND B TABLE 9)**

There are no traditional or major department store facilities in the County at the present time. The major department stores currently operating in Ontario are limited to two, The Bay and Sears, both of which are located in Kitchener/Waterloo and London. The population threshold in the primary trade area for entry of a major department store has historically exceeded 80,000 persons. The reference population forecast for Woodstock, the largest urban centre in the County in 2031, is some 52,300 persons. Given these considerations, the prospect of a full-line major department store locating in the County during the forecast period appears to be remote at this time.

The warranted additional department store space in Oxford County by 2031 amounts to some 155,000 square feet. This may take the form of another discount department store unit or support expansions of existing discount operations in the County.

b. Specialty Stores **(APPENDICES A AND B TABLE 10)**

The warranted additional space in this group, which includes apparel stores, home furnishings facilities and miscellaneous stores, is projected to amount to some 131,500 square feet by the end of the forecast period. Approximately 40% of this space is expected to be for the home furnishings sub-category, 35% relating to apparel/accessories retail uses and the balance to miscellaneous stores.

c. Pharmacies and Personal Care Stores **(APPENDICES A AND B TABLE 11)**

This group of stores is convenience oriented with good current representation across the County and accordingly shows high capture rates in both the Urban Centres and the Rural Settlements. The estimated warranted additional space in the County by 2031 amounts to some 52,400 square feet. Depending on locational distribution between the Urban Centres and the Rural Settlements, this amount of space could accommodate a minimum of three new format drug stores or as many as 12 new facilities in the form of a mixture of both new format drug stores and smaller Personal Care Stores.

d. Other NFSR Stores **(APPENDICES A AND B TABLE 12)**

Estimated warranted additional space in this group in the County by 2031 amounts to some 270,000 square feet. This will likely take the form of both expansions of existing and new large format retail facilities, as well as new smaller type retail uses since the group includes Canadian Tire, home improvement centres, other general merchandise stores, and various tires/batteries/accessories stores.

9.9 OTHER RETAIL – LIQUOR BEER WINE STORES (APPENDICES A AND B TABLE 13)

The demand for liquor, beer and wine store space in the County by 2031 is estimated to approximate some 26,600 square feet. This is expected to accommodate between 2 and 4 new facilities.

9.10 SERVICES ANALYSIS (APPENDICES A & B, TABLES 14 & 15)

For Services, the most common method of estimating future demand for additional space is to apply a space per capita factor to the forecast population to yield total future demand and subtract the current or base year inventory.

The Services categories for which warranted additional space estimates made are those included in the base year inventory data, and as a general statement includes the types of services typically found in shopping centres, strip malls, arterial commercial areas and in the Downtown. It does include above-grade services in any private sector owner/operator buildings.

The current or base year per capita space factors for the various service categories in each of the Urban Centres and in the Rural Settlements combined are presented in **Table 14**. Having regard to these factors, for each service category in each sector of the County we have selected a “best estimate” range for purposes of projecting future total space demands.

In **Table 15**, for the Services group as a whole, the total warranted additional space for the County as a whole by 2031 amounts to some 502,963 square feet.

The Services group showing the highest demand for additional space is Other Services, at some 105,889 square feet. For the balance of the group, the warranted additional space estimates by 2031 range between a low of 20,349 square feet for Business Services and a high of some 84,000 to 88,000 square feet for the Eating/Drinking and Finance/Insurance/Real Estate categories.

9.11 SUMMARY WARRANTED ADDITIONAL RETAIL / SERVICE SPACE (APPENDICES A & B, TABLE 16)

A summary of all retail/service demand for additional space in the County on a cumulative basis from 2011 through 2031 is presented in **Table 16**. Between the base year 2008 and 2011, the total additional demand for retail space is a modest 117,000 square feet, a reflection of the expected impact of the current economic recession and the uncertainty it engenders. In the Services group over the same period, the negative demand of 770 square feet in essence reflects the expectation that little change to the current inventory is likely.

By 2031, total demand for additional retail/service space in the County amounts to an estimated 1.32 million square feet requiring approximately 112 gross acres of land at grade level. Total retail space accounts for 817,500 square feet, most of this being in the NFSR group. Additional Services space amounts to an estimated 503,000 square feet.[11]

However, it is pertinent to note that approximately 447,300 sq.ft. is currently vacant.

9.12 COMPARISON SCENARIO A & SCENARIO B

As noted earlier, Scenario B (see **Appendix B**) is based on a more conservative population projection for the County of Oxford. Specifically, the total County population by 2031 is estimated at some 134,160 residents (see **Table 1** of **Appendix B**), or 14,320 less than under Scenario A (see **Table 1** of **Appendix A**). Total warranted additional retail/service space by 2031 under Scenario B amounts to an estimated 1.03 million square feet requiring about 87 gross acres of land (see **Table 16** of **Appendix B**) compared to a total of 1.32 million square feet under Scenario A occupying some 112 acres (see **Table 16** of **Appendix A**). As in the case of Scenario A, the retail uses in Scenario B account for a little over 60% of the total warranted additional retail/service space in the County by 2031.

[11] The estimates of warranted additional space by individual retail category are based on a residual analysis and as such assume there are no sales transfers from base year sales of existing operators and therefore no impacts on existing retail operations. Space additions in excess of the estimates cited might be acceptable at any given point in time provided the transfers from base year sales of existing operators are not critical resulting in closures that undermine the planned function of the retail structure.

10.0 PROPOSED DISTRIBUTION OF RETAIL AND SERVICE COMMERCIAL SPACE NEEDS

The projected additional space requirements in **Table 16** in **Appendices A** and **B** are for Oxford County as a whole. The next task is to consider how that space might be distributed amongst the three Large Urban Centres and the Rural Settlements. In **Table 17** in **Appendices A** and **B,** we set out a proposed distribution by municipality of the projected 2031 Oxford County additional retail/service space requirements under four summary headings: Food Store Retail; Non Food Store Retail; Liquor/Beer/Wine; and Services.

The distribution has been arrived at by considering the sources of the residual retail sales potentials accruing in each of the Urban Centres and the Rural Settlements in each retail category plus the additional services space projected in each area. The sources of the residual retail potentials include those arising locally in each area as a result of population growth and increases in per capita expenditures, and a share of the inflow sales to the County. In addition, in the case of the three Urban Centres, a portion of the local residuals generated in the Rural Settlements is attributed to the urban centres to recognize the fact that the residents in the Rural Settlements will continue to look to the three Urban Centres to meet the major portion of their retail needs.

The proposed distribution under Scenario A is 50% allocated to Woodstock, 25% to Tillsonburg, 15% to Ingersoll and 10% to the Rural Settlements. (The distribution under Scenario B is only marginally different)

Once a distribution is agreed upon, the next task will be to review the allocations to the respective Urban Centres and the Rural Settlements against the supply of available commercial land in those areas and determine if additional designations might be appropriate, and if so, how they might best be distributed internally within each Urban Centre and amongst the Villages in the Rural Settlements. This task will be addressed in Module 2 of the Study.

11.0 ISSUES AND OPPORTUNITIES

The demand for additional retail/service space in the County between 2008 and 2031 is projected to range between 1.0 and 1.325 million square feet. The opportunities for retail/service development in the County, however, will not be governed only by the amount of additional space warranted. Other factors and issues will of necessity have to be considered and addressed in this study including:

- The existing vacant space concentrations and particularly addressing the high vacancies in the downtown cores of the three urban areas;
- The role of current designated but unbuilt commercial sites;
- The influence of retail development trends including new retail format alternatives;
- The adequacy of the current retail structure and hierarchy;
- The role and function of the existing commercial centres and whether they should be expanded and enhanced and/or whether new centres should be designated; and
- The need / opportunity for commercial intensification.

12.0 NEXT STEPS

This report represents the findings of Module One, which profiled the characteristics of Oxford's retail sector, and commercial clusters and designations. The next step, through the Module 2 report, is to recommend a policy approach and controls in consideration of the projected commercial space demands, and proposed commercial space allocation in step with the projected population growth in the County.

Appendix A – Reference Tables for Scenario A

Table 1. Oxford County Population Forecast
Table 2. Oxford County Retail / Service Space Inventory
Table 3. Oxford County Annual Per Capita Expenditures
Table 4. Oxford County Food Store Retail (FSR) Expenditure Potential
Table 5. Oxford County Warehouse Membership Club (WMC) Analysis ($ millions)
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Table 13. Oxford County Liquor, Beer, Wine (LBW) Analysis
Table 14. Oxford County Selected Services Per Capita Space Ratios
Table 15. Oxford County Projected Additional Selected Service Space Requirements
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TABLE 1

OXFORD COUNTY POPULATION FORECAST

SCENARIO A

RDA based on Hemson Forecasts (April 2006)- Unadjusted for Net Undercoverage

	2001	2006	2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:							
Population	33,100	36,000	37,280	39,200	43,100	46,700	52,300
Average Annual Increase		580	640	640	780	720	560
Average Annual Growth Rate		1.8%	1.8%	1.7%	2.0%	1.7%	1.2%
ZONE B-INGERSOLL:							
Population	11,000	12,000	12,400	13,000	14,200	15,300	17,000
Average Annual Increase		200	200	200	240	220	170
Average Annual Growth Rate		1.8%	1.7%	1.6%	1.8%	1.5%	1.1%
ZONE C-TILLSONBURG:							
Population	14,100	15,300	15,780	16,500	18,000	19,400	21,500
Average Annual Increase		240	240	240	300	280	210
Average Annual Growth Rate		1.7%	1.6%	1.5%	1.8%	1.6%	1.1%
ZONE D-**RURAL SETTLEMENTS**:							
Population							
Blandford-Blenheim	7,600	7,800		8,400	8,700	9,000	9,400
East Zorra-Tavistock	7,200	7,500		7,900	8,200	8,600	9,100
Norwich	10,500	11,000		11,500	12,200	12,800	13,800
South-West Oxford	7,800	8,000		8,300	8,600	8,900	9,300
Zorra	8,100	8,500		9,100	9,700	10,300	11,200
Total	41,200	42,800	43,760	45,200	47,400	49,600	52,800
Average Annual Increase		320	480	480	440	440	320
Average Annual Growth Rate		0.8%	1.1%	1.1%	1.0%	0.9%	0.6%
TOTAL OXFORD COUNTY:							
Population	99,400	106,100	109,220	113,900	122,700	131,000	143,600
Average Annual Increase		1,340	1,560	1,560	1,760	1,660	1,260
Average Annual Growth Rate		1.3%	1.5%	1.4%	1.5%	1.4%	1.0%

RDA based on Hemson Forecasts (April 2006)- Adjusted for Net Undercoverage factor of 3.8% in 2001.

	2001	2006	2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:	34,358	37,224	38,548	40,533	44,565	48,288	54,078
ZONE B-INGERSOLL:	11,418	12,408	12,822	13,442	14,683	15,820	17,578
ZONE C-TILLSONBURG:	14,636	15,820	16,317	17,061	18,612	20,060	22,231
ZONE D-**RURAL SETTLEMENTS**:	42,766	44,255	45,248	46,737	49,012	51,286	54,595
TOTAL OXFORD COUNTY:	103,177	109,707	112,933	117,773	126,872	135,454	148,482

SOURCE: Hemson Consulting Ltd. "Population, Household & Employment Forecasts 2001-2031, Oxford County" (April 2006)

SCENARIO A

TABLE 2
COUNTY OF OXFORD
RETAIL / SERVICE SPACE INVENTORY
(Square Feet)

RETAIL / SERVICE CATEGORIES	URBAN CENTRES: Woodstock	Ingersoll	Tillsonburg	RURAL TOWNSHIP VILLAGES: Drumbo	Embro	Innerkip	Mt Elgin	Norwich	Plattsville	Tavistock	Thamesford	Other Oxford	Sub-Total Rural Twps.	TOTAL OXFORD
FOOD RETAIL STORES														
Supermarket	163,700	89,900	67,000	0	0	0	0	15,900	0	11,500	0	0	27,400	**348,000**
Grocery/Other Food Stores(1	63,500	17,400	30,100	2,000	9,100	5,500	4,200	13,800	0	5,300	5,700	7,400	53,000	**164,000**
Total FRS	227,200	107,300	97,100	2,000	9,100	5,500	4,200	29,700	0	16,800	5,700	7,400	80,400	512,000
NON FOOD RETAIL STORES														
Department Stores	195,000	0	79,600	0	0	0	0	0	0	0	0	0	0	**274,600**
Specialty Stores	450,400	98,800	217,800	2,000	1,500	3,700	0	42,100	0	41,000	2,300	0	92,600	**859,600**
Pharmacy And Personal Care Stores	48,000	22,700	34,900	0	0	0	0	5,700	0	2,400	1,100	0	9,200	**114,800**
Other NFSR	407,300	178,500	255,500	10,300	16,700	3,300	2,300	27,500	5,400	54,100	11,200	19,700	150,500	**991,800**
Total NFSR	1,100,700	300,000	587,800	12,300	18,200	7,000	2,300	75,300	5,400	97,500	14,600	19,700	252,300	2,240,800
LIQUOR BEER WINE STORES	14,500	6,700	14,400	0	240	500	0	2,700	0	3,000	512	0	6,952	42,552
TOTAL RETAIL	1,342,400	414,000	699,300	14,300	27,540	13,000	6,500	107,700	5,400	117,300	20,812	27,100	339,652	2,795,352
SERVICES:														
Eating/Drinking	236,700	54,100	100,600	7,000	2,700	3,500	0	13,700	7,900	23,300	9,800	0	67,900	**459,300**
Personal Services	78,000	27,300	38,700	600	0	0	0	11,100	900	2,500	0	0	15,100	**159,100**
Finance/Insurance/Real Estate	150,300	42,700	80,200	2,500	3,000	0	0	18,300	1,700	19,700	13,800	0	59,000	**332,200**
Medical/Dental/Health Services	78,300	23,300	40,100	0	0	0	0	2,600	0	5,700	2,500	0	10,800	**152,500**
Business Services	29,400	3,400	3,700	0	0	0	0	0	0	0	0	0	0	**36,500**
Entertainment	155,400	14,100	28,700	0	0	0	0	0	0	2,100	0	0	2,100	**200,300**
Other Services	258,300	56,300	113,100	1,000	0	2,000	0	15,200	9,500	30,700	13,300	0	71,700	**499,400**
Miscellaneous Office	157,100	26,000	2,400	1,200	0	0	0	0	0	0	0	0	1,200	**186,700**
TOTAL SERVICES	1,143,500	247,200	407,500	12,300	5,700	5,500	0	60,900	20,000	84,000	39,400	0	227,800	2,026,000
VACANT SPACE	224,000	77,700	119,200	0	0	0	0	8,500	900	2,400	14,600	0	26,400	447,300
VACANCY RATE	8.3%	10.5%	9.7%					4.8%	3.4%	1.2%	19.5%		4.4%	8.5%
TOTAL RETAIL / SERVICES AND VACANT SPACE	2,709,900	738,900	1,226,000	26,600	33,240	18,500	6,500	177,100	26,300	203,700	74,812	27,100	593,852	5,268,652

Source: Dalvay Group Winter 2008 / 2009

1) The Grocery/Other Food Store inventories in Embro, Innerkip and Thamesford include space for sale of liquor/beer/wine ranging between 240 and 510 square feet.

SCENARIO A

TABLE 3
OXFORD COUNTY ANNUAL PER CAPITA EXPENDITURES
FOOD STORE RETAIL (FSR), NON FOOD STORE RETAIL (NFSR) AND LIQUOR BEER WINE (LBW)
2008 Dollars

	Income	FSR		NFSR		LBW	
	Index	Index	Expenditure	Index	Expenditure	Index	Expenditure
Woodstock	91.00	99.10	$2,022	94.78	$5,128	95.43	$473
Ingersoll	85.90	98.59	$2,011	91.82	$4,967	90.08	$447
Tillsonburg	95.80	99.58	$2,031	97.56	$5,278	100.47	$498
RURAL SETTLEMENTS	92.90	99.29	$2,026	95.88	$5,187	97.42	$483
Oxford County	91.90	99.19	$2,023	95.30	$5,156	96.38	$478
ONTARIO FSR	**100.00**		**$2,040**				
ONTARIO NFSR	**100.00**				**$5,410**		
ONTARIO LBW	**100.00**						**$496**

Notes: Income Index based on Statistics Canada 2006 Census data.
See Appendix A for details of Ontario per capita expenditures
FSR Index = 90.0 + 0.10 (Income Index)
NFSR Index = 42 + 0.58 (Income Index)
LBW Index= 1.0487(Income Index)

TABLE 4 SCENARIO A

OXFORD COUNTY FOOD STORE RETAIL (FSR) EXPENDITURE POTENTIAL

2008 Dollars	2008
Province of Ontario:	
Per Capita Food Store Retail Expenditure (excludes WMC Food)	$2,040
Add: Estimate For WMC Food Component	$150
Adjusted Per Capita FSR Expenditure	$2,190

2008 Dollars		2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:						
Income Index		91.0				
Per Capita FSR Index		99.1				
Per Capita FSR Expenditures		$2,170	$2,170	$2,198	$2,225	$2,281
Population		38,548	40,533	44,565	48,288	54,078
Total FSR Expenditures	($Millions)	$83.659	$87.968	$97.935	$107.448	$123.375
Supermarket Share		89.4%	90.0%	90.0%	90.0%	90.0%
Grocery/Other Food Store Share		5.5%	5.0%	5.0%	5.0%	5.0%
Warehouse Membership Club Share		5.1%	5.0%	5.0%	5.0%	5.0%
Supermarket Share	($Millions)	$74.791	$79.171	$88.141	$96.703	$111.038
Grocery/Other Food Store Share	($Millions)	$4.601	$4.398	$4.897	$5.372	$6.169
Warehouse Membership Club Share	($Millions)	$4.267	$4.398	$4.897	$5.372	$6.169
ZONE B-INGERSOLL:						
Income Index		85.9				
Per Capita FSR Index		98.6				
Per Capita FSR Expenditures		$2,159	$2,159	$2,186	$2,214	$2,270
Population		12,822	13,442	14,683	15,820	17,578
Total FSR Expenditures	($Millions)	$27.683	$29.023	$32.100	$35.021	$39.896
Supermarket Share		87.5%	90.0%	90.0%	90.0%	90.0%
Grocery/Other Food Store Share		9.2%	6.7%	6.7%	6.7%	6.7%
Warehouse Membership Club Share		3.3%	3.3%	3.3%	3.3%	3.3%
Supermarket Share	($Millions)	$24.223	$26.121	$28.890	$31.519	$35.907
Grocery/Other Food Store Share	($Millions)	$2.547	$1.945	$2.151	$2.346	$2.673
Warehouse Membership Club Share	($Millions)	$0.914	$0.958	$1.059	$1.156	$1.317
ZONE C-TILLSONBURG:						
Income Index		95.8				
Per Capita FSR Index		99.6				
Per Capita FSR Expenditures		$2,181	$2,181	$2,208	$2,236	$2,292
Population		16,317	17,061	18,612	20,060	22,231
Total FSR Expenditures	($Millions)	$35.583	$37.207	$41.099	$44.852	$50.964
Supermarket Share		91.3%	92.5%	92.5%	92.5%	92.5%
Grocery/Other Food Store Share		4.0%	3.0%	3.0%	3.0%	3.0%
Warehouse Membership Club Share		4.7%	4.5%	4.5%	4.5%	4.5%
Supermarket Share	($Millions)	$32.487	$34.416	$38.017	$41.488	$47.142
Grocery/Other Food Store Share	($Millions)	$1.423	$1.116	$1.233	$1.346	$1.529
Warehouse Membership Club Share	($Millions)	$1.672	$1.674	$1.849	$2.018	$2.293
ZONE D-RURAL SETTLEMENTS:						
Income Index		92.9				
Per Capita FSR Index		99.3				
Per Capita FSR Expenditures		$2,174	$2,174	$2,202	$2,229	$2,286
Population		45,248	46,737	49,012	51,286	54,595
Total FSR Expenditures	($Millions)	$98.389	$101.627	$107.912	$114.339	$124.793
Supermarket Share		91.5%	91.5%	91.5%	91.5%	91.5%
Grocery/Other Food Store Share		5.0%	5.0%	5.0%	5.0%	5.0%
Warehouse Membership Club Share		3.5%	3.5%	3.5%	3.5%	3.5%
Supermarket Share	($Millions)	$90.026	$92.989	$98.740	$104.620	$114.186
Grocery/Other Food Store Share	($Millions)	$4.919	$5.081	$5.396	$5.717	$6.240
Warehouse Membership Club Share	($Millions)	$3.444	$3.557	$3.777	$4.002	$4.368
TOTAL OXFORD COUNTY:						
Total FSR Expenditures	($Millions)	$245.315	$255.824	$279.046	$301.661	$339.029
Supermarket Share	($Millions)	$221.528	$232.697	$253.788	$274.331	$308.272
Grocery / Other Food Store Share	($Millions)	$13.491	$12.540	$13.676	$14.781	$16.610
Warehouse Membership Club Share	($Millions)	$10.296	$10.587	$11.582	$12.548	$14.146

Source: Table 1 and Table 3. Real increases in per capita expenditures are 0.25% per annum for FSR.

Distribution of FSR expenditures by category are RDA estimates based on review of inventories and results of various consumer surveys.

TABLE 5 SCENARIO A

OXFORD COUNTY WAREHOUSE MEMBERSHIP CLUB (WMC) ANALYSIS ($ Millions)

2008 Dollars			**2008**	**2011**	**2016**	**2021**	**2031**
ZONE A-WOODSTOCK:							
WMC Potential			$4.267	$4.398	$4.897	$5.372	$6.169
Oxford County Share	%		0.0%	0.0%	0.0%	0.0%	0.0%
Oxford County Share	$		$0.000	$0.000	$0.000	$0.000	$0.000
Residual Potential	$		$0.000	$0.000	$0.000	$0.000	$0.000
ZONE B-INGERSOLL:							
WMC Potential			$0.914	$0.958	$1.059	$1.156	$1.317
Oxford County Share	%		0.0%	0.0%	0.0%	0.0%	0.0%
Oxford County Share	$		$0.000	$0.000	$0.000	$0.000	$0.000
Residual Potential	$		$0.000	$0.000	$0.000	$0.000	$0.000
ZONE C-TILLSONBURG:							
WMC Potential			$1.672	$1.674	$1.849	$2.018	$2.293
Oxford County Share	%		0.0%	0.0%	0.0%	0.0%	0.0%
Oxford County Share	$		$0.000	$0.000	$0.000	$0.000	$0.000
Residual Potential	$		$0.000	$0.000	$0.000	$0.000	$0.000
ZONE D-RURAL SETTLEMENTS:							
WMC Potential			$3.444	$3.557	$3.777	$4.002	$4.368
Oxford County Share	%		0.0%	0.0%	0.0%	0.0%	0.0%
Oxford County Share	$		$0.000	$0.000	$0.000	$0.000	$0.000
Residual Potential	$		$0.000	$0.000	$0.000	$0.000	$0.000
TOTAL OXFORD COUNTY:							
WMC Potential			$10.296	$10.587	$11.582	$12.548	$14.146
Oxford County Share	%						
Oxford County Share	$		$0.000	$0.000	$0.000	$0.000	$0.000
Residual Potential	$		$0.000	$0.000	$0.000	$0.000	$0.000
Plus: Inflow Sales	@	15.0%		$0.000	$0.000	$0.000	$0.000
TOTAL ADDITIONAL SALES POTENTIAL				**$0.000**	**$0.000**	**$0.000**	**$0.000**
WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY					**(Square Feet - GLA)**		
	@	$600 per sq.ft.		**0**	**0**	**0**	**0**
	@	$625 per sq.ft.		**0**	**0**	**0**	**0**
	@	$650 per sq.ft.		**0**	**0**	**0**	**0**
	@	$750 per sq.ft.		**0**	**0**	**0**	**0**

Source Table 4

TABLE 6

SCENARIO A

OXFORD COUNTY SUPERMARKET ANALYSIS ($ Millions)

2008 Dollars				**2008**	**2011**	**2016**	**2021**	**2031**
ZONE A-WOODSTOCK:								
Supermarket Potential				$74.791	$79.171	$88.141	$96.703	$111.038
	Oxford County Share	%		99.3%	99.5%	99.5%	99.5%	99.5%
	Oxford County Share	$		$74.268	$78.775	$87.701	$96.220	$110.482
	Residual Potential	$		$0.000	$4.507	$13.433	$21.952	$36.215
ZONE B-INGERSOLL:								
Supermarket Potential				$24.223	$26.121	$28.890	$31.519	$35.907
	Oxford County Share	%		95.4%	97.5%	97.5%	97.5%	97.5%
	Oxford County Share	$		$23.109	$25.468	$28.168	$30.731	$35.009
	Residual Potential	$		$0.000	$2.359	$5.059	$7.623	$11.900
ZONE C-TILLSONBURG:								
Supermarket Potential				$32.487	$34.416	$38.017	$41.488	$47.142
	Oxford County Share	%		92.2%	95.0%	95.0%	95.0%	95.0%
	Oxford County Share	$		$29.953	$32.695	$36.116	$39.414	$44.785
	Residual Potential	$		$0.000	$2.742	$6.162	$9.460	$14.831
ZONE D-RURAL SETTLEMENTS:								
Supermarket Potential				$90.026	$92.989	$98.740	$104.620	$114.186
	Oxford County Share	%		88.0%	90.0%	90.0%	90.0%	90.0%
	Oxford County Share	$		$79.223	$83.690	$88.866	$94.158	$102.767
	Residual Potential	$		$0.000	$4.467	$9.643	$14.935	$23.544
TOTAL OXFORD COUNTY:								
Supermarket Potential				$221.528	$232.697	$253.788	$274.331	$308.272
	Oxford County Share	%						
	Oxford County Share	$		$206.553	$220.628	$240.850	$260.523	$293.043
	Residual Potential	$		$0.000	$14.075	$34.297	$53.970	$86.491
Plus:	Inflow Sales	@ 12.5%			$2.011	$4.900	$7.710	$12.356
TOTAL ADDITIONAL SALES POTENTIAL					**$16.086**	**$39.197**	**$61.680**	**$98.846**
WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY						**(Square Feet - GLA)**		
		@	$475 per sq.ft.		**33,865**	82,519	129,853	208,098
		@	$500 per sq.ft.		32,172	**78,393**	123,361	197,693
		@	$525 per sq.ft.		30,640	74,660	**117,486**	188,279
		@	$575 per sq.ft.		27,975	68,168	107,270	**171,907**

Source: Table 4. Oxford County shares based on review of inventories and results of various consumer surveys.

TABLE 7

SCENARIO A

OXFORD COUNTY GROCERY/SPECIALTY FOOD STORE ANALYSIS ($ Millions)

2008 Dollars		2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:						
Grocery/Specialty Store Potential		$4.601	$4.398	$4.897	$5.372	$6.169
Oxford County Share	%	89.6%	90.0%	90.0%	90.0%	90.0%
Oxford County Share	$	$4.123	$3.959	$4.407	$4.835	$5.552
Residual Potential	$	$0.000	-$0.164	$0.284	$0.712	$1.429
ZONE B-INGERSOLL:						
Grocery/Specialty Store Potential		$2.547	$1.945	$2.151	$2.346	$2.673
Oxford County Share	%	69.6%	75.0%	75.0%	75.0%	75.0%
Oxford County Share	$	$1.773	$1.458	$1.613	$1.760	$2.005
Residual Potential	$	$0.000	-$0.314	-$0.160	-$0.013	$0.232
ZONE C-TILLSONBURG:						
Grocery/Specialty Store Potential		$1.423	$1.116	$1.233	$1.346	$1.529
Oxford County Share	%	77.0%	82.5%	82.5%	82.5%	82.5%
Oxford County Share	$	$1.096	$0.921	$1.017	$1.110	$1.261
Residual Potential	$	$0.000	-$0.175	-$0.079	$0.014	$0.165
ZONE D-RURAL SETTLEMENTS:						
Grocery/Specialty Store Potential		$4.919	$5.081	$5.396	$5.717	$6.240
Oxford County Share	%	89.1%	92.5%	90.0%	90.0%	90.0%
Oxford County Share	$	$4.383	$4.700	$4.856	$5.145	$5.616
Residual Potential	$	$0.000	$0.317	$0.473	$0.762	$1.232
TOTAL OXFORD COUNTY:						
Grocery/Specialty Store Potential		$13.491	$12.540	$13.676	$14.781	$16.610
Oxford County Share	%	84.3%	88.0%	87.0%	86.9%	86.9%
Oxford County Share	$	$11.375	$11.038	$11.893	$12.850	$14.434
Residual Potential	$	$0.000	-$0.336	$0.519	$1.476	$3.059
Plus: Inflow Sales	7.5%		-$0.027	$0.042	$0.120	$0.248
TOTAL ADDITIONAL SALES POTENTIAL			-$0.364	$0.561	$1.595	$3.307
WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY			(Square Feet - GLA)			
@ $375 per sq.ft.			-970	1,496	4,255	8,819
@ $400 per sq.ft.			-909	1,402	3,989	8,268
@ $425 per sq.ft.			-856	1,320	3,754	7,782
@ $475 per sq.ft.			-766	1,181	3,359	6,963

Source: Table 4. Oxford County shares based on review of inventories and results of various consumer surveys.

TABLE 8

SCENARIO A

OXFORD COUNTY NON-FOOD STORE RETAIL (NFSR) EXPENDITURE POTENTIAL

2008 Dollars		2008	
Province of Ontario:			
Per Capita NFSR Expenditure		$5,410	
Less: WMC Food Component		($150)	
Adjusted Per Capita NFSR Expenditure		$5,260	
Department Stores		$768	14.6%
Clothing and Accessories Stores			14.0%
Furniture, Home Furnishings and Electronic Stores			16.2%
Miscellaneous Retailers			11.6%
Total Specialty Stores		$2,199	41.8%
Pharmacies and Personal Care Stores		$899	17.1%
Building and Outdoor Home Supplies Stores			12.8%
Other General Merchandise Stores			11.3%
Selected Automotive Stores (Tires/Batteries/ Accessories)			2.4%
Total Other NFSR		$1,394	26.5%
Total Adjusted Per Capita NFSR		$5,260	100.0%

2008 Dollars		2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:						
Income Index		91.0				
Per Capita NFSR Index		94.8				
Per Capita NFSR Expenditures		$4,985	$4,985	$5,240	$5,507	$6,083
Population		38,548	40,533	44,565	48,288	54,078
Total NFSR Expenditures	($Millions)	$192.176	$202.073	$233.511	$265.922	$328.967
Department Store Share		22.4%	22.5%	22.5%	22.5%	22.5%
Specialty Stores Share		38.0%	38.0%	38.0%	38.0%	38.0%
Pharmacies and Personal Care Stores Share		13.1%	13.1%	13.1%	13.1%	13.1%
Other NFSR Share		26.5%	26.5%	26.5%	26.5%	26.5%
Department Store Share	($Millions)	$43.047	$45.467	$52.540	$59.832	$74.018
Specialty Stores Share	($Millions)	$73.027	$76.788	$88.734	$101.050	$125.007
Pharmacies and Personal Care Stores Share	($Millions)	$25.175	$26.472	$30.590	$34.836	$43.095
Other NFSR Share	($Millions)	$50.927	$53.549	$61.880	$70.469	$87.176
ZONE B-INGERSOLL:						
Income Index		85.9				
Per Capita NFSR Index		91.8				
Per Capita NFSR Expenditures		$4,830	$4,830	$5,076	$5,335	$5,893
Population		12,822	13,442	14,683	15,820	17,578
Total NFSR Expenditures	($Millions)	$61.925	$64.921	$74.531	$84.401	$103.591
Department Store Share		16.1%	16.1%	16.1%	16.1%	16.1%
Specialty Stores Share		15.1%	15.1%	15.1%	15.1%	15.1%
Pharmacies and Personal Care Stores Share		13.3%	13.3%	13.3%	13.3%	13.3%
Other NFSR Share		55.5%	55.5%	55.5%	55.5%	55.5%
Department Store Share	($Millions)	$9.970	$10.452	$12.000	$13.589	$16.678
Specialty Stores Share	($Millions)	$9.351	$9.803	$11.254	$12.745	$15.642
Pharmacies and Personal Care Stores Share	($Millions)	$8.236	$8.635	$9.913	$11.225	$13.778
Other NFSR Share	($Millions)	$34.368	$36.031	$41.365	$46.843	$57.493
ZONE C-TILLSONBURG:						
Income Index		95.8				
Per Capita NFSR Index		97.6				
Per Capita NFSR Expenditures		$5,132	$5,132	$5,393	$5,669	$6,262
Population		16,317	17,061	18,612	20,060	22,231
Total NFSR Expenditures	($Millions)	$83.731	$87.551	$100.382	$113.709	$139.202
Department Store Share		26.3%	26.3%	26.3%	26.3%	26.3%
Specialty Stores Share		22.3%	22.3%	22.3%	22.3%	22.3%
Pharmacies and Personal Care Stores Share		14.0%	14.0%	14.0%	14.0%	14.0%
Other NFSR Share		37.4%	37.4%	37.4%	37.4%	37.4%
Department Store Share	($Millions)	$22.021	$23.026	$26.401	$29.905	$36.610
Specialty Stores Share	($Millions)	$18.672	$19.524	$22.385	$25.357	$31.042
Pharmacies and Personal Care Stores Share	($Millions)	$11.722	$12.257	$14.054	$15.919	$19.488
Other NFSR Share	($Millions)	$31.315	$32.744	$37.543	$42.527	$52.061
ZONE D-RURAL SETTLEMENTS:						
Income Index		92.9				
Per Capita NFSR Index		95.9				
Per Capita NFSR Expenditures		$5,043	$5,043	$5,301	$5,571	$6,154
Population		45,248	46,737	49,012	51,286	54,595
Total NFSR Expenditures	($Millions)	$228.198	$235.707	$259.788	$285.713	$335.966
Department Store Share		26.5%	26.5%	26.5%	26.5%	26.5%
Specialty Stores Share		18.4%	18.4%	18.4%	18.4%	18.4%
Pharmacies and Personal Care Stores Share		10.0%	10.0%	10.0%	10.0%	10.0%
Other NFSR Share		45.1%	45.1%	45.1%	45.1%	45.1%
Department Store Share	($Millions)	$60.472	$62.462	$68.844	$75.714	$89.031
Specialty Stores Share	($Millions)	$41.988	$43.370	$47.801	$52.571	$61.818
Pharmacies and Personal Care Stores Share	($Millions)	$22.820	$23.571	$25.979	$28.571	$33.597
Other NFSR Share	($Millions)	$102.917	$106.304	$117.165	$128.856	$151.521
TOTAL OXFORD COUNTY:						
Total NFSR Expenditures	($Millions)	$566.029	$590.253	$668.213	$749.744	$907.725
Department Store Share	($Millions)	$135.511	$141.407	$159.784	$179.040	$216.337
Specialty Stores Share	($Millions)	$143.038	$149.485	$170.175	$191.723	$233.509
Pharmacies and Personal Care Stores Share	($Millions)	$67.953	$70.934	$80.535	$90.552	$109.957
Other NFSR Share	($Millions)	$219.527	$228.629	$257.953	$288.695	$348.251

Source: Table 1 and Table 3. Real increases in per capita expenditures are 1.0% per annum for NFSR.
Distribution of NFSR expenditures by category are RDA estimates based on review of inventories and results of various consumer surveys.

TABLE 9

SCENARIO A

OXFORD COUNTY DEPARTMENT STORE ANALYSIS ($ Millions)

2008 Dollars				2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:								
Department Store Potential				$43.047	$45.467	$52.540	$59.832	$74.018
Oxford County Share	%			86.5%	87.5%	87.5%	87.5%	87.5%
Oxford County Share	$			$37.236	$39.783	$45.972	$52.353	$64.765
Residual Potential	$			$0.000	$2.547	$8.736	$15.117	$27.529
ZONE B-INGERSOLL:								
Department Store Potential				$9.970	$10.452	$12.000	$13.589	$16.678
Oxford County Share	%			68.9%	70.0%	70.0%	70.0%	70.0%
Oxford County Share	$			$6.869	$7.317	$8.400	$9.512	$11.675
Residual Potential	$			$0.000	$0.447	$1.530	$2.643	$4.805
ZONE C-TILLSONBURG:								
Department Store Potential				$22.021	$23.026	$26.401	$29.905	$36.610
Oxford County Share	%			75.2%	77.5%	77.5%	77.5%	77.5%
Oxford County Share	$			$16.560	$17.845	$20.460	$23.177	$28.373
Residual Potential	$			$0.000	$1.285	$3.901	$6.617	$11.813
ZONE D-RURAL SETTLEMENTS:								
Department Store Potential				$60.472	$62.462	$68.844	$75.714	$89.031
Oxford County Share	%			75.0%	76.0%	76.0%	76.0%	76.0%
Oxford County Share	$			$45.354	$47.471	$52.321	$57.543	$67.664
Residual Potential	$			$0.000	$2.117	$6.967	$12.188	$22.309
TOTAL OXFORD COUNTY:								
Department Store Potential				$135.511	$141.407	$159.784	$179.040	$216.337
Oxford County Share	%			78.2%	79.5%	79.6%	79.6%	79.7%
Oxford County Share	$			$106.020	$112.416	$127.154	$142.585	$172.476
Residual Potential	$			$0.000	$6.397	$21.134	$36.565	$66.457
Plus: Inflow Sales	10.0%				$0.711	$2.348	$4.063	$7.384
TOTAL ADDITIONAL SALES POTENTIAL					$7.108	$23.483	$40.628	$73.841
WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY						(Square Feet - GLA)		
	@	$375	per sq.ft.		18,954	62,620	108,341	196,909
	@	$400	per sq.ft.		17,769	58,707	101,570	184,602
	@	$425	per sq.ft.		16,724	55,253	95,595	173,743
	@	$475	per sq.ft.		14,963	49,437	85,532	155,455

Source: Table 8. Oxford County shares based on review of inventories and results of various consumer surveys.

TABLE 10

SCENARIO A

OXFORD COUNTY SPECIALTY STORE ANALYSIS ($ Millions)

2008 Dollars		2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:						
Specialty Store Potential		$73.027	$76.788	$88.734	$101.050	$125.007
Oxford County Share	%	60.0%	62.5%	62.5%	62.5%	62.5%
Oxford County Share	$	$43.816	$47.992	$55.459	$63.156	$78.130
Residual Potential	$	$0.000	$4.176	$11.643	$19.340	$34.314
ZONE B-INGERSOLL:						
Specialty Store Potential		$9.351	$9.803	$11.254	$12.745	$15.642
Oxford County Share	%	55.6%	57.5%	57.5%	57.5%	57.5%
Oxford County Share	$	$5.199	$5.637	$6.471	$7.328	$8.994
Residual Potential	$	$0.000	$0.438	$1.272	$2.129	$3.795
ZONE C-TILLSONBURG:						
Specialty Store Potential		$18.672	$19.524	$22.385	$25.357	$31.042
Oxford County Share	%	49.1%	52.5%	52.5%	52.5%	52.5%
Oxford County Share	$	$9.168	$10.250	$11.752	$13.312	$16.297
Residual Potential	$	$0.000	$1.082	$2.584	$4.145	$7.129
ZONE D-RURAL SETTLEMENTS:						
Specialty Store Potential		$41.988	$43.370	$47.801	$52.571	$61.818
Oxford County Share	%	47.5%	50.0%	50.0%	50.0%	50.0%
Oxford County Share	$	$19.944	$21.685	$23.901	$26.286	$30.909
Residual Potential	$	$0.000	$1.741	$3.956	$6.341	$10.964
TOTAL OXFORD COUNTY:						
Specialty Store Potential		$143.038	$149.485	$170.175	$191.723	$233.509
Oxford County Share	%	54.6%	57.2%	57.3%	57.4%	57.5%
Oxford County Share	$	$78.127	$85.564	$97.583	$110.083	$134.330
Residual Potential	$	$0.000	$7.437	$19.455	$31.955	$56.202
Plus: Inflow Sales	10.0%		$0.826	$2.162	$3.551	$6.245
TOTAL ADDITIONAL SALES POTENTIAL			$8.263	$21.617	$35.506	$62.447
WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY				(Square Feet - GLA)		
@ $375 per sq.ft.			22,035	57,645	94,682	166,525
@ $400 per sq.ft.			20,658	54,043	88,764	156,117
@ $425 per sq.ft.			19,443	50,864	83,543	146,934
@ $475 per sq.ft.			17,396	45,509	74,749	131,467

Source: Table 8. Oxford County shares based on review of inventories and results of various consumer surveys.

TABLE 11

SCENARIO A

OXFORD COUNTY PHARMACIES AND PERSONAL CARE STORE ANALYSIS ($ Millions)

2008 Dollars		2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:						
Pharmacies and Personal Care Store Potential		$25.175	$26.472	$30.590	$34.836	$43.095
Oxford County Share	%	98.5%	98.5%	98.5%	98.5%	98.5%
Oxford County Share	$	$24.797	$26.075	$30.131	$34.313	$42.448
Residual Potential	$	$0.000	$1.277	$5.334	$9.516	$17.651
ZONE B-INGERSOLL:						
Pharmacies and Personal Care Store Potential		$8.236	$8.635	$9.913	$11.225	$13.778
Oxford County Share	%	98.8%	98.5%	98.5%	98.5%	98.5%
Oxford County Share	$	$8.137	$8.505	$9.764	$11.057	$13.571
Residual Potential	$	$0.000	$0.368	$1.627	$2.920	$5.434
ZONE C-TILLSONBURG:						
Pharmacies and Personal Care Store Potential		$11.722	$12.257	$14.054	$15.919	$19.488
Oxford County Share	%	98.7%	98.5%	98.5%	98.5%	98.5%
Oxford County Share	$	$11.570	$12.073	$13.843	$15.680	$19.196
Residual Potential	$	$0.000	$0.503	$2.273	$4.111	$7.626
ZONE D-RURAL SETTLEMENTS:						
Pharmacies and Personal Care Store Potential		$22.820	$23.571	$25.979	$28.571	$33.597
Oxford County Share	%	94.5%	95.0%	95.0%	95.0%	95.0%
Oxford County Share	$	$21.565	$22.392	$24.680	$27.143	$31.917
Residual Potential	$	$0.000	$0.827	$3.115	$5.578	$10.352
TOTAL OXFORD COUNTY:						
Pharmacies and Personal Care Store Potential		$67.953	$70.934	$80.535	$90.552	$109.957
Oxford County Share	%	97.2%	97.3%	97.4%	97.4%	97.4%
Oxford County Share	$	$66.069	$69.045	$78.418	$88.193	$107.132
Residual Potential	$	$0.000	$2.976	$12.348	$22.124	$41.063
Plus: Inflow Sales	10.0%		$0.331	$1.372	$2.458	$4.563
TOTAL ADDITIONAL SALES POTENTIAL			$3.306	$13.721	$24.582	$45.625
WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY				(Square Feet - GLA)		
@	$725 per sq.ft.		4,561	18,925	33,907	62,931
@	$750 per sq.ft.		4,409	18,294	32,776	60,833
@	$775 per sq.ft.		4,266	17,704	31,719	58,871
@	$825 per sq.ft.		4,008	16,631	29,797	55,303

Source: Table 8. Oxford County shares based on review of inventories and results of various consumer surveys.

TABLE 12

OXFORD COUNTY OTHER NFSR ANALYSIS ($ Millions)

SCENARIO A

2008 Dollars			2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:							
Other NFSR Potential			$50.927	$53.549	$61.880	$70.469	$87.176
Oxford County Share	%		85.0%	87.5%	87.5%	87.5%	87.5%
Oxford County Share	$		$43.288	$46.856	$54.145	$61.661	$76.279
Residual Potential	$		$0.000	$3.568	$10.858	$18.373	$32.992
ZONE B-INGERSOLL:							
Other NFSR Potential			$34.368	$36.031	$41.365	$46.843	$57.493
Oxford County Share	%		88.2%	90.0%	90.0%	90.0%	90.0%
Oxford County Share	$		$30.313	$32.428	$37.228	$42.158	$51.743
Residual Potential	$		$0.000	$2.115	$6.916	$11.846	$21.431
ZONE C-TILLSONBURG:							
Other NFSR Potential			$31.315	$32.744	$37.543	$42.527	$52.061
Oxford County Share	%		91.6%	92.5%	92.5%	92.5%	92.5%
Oxford County Share	$		$28.685	$30.288	$34.727	$39.338	$48.157
Residual Potential	$		$0.000	$1.604	$6.042	$10.653	$19.472
ZONE D-RURAL SETTLEMENTS:							
Other NFSR Potential			$102.917	$106.304	$117.165	$128.856	$151.521
Oxford County Share	%		77.5%	80.0%	80.0%	80.0%	80.0%
Oxford County Share	$		$79.761	$85.043	$93.732	$103.085	$121.217
Residual Potential	$		$0.000	$5.282	$13.971	$23.324	$41.456
TOTAL OXFORD COUNTY:							
Other NFSR Potential			$219.527	$228.629	$257.953	$288.695	$348.251
Oxford County Share	%		82.9%	85.1%	85.2%	85.3%	85.4%
Oxford County Share	$		$182.046	$194.615	$219.833	$246.242	$297.396
Residual Potential	$		$0.000	$12.569	$37.786	$64.196	$115.350
Plus: Inflow Sales	10.0%			$1.397	$4.198	$7.133	$12.817
TOTAL ADDITIONAL SALES POTENTIAL				$13.966	$41.985	$71.328	$128.167
WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY					(Square Feet - GLA)		
	@	$375 per sq.ft.		37,242	111,960	190,209	341,777
	@	$400 per sq.ft.		34,915	104,962	178,321	320,416
	@	$425 per sq.ft.		32,861	98,788	167,831	301,568
	@	$475 per sq.ft.		29,402	88,389	150,165	269,824

Source: Table 8. Oxford County shares based on review of inventories and results of various consumer surveys.

TABLE 13

SCENARIO A

OXFORD COUNTY LIQUOR, BEER, WINE (LBW) ANALYSIS

2008 Dollars			2008
Province of Ontario:			
Per Capita LBW Expenditure			$496

2008 Dollars			2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:							
Income Index			91.0				
Per Capita LBW Index			95.4				
Per Capita LBW Expenditure			$473	$473	$510	$549	$638
Population			38,548	40,533	44,565	48,288	54,078
Total LBW Expenditures		($Millions)	$18.246	$19.186	$22.725	$26.526	$34.476
Oxford County Share	%		95.0%	95.0%	95.0%	95.0%	95.0%
Oxford County Share	$	($Millions)	$17.334	$18.227	$21.589	$25.200	$32.752
Residual Potential	$	($Millions)	$0.000	$0.893	$4.255	$7.866	$15.418
ZONE B-INGERSOLL:							
Income Index			85.9				
Per Capita LBW Index			90.1				
Per Capita LBW Expenditure			$447	$447	$481	$519	$602
Population			12,822	13,442	14,683	15,820	17,578
Total LBW Expenditures		($Millions)	$5.729	$6.006	$7.067	$8.203	$10.578
Oxford County Share	%		95.0%	95.0%	95.0%	95.0%	95.0%
Oxford County Share	$	($Millions)	$5.442	$5.706	$6.714	$7.793	$10.049
Residual Potential	$	($Millions)	$0.000	$0.263	$1.272	$2.351	$4.607
ZONE C-TILLSONBURG:							
Income Index			95.8				
Per Capita LBW Index			100.5				
Per Capita LBW Expenditure			$498	$498	$537	$578	$671
Population			16,317	17,061	18,612	20,060	22,231
Total LBW Expenditures		($Millions)	$8.131	$8.502	$9.991	$11.601	$14.920
Oxford County Share	%		95.0%	95.0%	95.0%	95.0%	95.0%
Oxford County Share	$	($Millions)	$7.724	$8.077	$9.492	$11.021	$14.174
Residual Potential	$	($Millions)	$0.000	$0.352	$1.768	$3.296	$6.450
ZONE D-RURAL SETTLEMENTS:							
Income Index			92.9				
Per Capita LBW Index			97.4				
Per Capita LBW Expenditure			$483	$483	$521	$561	$651
Population			45,248	46,737	49,012	51,286	54,595
Total LBW Expenditures		($Millions)	$21.865	$22.584	$25.514	$28.761	$35.532
Oxford County Share	%		95.0%	95.0%	95.0%	95.0%	95.0%
Oxford County Share	$	($Millions)	$20.772	$21.455	$24.238	$27.323	$33.756
Residual Potential	$	($Millions)	$0.000	$0.684	$3.467	$6.552	$12.984
TOTAL OXFORD COUNTY:							
Total LBW Expenditures			$53.971	$56.278	$65.298	$75.092	$95.507
Oxford County Share	%		95.0%	95.0%	95.0%	95.0%	95.0%
Oxford County Share	$	($Millions)	$51.272	$53.464	$62.033	$71.337	$90.732
Residual Potential	$	($Millions)	$0.000	$2.192	$10.761	$20.065	$39.460
Plus: Inflow Sales	10.0%	($Millions)		$0.244	$1.196	$2.229	$4.384
TOTAL ADDITIONAL SALES POTENTIAL		($Millions)		$2.436	$11.956	$22.295	$43.844
WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY				(Square Feet - GLA)			
	@	$1,250 per sq.ft.		1,948	9,565	17,836	35,075
	@	$1,350 per sq.ft.		1,804	8,857	16,514	32,477
	@	$1,450 per sq.ft.		1,680	8,246	15,376	30,237
	@	$1,650 per sq.ft.		1,476	7,246	13,512	26,572

Source: Table 1 and Table 3. Real increases in per capita expenditures are 1.0% per annum for LBW.
Oxford County Shares are RDA estimates recognizing convenience orientation of LBW stores.

TABLE 14

COUNTY OF OXFORD SELECTED SERVICES PER CAPITA SPACE RATIOS

SCENARIO A

Service Category	WOODSTOCK (2008 Population =38548) 2008 Inventory Sq.Ft	Per Capita	INGERSOLL (2008 Population = 12822) 2008 Inventory Sq.Ft	Per Capita
Eating and Drinking	236,700	6.14	54,100	4.22
Personal	78,000	2.02	27,300	2.13
Finance/Insurance/Real Estate	150,300	3.90	42,700	3.33
Medical/Dental/Health Services	78,300	2.03	23,300	1.82
Business	29,400	0.76	3,400	0.27
Entertainment	140,400	3.64	14,100	1.10
Other Services	258,300	6.70	56,300	4.39
Miscellaneous Office	157,100	4.08	26,000	2.03

Service Category	TILLSONBURG (2008 Population = 16317) 2008 Inventory* Sq.Ft	Per Capita	RURAL SETTLEMENTS (2008 Population = 45248) 2008 Inventory* Sq.Ft	Per Capita
Eating and Drinking	100,600	6.17	67,900	1.50
Personal	38,700	2.37	15,100	0.33
Finance/Insurance/Real Estate	80,200	4.92	59,000	1.30
Medical/Dental/Health Services	40,100	2.46	10,800	0.24
Business	3,700	0.23	0	0.00
Entertainment	28,700	1.76	2,100	0.05
Other Services	113,100	6.93	71,700	1.58
Miscellaneous Office	2,400	0.15	1,200	0.03

Source: Table 1 for population and Table 2 for space inventory.

TABLE 15

SCENARIO A

COUNTY OF OXFORD PROJECTED ADDITIONAL SELECTED SERVICE SPACE REQUIREMENTS

ZONE A-WOODSTOCK			2008	2011	2016	2021	2031
Population Forecast			38,548	40,533	44,565	48,288	54,078
Service Category	Range Per Capita Sq.Ft.		Projected Space Requirements: (Square Feet)				
Eating and Drinking	5.50	5.00	236,700	222,930	245,110	253,511	270,391
	Additional Space Over 2008			-13,770	8,410	16,811	33,691
Personal	1.90	1.80	78,000	77,012	84,674	89,332	97,341
	Additional Space Over 2008			-988	6,674	11,332	19,341
Finance/Insurance/Real Estate	3.80	3.70	150,300	151,998	167,120	178,665	200,089
	Additional Space Over 2008			1,698	16,820	28,365	49,789
Medical/Dental/Health Services	2.00	2.10	78,300	83,092	91,359	98,990	110,860
	Additional Space Over 2008			4,792	13,059	20,690	32,560
Business	0.70	0.80	29,400	30,400	33,424	36,216	40,559
	Additional Space Over 2008			1,000	4,024	6,816	11,159
Entertainment	3.45	3.35	140,400	139,838	153,751	164,179	181,162
	Additional Space Over 2008			-562	13,351	23,779	40,762
Other Services	6.40	5.55	258,300	259,410	262,936	276,206	300,134
	Additional Space Over 2008			1,110	4,636	17,906	41,834
Miscellaneous Office	3.90	3.70	157,100	158,078	169,349	181,079	200,089
	Additional Space Over 2008			978	12,249	23,979	42,989
Total Additional Selected Services				-5,741	79,222	149,678	272,125

ZONE B-INGERSOLL			2008	2011	2016	2021	2031
Population Forecast			12,822	13,442	14,683	15,820	17,578
Service Category	Range Per Capita Sq.Ft.		Projected Space Requirements: (Square Feet)				
Eating and Drinking	4.20	4.00	57,400	56,456	60,934	64,863	70,312
	Additional Space Over 2008			-944	3,534	7,463	12,912
Personal	2.00	1.85	26,900	26,884	27,897	29,663	32,519
	Additional Space Over 2008			-16	997	2,763	5,619
Finance/Insurance/Real Estate	3.20	2.90	42,700	43,014	45,517	47,461	50,976
	Additional Space Over 2008			314	2,817	4,761	8,276
Medical/Dental/Health Services	1.90	2.00	24,600	26,212	28,631	30,849	34,277
	Additional Space Over 2008			1,612	4,031	6,249	9,677
Business	0.25	0.35	3,400	4,033	4,405	4,746	5,273
	Additional Space Over 2008			633	1,005	1,346	1,873
Entertainment	0.95	1.05	14,100	14,114	15,417	15,820	17,578
	Additional Space Over 2008			14	1,317	1,720	3,478
Other Services	4.10	3.95	55,100	55,112	59,465	63,281	69,433
	Additional Space Over 2008			12	4,365	8,181	14,333
Miscellaneous Office	2.00	2.10	26,000	26,212	30,100	32,431	36,035
	Additional Space Over 2008			212	4,100	6,431	10,035
Total Additional Selected Services				1,838	22,166	38,914	66,204

TABLE 15 (CONT'D)

SCENARIO A

COUNTY OF OXFORD PROJECTED ADDITIONAL SELECTED SERVICE SPACE REQUIREMENTS

ZONE C-TILLSONBURG			2008	2011	2016	2021	2031
Population Forecast			16,317	17,061	18,612	20,060	22,231
Service Category	Range Per Capita Sq.Ft.		Projected Space Requirements: (Square Feet)				
Eating and Drinking	5.90	5.75	100,600	100,660	108,880	116,346	127,828
	Additional Space Over 2008			60	8,280	15,746	27,228
Personal	2.25	2.15	38,700	38,387	40,946	43,630	47,797
	Additional Space Over 2008			-313	2,246	4,930	9,097
Finance/Insurance/Real Estate	4.70	4.50	80,200	80,187	85,615	91,271	100,040
	Additional Space Over 2008			-13	5,415	11,071	19,840
Medical/Dental/Health Services	2.45	2.50	40,100	42,226	46,065	49,648	55,022
	Additional Space Over 2008			2,126	5,965	9,548	14,922
Business	0.20	0.30	3,700	4,265	4,653	5,015	5,558
	Additional Space Over 2008			565	953	1,315	1,858
Entertainment	1.65	1.60	28,700	28,151	30,524	32,697	35,570
	Additional Space Over 2008			-549	1,824	3,997	6,870
Other Services	6.65	6.60	113,100	113,456	123,584	132,995	147,169
	Additional Space Over 2008			356	10,484	19,895	34,069
Miscellaneous Office	0.10	0.20	2,400	2,559	2,792	3,009	3,335
	Additional Space Over 2008			159	392	609	935
Total Additional Selected Services				2,391	35,559	67,110	114,817

ZONE D-RURAL SETTLEMENTS			2008	2011	2016	2021	2031
Population Forecast			45,248	46,737	49,012	51,286	54,595
Service Category	Range Per Capita Sq.Ft.		Projected Space Requirements: (Square Feet)				
Eating and Drinking	1.40	1.50	67,900	67,768	72,292	75,904	81,893
	Additional Space Over 2008			-132	4,392	8,004	13,993
Personal	0.30	0.35	15,100	15,189	16,419	17,694	19,108
	Additional Space Over 2008			89	1,319	2,594	4,008
Finance/Insurance/Real Estate	1.25	1.20	59,000	58,421	60,774	62,569	65,514
	Additional Space Over 2008			-579	1,774	3,569	6,514
Medical/Dental/Health Services	0.20	0.30	10,800	11,684	12,253	12,822	13,649
	Additional Space Over 2008			884	1,453	2,022	2,849
Business	0.01	0.10	0	701	1,715	3,334	5,460
	Additional Space Over 2008			701	1,715	3,334	5,460
Entertainment	0.04	0.05	2,100	2,103	2,451	2,564	2,730
	Additional Space Over 2008			3	351	464	630
Other Services	1.50	1.60	71,700	71,040	74,988	81,033	87,352
	Additional Space Over 2008			-660	3,288	9,333	15,652
Miscellaneous Office	0.03	0.04	1,200	1,636	1,715	1,795	1,911
	Additional Space Over 2008			436	515	595	711
Total Additional Selected Services				743	14,807	29,914	49,817

TABLE 15 (CONT'D)

SCENARIO A

COUNTY OF OXFORD PROJECTED ADDITIONAL SELECTED SERVICE SPACE REQUIREMENTS

OXFORD COUNTY		2008	2011	2016	2021	2031
Population Forecast		112,933	117,773	126,872	135,454	148,482
Service Category		Projected Space Requirements: (Square Feet)				
Eating and Drinking	Additional Space Over 2008		-14,785	24,616	48,023	87,824
Personal	Additional Space Over 2008		-1,227	11,237	21,619	38,065
Finance/Insurance/Real Estate	Additional Space Over 2008		1,420	26,827	47,766	84,419
Medical/Dental/Health Services	Additional Space Over 2008		9,414	24,508	38,508	60,008
Business	Additional Space Over 2008		2,899	7,697	12,810	20,349
Entertainment	Additional Space Over 2008		-1,094	16,842	29,960	51,739
Other Services	Additional Space Over 2008		818	22,773	55,315	105,889
Miscellaneous Office	Additional Space Over 2008		1,785	17,255	31,615	54,670
Total Additional Selected Services			-770	151,754	285,617	502,963

Source: RDA estimates.

TABLE 16

SCENARIO A

OXFORD COUNTY SUMMARY GROSS WARRANTED ADDITIONAL RETAIL/SERVICE SPACE (SQUARE FEET)

RETAIL CATEGORY		2011	2016	2021	2031
FOOD STORE RETAIL (FSR):					
Warehouse Membership Club (Food Component)		0	0	0	0
Supermarkets		33,865	78,393	117,486	171,907
Grocery/Other Food Stores		-970	1,402	3,754	6,963
Total Food Store Retail		32,895	79,796	121,240	178,869
NON FOOD STORE RETAIL (NFSR)					
Department Stores		18,954	58,707	95,595	155,455
Specialty Stores		22,035	54,043	83,543	131,467
Pharmacy and Personal Care Stores		4,561	18,294	31,719	55,303
Other NFSR		37,242	104,962	167,831	269,824
Total Non Food Store Retail		82,791	236,006	378,688	612,049
OTHER RETAIL:					
Liquor/Beer/Wine		1,948	8,857	15,376	26,572
Total Other Retail		1,948	8,857	15,376	26,572
TOTAL RETAIL		117,635	324,658	515,304	817,491
SERVICES CATEGORY:					
Eating/Drinking		-14,785	24,616	48,023	87,824
Personal Services		-1,227	11,237	21,619	38,065
Finance/Insurance/Real Estate		1,420	26,827	47,766	84,419
Medical/Dental/Health Services		9,414	24,508	38,508	60,008
Business Services		2,899	7,697	12,810	20,349
Entertainment		-1,094	16,842	29,960	51,739
Other Services		818	22,773	55,315	105,889
Miscellaneous Office		1,785	17,255	31,615	54,670
TOTAL SERVICES		-770	151,754	285,617	502,963
TOTAL RETAIL/SERVICE		116,864	476,412	800,920	1,320,454
LAND AREA REQUIRED:(27% COVERAGE)	GROSS ACRES	9.94	40.51	68.10	112.27

Source: RDA estimates. See Tables 1 through 15.

TABLE 17

SCENARIO A

OXFORD COUNTY PROPOSED DISTRIBUTION OF PROJECTED 2031 ADDITIONAL RETAIL/SERVICE SPACE REQUIREMENTS

ZONE	Food Store Retail (Sq.Ft)	Non-Food Store Retail (Sq.Ft)	Liquor/ Beer/Wine (Sq.Ft)	Services (Sq.Ft)	Total Retail/Service Space (Sq.Ft)	Total Retail/Service Distribution
WOODSTOCK	77,300	301,100	11,400	269,900	659,700	50.0%
INGERSOLL	35,600	91,800	5,100	65,400	197,900	15.0%
TILLSONBURG	50,400	164,600	6,900	107,900	329,800	25.0%
RURAL SETTLEMENTS	15,400	52,600	3,400	60,500	131,900	10.0%
OXFORD COUNTY	178,700	610,100	26,800	503,700	1,319,300	100.0%

Source: RDA estimates derived from Table 16.

Appendix B – Reference Tables for Scenario B

Table 1. Oxford County Population Forecast
Table 2. Oxford County Retail / Service Space Inventory
Table 3. Oxford County Annual Per Capita Expenditures
Table 4. Oxford County Food Store Retail (FSR) Expenditure Potential
Table 5. Oxford County Warehouse Membership Club (WMC) Analysis ($ millions)
Table 6. Oxford County Supermarket Analysis ($ millions)
Table 7. Oxford County Grocery/Specialty Food Store Analysis ($ millions)
Table 8. Oxford County Non-Food Store Retail (NFSR) Expenditure Potential
Table 9. Oxford County Department Store Analysis ($ millions)
Table 10. Oxford County Specialty Store Analysis ($ millions)
Table 11. Oxford County Pharmacies and Personal Care Store Analysis ($ millions)
Table 12. Oxford County Other NFSR Analysis ($ millions)
Table 13. Oxford County Liquor, Beer, Wine (LBW) Analysis
Table 14. Oxford County Selected Services Per Capita Space Ratios
Table 15. Oxford County Projected Additional Selected Service Space Requirements
Table 16. Oxford County Summary Gross Warranted Additional Retail/Service Space (Square Feet)
Table 17. Oxford County Proposed Distribution of Projected 2031 Additional Retail/Service Space Requirements

TABLE 1

OXFORD COUNTY POPULATION FORECAST

Modified Hemson Forecasts (April 2006)- Unadjusted for Net Undercoverage

SCENARIO B

	2001	2006	2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:							
Population	33,269	35,480	36,456	37,920	40,893	43,638	47,907
Average Annual Increase		442	488	488	595	549	427
Average Annual Growth Rate		1.3%	1.4%	1.3%	1.6%	1.3%	1.0%
ZONE B-INGERSOLL:							
Population	10,977	11,760	12,073	12,543	13,483	14,344	15,675
Average Annual Increase		157	157	157	188	172	133
Average Annual Growth Rate		1.4%	1.3%	1.3%	1.5%	1.3%	0.9%
ZONE C-TILLSONBURG:							
Population	14,052	14,822	15,130	15,592	16,555	17,453	18,800
Average Annual Increase		154	154	154	193	180	135
Average Annual Growth Rate		1.1%	1.0%	1.0%	1.2%	1.1%	0.8%
ZONE D-RURAL SETTLEMENTS:							
Population							
Blandford-Blenheim	7422	7149					
East Zorra-Tavistock	7238	7350					
Norwich	10478	10481					
South-West Oxford	7782	7589					
Zorra	8052	8125					
Total	40,972	40,694	41,334	42,295	43,762	45,230	47,364
Average Annual Increase		-56	320	320	293	294	213
Average Annual Growth Rate		-0.1%	0.8%	0.8%	0.7%	0.7%	0.5%
TOTAL OXFORD COUNTY:							
Population	99,270	102,756	104,994	108,350	114,693	120,665	129,746
Average Annual Increase		697	1,119	1,119	1,269	1,194	908
Average Annual Growth Rate		0.7%	1.1%	1.1%	1.2%	1.0%	0.8%

Modified HemsonForecast - Adjusted for Net Undercoverage factor of 3.8% in 2001and 3.4% in 2006/2031.

	2001	2006	2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:	34,533	36,686	37,696	39,209	42,283	45,122	49,536
ZONE B-INGERSOLL:	11,394	12,160	12,484	12,969	13,941	14,832	16,208
ZONE C-TILLSONBURG:	14,586	15,326	15,644	16,122	17,118	18,046	19,439
ZONE D-RURAL SETTLEMENTS:	42,529	42,078	42,739	43,733	45,250	46,768	48,974
TOTAL OXFORD COUNTY:	103,042	106,250	108,563	112,034	118,593	124,768	134,157

SOURCE: Modified Hemson Consulting Ltd. "Population, Household & Employment Forecasts 2001-2031, Oxford County" (April 2006)

SCENARIO B

TABLE 2
COUNTY OF OXFORD
RETAIL / SERVICE SPACE INVENTORY
(Square Feet)

	URBAN CENTRES			RURAL TOWNSHIP VILLAGES										
RETAIL / SERVICE CATEGORIES	Woodstock	Ingersoll	Tillsonburg	Drumbo	Embro	Innerkip	Mt Elgin	Norwich	Plattsville	Tavistock	Thamesford	Other Oxford	Sub-Total Rural Twps.	TOTAL OXFORD
FOOD RETAIL STORES														
Supermarket	163,700	89,900	67,000	0	0	0	0	15,900	0	11,500	0	0	27,400	**348,000**
Grocery/Other Food Stores(1	63,500	17,400	30,100	2,000	9,100	5,500	4,200	13,800	0	5,300	5,700	7,400	53,000	**164,000**
Total FRS	227,200	107,300	97,100	2,000	9,100	5,500	4,200	29,700	0	16,800	5,700	7,400	80,400	512,000
NON FOOD RETAIL STORES														
Department Stores	195,000	0	79,600	0	0	0	0	0	0	0	0	0	0	**274,600**
Specialty Stores	450,400	98,800	217,800	2,000	1,500	3,700	0	42,100	0	41,000	2,300	0	92,600	**859,600**
Pharmacy And Personal Care Stores	48,000	22,700	34,900	0	0	0	0	5,700	0	2,400	1,100	0	9,200	**114,800**
Other NFSR	407,300	178,500	255,500	10,300	16,700	3,300	2,300	27,500	5,400	54,100	11,200	19,700	150,500	**991,800**
Total NFSR	1,100,700	300,000	587,800	12,300	18,200	7,000	2,300	75,300	5,400	97,500	14,600	19,700	252,300	2,240,800
LIQUOR BEER WINE STORES	14,500	6,700	14,400	0	240	500	0	2,700	0	3,000	512	0	6,952	42,552
TOTAL RETAIL	1,342,400	414,000	699,300	14,300	27,540	13,000	6,500	107,700	5,400	117,300	20,812	27,100	339,652	2,795,352
SERVICES:														
Eating/Drinking	236,700	54,100	100,600	7,000	2,700	3,500	0	13,700	7,900	23,300	9,800	0	67,900	**459,300**
Personal Services	78,000	27,300	38,700	600	0	0	0	11,100	900	2,500	0	0	15,100	**159,100**
Finance/Insurance/Real Estate	150,300	42,700	80,200	2,500	3,000	0	0	18,300	1,700	19,700	13,800	0	59,000	**332,200**
Medical/Dental/Health Services	78,300	23,300	40,100	0	0	0	0	2,600	0	5,700	2,500	0	10,800	**152,500**
Business Services	29,400	3,400	3,700	0	0	0	0	0	0	0	0	0	0	**36,500**
Entertainment	155,400	14,100	28,700	0	0	0	0	0	0	2,100	0	0	2,100	**200,300**
Other Services	258,300	56,300	113,100	1,000	0	2,000	0	15,200	9,500	30,700	13,300	0	71,700	**499,400**
Miscellaneous Office	157,100	26,000	2,400	1,200	0	0	0	0	0	0	0	0	1,200	**186,700**
TOTAL SERVICES	1,143,500	247,200	407,500	12,300	5,700	5,500	0	60,900	20,000	84,000	39,400	0	227,800	2,026,000
VACANT SPACE	224,000	77,700	119,200	0	0	0	0	8,500	900	2,400	14,600	0	26,400	447,300
VACANCY RATE	8.3%	10.5%	9.7%					4.8%	3.4%	1.2%	19.5%		4.4%	8.5%
TOTAL RETAIL / SERVICES AND VACANT SPACE	2,709,900	738,900	1,226,000	26,600	33,240	18,500	6,500	177,100	26,300	203,700	74,812	27,100	593,852	5,268,652

Source: Dalvay Group Winter 2008 / 2009

1) The Grocery/Other Food Store inventories in Embro, Innerkip and Thamesford include space for sale of liquor/beer/wine ranging between 240 and 510 square feet.

TABLE 3

SCENARIO B

OXFORD COUNTY ANNUAL PER CAPITA EXPENDITURES

FOOD STORE RETAIL (FSR), NON FOOD STORE RETAIL (NFSR) AND LIQUOR BEER WINE (LBW)

2008 Dollars

	Income	FSR		NFSR		LBW	
	Index	Index	Expenditure	Index	Expenditure	Index	Expenditure
Woodstock	91.00	99.10	$2,022	94.78	$5,128	95.43	$473
Ingersoll	85.90	98.59	$2,011	91.82	$4,967	90.08	$447
Tillsonburg	95.80	99.58	$2,031	97.56	$5,278	100.47	$498
RURAL SETTLEMENTS	92.90	99.29	$2,026	95.88	$5,187	97.42	$483
Oxford County	91.90	99.19	$2,023	95.30	$5,156	96.38	$478
ONTARIO FSR	100.00		$2,040				
ONTARIO NFSR	100.00				$5,410		
ONTARIO LBW	100.00						$496

Notes: Income Index based on Statistics Canada 2006 Census data.
See Appendix A for details of Ontario per capita expenditures
FSR Index = 90.0 + 0.10 (Income Index)
NFSR Index = 42 + 0.58 (Income Index)
LBW Index= 1.0487(Income Index)

TABLE 4 SCENARIO B

OXFORD COUNTY FOOD STORE RETAIL (FSR) EXPENDITURE POTENTIAL

2008 Dollars		2008
Province of Ontario:		
Per Capita Food Store Retail Expenditure (excludes WMC Food)		$2,040
Add: Estimate For WMC Food Component		$150
Adjusted Per Capita FSR Expenditure		$2,190

2008 Dollars		2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:						
Income Index		91.0				
Per Capita FSR Index		99.1				
Per Capita FSR Expenditures		$2,170	$2,170	$2,198	$2,225	$2,281
Population		37,696	39,209	42,283	45,122	49,536
Total FSR Expenditures	($Millions)	$81.810	$85.096	$92.920	$100.403	$113.012
Supermarket Share		89.4%	90.0%	90.0%	90.0%	90.0%
Grocery/Other Food Store Share		5.5%	5.0%	5.0%	5.0%	5.0%
Warehouse Membership Club Share		5.1%	5.0%	5.0%	5.0%	5.0%
Supermarket Share	($Millions)	$73.138	$76.586	$83.628	$90.363	$101.711
Grocery/Other Food Store Share	($Millions)	$4.500	$4.255	$4.646	$5.020	$5.651
Warehouse Membership Club Share	($Millions)	$4.172	$4.255	$4.646	$5.020	$5.651
ZONE B-INGERSOLL:						
Income Index		85.9				
Per Capita FSR Index		98.6				
Per Capita FSR Expenditures		$2,159	$2,159	$2,186	$2,214	$2,270
Population		12,484	12,969	13,941	14,832	16,208
Total FSR Expenditures	($Millions)	$26.954	$28.003	$30.479	$32.833	$36.787
Supermarket Share		87.5%	90.0%	90.0%	90.0%	90.0%
Grocery/Other Food Store Share		9.2%	6.7%	6.7%	6.7%	6.7%
Warehouse Membership Club Share		3.3%	3.3%	3.3%	3.3%	3.3%
Supermarket Share	($Millions)	$23.585	$25.202	$27.431	$29.550	$33.108
Grocery/Other Food Store Share	($Millions)	$2.480	$1.876	$2.042	$2.200	$2.465
Warehouse Membership Club Share	($Millions)	$0.889	$0.924	$1.006	$1.083	$1.214
ZONE C-TILLSONBURG:						
Income Index		95.8				
Per Capita FSR Index		99.6				
Per Capita FSR Expenditures		$2,181	$2,181	$2,208	$2,236	$2,292
Population		15,644	16,122	17,118	18,046	19,439
Total FSR Expenditures	($Millions)	$34.117	$35.159	$37.800	$40.351	$44.564
Supermarket Share		91.3%	92.5%	92.5%	92.5%	92.5%
Grocery/Other Food Store Share		4.0%	3.0%	3.0%	3.0%	3.0%
Warehouse Membership Club Share		4.7%	4.5%	4.5%	4.5%	4.5%
Supermarket Share	($Millions)	$31.149	$32.522	$34.965	$37.324	$41.222
Grocery/Other Food Store Share	($Millions)	$1.365	$1.055	$1.134	$1.211	$1.337
Warehouse Membership Club Share	($Millions)	$1.604	$1.582	$1.701	$1.816	$2.005
ZONE D-RURAL SETTLEMENTS:						
Income Index		92.9				
Per Capita FSR Index		99.3				
Per Capita FSR Expenditures		$2,174	$2,174	$2,202	$2,229	$2,286
Population		42,739	43,733	45,250	46,768	48,974
Total FSR Expenditures	($Millions)	$92.935	$95.095	$99.630	$104.265	$111.945
Supermarket Share		91.5%	91.5%	91.5%	91.5%	91.5%
Grocery/Other Food Store Share		5.0%	5.0%	5.0%	5.0%	5.0%
Warehouse Membership Club Share		3.5%	3.5%	3.5%	3.5%	3.5%
Supermarket Share	($Millions)	$85.035	$87.012	$91.161	$95.403	$102.430
Grocery/Other Food Store Share	($Millions)	$4.647	$4.755	$4.981	$5.213	$5.597
Warehouse Membership Club Share	($Millions)	$3.253	$3.328	$3.487	$3.649	$3.918
TOTAL OXFORD COUNTY:						
Total FSR Expenditures	($Millions)	$235.816	$243.353	$260.829	$277.852	$306.308
Supermarket Share	($Millions)	$212.907	$221.323	$237.185	$252.640	$278.471
Grocery/Other Food Store Share	($Millions)	$12.991	$11.940	$12.804	$13.644	$15.050
Warehouse Membership Club Share	($Millions)	$9.918	$10.089	$10.840	$11.569	$12.788

Source: Table 1 and Table 3. Real increases in per capita expenditures are 0.25% per annum for FSR.

Distribution of FSR expenditures by category are RDA estimates based on review of inventories and results of various consumer surveys.

TABLE 5

SCENARIO B

OXFORD COUNTY WAREHOUSE MEMBERSHIP CLUB (WMC) ANALYSIS ($ Millions)

2008 Dollars				2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:								
WMC Potential				$4.172	$4.255	$4.646	$5.020	$5.651
Oxford County Share	%			0.0%	0.0%	0.0%	0.0%	0.0%
Oxford County Share	$			$0.000	$0.000	$0.000	$0.000	$0.000
Residual Potential	$			$0.000	$0.000	$0.000	$0.000	$0.000
ZONE B-INGERSOLL:								
WMC Potential				$0.889	$0.924	$1.006	$1.083	$1.214
Oxford County Share	%			0.0%	0.0%	0.0%	0.0%	0.0%
Oxford County Share	$			$0.000	$0.000	$0.000	$0.000	$0.000
Residual Potential	$			$0.000	$0.000	$0.000	$0.000	$0.000
ZONE C-TILLSONBURG:								
WMC Potential				$1.604	$1.582	$1.701	$1.816	$2.005
Oxford County Share	%			0.0%	0.0%	0.0%	0.0%	0.0%
Oxford County Share	$			$0.000	$0.000	$0.000	$0.000	$0.000
Residual Potential	$			$0.000	$0.000	$0.000	$0.000	$0.000
ZONE D-RURAL SETTLEMENTS:								
WMC Potential				$3.253	$3.328	$3.487	$3.649	$3.918
Oxford County Share	%			0.0%	0.0%	0.0%	0.0%	0.0%
Oxford County Share	$			$0.000	$0.000	$0.000	$0.000	$0.000
Residual Potential	$			$0.000	$0.000	$0.000	$0.000	$0.000
TOTAL OXFORD COUNTY:								
WMC Potential				$9.918	$10.089	$10.840	$11.569	$12.788
Oxford County Share	%							
Oxford County Share	$			$0.000	$0.000	$0.000	$0.000	$0.000
Residual Potential	$			$0.000	$0.000	$0.000	$0.000	$0.000
Plus: Inflow Sales	@	15.0%			$0.000	$0.000	$0.000	$0.000
TOTAL ADDITIONAL SALES POTENTIAL					$0.000	$0.000	$0.000	$0.000
WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY					(Square Feet - GLA)			
	@	$600	per sq.ft.		0	0	0	0
	@	$625	per sq.ft.		0	0	0	0
	@	$650	per sq.ft.		0	0	0	0
	@	$750	per sq.ft.		0	0	0	0

Source: Table 4

TABLE 6

SCENARIO B

OXFORD COUNTY SUPERMARKET ANALYSIS ($ Millions)

2008 Dollars		2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:						
Supermarket Potential		$73.138	$76.586	$83.628	$90.363	$101.711
Oxford County Share	%	99.3%	99.5%	99.5%	99.5%	99.5%
Oxford County Share	$	$72.626	$76.203	$83.210	$89.911	$101.202
Residual Potential	$	$0.000	$3.577	$10.584	$17.285	$28.576
ZONE B-INGERSOLL:						
Supermarket Potential		$23.585	$25.202	$27.431	$29.550	$33.108
Oxford County Share	%	95.4%	97.5%	97.5%	97.5%	97.5%
Oxford County Share	$	$22.500	$24.572	$26.746	$28.811	$32.280
Residual Potential	$	$0.000	$2.073	$4.246	$6.311	$9.781
ZONE C-TILLSONBURG:						
Supermarket Potential		$31.149	$32.522	$34.965	$37.324	$41.222
Oxford County Share	%	92.2%	95.0%	95.0%	95.0%	95.0%
Oxford County Share	$	$28.720	$30.896	$33.216	$35.458	$39.160
Residual Potential	$	$0.000	$2.177	$4.497	$6.739	$10.441
ZONE D-RURAL SETTLEMENTS:						
Supermarket Potential		$85.035	$87.012	$91.161	$95.403	$102.430
Oxford County Share	%	88.0%	90.0%	90.0%	90.0%	90.0%
Oxford County Share	$	$74.831	$78.311	$82.045	$85.863	$92.187
Residual Potential	$	$0.000	$3.480	$7.214	$11.032	$17.356
TOTAL OXFORD COUNTY:						
Supermarket Potential		$212.907	$221.323	$237.185	$252.640	$278.471
Oxford County Share	%					
Oxford County Share	$	$198.677	$209.982	$225.217	$240.043	$264.830
Residual Potential	$	$0.000	$11.306	$26.541	$41.366	$66.154
Plus: Inflow Sales	@ 12.5%		$1.615	$3.792	$5.909	$9.451
TOTAL ADDITIONAL SALES POTENTIAL			$12.921	$30.332	$47.276	$75.604
WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY				(Square Feet - GLA)		
@ $475 per sq.ft.			27,202	63,857	99,528	159,167
@ $500 per sq.ft.			25,842	60,664	94,551	151,209
@ $525 per sq.ft.			24,612	57,775	90,049	144,008
@ $575 per sq.ft.			22,471	52,751	82,219	131,486

Source: Table 4. Oxford County shares based on review of inventories and results of various consumer surveys.

TABLE 7

SCENARIO B

OXFORD COUNTY GROCERY/SPECIALTY FOOD STORE ANALYSIS ($ Millions)

2008 Dollars				2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:								
Grocery/Specialty Store Potential				$4.500	$4.255	$4.646	$5.020	$5.651
Oxford County Share	%			89.6%	90.0%	90.0%	90.0%	90.0%
Oxford County Share	$			$4.032	$3.829	$4.181	$4.518	$5.086
Residual Potential	$			$0.000	-$0.202	$0.150	$0.487	$1.054
ZONE B-INGERSOLL:								
Grocery/Specialty Store Potential				$2.480	$1.876	$2.042	$2.200	$2.465
Oxford County Share	%			69.6%	75.0%	75.0%	75.0%	75.0%
Oxford County Share	$			$1.726	$1.407	$1.532	$1.650	$1.849
Residual Potential	$			$0.000	-$0.319	-$0.194	-$0.076	$0.123
ZONE C-TILLSONBURG:								
Grocery/Specialty Store Potential				$1.365	$1.055	$1.134	$1.211	$1.337
Oxford County Share	%			77.0%	82.5%	82.5%	82.5%	82.5%
Oxford County Share	$			$1.051	$0.870	$0.936	$0.999	$1.103
Residual Potential	$			$0.000	-$0.181	-$0.115	-$0.052	$0.052
ZONE D-RURAL SETTLEMENTS:								
Grocery/Specialty Store Potential				$4.647	$4.755	$4.981	$5.213	$5.597
Oxford County Share	%			89.1%	92.5%	90.0%	90.0%	90.0%
Oxford County Share	$			$4.140	$4.398	$4.483	$4.692	$5.038
Residual Potential	$			$0.000	$0.258	$0.343	$0.552	$0.897
TOTAL OXFORD COUNTY:								
Grocery/Specialty Store Potential				$12.991	$11.940	$12.804	$13.644	$15.050
Oxford County Share	%			84.3%	88.0%	86.9%	86.9%	86.9%
Oxford County Share	$			$10.949	$10.505	$11.132	$11.859	$13.075
Residual Potential	$			$0.000	-$0.444	$0.183	$0.910	$2.126
Plus: Inflow Sales	7.5%				-$0.036	$0.015	$0.074	$0.172
TOTAL ADDITIONAL SALES POTENTIAL					-$0.480	$0.198	$0.984	$2.298
WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY						(Square Feet - GLA)		
	@	$375	per sq.ft.		-1,279	528	2,624	6,129
	@	$400	per sq.ft.		-1,199	495	2,460	5,746
	@	$425	per sq.ft.		-1,129	466	2,315	5,408
	@	$475	per sq.ft.		-1,010	417	2,071	4,839

Source: Table 4. Oxford County shares based on review of inventories and results of various consumer surveys.

TABLE 8 SCENARIO B

OXFORD COUNTY NON-FOOD STORE RETAIL (NFSR) EXPENDITURE POTENTIAL

2008 Dollars		2008	
Province of Ontario:			
Per Capita NFSR Expenditure		$5,410	
Less: WMC Food Component		($150)	
Adjusted Per Capita NFSR Expenditure		$5,260	
Department Stores		$768	14.6%
Clothing and Accessories Stores			14.0%
Furniture, Home Furnishings and Electronic Stores			16.2%
Miscellaneous Retailers			11.6%
Total Specialty Stores		$2,199	41.8%
Pharmacies and Personal Care Stores		$899	17.1%
Building and Outdoor Home Supplies Stores			12.8%
Other General Merchandise Stores			11.3%
Selected Automotive Stores (Tires/Batteries/ Accessories)			2.4%
Total Other NFSR		$1,394	26.5%
Total Adjusted Per Capita NFSR		$5,260	100.0%

2008 Dollars		2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:						
Income Index		91.0				
Per Capita NFSR Index		94.8				
Per Capita NFSR Expenditures		$4,985	$4,985	$5,240	$5,507	$6,083
Population		37,696	39,209	42,283	45,122	49,536
Total NFSR Expenditures	($Millions)	$187.928	$195.475	$221.554	$248.486	$301.335
Department Store Share		22.4%	22.5%	22.5%	22.5%	22.5%
Specialty Stores Share		38.0%	38.0%	38.0%	38.0%	38.0%
Pharmacies and Personal Care Stores Share		13.1%	13.1%	13.1%	13.1%	13.1%
Other NFSR Share		26.5%	26.5%	26.5%	26.5%	26.5%
Department Store Share	($Millions)	$42.096	$43.982	$49.850	$55.909	$67.800
Specialty Stores Share	($Millions)	$71.413	$74.281	$84.190	$94.425	$114.507
Pharmacies and Personal Care Stores Share	($Millions)	$24.619	$25.607	$29.024	$32.552	$39.475
Other NFSR Share	($Millions)	$49.801	$51.801	$58.712	$65.849	$79.854
ZONE B-INGERSOLL:						
Income Index		85.9				
Per Capita NFSR Index		91.8				
Per Capita NFSR Expenditures		$4,830	$4,830	$5,076	$5,335	$5,893
Population		12,484	12,969	13,941	14,832	16,208
Total NFSR Expenditures	($Millions)	$60.293	$62.639	$70.768	$79.128	$95.517
Department Store Share		16.1%	16.1%	16.1%	16.1%	16.1%
Specialty Stores Share		15.1%	15.1%	15.1%	15.1%	15.1%
Pharmacies and Personal Care Stores Share		13.3%	13.3%	13.3%	13.3%	13.3%
Other NFSR Share		55.5%	55.5%	55.5%	55.5%	55.5%
Department Store Share	($Millions)	$9.707	$10.085	$11.394	$12.740	$15.378
Specialty Stores Share	($Millions)	$9.104	$9.458	$10.686	$11.948	$14.423
Pharmacies and Personal Care Stores Share	($Millions)	$8.019	$8.331	$9.412	$10.524	$12.704
Other NFSR Share	($Millions)	$33.463	$34.765	$39.276	$43.916	$53.012
ZONE C-TILLSONBURG:						
Income Index		95.8				
Per Capita NFSR Index		97.6				
Per Capita NFSR Expenditures		$5,132	$5,132	$5,393	$5,669	$6,262
Population		15,644	16,122	17,118	18,046	19,439
Total NFSR Expenditures	($Millions)	$80.282	$82.733	$92.324	$102.297	$121.720
Department Store Share		26.3%	26.3%	26.3%	26.3%	26.3%
Specialty Stores Share		22.3%	22.3%	22.3%	22.3%	22.3%
Pharmacies and Personal Care Stores Share		14.0%	14.0%	14.0%	14.0%	14.0%
Other NFSR Share		37.4%	37.4%	37.4%	37.4%	37.4%
Department Store Share	($Millions)	$21.114	$21.759	$24.281	$26.904	$32.012
Specialty Stores Share	($Millions)	$17.903	$18.450	$20.588	$22.812	$27.144
Pharmacies and Personal Care Stores Share	($Millions)	$11.239	$11.583	$12.925	$14.322	$17.041
Other NFSR Share	($Millions)	$30.025	$30.942	$34.529	$38.259	$45.523
ZONE D-RURAL SETTLEMENTS:						
Income Index		92.9				
Per Capita NFSR Index		95.9				
Per Capita NFSR Expenditures		$5,043	$5,043	$5,301	$5,571	$6,154
Population		42,739	43,733	45,250	46,768	48,974
Total NFSR Expenditures	($Millions)	$215.547	$220.558	$239.849	$260.540	$301.377
Department Store Share		26.5%	26.5%	26.5%	26.5%	26.5%
Specialty Stores Share		18.4%	18.4%	18.4%	18.4%	18.4%
Pharmacies and Personal Care Stores Share		10.0%	10.0%	10.0%	10.0%	10.0%
Other NFSR Share		45.1%	45.1%	45.1%	45.1%	45.1%
Department Store Share	($Millions)	$57.120	$58.448	$63.560	$69.043	$79.865
Specialty Stores Share	($Millions)	$39.661	$40.583	$44.132	$47.939	$55.453
Pharmacies and Personal Care Stores Share	($Millions)	$21.555	$22.056	$23.985	$26.054	$30.138
Other NFSR Share	($Millions)	$97.212	$99.472	$108.172	$117.504	$135.921
TOTAL OXFORD COUNTY:						
Total NFSR Expenditures	($Millions)	$544.050	$561.406	$624.495	$690.450	$819.949
Department Store Share	($Millions)	$130.037	$134.274	$149.084	$164.596	$195.056
Specialty Stores Share	($Millions)	$138.080	$142.771	$159.597	$177.124	$211.527
Pharmacies and Personal Care Stores Share	($Millions)	$65.432	$67.577	$75.346	$83.451	$99.357
Other NFSR Share	($Millions)	$210.501	$216.980	$240.689	$265.527	$314.310

Source: Table 1 and Table 3. Real increases in per capita expenditures are 1.0% per annum for NFSR.

Distribution of NFSR expenditures by category are RDA estimates based on review of inventories and results of various consumer surveys.

TABLE 9

SCENARIO B

OXFORD COUNTY DEPARTMENT STORE ANALYSIS ($ Millions)

2008 Dollars				2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:								
Department Store Potential				$42.096	$43.982	$49.850	$55.909	$67.800
Oxford County Share	%			86.5%	87.5%	87.5%	87.5%	87.5%
Oxford County Share	$			$36.413	$38.484	$43.618	$48.921	$59.325
Residual Potential	$			$0.000	$2.071	$7.205	$12.508	$22.912
ZONE B-INGERSOLL:								
Department Store Potential				$9.707	$10.085	$11.394	$12.740	$15.378
Oxford County Share	%			68.9%	70.0%	70.0%	70.0%	70.0%
Oxford County Share	$			$6.688	$7.059	$7.976	$8.918	$10.765
Residual Potential	$			$0.000	$0.371	$1.287	$2.229	$4.076
ZONE C-TILLSONBURG:								
Department Store Potential				$21.114	$21.759	$24.281	$26.904	$32.012
Oxford County Share	%			75.2%	77.5%	77.5%	77.5%	77.5%
Oxford County Share	$			$15.878	$16.863	$18.818	$20.851	$24.810
Residual Potential	$			$0.000	$0.985	$2.940	$4.973	$8.932
ZONE D-RURAL SETTLEMENTS:								
Department Store Potential				$57.120	$58.448	$63.560	$69.043	$79.865
Oxford County Share	%			75.0%	76.0%	76.0%	76.0%	76.0%
Oxford County Share	$			$42.840	$44.420	$48.306	$52.473	$60.697
Residual Potential	$			$0.000	$1.580	$5.466	$9.633	$17.857
TOTAL OXFORD COUNTY:								
Department Store Potential				$130.037	$134.274	$149.084	$164.596	$195.056
Oxford County Share	%			78.3%	79.6%	79.6%	79.7%	79.8%
Oxford County Share	$			$101.819	$106.827	$118.717	$131.162	$155.597
Residual Potential	$			$0.000	$5.008	$16.899	$29.343	$53.778
Plus: Inflow Sales	10.0%				$0.556	$1.878	$3.260	$5.975
TOTAL ADDITIONAL SALES POTENTIAL					$5.565	$18.776	$32.603	$59.753
WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY						(Square Feet - GLA)		
	@	$375	per sq.ft.		14,839	50,070	86,942	159,342
	@	$400	per sq.ft.		13,912	46,940	81,508	149,384
	@	$425	per sq.ft.		13,093	44,179	76,713	140,596
	@	$475	per sq.ft.		11,715	39,529	68,638	125,797

Source: Table 8. Oxford County shares based on review of inventories and results of various consumer surveys.

TABLE 10

OXFORD COUNTY SPECIALTY STORE ANALYSIS ($ Millions)

SCENARIO B

2008 Dollars				2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:								
Specialty Store Potential				$71.413	$74.281	$84.190	$94.425	$114.507
Oxford County Share	%			60.0%	62.5%	62.5%	62.5%	62.5%
Oxford County Share	$			$42.848	$46.425	$52.619	$59.015	$71.567
Residual Potential	$			$0.000	$3.578	$9.771	$16.168	$28.719
ZONE B-INGERSOLL:								
Specialty Store Potential				$9.104	$9.458	$10.686	$11.948	$14.423
Oxford County Share	%			55.6%	57.5%	57.5%	57.5%	57.5%
Oxford County Share	$			$5.062	$5.439	$6.144	$6.870	$8.293
Residual Potential	$			$0.000	$0.377	$1.082	$1.808	$3.231
ZONE C-TILLSONBURG:								
Specialty Store Potential				$17.903	$18.450	$20.588	$22.812	$27.144
Oxford County Share	%			49.1%	52.5%	52.5%	52.5%	52.5%
Oxford County Share	$			$8.790	$9.686	$10.809	$11.976	$14.250
Residual Potential	$			$0.000	$0.896	$2.019	$3.186	$5.460
ZONE D-RURAL SETTLEMENTS:								
Specialty Store Potential				$39.661	$40.583	$44.132	$47.939	$55.453
Oxford County Share	%			47.5%	50.0%	50.0%	50.0%	50.0%
Oxford County Share	$			$18.839	$20.291	$22.066	$23.970	$27.727
Residual Potential	$			$0.000	$1.453	$3.227	$5.131	$8.888
TOTAL OXFORD COUNTY:								
Specialty Store Potential				$138.080	$142.771	$159.597	$177.124	$211.527
Oxford County Share	%			54.7%	57.3%	57.4%	57.5%	57.6%
Oxford County Share	$			$75.539	$81.841	$91.638	$101.832	$121.837
Residual Potential	$			$0.000	$6.303	$16.100	$26.293	$46.299
Plus: Inflow Sales	10.0%				$0.700	$1.789	$2.921	$5.144
TOTAL ADDITIONAL SALES POTENTIAL					$7.003	$17.889	$29.214	$51.443
WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY						(Square Feet - GLA)		
	@	$375	per sq.ft.		18,674	47,703	77,905	137,181
	@	$400	per sq.ft.		17,507	44,721	73,036	128,607
	@	$425	per sq.ft.		16,477	42,091	68,740	121,042
	@	$475	per sq.ft.		14,743	37,660	61,504	108,301

Source: Table 8. Oxford County shares based on review of inventories and results of various consumer surveys.

TABLE 11

SCENARIO B

OXFORD COUNTY PHARMACIES AND PERSONAL CARE STORE ANALYSIS ($ Millions)

2008 Dollars		2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:						
Pharmacies and Personal Care Store Potential		$24.619	$25.607	$29.024	$32.552	$39.475
Oxford County Share	%	98.5%	98.5%	98.5%	98.5%	98.5%
Oxford County Share	$	$24.249	$25.223	$28.588	$32.063	$38.883
Residual Potential	$	$0.000	$0.974	$4.339	$7.814	$14.633
ZONE B-INGERSOLL:						
Pharmacies and Personal Care Store Potential		$8.019	$8.331	$9.412	$10.524	$12.704
Oxford County Share	%	98.8%	98.5%	98.5%	98.5%	98.5%
Oxford County Share	$	$7.923	$8.206	$9.271	$10.366	$12.513
Residual Potential	$	$0.000	$0.283	$1.348	$2.443	$4.590
ZONE C-TILLSONBURG:						
Pharmacies and Personal Care Store Potential		$11.239	$11.583	$12.925	$14.322	$17.041
Oxford County Share	%	98.7%	98.5%	98.5%	98.5%	98.5%
Oxford County Share	$	$11.093	$11.409	$12.731	$14.107	$16.785
Residual Potential	$	$0.000	$0.316	$1.638	$3.013	$5.692
ZONE D-RURAL SETTLEMENTS:						
Pharmacies and Personal Care Store Potential		$21.555	$22.056	$23.985	$26.054	$30.138
Oxford County Share	%	94.5%	95.0%	95.0%	95.0%	95.0%
Oxford County Share	$	$20.369	$20.953	$22.786	$24.751	$28.631
Residual Potential	$	$0.000	$0.584	$2.416	$4.382	$8.262
TOTAL OXFORD COUNTY:						
Pharmacies and Personal Care Store Potential		$65.432	$67.577	$75.346	$83.451	$99.357
Oxford County Share	%	97.3%	97.4%	97.4%	97.4%	97.4%
Oxford County Share	$	$63.635	$65.791	$73.376	$81.288	$96.812
Residual Potential	$	$0.000	$2.157	$9.742	$17.653	$33.177
Plus: Inflow Sales	10.0%		$0.240	$1.082	$1.961	$3.686
TOTAL ADDITIONAL SALES POTENTIAL			$2.396	$10.824	$19.614	$36.864
WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY				(Square Feet - GLA)		
@	$725 per sq.ft.		3,305	14,930	27,054	50,847
@	$750 per sq.ft.		3,195	14,432	26,153	49,152
@	$775 per sq.ft.		3,092	13,967	25,309	47,566
@	$825 per sq.ft.		2,904	13,120	23,775	44,683

Source: Table 8. Oxford County shares based on review of inventories and results of various consumer surveys.

TABLE 12

SCENARIO B

OXFORD COUNTY OTHER NFSR ANALYSIS ($ Millions)

2008 Dollars		2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:						
Other NFSR Potential		$49.801	$51.801	$58.712	$65.849	$79.854
Oxford County Share	%	85.0%	87.5%	87.5%	87.5%	87.5%
Oxford County Share	$	$42.331	$45.326	$51.373	$57.618	$69.872
Residual Potential	$	$0.000	$2.995	$9.042	$15.287	$27.541
ZONE B-INGERSOLL:						
Other NFSR Potential		$33.463	$34.765	$39.276	$43.916	$53.012
Oxford County Share	%	88.2%	90.0%	90.0%	90.0%	90.0%
Oxford County Share	$	$29.514	$31.288	$35.349	$39.524	$47.711
Residual Potential	$	$0.000	$1.774	$5.835	$10.010	$18.197
ZONE C-TILLSONBURG:						
Other NFSR Potential		$30.025	$30.942	$34.529	$38.259	$45.523
Oxford County Share	%	91.6%	92.5%	92.5%	92.5%	92.5%
Oxford County Share	$	$27.503	$28.622	$31.939	$35.390	$42.109
Residual Potential	$	$0.000	$1.118	$4.436	$7.886	$14.606
ZONE D-RURAL SETTLEMENTS:						
Other NFSR Potential		$97.212	$99.472	$108.172	$117.504	$135.921
Oxford County Share	%	77.5%	80.0%	80.0%	80.0%	80.0%
Oxford County Share	$	$75.339	$79.577	$86.538	$94.003	$108.737
Residual Potential	$	$0.000	$4.238	$11.199	$18.664	$33.398
TOTAL OXFORD COUNTY:						
Other NFSR Potential		$210.501	$216.980	$240.689	$265.527	$314.310
Oxford County Share	%	83.0%	85.2%	85.3%	85.3%	85.4%
Oxford County Share	$	$174.687	$184.813	$205.198	$226.534	$268.429
Residual Potential	$	$0.000	$10.126	$30.511	$51.847	$93.741
Plus: Inflow Sales	10.0%		$1.125	$3.390	$5.761	$10.416
TOTAL ADDITIONAL SALES POTENTIAL			$11.251	$33.901	$57.608	$104.157

WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY			(Square Feet - GLA)		
@ $375 per sq.ft.		30,003	90,404	153,621	277,753
@ $400 per sq.ft.		28,127	84,754	144,020	260,393
@ $425 per sq.ft.		26,473	79,768	135,548	245,076
@ $475 per sq.ft.		23,686	71,372	121,280	219,278

Source: Table 8. Oxford County shares based on review of inventories and results of various consumer surveys.

TABLE 13

SCENARIO B

OXFORD COUNTY LIQUOR, BEER, WINE (LBW) ANALYSIS

2008 Dollars			2008
Province of Ontario:			
Per Capita LBW Expenditure			$496

2008 Dollars			2008	2011	2016	2021	2031
ZONE A-WOODSTOCK:							
Income Index			91.0				
Per Capita LBW Index			95.4				
Per Capita LBW Expenditure			$473	$473	$510	$549	$638
Population			37,696	39,209	42,283	45,122	49,536
Total LBW Expenditures		($Millions)	$17.843	$18.559	$21.561	$24.787	$31.580
Oxford County Share	%		95.0%	95.0%	95.0%	95.0%	95.0%
Oxford County Share	$	($Millions)	$16.951	$17.631	$20.483	$23.547	$30.001
Residual Potential	$	($Millions)	$0.000	$0.681	$3.532	$6.597	$13.050
ZONE B-INGERSOLL:							
Income Index			85.9				
Per Capita LBW Index			90.1				
Per Capita LBW Expenditure			$447	$447	$481	$519	$602
Population			12,484	12,969	13,941	14,832	16,208
Total LBW Expenditures		($Millions)	$5.578	$5.795	$6.711	$7.691	$9.754
Oxford County Share	%		95.0%	95.0%	95.0%	95.0%	95.0%
Oxford County Share	$	($Millions)	$5.299	$5.505	$6.375	$7.306	$9.266
Residual Potential	$	($Millions)	$0.000	$0.206	$1.076	$2.007	$3.967
ZONE C-TILLSONBURG:							
Income Index			95.8				
Per Capita LBW Index			100.5				
Per Capita LBW Expenditure			$498	$498	$537	$578	$671
Population			15,644	16,122	17,118	18,046	19,439
Total LBW Expenditures		($Millions)	$7.796	$8.034	$9.189	$10.436	$13.047
Oxford County Share	%		95.0%	95.0%	95.0%	95.0%	95.0%
Oxford County Share	$	($Millions)	$7.406	$7.632	$8.730	$9.915	$12.394
Residual Potential	$	($Millions)	$0.000	$0.226	$1.324	$2.509	$4.988
ZONE D-RURAL SETTLEMENTS:							
Income Index			92.9				
Per Capita LBW Index			97.4				
Per Capita LBW Expenditure			$483	$483	$521	$561	$651
Population			42,739	43,733	45,250	46,768	48,974
Total LBW Expenditures		($Millions)	$20.653	$21.133	$23.556	$26.227	$31.874
Oxford County Share	%		95.0%	95.0%	95.0%	95.0%	95.0%
Oxford County Share	$	($Millions)	$19.620	$20.076	$22.378	$24.916	$30.280
Residual Potential	$	($Millions)	$0.000	$0.456	$2.758	$5.296	$10.660
TOTAL OXFORD COUNTY:							
Total LBW Expenditures			$51.869	$53.521	$61.017	$69.142	$86.255
Oxford County Share	%		95.0%	95.0%	95.0%	95.0%	95.0%
Oxford County Share	$	($Millions)	$49.276	$50.845	$57.966	$65.684	$81.942
Residual Potential	$	($Millions)	$0.000	$1.569	$8.690	$16.409	$32.666
Plus: Inflow Sales	10.0%	($Millions)		$0.174	$0.966	$1.823	$3.630
TOTAL ADDITIONAL SALES POTENTIAL		($Millions)		$1.744	$9.656	$18.232	$36.296

WARRANTED ADDITIONAL SPACE IN OXFORD COUNTY			2011	2016	2021	2031
			(Square Feet - GLA)			
@	$1,250	per sq.ft.	1,395	7,725	14,586	29,037
@	$1,350	per sq.ft.	1,292	7,153	13,505	26,886
@	$1,450	per sq.ft.	1,202	6,659	12,574	25,032
@	$1,650	per sq.ft.	1,057	5,852	11,050	21,998

Source: Table 1 and Table 3. Real increases in per capita expenditures are 1.0% per annum for LBW.
Oxford County Shares are RDA estimates recognizing convenience orientation of LBW stores.

TABLE 14

SCENARIO B

COUNTY OF OXFORD SELECTED SERVICES PER CAPITA SPACE RATIOS

	WOODSTOCK (2008 Population =37695) 2008 Inventory		INGERSOLL (2008 Population = 12484) 2008 Inventory	
Service Category	Sq.Ft	Per Capita	Sq.Ft	Per Capita
Eating and Drinking	236,700	6.28	54,100	4.33
Personal	78,000	2.07	27,300	2.19
Finance/Insurance/Real Estate	150,300	3.99	42,700	3.42
Medical/Dental/Health Services	78,300	2.08	23,300	1.87
Business	29,400	0.78	3,400	0.27
Entertainment	140,400	3.72	14,100	1.13
Other Services	258,300	6.85	56,300	4.51
Miscellaneous Office	157,100	4.17	26,000	2.08

	TILLSONBURG (2008 Population = 15644) 2008 Inventory*		RURAL SETTLEMENTS (2008 Population = 42740) 2008 Inventory*	
Service Category	Sq.Ft	Per Capita	Sq.Ft	Per Capita
Eating and Drinking	100,600	6.43	67,900	1.59
				0.00
Personal	38,700	2.47	15,100	0.33
Finance/Insurance/Real Estate	80,200	5.13	59,000	1.38
Medical/Dental/Health Services	40,100	2.56	10,800	0.25
Business	3,700	0.24	0	0.00
Entertainment	28,700	1.83	2,100	0.05
Other Services	113,100	7.23	71,700	1.68
Miscellaneous Office	2,400	0.15	1,200	0.03

Source: Table 1 for population and Table 2 for space inventory.

TABLE 15

SCENARIO B

COUNTY OF OXFORD PROJECTED ADDITIONAL SELECTED SERVICE SPACE REQUIREMENTS

ZONE A-WOODSTOCK			2008	2011	2016	2021	2031
Population Forecast			37,696	39,209	42,283	45,122	49,536
Service Category	Range Per Capita Sq.Ft.		Projected Space Requirements: (Square Feet)				
Eating and Drinking	5.80	5.30	236,700	218,592	235,730	250,425	260,063
	Additional Space Over 2008			-18,108	-970	13,725	23,363
Personal	1.95	1.85	78,000	76,458	82,453	85,731	89,165
	Additional Space Over 2008			-1,542	4,453	7,731	11,165
Finance/Insurance/Real Estate	3.85	3.75	150,300	150,956	162,791	171,462	185,759
	Additional Space Over 2008			656	12,491	21,162	35,459
Medical/Dental/Health Services	2.05	2.15	78,300	82,339	88,795	94,756	104,025
	Additional Space Over 2008			4,039	10,495	16,456	25,725
Business	0.75	0.80	29,400	30,387	32,770	34,969	38,390
	Additional Space Over 2008			987	3,370	5,569	8,990
Entertainment	3.55	3.45	140,400	139,193	149,049	157,926	172,137
	Additional Space Over 2008			-1,207	8,649	17,526	31,737
Other Services	6.60	6.00	258,300	258,781	262,157	275,242	297,215
	Additional Space Over 2008			481	3,857	16,942	38,915
Miscellaneous Office	4.00	3.80	157,100	156,837	164,905	173,719	188,236
	Additional Space Over 2008			-263	7,805	16,619	31,136
Total Additional Selected Services				-14,956	50,149	115,731	206,491

ZONE B-INGERSOLL			2008	2011	2016	2021	2031
Population Forecast			12,484	12,969	13,941	14,832	16,208
Service Category	Range Per Capita Sq.Ft.		Projected Space Requirements: (Square Feet)				
Eating and Drinking	4.35	4.05	57,400	56,417	59,251	62,293	65,642
	Additional Space Over 2008			-983	1,851	4,893	8,242
Personal	2.05	1.90	26,900	26,587	27,883	28,922	30,795
	Additional Space Over 2008			-313	983	2,022	3,895
Finance/Insurance/Real Estate	3.30	3.05	42,700	42,799	45,310	46,720	49,434
	Additional Space Over 2008			99	2,610	4,020	6,734
Medical/Dental/Health Services	1.90	2.00	24,600	25,290	27,186	28,922	31,606
	Additional Space Over 2008			690	2,586	4,322	7,006
Business	0.25	0.35	3,400	3,891	4,182	4,450	4,862
	Additional Space Over 2008			491	782	1,050	1,462
Entertainment	1.05	1.02	14,100	13,618	14,638	15,202	16,613
	Additional Space Over 2008			-482	538	1,102	2,513
Other Services	4.30	4.25	55,100	55,769	59,530	63,183	68,884
	Additional Space Over 2008			669	4,430	8,083	13,784
Miscellaneous Office	2.00	2.10	26,000	26,587	28,580	30,405	33,226
	Additional Space Over 2008			587	2,580	4,405	7,226
Total Additional Selected Services				759	16,360	29,897	50,863

TABLE 15 (CONT'D)

SCENARIO B

COUNTY OF OXFORD PROJECTED ADDITIONAL SELECTED SERVICE SPACE REQUIREMENTS

ZONE C-TILLSONBURG			2008	2011	2016	2021	2031
Population Forecast			15,644	16,122	17,118	18,046	19,439
Service Category	Range Per Capita Sq.Ft.		Projected Space Requirements: (Square Feet)				
Eating and Drinking	6.20	6.05	100,600	99,957	105,275	110,083	117,607
	Additional Space Over 2008			-643	4,675	9,483	17,007
Personal	2.35	2.30	38,700	37,887	40,227	41,958	44,710
	Additional Space Over 2008			-813	1,527	3,258	6,010
Finance/Insurance/Real Estate	4.95	4.85	80,200	79,805	84,306	88,427	94,280
	Additional Space Over 2008			-395	4,106	8,227	14,080
Medical/Dental/Health Services	2.55	2.65	40,100	41,918	44,506	46,921	50,542
	Additional Space Over 2008			1,818	4,406	6,821	10,442
Business	0.25	0..26	3,700	4,111	4,365	4,602	4,957
	Additional Space Over 2008			411	665	902	1,257
Entertainment	1.75	1.65	28,700	27,811	29,443	30,950	33,047
	Additional Space Over 2008			-889	743	2,250	4,347
Other Services	7.00	6.95	113,100	112,855	119,483	125,603	135,102
	Additional Space Over 2008			-245	6,383	12,503	22,002
Miscellaneous Office	0.10	0.20	2,400	2,418	2,568	2,707	2,916
	Additional Space Over 2008			18	168	307	516
Total Additional Selected Services				-739	22,672	43,750	75,661

ZONE D-RURAL SETTLEMENTS			2008	2011	2016	2021	2031
Population Forecast			42,739	43,733	45,250	46,768	48,974
Service Category	Range Per Capita Sq.Ft.		Projected Space Requirements: (Square Feet)				
Eating and Drinking	1.50	1.65	67,900	67,130	71,269	74,829	79,583
	Additional Space Over 2008			-770	3,369	6,929	11,683
Personal	0.30	0.35	15,100	15,088	16,064	17,070	18,121
	Additional Space Over 2008			-12	964	1,970	3,021
Finance/Insurance/Real Estate	1.40	1.30	59,000	58,384	59,956	61,734	64,156
	Additional Space Over 2008			-616	956	2,734	5,156
Medical/Dental/Health Services	0.20	0.30	10,800	11,371	11,765	12,160	12,733
	Additional Space Over 2008			571	965	1,360	1,933
Business	0.01	0.10	0	656	1,584	3,040	4,897
	Additional Space Over 2008			656	1,584	3,040	4,897
Entertainment	0.04	0.05	2,100	1,968	2,262	2,338	2,449
	Additional Space Over 2008			-132	162	238	349
Other Services	1.60	1.70	71,700	70,848	73,757	76,933	83,256
	Additional Space Over 2008			-852	2,057	5,233	11,556
Miscellaneous Office	0.03	0.04	1,200	1,531	1,584	1,637	1,714
	Additional Space Over 2008			331	384	437	514
Total Additional Selected Services				-826	10,441	21,940	39,110

TABLE 15 (CONT'D)

SCENARIO B

COUNTY OF OXFORD PROJECTED ADDITIONAL SELECTED SERVICE SPACE REQUIREMENTS

OXFORD COUNTY		2008	2011	2016	2021	2031
Population Forecast		108,563	112,034	118,593	124,768	134,157
Service Category		Projected Space Requirements: (Square Feet)				
Eating and Drinking	Additional Space Over 2008		-20,504	8,924	35,030	60,296
Personal	Additional Space Over 2008		-2,680	7,926	14,981	24,090
Finance/Insurance/Real Estate	Additional Space Over 2008		-257	20,162	36,143	61,430
Medical/Dental/Health Services	Additional Space Over 2008		7,118	18,452	28,958	45,106
Business	Additional Space Over 2008		2,545	6,401	10,561	16,607
Entertainment	Additional Space Over 2008		-2,710	10,093	21,116	38,946
Other Services	Additional Space Over 2008		52	16,727	42,761	86,258
Miscellaneous Office	Additional Space Over 2008		673	10,936	21,767	39,392
Total Additional Selected Services			-15,762	99,622	211,318	372,125

Source: RDA estimates.

TABLE 16

SCENARIO B

OXFORD COUNTY SUMMARY GROSS WARRANTED ADDITIONAL RETAIL/SERVICE SPACE (SQUARE FEET)

RETAIL CATEGORY		2011	2016	2021	2031
FOOD STORE RETAIL (FSR):					
Warehouse Membership Club (Food Component)		0	0	0	0
Supermarkets		27,202	60,664	90,049	131,486
Grocery/Other Food Stores		-1,279	495	2,315	4,839
Total Food Store Retail		25,923	61,160	92,364	136,324
NON FOOD STORE RETAIL (NFSR)					
Department Stores		14,839	46,940	76,713	125,797
Specialty Stores		18,674	44,721	68,740	108,301
Pharmacy and Personal Care Stores		3,305	14,432	25,309	44,683
Other NFSR		30,003	84,754	135,548	219,278
Total Non Food Store Retail		66,821	190,848	306,310	498,059
OTHER RETAIL:					
Liquor/Beer/Wine		1,395	7,153	12,574	21,998
Total Other Retail		1,395	7,153	12,574	21,998
TOTAL RETAIL		94,139	259,160	411,248	656,381
SERVICES CATEGORY:					
Eating/Drinking		-20,504	8,924	35,030	60,296
Personal Services		-2,680	7,926	14,981	24,090
Finance/Insurance/Real Estate		-257	20,162	36,143	61,430
Medical/Dental/Health Services		7,118	18,452	28,958	45,106
Business Services		2,545	6,401	10,561	16,607
Entertainment		-2,710	10,093	21,116	38,946
Other Services		52	16,727	42,761	86,258
Miscellaneous Office		673	10,936	21,767	39,392
TOTAL SERVICES		-15,762	99,622	211,318	372,125
TOTAL RETAIL/SERVICE		78,377	358,781	622,566	1,028,506
LAND AREA REQUIRED:(27% COVERAGE)	GROSS ACRES	6.66	30.51	52.93	87.45

Source: RDA estimates. See Tables 1 through 15.

TABLE 17

SCENARIO B

OXFORD COUNTY PROPOSED DISTRIBUTION OF PROJECTED 2031 ADDITIONAL RETAIL/SERVICE SPACE REQUIREMENTS

ZONE	Food Store Retail (Sq.Ft)	Non-Food Store Retail (Sq.Ft)	Liquor/ Beer/Wine (Sq.Ft)	Services (Sq.Ft)	Total Retail/Service Space (Sq.Ft)	Total Retail/Service Distribution
WOODSTOCK	60,400	250,400	9,600	202,900	523,300	51.0%
INGERSOLL	27,300	73,800	4,200	48,600	153,900	15.0%
TILLSONBURG	37,000	130,600	5,500	73,100	246,200	24.0%
RURAL SETTLEMENTS	11,000	41,800	2,800	47,000	102,600	10.0%
OXFORD COUNTY	135,700	496,600	22,100	371,600	1,026,000	100.0%

Source: RDA estimates derived from Table 16.