The Town of Carleton Place

Community Situational Analysis

By:

McSweeney & Associates
MANAGEMENT CONSULTANTS

In Association with:

MARKET RESEARCH CORPORATION

And

Municipal Solutions Inc.

January 22, 2007

Community Situational Analysis

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Paul Knowles, CAO
Town of Carleton Place
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January 22, 2007

Dear Paul:

On behalf of our team, I am pleased to provide you with the Town of Carleton Place's Community Situation Analysis. The report contains detailed information on the following topics:

- 2006 demographic information detailing Carleton Place's population;
- Carleton Place's housing market;
- Carleton Place's Retail market, and;
- Carleton place's industrial market.

I would be pleased to discuss any aspect of this report with you and/or the economic development steering committee. I may be reached at my office toll free at 1-866-304-2896.

Yours truly,

E. McSweeney

Eric McSweeney
President

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1 Demographic Characteristics

Table 1 presents population age statistics for Carleton Place and compares the age structure of Carleton Place to Ontario.

The population of Carleton Place increased by an estimated 11% between 2001 and 2006 compared to the Ontario growth rate of 10% over the same period. In 2001, Carleton Place generally had a larger population below 20 years of age, those 40-49 years of age and those aged 80 and older. This trend continues for 2006. The average age of the Carleton Place residents declined from 38.2 years in 2001, to 37.6 years in 2006.

Table 1: 2001 Census and 2006 Population Estimates for Carleton Place

Characteristic	Carleton Place (2001)	Carleton Place (2001 %)	Ontario 2001 (%)	Carleton Place (2006)	Carleton Place (2006 %)	Ontario 2006 (%)
Population, 2001	9,080					
Population, 2006				10,039		
% Change 01-06				**11%**		10%
Total Population	9,080			10,039		
0-4	565	**6.2%**	5.9%	595	**5.9%**	5.4%
5-9	725	**8.0%**	6.8%	669	**6.7%**	6.0%
10-14	710	**7.8%**	6.9%	783	**7.8%**	6.7%
15-19	665	**7.3%**	6.7%	750	**7.5%**	6.7%
20-24	465	5.1%	**6.3%**	674	6.7%	6.7%
25-29	535	5.9%	**6.4%**	565	5.6%	**6.6%**
30-34	625	6.9%	**7.3%**	635	6.3%	**7.0%**
35-39	830	**9.1%**	8.7%	742	7.4%	**7.6%**
40-44	835	**9.2%**	8.5%	915	**9.1%**	8.6%
45-49	690	**7.6%**	7.5%	855	**8.5%**	8.0%
50-54	565	6.2%	**6.8%**	704	7.0%	7.0%
55-59	375	4.1%	**5.1%**	545	5.4%	**6.1%**
60-64	340	3.7%	**4.2%**	375	3.7%	**4.6%**
65-69	280	3.1%	**3.8%**	336	3.3%	**3.7%**
70-74	270	3.0%	**3.4%**	273	2.7%	**3.2%**
75-79	265	**2.9%**	2.8%	239	2.4%	**2.7%**
80-84	190	**2.1%**	1.7%	211	**2.1%**	1.9%
85+	160	**1.8%**	1.3%	174	**1.7%**	1.5%
Population 15-85 (%)		80.0			77.9%	81.9%

Source: McSweeney & Associates from Statistics Canada Census Data for 2001 and Manifold Data Mining Inc. for 2006

Table 2 compares mobility of Carleton Place residents for 2001 and 2006 by place of residence 1 year ago and 5 years ago. Key observations are:

- Carleton Place had a greater percentage of movers over the last 5 years than Ontario;
- Carleton Place had a higher percentage of migrants compared to Ontario, the majority of which consisted of internal migrants (from within Canada); and a much lower percentage of external migrants (outside of Canada);
- Carleton Place had a higher percentage of interprovincial migrants.

Table 2: 2001 Census and 2006 Mobility Estimates for Carleton Place

Characteristic	CP 2001	CP 2001 (%)	ONT 2001 (%)	CP 2006	CP 2006 (%)	ONT 2006 (%)
Mobility Status – Place of Residence One Year Ago						
Total Population 1 Year and Over by Mobility Status	8,780			10,039		
Non-Movers	7,260	**82.7%**	86.1%	8,307	82.7%	**86.0%**
Movers	1,520	**17.3%**	13.9%	1,732	**17.3%**	14.0%
Non-migrants	745	49.0%	**57.0%**	853	49.2%	**56.8%**
Migrants	770	**50.7%**	43.0%	879	**50.8%**	43.2%
Internal Migrants	755	**98.1%**	77.5%	858	**97.6%**	79.2%
Intraprovincial Migrants	635	84.1%	**85.4%**	741	**86.4%**	86.3%
Interprovincial Migrants	115	**15.2%**	14.6%	117	13.6%	**13.7%**
External Migrants	15	1.9%	**22.5%**	21	2.4%	**20.8%**
Mobility Status – Place of Residence Five Years Ago						
Total Population 5 Years and Over by Mobility Status	8,320			10,039		
Non-Movers	4,435	53.3%	**57.2%**	5,352	53.3%	**56.8%**
Movers	3,885	**46.7%**	42.8%	4,687	**46.7%**	43.2%
Non-migrants	1,730	44.5%	**54.2%**	2,088	44.5%	**54.3%**
Migrants	2,155	**55.5%**	45.8%	2,599	**55.5%**	45.7%
Internal Migrants	2,115	**98.1%**	75.2%	2,556	**98.3%**	77.0%
Intraprovincial Migrants	1,730	81.8%	**84.5%**	2,093	81.9%	**85.1%**
Interprovincial Migrants	385	**18.2%**	15.5%	462	**18.1%**	14.9%
External Migrants	40	1.9%	**24.8%**	43	1.7%	**23.4%**

Source: McSweeney & Associates from Statistics Canada 2001 Census data and Manifold Data Mining Inc *Superdemographics 2006*

Table 3 shows Carleton Place and Ontario income characteristics. In 2000, Carleton Place residents had lower average and median incomes (both household and individual) compared to Ontario, and had a higher amount of income derived from government transfers and a smaller amount derived from employment.

Table 3: 2000 Census and 2005 Estimates of Carleton Place Income Characteristics

Characteristic	CP 2000	ONT 2000	CP 2005	ONT 2005
Total income in 2000 of population 15 years and over	6,905	9,048,040	7,991	
Without income	245	449,480	292	
With income	6,655	8,598,560	7,699	
Average income $	$29,011	**$32,865**	$29,386	$33,639
Median income $	$24,759	**$24,816**	$25,220	$26,714
Composition of Total Income %	100.00%	100.00%		
Employment income %	75.50%	**78.70%**		
Government transfer payments %	**12.00%**	9.80%		
Other %	**12.50%**	11.50%		
Average household income $	$56,185	**$66,836**	$58,203	$71,171
Median household income $	$50,204	**$53,626**	$50,766	$60,919

Source: McSweeney & Associates from Statistics Canada data and Manifold Data Mining Inc *Superdemographics 2006*

Table 4 provides a comparison of key labour force indicator estimates for Carleton Place and Ontario. Labour trends in Carleton Place are more favourable compared to the Ontario average. For 2001 and 2006, Carleton Place outperformed Ontario with respect to participation rates and employment rates but had a higher unemployment rate.

Table 4: Key Labour Force Indicators: Carleton Place versus Ontario 2001-2006

Characteristic	CP 2001	ONT 2001	CP 2006	ONT 2006
Total population 15 years and over by labour force activity	6,905	9,048,040	7,991	10,238,451
In the labour force	4,815	6,086,815	5,562	6,921,876
Employed	4,465	5,713,900	5,133	6,450,087
Unemployed	355	372,915	430	471,789
Not in the labour force	2,085	2,961,220	2,429	3,316,575
Participation rate	**69.7%**	67.3%	**70.0%**	68.0%
Employment rate	**64.7%**	63.2%	**64.0%**	63.0%
Unemployment rate	7.4%	**6.1%**	7.7%	**6.8%**

Source: McSweeney & Associates from Statistics Canada data and Manifold Data Mining Inc *Superdemographics 2006*

Table 5 shows the highest education levels obtained by Carleton Place residents in comparison to Ontario. For 2006, estimates indicate Carleton Place (relative to Ontario) had a smaller percentage of the population with a university education, but had a greater percentage of the population with a trades certificate or diploma or college education.

Table 5: Education Levels Attained: Carleton Place versus Ontario 2006

Characteristic	Carleton Place 2006	Carleton Place 2006 (%)	Ontario 2006 (%)
Total population 20 years and over by highest level of schooling	7,241		
Less than grade 9	436	6.0%	**8.6%**
Grades 9 to 13	2,486	**34.3%**	31.1%
Without high school graduation certificate	1,485	**59.7%**	54.2%
With high school graduation certificate	1,001	40.3%	**45.8%**
Trades certificate or diploma	905	**12.5%**	10.2%
College	2,246	**31.0%**	23.8%
Without certificate or diploma	558	24.8%	**27.6%**
With certificate or diploma	1,688	75.2%	**72.4%**
University	1,167	16.1%	**26.2%**
Without degree	420	**36.0%**	27.0%
Without certificate or diploma	277	**23.7%**	18.6%
With certificate or diploma	143	8.5%	**12.9%**
With bachelor's degree or higher	747	64.0%	**73.0%**

Source: McSweeney & Associates from Manifold Data Mining Inc *Superdemographics 2006*

Table 6 shows school attendance estimates for those aged 15 to 24 for Carleton Place and Ontario. Carleton Place had a smaller percentage of this population attending school full time and a greater percentage not attending school or attending school part-time relative to Ontario.

Table 6: Population aged 15-24 by School Attendance, Carleton Place vs. Ontario, 2006 Estimates

Characteristic	CP 2006	CP 2006 (%)	ONT 2006 (%)
Total population 15 to 24 years by school attendance	1,424		
Not attending school	556	**39.0%**	34.6%
Attending school full time	797	56.0%	**60.6%**
Attending school part time	71	5.0%	4.9%

Source: McSweeney & Associates from Manifold Data Mining Inc *Superdemographics 2006*

Table 7 shows population by first language spoken estimates for Carleton Place and Ontario residents in 2006. Carleton Place had a higher percentage of residents who spoke English as a first language compared to Ontario.

Table 7: Population by First Language Spoken, Carleton Place versus Ontario 2006

Characteristic	CP 2006	CP 2006 (%)	ONT 2006 (%)
Total population by first official language spoken	10,039		
English	9,732	**96.9%**	93.0%
French	306	3.0%	**4.4%**
English and French	0	0.0%	**0.7%**
Neither English nor French	0	0.0%	**2.0%**
Official language minority	306	3.0%	**4.5%**

Source: McSweeney and Associates from Manifold Data Mining Inc *Superdemographics 2006*

Table 8 indicates industries worked in most recently (2006 estimates) by Carleton Place and Ontario residents. The information is by place of residence (i.e. applies to Carleton Place residents, not employees working in Carleton Place).

In 2006, relative to Ontario, a larger percentage of Carleton Place residents worked in the following industries:

- Construction;
- Retail trades;
- Real estate and rental and leasing;
- Professional, scientific, and technical services;
- Health care and social assistance;
- Accommodation and food services;
- Other services (except public administration), and;
- Public administration.

A smaller percentage of Carleton Place residents worked in:

- Agriculture;
- Mining and oil and gas extraction;
- Utilities;
- Manufacturing;
- Wholesale trade;
- Transportation and warehousing;
- Information and cultural industries;
- Finance and insurance;
- Management of companies and enterprises;
- Administrative and support;
- Educational services, and;
- Arts, entertainment and recreation.

Table 8: Experienced Labour Force by Industry - Summary (NAICS) 2006 Estimates

Characteristic	CP 2006	CP 2006 (%)	ONT 2006 (%)
Total Labour Force 15+	5,567	-	-
Agriculture, forestry, fishing and hunting	38	0.7%	**2.0%**
Mining and oil and gas extraction	13	0.2%	**0.3%**
Utilities	12	0.2%	**0.8%**
Construction	359	**6.4%**	5.5%
Manufacturing	842	15.1%	**16.2%**
Wholesale trade	157	2.8%	**4.6%**
Retail trade	679	**12.2%**	11.1%
Transportation and warehousing	224	4.0%	**4.6%**
Information and cultural industries	126	2.3%	**2.8%**
Finance and insurance	71	1.3%	**4.8%**
Real estate and rental and leasing	126	**2.3%**	1.8%
Professional, scientific and technical services	443	**8.0%**	7.0%
Management of companies and enterprises	0	0.0%	**0.1%**
Administrative and support, waste management and remediation services	225	4.0%	**4.2%**
Educational services	253	4.5%	**6.1%**
Health care and social assistance	558	**10.0%**	8.8%
Arts, entertainment and recreation	70	1.3%	**2.0%**
Accommodation and food services	460	**8.3%**	6.2%
Other services (except public administration)	296	**5.3%**	4.5%
Public administration	553	**9.9%**	5.1%

Source: McSweeney & Associates from Manifold Data Mining Inc *Superdemographics 2006*

Table 9 presents information on the occupations of the labour force of the resident labour force in Carleton Place. Relative to Ontario, a greater percentage of Carleton Place residents had the following occupations: management occupations; natural and applied sciences and related occupations; occupations in social science, education, government service and related occupations; occupations in art, culture, recreation, and sport, and; sales and service occupations.

Table 9: Experienced Labour Force by Occupation - 2006 Estimates

Characteristic	**CP 2006**	**CP 2006 (%)**	**Ontario 2006 (%)**
Total labour force 15 years and over by occupation	5,562		
Occupation - Not applicable	94		
All occupations	5,469		
A Management occupations	644	11.8%	**11.6%**
A0 Senior management occupations	59	9.2%	**12.2%**
A1 Specialist managers	203	31.5%	**27.4%**
A2 Managers in retail trade, food and accommodation services	190	**29.5%**	28.6%
A3 Other managers, n.e.c.	193	**30.0%**	31.8%
B Business, finance and administration occupations	962	17.6%	**18.3%**
B0 Professional occupations in business and finance	48	5.0%	**14.7%**
B1 Finance and insurance administration occupations	35	**3.6%**	6.6%
B2 Secretaries	65	**6.8%**	10.7%
B3 Administrative and regulatory occupations	135	14.0%	**11.4%**
B4 Clerical supervisors	44	**4.6%**	3.2%
B5 Clerical occupations	634	**65.9%**	53.4%
C Natural and applied sciences and related occupations	548	10.0%	**7.1%**
C0 Professional occupations in natural and applied sciences	318	58.0%	**60.2%**
C1 Technical occupations related to natural and applied sciences	230	**42.0%**	39.8%
D Health occupations	201	**3.7%**	4.7%
D0 Professional occupations in health	8	4.0%	**22.8%**
D1 Nurse supervisors and registered nurses	55	**27.4%**	32.0%
D2 Technical and related occupations in health	93	46.3%	**22.7%**
D3 Assisting occupations in support of health services	46	**22.9%**	22.6%
E Occupations in social science, education, government service and religion	440	8.0%	**7.6%**
E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	135	30.7%	**28.1%**
E1 Teachers and professors	150	**34.1%**	48.6%
E2 Paralegals, social services workers and occupations in education and religion, n.e.c.	155	35.2%	23.3%
F Occupations in art, culture, recreation and sport	181	3.3%	**2.8%**
F0 Professional occupations in art and culture	91	50.3%	**43.2%**
F1 Technical occupations in art, culture, recreation and sport	89	**49.2%**	56.8%
G Sales and service occupations	1,392	25.5%	**22.8%**
G0 Sales and service supervisors	54	**3.9%**	3.1%
G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	80	5.7%	**10.6%**
G2 Retail salespersons and sales clerks	291	20.9%	**17.3%**
G3 Cashiers	94	6.8%	**7.2%**
G4 Chefs and cooks	106	**7.6%**	5.1%

Characteristic	CP 2006	CP 2006 (%)	Ontario 2006 (%)
G5 Occupations in food and beverage service	84	6.0%	**6.8%**
G6 Occupations in protective services	73	**5.2%**	6.5%
G7 Occupations in travel and accommodation, including attendants in recreation and sport	21	1.5%	**3.4%**
G8 Child care and home support workers	117	**8.4%**	6.7%
G9 Sales and service occupations, n.e.c.	473	**34.0%**	33.2%
H Trades, transport and equipment operators and related occupations	731	**13.4%**	14.3%
H0 Contractors and supervisors in trades and transportation	56	**7.7%**	5.7%
H1 Construction trades	136	18.6%	**14.5%**
H2 Stationary engineers, power station operators and electrical trades and telecommunications occupations	103	**14.1%**	7.7%
H3 Machinists, metal forming, shaping and erecting occupations	62	8.5%	**10.6%**
H4 Mechanics	106	**14.5%**	15.0%
H5 Other trades, n.e.c.	21	2.9%	**5.4%**
H6 Heavy equipment and crane operators, including drillers	57	**7.8%**	3.6%
H7 Transportation equipment operators and related workers, excluding labourers	124	**17.0%**	22.1%
H8 Trades helpers, construction and transportation labourers and related occupations	65	8.9%	**15.5%**
I Occupations unique to primary industry	107	**2.0%**	2.8%
I0 Occupations unique to agriculture, excluding labourers	52	**48.6%**	66.3%
I1 Occupations unique to forestry operations, mining, oil and gas extraction and fishing, excluding labourers	0	0.0%	**7.4%**
I2 Primary production labourers	55	51.4%	**26.3%**
J Occupations unique to processing, manufacturing and utilities	263	4.8%	**8.1%**
J0 Supervisors in manufacturing	16	**6.1%**	7.9%
J1 Machine operators in manufacturing	89	33.8%	**37.3%**
J2 Assemblers in manufacturing	146	55.5%	**32.1%**
J3 Labourers in processing, manufacturing and utilities	12	**4.6%**	22.6%

Source: McSweeney & Associates from Manifold Data Mining Inc *Superdemographics 2006*

Table 10 shows the place of work status estimates of Carleton Place and Ontario residents. Relative to Ontario, Carleton Place had a greater percentage of residents who declared a place of work in a different Municipality or worked at home and a smaller percentage of residents who declared a place of work in their Municipality of residence or in the same County.

Table 10: Place of Work Status, Carleton Place versus Ontario 2006

Characteristics	CP 2006	CP 2006 (%)	ONT 2006 (%)
Total employed labour force 15 years and over by place of work status	5,133		
Usual place of work	4,274	83.3%	**84.1%**
In Municipality of residence	1,423	33.3%	**60.9%**
In different Municipality	2,850	**66.7%**	39.1%
In same County	287	10.1%	**38.6%**
At home	423	**8.2%**	7.1%
Outside Canada	17	0.3%	**0.6%**
No fixed workplace address	419	8.2%	8.2%

Source: McSweeney & Associates from Manifold Data Mining Inc *Superdemographics 2006*

Table 11 shows mode of transportation used to travel to work for Carleton Place for residents in 2001 and 2006. From 2001 to 2006, estimates indicated Carleton Place residents had an increased percentage of the population who travelled to work as a driver or passenger, used public transportation, or bicycled to work.

Table 11: Mode of Transportation, Carleton Place 2001-2006

Characteristic	CP 2001	CP 2001 (%)	CP 2006	CP 2006 (%)
Total employed labour force 15 years and over by mode of transportation	4,100		4,693	
Car, truck, van, as driver	3,055	74.5%	4,647	**75.4%**
Car, truck, van, as passenger	435	10.6%	3,539	**10.7%**
Public transit	50	1.2%	613	**1.5%**
Walked	465	**11.3%**	501	10.6%
Bicycle	25	0.6%	92	**0.7%**
Motorcycle	0	0.0%	70	0.0%
Taxicab	15	**0.4%**	515	0.0%
Other method	55	**1.3%**	496	1.1%

Source: McSweeney & Associates from Statistics Canada and Manifold Data Mining Inc *Superdemographics 2006*

The following two tables provide information on persons reporting a “usual place of work other than in their home or outside of Canada” and reveal the following information regarding labour force mobility in Carleton Place:

- The largest number of workers commuting to work in Carleton Place travel from Mississippi Mills;
- The majority of the Carleton Place labour force commutes to work in Ottawa;
- 59.8% of workers declaring a usual place of work in Carleton place live outside of the area, and;
- 62.3% of the Carleton Place labour force has a usual place of work outside of Carleton Place.

Table 12: Where the Resident Carleton Place Labour Force Works - 2001

Place of residence / Place of work	Total - Sex	Sex Male	Female
Carleton Place/Hull	45	35	15
Carleton Place/Ottawa	2,010	1,170	845
Carleton Place/Smiths Falls	50	25	25
Carleton Place/Perth	60	0	55
Carleton Place/Carleton Place	1,370	520	850
Carleton Place/Mississippi Mills	95	30	65
Total labour force with a usual place of work	**3,630**	**1,780**	**1,855**
Percentage of residents declaring a usual place of work outside of Carleton Place	*62.3%*		
Percentage outside commuters male/female		*49.0%*	*51.1%*

Source: McSweeney & Associates from 2001 Statistics Canada Census Data.

Table 13: Labour Force Commuting to Work in Carleton Place - 2001

Place of residence / Place of work	Total - Sex	Sex Male	Female
Ottawa/Carleton Place	370	170	200
Rideau Lakes/Carleton Place	30	10	15
Smiths Falls/Carleton Place	55	15	40
Tay Valley/Carleton Place	40	15	20
Perth/Carleton Place	25	0	20
Carleton Place/Carleton Place	1,370	520	850
Mississippi Mills/Carleton Place	635	265	365
Beckwith/Carleton Place	630	300	330
Montague/Carleton Place	25	15	0
Drummond/North Elmsley/Carleton Place	140	55	75
Lanark Highlands/Carleton Place	85	35	50
Total workforce commuting to work in Carleton Place	**3,405**	**1,400**	**1,965**
Percentage of workers (non-residents) commuting to work in Carleton Place	*59.8%*		
Percentage commuters male / female		*41.1%*	*57.7%*

Source: McSweeney & Associates from 2001 Statistics Canada Census Data

Table 14 summarizes Carleton Place's population, labour force and number of households and is as follows:

Table 14: Population, Households and Labour Force: Carleton Place

Year	Total Population	No. of Households	Labour Force
1996 (actual)	8,483	3,150	4,135
2001 (actual)	9,080	3,435	4,815
2006 (estimate)	10,100	3,840	5,560
Growth Summary			
1996-2001			
Numeric	597	285	680
%	7.0	9.0	16.4
2001-2006			
Numeric	1,020	405	745
%	11.2	11.8	15.5
1996-2001			
Numeric	1,617	690	1,425
%	19.1	21.9	34.5

Source: Market Research Corporation based on the census data of 1996, 2001 and Manifold Data Mining Inc. *SuperDemographics 2006.*

2 Housing Market

2.2 Housing Units

The number of housing units in Carleton Place by type, tenure, and value is presented in the following table for the years 2001 and 2006.

Table 15: Housing in Carleton Place, 2001 versus 2006

Characteristic	2001		2006		2001-2006 Change	
	#	%	#	%	#	%
A - Tenure						
Total	3,435		3,849		414	12.1%
Owned	2,410	70.2%	2,805	72.9%	395	16.4%
Rented	1,020	29.7%	1,043	27.1%	23	2.6%
B - Price						
Average Value ($)	124,030	-	162,130	-	38,100	30.7%
Average Monthly Rent ($)	690	-	625	-	-65	-9.5%
C - Type						
Total Occupied Dwellings	3,435		3,849		414	12.1%
Single Detached	2,045	59.5%	2,591	67.3%	546	26.7%
Semi-Detached	375	10.9%	350	9.1%	-25	-7.7%
Rowhouses	395	11.5%	326	8.4%	-69	-17.5%
Apartment						
5 + Stories	0	0.0%	22	0.6%	22	-
Under 5 Stories	520	15.1%	452	11.7%	-68	-13.1%

Source: Statistics Canada and Manifold Data Mining Inc *Superdemographics 2006*.

As indicated:

- There was a total estimate of 3,849 occupied private dwellings in Carleton Place for 2006.
- In 2001, 70.2% of all dwellings were owner-occupied; this number increased to 72.9% for 2006.
- Single detached homes accounted for the bulk of all dwelling types in 2001 at 59.5%. This pattern continues in 2006, however single detached homes account for an even greater share of dwellings at 67.3% of the total.
- Ground-oriented family-type housing accounted for approximately 84.8% of all dwelling types in 2006; only one in ten (12.3%) dwellings in Carleton Place is apartments.
- The average 2006 price of a dwelling in Carleton Place was estimated to be valued at $162,130. In 2001, the average dwelling was valued at $124,040. This represents a 30.7% increase in the value of homes in Carleton place.
- In 2006, the estimated average monthly rent in Carleton Place was $625.

2.3 Residential Development Since 2001

Residential development has continued at a rapid rate in Carleton Place since 2001.

Table 16: Residential Development in Carleton Place, 2001-2006

Year	Construction Value ($)	Number of Housing Units	Number of Permits Issued
2001	4,735,000	Not available	57
2002	8,751,000	Not available	80
2003	7,506,000	Not available	53
2004	10,690,000	54	118
2005	11,580,000	54	108
2006	10,756,800.00	41	-
Total	**54,018,800**	**149**	**416**
Average Annual	**9,003,133**	**49.7**	**83.2**

Source: Town of Carleton Place.

As demonstrated in the above table:

- For the period 2001-2006, at total of $54.0 million was invested in residential construction in Carleton place. The average annual investment was $9.0 million.
- A total of 149 new units were built in Carleton Place in the last five years, representing an average of 49.7 new units per year.

2.4 Resale Housing

Relative to Ottawa, the price of housing in Carleton Place is low. The Canadian Mortgage and Housing Corporation (CHMC) *Housing Market Outlook: Ottawa Fall 2006* profiles Ottawa's housing resale market remaining at historical highs for 2006 and 2007 and provides the following information on Ottawa resale housing market:

> Multiple Listing Sales (MLS) for 2006 overall will reach 13,900 units, which is a record for the Ottawa area. Strong employment growth and continued low interest rates will help keep resale home sales strong and boost the resale market to achieve an all-time high of 14,000 transactions in 2007. Low mortgage carrying costs (adjusted for inflation being approximately $1,500) are also prompting many households to turn to home ownership. Strong home sales are also keeping pace with more abundant supply of properties with "For Sale" signs, insuring the market remains close to the top of a balanced market range. It is therefore demand, supported by a vigorous job market and high consumer confidence, which will stipulate sales, despite steadily rising prices. The average MLS price of properties will reach $256,000 for 2006, up by 3.2% over last year. This increase is moving progressively closer to the general rate of inflation, after many year of more substantial growth. The average MLS price will reach $262,000 in 2007, for an increase of 2.3% over the 2006 level. Prices are therefore expected to keep rising, but at a slower pace than in recent years.

A sample of houses for sale in December 2006 from the Ottawa Real Estate Board's MLS Listings profiling Carleton Place can be found in Appendix A. Based on these listing prices, it is clear that the range of resale housing in Carleton Place is generally between $150,000 and $250,000. From the MLS listings, the average price of resale housing in Carleton Place was calculated to be $207,885 with an average of three bedrooms and two bedrooms. The median price of resale housing in Carleton Place was $188,900 with three bedrooms and two bedrooms. **Generally, resale units are at least $48,115 less than the same unit in Ottawa.**

2.5 Households by Size

Table 17 profiles Carleton Place Households. Total households increased by an average of 57, or 1.8%, annually from 3,150 in 1996, to 3,435 in 2001. The number of two-person households increased, and that of four & five persons decreased in this time period.

Table 17: Number of Households By Size: Carleton Place 1996-2001

Size	1996		2001		Average Annual Change: 96-01	
	No.	%	No.	%	Numeric	%
One	715	22.7	770	22.4	11	1.5
Two	970	30.8	1,155	33.6	37	3.8
Three	540	17.1	585	17	9	1.7
Four & Five	860	27.3	860	25	--	--
Six & More	65	2.1	65	1.9	--	--
Total	**3,150**	**100**	**3,435**	**100**	**57**	**1.8**
Average Size	**2.68**	**--**	**2.64**	**--**	**-0.008**	**-0.3**

Source: Market Research Corporation based on census data, 1996 and 2001, Statistics Canada

By 2006, the total number of households had increased to 3,840 reflecting an average annual growth of 81 or 2.4%. For the period 2006-2011, we estimate an average annual increase of 112 households or 2.9% in Carleton Place:

Table 18: Forecasts of Households By Size: Carleton Place, 2006-2011

Size	Year				Average Annual Change: 06-11	
	2006	2008	2009	2011	Numeric	%
One Person	900	940	970	1,070	34	3.8
Two Persons	1,265	1,355	1,425	1,540	55	4.3
Three Persons	700	780	800	850	30	4.3
Four & Five Persons	940	940	930	920	-4	-0.4
Six or More Persons	35	35	30	20	-3	-8.6
Total Households	**3,840**	**4,040**	**4,155**	**4,400**	**112**	**2.9**
Total Population	10,100	10,550	10,800	11,300	240	2.4
Average Household Size	2.63	2.61	2.6	2.57	-0.012	-0.5

Source: Market Research Corporation

The largest growth found was in two-person households (i.e., 55 or 4.3% annually). Single-person households often require rental housing, and others are mostly homeowners. **On an average annual basis therefore, we estimate that Carleton Place will need 20-30 rental, and 70 to 100 owner-occupied units to the year 2011.**

3 Community Telephone Survey

In order to better understand socio-demographic, economic, and lifestyle characteristics of Carleton Place residents, a telephone survey was conducted involving 404 households (Appendices B and C).

3.1 Characteristics of the Respondents

The general characteristics of respondents are summarized in Table 19. As demonstrated:

Table 19: Characteristics of the Survey Respondents

Characteristics	Number	% of Total
A. Gender		
Females	246	60.9
Males	158	39.1
Total	404	100
B. Age Distribution of Respondents' Household Members	-	
Under 18 Years	268	24
19-29	150	13.4
30-49	331	29.7
50-65	258	23.1
65 & Older	108	9.7
Refused	0	--
Total	1,115	100
Average Age[1] (years)	37.9	--
Average Household Size (person)	2.76	--
C. Highest Level of Education		
High School or Less	133	32.9
Community College or Less	132	32.7
University Bachelor or Less	119	29.4
Masters Degree	12	3
Ph.D.	3	0.7
Refused	5	1.2
Total	404	100
D. Employment Status		
Full Time Members of Households	496	44.5
Part Time Members of Households	79	7.1
Not Working[2] Members of Households	540	48.4
Total Members of Households	1,115	100
Employment Participation Rate (%)	77.8	--

Source: Market Research Corporation based on the telephone survey of Nov. 2006

[1] Used 9 for "Under 18" and 75 for "65 & Older" categories.
[2] Includes the unemployed, under 18, and the retired residents.

1. More than six in ten respondents were female, which is within the range of 50-70% expected from such surveys;
2. The average age of respondents is almost 38, and their average household size, 2.76 persons;
3. Carleton Place residents are highly educated with almost two in three (65.8%) having community college to PhD level education (the remaining one-third of the 15+ year olds are in high school);
4. The 404 survey respondents represent a total population of 1,115. Roughly 4 in 10 of this population are employed full-time, and 1 in 10 are employed part-time. The overall employment participation rate of the residents is 77.8% which is quite high; and
5. The high levels of education and employment of the respondents is also reflected in the overall average household income of at least $74,780 or a per capita income of $27,094.

From the survey results, residents of Carleton Place are young, family-oriented, highly educated and generally affluent.

3.2 Income and Retail Expenditures

There is a significant variation in the incomes of the households in Carleton Place. As demonstrated in Table 20:

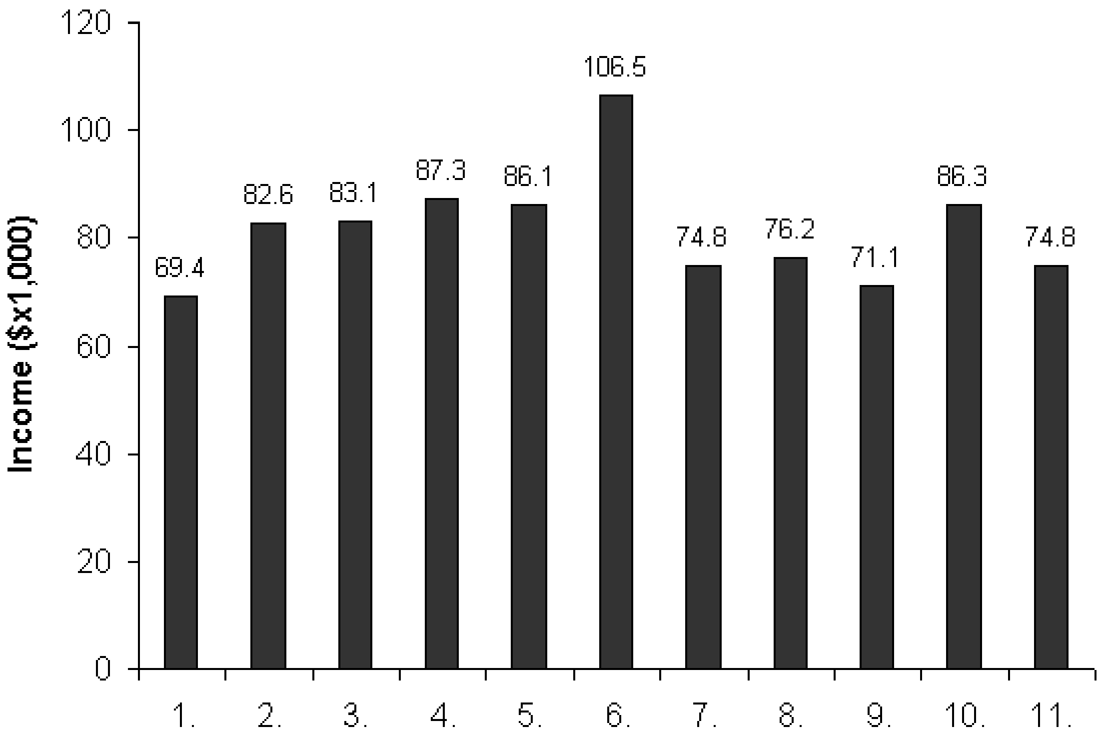
Table 20: Household Income Distribution of the Respondents

Income Class	Number	% of Total
A. Distribution		
Under $30,000	27	6.7
30,000-50,000	57	14.1
50,000-80,000	77	19
80,000-100,000	60	14.8
Over 100,000	73	18.1
Refused	110	27.2
Total	404	100
B. Average Household Incomes of:		--
Female Respondents (all)	$69,410	--
Male Respondents (all)	$82,645	--
Full Time Employed: All	$83,135	--
Full Time Employed: Working In Ottawa	$87,310	--
University Educated	$86,085	--
High Income Households: Over $80,000	$106,470	--
Favouring Boundary Expansion	$74,830	--
Opposing Boundary Expansion	$76,170	--
Believe Not Enough Retail Stores In Carleton Place	$71,125	--
Believe Right Number of Retail Stores In Carleton Place	$86,270	--

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

Figure 1 shows the average household income of the respondents of the telephone survey. A legend for Figure 1 can be found following it.

Figure 1: Average Household Income of the Respondents



Source: Market Research Corporation based on the telephone survey of Nov. 2006.

Figure 1 Legend	
1. Female	7. Favouring Boundary Expansion
2. Male	8. Opposing Boundary Expansion
3. Full-Time Employed (all)	9. Believe There Are Not Enough Retail Stores In Carleton Place
4. Full-Time Employed In Ottawa Only	10. Believe There Are The Right Number of Retail Stores In Carleton Place
5. University Educated	11. All 404 Respondents Combined
6. High Income Respondents (over $80,000)	

Key indicators are:

1. One in 15 households (6.7%) make less than $30,000 a year;
2. Close to half (48.6%) make between $30,000 to $100,000 a year;
3. One in five (18.1%) make over $100,000;

Regarding female respondents, since fewer of them work (Table 19), their overall average income is lower. It is therefore likely that since their income is lower than the average, they would like more retail stores (and probably discount) in Carleton Place.

Due to lack of sufficient retail stores in Carleton Place, employment patterns, and other factors, Carleton Place residents spend significant amounts of total retail expenditures at shopping facilities outside the Town, primarily in Ottawa. The estimated overall annualized expenditure is $7,463 per respondent, or $2,704 per capita (Table 21). Most of the identified subgroups, especially males and high income households, spend much more than this average. Those who believe that there is just the right number of retail stores in Carleton Place spend the least amount outside ($4,548).

At an average of $2,704 per person, it is estimated that Carleton Place loses an estimated $27.3 million of its residents' total retail expenditures to shopping facilities outside in 2006.

Table 21: Spending At Stores Outside Carleton Place

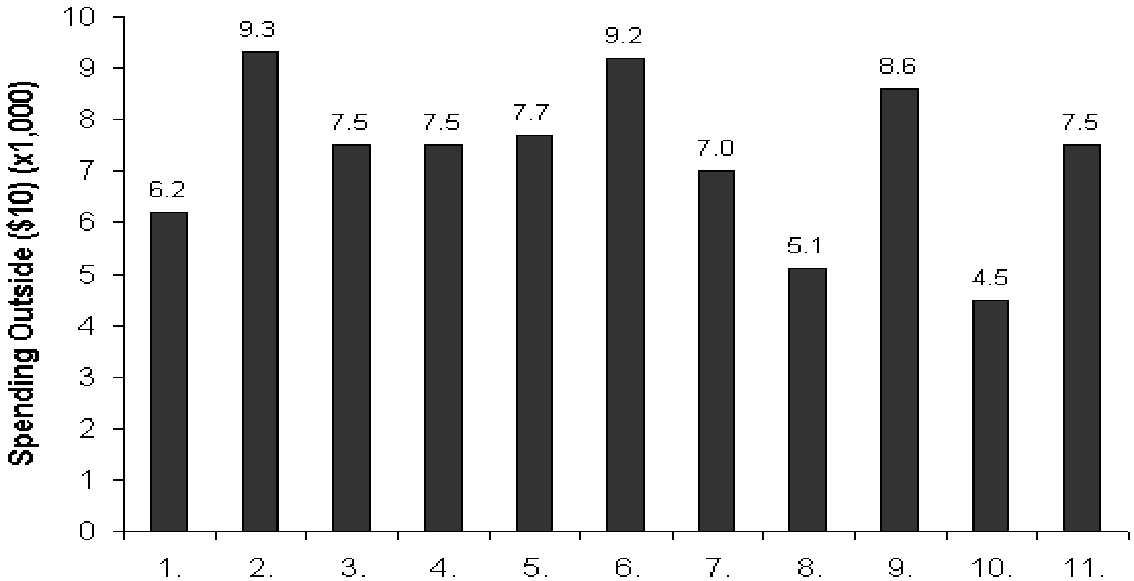
Respondents	No. In Sample	Spent Last Month ($)	Annualized[3] Spending ($)
A. Overall			
All Who Shopped Outside	305	824	9,886
All Respondents[4]	404	622	7,463
Per Capita	1,115	225	2,704
B. Average Spending Per Respondent:			
Female	246	521	6,252
Male	158	779	9,348
Full-Time Employed	350	623	7,476
Full-Time Employed In Ottawa	211	628	7,536
University Educated	134	639	7,668
High Income (over $80,000)	133	768	9,216
Favouring Boundary Expansion	196	586	7,032
Opposing Boundary Expansion	160	428	5,136
Believe Not Enough Retail Stores In Carleton Place	285	715	8,580
Believe Right Number of Retail Stores In Carleton Place	104	379	4,548

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

Figure 2 provides a bar graph profiling average annual spending of respondents at store outside of Carleton Place. A legend for Figure 2 can be found following it.

Figure 2: Average Annual Spending Per Respondent at Stores Outside Carleton Place

[3] Last month's spending multiplied by 12.
[4] Includes those who did not shop outside Carleton Place last month (i.e., overall average).



Source: Market Research Corporation based on the telephone survey of Nov. 2006.

Figure 2 Legend	
1. Female	7. Favouring Boundary Expansion
2. Male	8. Opposing Boundary Expansion
3. Full-Time Employed (all)	9. Believe There Are Not Enough Retail Stores In Carleton Place
4. Full-Time Employed In Ottawa Only	10. Believe There Are The Right Number of Retail Stores In Carleton Place
5. University Educated	11. All 404 Respondents Combined
6. High Income Respondents (over $80,000)	

3.3 Employment Status

As indicated in Table 22, almost 88% of residents in Carleton Place aged 20-64 work. As shown in the following table, most of the full-time employed work in the City of Ottawa.

Table 22: Employment Status of Carleton Place Telephone Survey Respondents

Place of Work	Status	Number Employed 1	2	3	4	5+	Total Households
Carleton Place	Full-Time	75	35	3	2	--	115
Carleton Place	Part-Time	43	5	--	--	--	48
Ottawa	Full-Time	119	86	5	1	--	211
Ottawa	Part-Time	11	2	--	--	--	13
Other Places[5]	Full-Time	24	--	--	--	--	24
Other Places	Part-Time	11	--	--	--	--	11
Total	Full-Time	218	121	8	3	--	350
Total	Part-Time	65	7	--	--	--	72
Carleton Place's Share of Total = 32.8% for Full-Time							
Carleton Place's Share of Total = 66.7% for Part-Time							
City of Ottawa's Share of Total = 60.3% for Full-time							
City of Ottawa's Share of Total = 18.0% for Part-time							
Other Places' Share of Total = 6.8% for Full-Time							
Other Places' Share of Total = 15.3% for Part-Time							

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

Tables 23 and 24 describe gender and employment share of Carleton Place telephone survey respondents respectively. Carleton Place's share of employment is high only for the part-time employed residents:

Table 23: Gender of Carleton Place Full-Time Employed Respondents

Gender	Working Everywhere	Working In Ottawa
Female	43%	44%
Male	57%	56%

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

Table 24: Employment Share of Carleton Place Telephone Survey Respondents

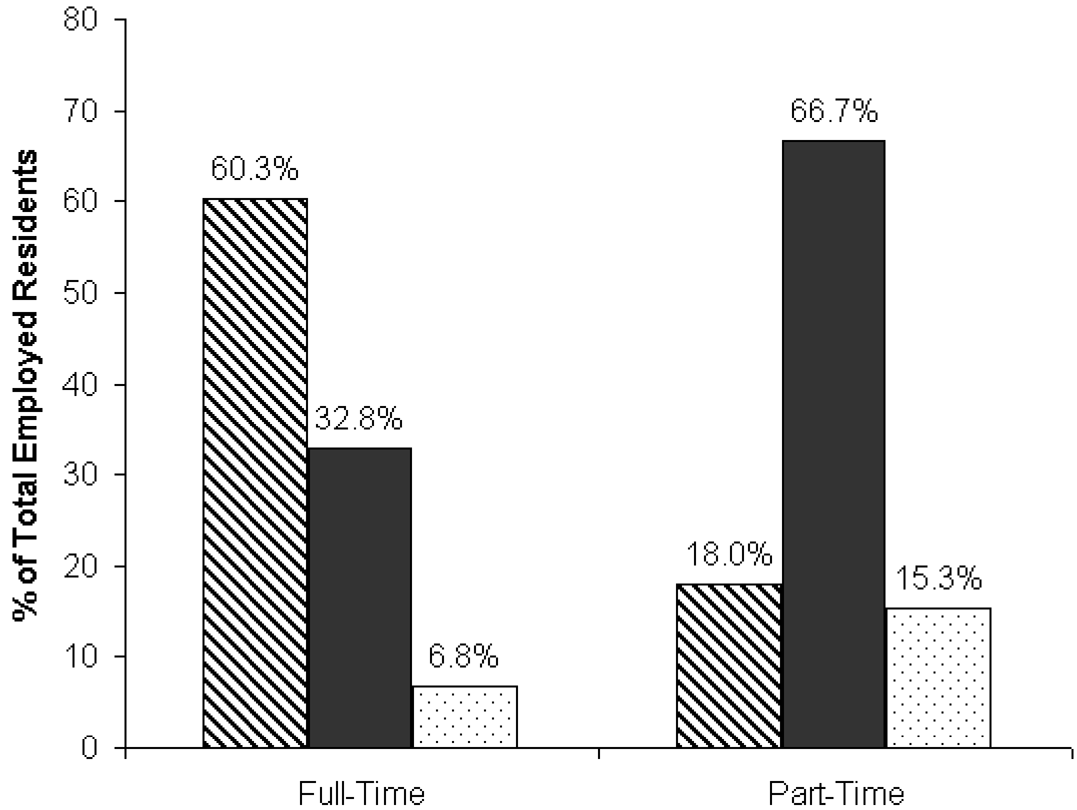
Employment Status	% Share: Ottawa	Carleton Place	Elsewhere
Full-Time	60.3%	32.8%	6.8%
Part-Time	18.0%	66.7%	15.3%

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

[5] Six in Perth, two or one in 12 other locations between Hull, Que. And Brockville, Ont.

Figure 3 shows work locations of employed Carleton Place residents.

Figure 3: Work Location of Employed Residents of Carleton Place



Source: Market Research Corporation based on the telephone survey of Nov. 2006.

Figure 3 Legend	
	City of Ottawa
	Carleton Place
::::::::::::::::::::::::::	**Other Places**

More men than women work on a full-time basis, both in Ottawa, as well as other places. The overall distribution of the full-time employed residents is 56.5% males, and 43.5% females.

3.4 Perceptions of Carleton Place

Carleton Place is liked mostly for:

a. Its small size (33.2%);
b. Friendliness of its people (14.6%);
c. Its rural/country location (12.4%).

These three attributes were mentioned by more than six in ten (60.2%) of the respondents. The positive attributes mentioned are provided in Table 25:

Table 25: Most Liked Qualities of Carleton Place

Qualities/Strengths	No. of Respondents	% of Total
Its small size	134	33.2
Friendliness of the people	59	14.6
Rural/Country Location	50	12.4
Strong Sense of Community	25	6.2
Natural Amenities/Beauty	21	5.2
Closeness to Ottawa	11	2.7
Heritage/Historical buildings	5	1.2
Other		
- Convenience/Easy to get around	15	3.7
- Safety	12	3.0
- Quiet	11	2.7
- Everything within walking distance	10	2.5
- Lifestyle/Quality of life	10	2.5
Comments By Fewer Than 5 Respondents	27	6.7
No Comments or Opinions	14	3.5
Total	**404**	**100.0**

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

What respondents do not like about Carleton Place are (Table 26):

d. Lack of retail store choice (10.6%);
e. The main street (6.2%);
f. Lack of activities (2.2%).

These perceived negative attributes were mentioned by fewer than two in ten (19.0%) respondents, and following is a list of all negative attributes mentioned:

Table 26: Least Liked Features of Carleton Place

Features/Weaknesses	No. of Respondents	% of Total
Lack of Retail Store Choice	43	10.6
The Main St.	25	6.2
Lack of Activities/Boring	9	2.2
Stores Not Being Open In Evenings	7	1.7
Not Enough Work Opportunities	6	1.5
Other		
- Traffic & Road Conditions	41	10.1
- Vandalism	26	6.4
- Too Much Development/Growth	21	5.2
- Too Many Chain Stores	7	1.7
- Too Isolated	7	1.7
- The Downtown	7	1.7
- Rude/Inconsiderate Drivers	6	1.5
Comments By Fewer Than 5 Respondents	65	16.1
No Comments or Opinions	134	33.2
Total	**404**	**100.0**

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

From a statistical point of view, respondents were three times as likely to think positive/enjoy Carleton Place as to dislike it. **However, dissatisfaction by 19% is too high, in our experience, as it indicates that two in ten residents want/need/wish for major changes in Carleton Place;**

The top five opportunities which **all** residents of Carleton Place (not only the above 19%) want are:

g. Improvement of transportation (19.5%);
h. Promotion of small business (14.7%);
i. Improvement of the Main Street (14.4%);
j. Promotion of tourism (14.2%); and
k. Attracting more large retail stores (8.6%).

Seven in ten (71.4%) respondents' suggestions related to the above five opportunities. A list of all opportunities mentioned is provided in Table 27:

Table 27: Most Important Opportunities For Carleton Place

Opportunities	No. of Mentions	% of Total
1. Improvement of Transportation (roads and buses)	77	19.5
2. Promote Small Businesses	58	14.7
3. Improve the Main St.	57	14.4
4. Promote Tourism	56	14.2
5. Attract More Large Retail Stores	34	8.6
6. Revamp Waterfront	21	5.3
7. Maintain a Balance Between Growth and Small Town Uniqueness	15	3.8
8. Create More Green Areas	14	3.5
9. Attract More Specialty Stores Downtown	12	3
10. Create More Job Opportunities	11	2.8
11. Build Larger Youth Recreation Centre	8	2
12. Improve Design of New Homes	7	1.8
13. Preserve Heritage Buildings	5	1.3
14. Others[6]	20	5.1
Total	**395**	**100**

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

3.5 Lifestyle Characteristics and Preferences

One-third (38.4%) of respondents indicated that there is a lack of arts and cultural programs in Carleton Place;

Table 28: Availability of Arts and Culture In Carleton Place

Rating	No. of Households	% of Total
There Are Plenty	95	23.5
There Is the Right Amount	68	16.8
There Are Not Enough	155	38.4
Not Sure/No Opinion	86	21.3
Total	**404**	**100**

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

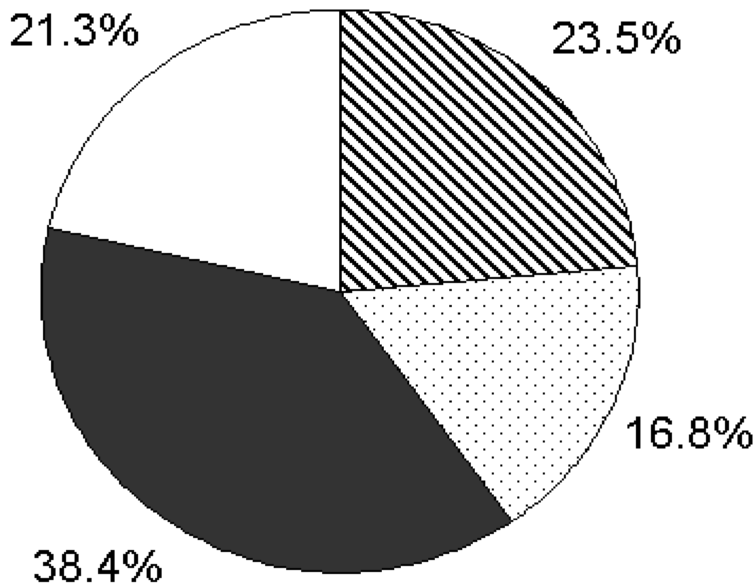
Top Five Comments offered on Arts and Culture in Carleton Place:

1. Target them to the youth (26 or 6.4%);
2. Offer more variety (25 or 6.2%);
3. Offer more children's events (16 or 4.0%);
4. Offer more theatre (9 or 2.2%); and
5. Provide more financial support (9 or 2.2%).

[6] Mentioned fewer than 5 times each.

Figure 4 provides the availability of arts and culture in Carleton Place in pie graph form with the same results as Table 28. A legend is provided following Figure 4.

Figure 4: Availability of Arts and Culture In Carleton Place



Source: Market Research Corporation based on the telephone survey of Nov. 2006.

Figure 4 Legend
There Are Plenty of Arts & Cultural Programs & Services
There Is The Right Amount of Arts & Cultural Programs & Services
There Are Not Enough Arts & Cultural Programs & Services
Not Sure/No Opinion

Three-quarters of households (74.7%) in Carleton Place have access to the internet, and half (45.8% of all households) have high speed services at home as shown in Table 29;

Table 29: Carleton Place access to Basic and High Speed Internet

Have Access	Internet		High Speed At Home	
	No.	%	No.	%
Yes	302	74.7	185	45.8
No	100	24.7	146	36.1
Refused	2	0.5	73	18.1
Total	**404**	**100**	**404**	**100**

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

Household in Carleton Places have 1.91 cars and/or trucks. Those who work full-time have 2.04 or more;

Table 30: Carleton Place Presence of Vehicles

Number (vehicles)	No. of Households	% of Total
One	118	29.2
Two	197	48.8
Three or More	68	16.8
Refused	21	5.2
Total	**404**	**100**
Average[7] (overall)		1.91
Average For Full-Time Employed		2.04
Average For Full-Time Employed In Ottawa		2.05

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

The vast majority of the respondents (86.4%) indicated that Carleton Place **should** try to create more jobs in the Town;

Table 31: Job Creation in Carleton Place

Response	Repiles	% Replies
Carleton Place Should Create More Jobs	349	86.40%
Carleton Place Should Not Create More Jobs	17	4.20%
Undecided On the Issue of Job Creation	38	9.40%

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

The top three desired types of jobs to be created (Table 32) are:

a. High Technology (30.8%);
b. Manufacturing (27.5%); and
c. Clean industry jobs (14.2%).

Table 32: Most Desired Jobs to be Created in Carleton Place

Type	No. of Mentions	% of Total
High Technology	160	30.8
Manufacturing	143	27.5
Clean Industries	74	14.2
Others	143	27.5
- Retail Work	80	15.4
- Trades	12	2.3
- Small Business	11	2.1
- Administrative	10	1.9
- High Paying	10	1.9
- Health Care	10	1.9
- Others (fewer than 5 mentions)	10	1.9
Total	**520**	**100.0**

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

[7] Used 3.2 for the "Three or More" category, and excluding the "Refused" category.

For the purposes of job creation, close to half of respondents (48.5%) indicated that Carleton Place's geographic boundaries **should** be expanded. However, a large minority (39.6%) are not in favour of this. More information, exchanges of ideas and dialogues are needed to arrive at definitive conclusions in this regard.

Table 33: Whether Carleton Place's Geographic Boundaries Should Be Expanded

Opinion	No. of Households	% of Total
Yes, It Should Be Expanded	196	48.5
No, It Should Not Be Expanded	160	39.6
Not Sure/No Opinion	48	11.9
Total	**404**	**100**

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

3.6 Perceptions of Retail Stores

The majority of respondents (70.5%) indicated there are not enough retail stores in Carleton Place at the present time (Table 34):

Table 34: Rating the Quantity of Retail Stores in Carleton Place

Ratings	No. of Households	% of Total
There Are Not Enough	285	70.5
There Is Just the Right Number	104	25.7
There Are Too Many	7	1.7
Not Sure/No Opinion	8	2
Total	**404**	**100**

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

Half (49.7%) of respondents indicated that the quality of the existing retail stores is "good" and one in ten (9.4%) rated it "excellent". One-third (35.6%) however, believe the quality is "average", and 4.5% of respondents believe the quality is "poor";

Table 35: Rating the Quality of Retail Stores in Carleton Place

Ratings	No. of Households	% of Total
They Are Excellent	38	9.4
They Are Good	201	49.7
They Are Average	144	35.6
They Are Poor	18	4.5
Not Sure/No Opinion	3	0.7
Total	**404**	**100**

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

The top three complaints about retail stores from all respondents (i.e., not only from those who are dissatisfied) are:

a. Limited choice of shopping places (33.2%);
b. Limited variety/mix of products (29.9%); and
c. Limited store hours (18.6%).

A list of complaints is provided in Table 36:

Table 36: Criticisms of the Retail Stores in Carleton Place

Criticisms	No. of Mentions	% of Total
Limited Choice of Shopping Places	82	33.2
Limited Variety/Mix of Products	74	29.9
Limited Store Hours	46	18.6
Poor Service	16	6.5
Other	29	11.7
- Parking Problems	21	8.5
- Not Enough Stores	5	2
- Poor/Unimaginative Store Interiors	3	1.2
Total	**247**	**100**

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

A variety of desirable additional retail and service businesses were mentioned by respondents. The top five in terms of the frequency of mentions are:

a. Clothing stores (all types) 23.7%
b. A Wal Mart store 19.5%
c. A Zeller's 10.5%
d. Shoe stores 5.6%
e. Specialty shops 5.0%

The complete list of desired additional stores is provided in Table 37.

Table 37: Desired Additional Retail and Service Stores in Carleton Place

Store Type or Name	No. of Mentions	% of Total
A. Top 10 Mentions	387	77.9
1. Clothing Stores	118	23.7
- More Stores (not specified)	40	8
- Women's Clothing	23	4.6
- Men's Clothing	22	4.4
- Family Clothing	11	2.2
- Children's Clothing	8	1.6
- High End Clothing	6	1.2
- Plus Size Clothing	3	0.6
- Lingerie Clothing	3	0.6
- Teenager's Clothing	2	0.4
2. Wal-Mart	97	19.5
3. Zeller's	52	10.5
4. Shoe Store	28	5.6
5. Specialty Shops	25	5
6. Department Stores	19	3.8
7. Arts & Craft Stores	15	3
8. The Home Depot	14	2.8
9. Furniture Stores	12	2.4
10. Reitman's Store	7	1.4
B. Mentioned 2-10 Times	49	9.9
1. Big Box Stores	6	1.2
2. Sears Department Store	5	1
3. Giant Tiger Store	5	1
4. Home Sense	4	0.8
5. RONA	4	0.8
6. Sporting Goods Store	3	0.6
7. Costco	3	0.6
8. Chain Store	3	0.6
9. Gap Store	3	0.6
10. McDonald's Restaurant	3	0.6
11. Discount Stores	2	0.4
12. Fabric Stores	2	0.4
13. Quality Restaurants	2	0.4
14. Toy Stores	2	0.4
15. Winners (clothing)	2	0.4
C. Mentioned Once	61	12.3
Grand Total	**497**	**100**

Source: Market Research Corporation based on the telephone survey of Nov. 2006.

4 Retail Market

4.1 Retail Industry Trends

The retail industry is fiercely competitive. Through mergers, buy-outs and store brand-names as examples, attempts are made at increasing market shares and/or reducing competition (the take-over of K-Mart by Zeller's is a good example). However, due to demographic changes, lifestyle preferences, factors related to aging, the environment, transportation, and others, there is continuous demand for new products and services by consumers. In response, the retail industry presents not only new products and services to the market, but also new formats of merchandizing.

Traditionally, there were three types of shopping centres in addition to main street retail. These are:

1. **Regional shopping centres** are enclosed, over 375,000 sq. ft. in size, and anchored by at least one major department store (according to definitions by the Urban Land Institute, and the International Council of Shopping Centres). There is no regional shopping centre in Carleton Place. The last of these centres in the Ottawa Region was the Rideau Centre, built in 1983. Furthermore, **there is no proposal to develop another centre of this type anywhere within or close to the National Capital region including within the Town of Carleton Place** (the industry is rarely building such centres anywhere in North America);

2. **Community shopping centres** are between 100,000 and 375,000 sq. ft. in size, anchored by a junior department store and/or a supermarket. In Carleton Place, the Canadian Tire and Your Independent Grocer stores on Highway 7 make up the closest facility to a community shopping centre;

3. **Neighbourhood shopping centres** are between 30,000 and 100,000 sq. ft. and anchored by a supermarket, and/or a drug store. The Mews is one such facility in Carleton Place.

Within some neighbourhoods, there are also small plazas up to 30,000 sq. ft., with up to 10 units, strictly for the local and daily shopping needs of the surrounding residents.

During the last 10-15 years, many new, innovative approaches to retailing have emerged. The following are the key examples in this regard:

A. Emergence / Popularity of Big Box Stores:

These stores are large, offer products in a no-frills environment, with little packaging and in large quantities. The unit price of the product offered is (or is perceived to be) low. Often products are delivered to these stores directly by the manufacturer, in original packaging materials, and increasingly based on 'just-in-time' delivery systems. These stores function almost as distribution centres, since they provide very little service (thus significantly reducing labour costs), and get the manufacturer to deliver and set up the products in-store, and reclaim what is not sold within a certain time period (applicable more to perishable products). By dealing directly with suppliers and manufacturers, middlemen are virtually eliminated, providing additional cost savings (i.e. price reduction).

These stores are typically developed on their own site, are heavily automobile-oriented, and provide large amounts of parking as close to the store as possible. The most well-known of big-box stores is Price Club/Costco of which there are presently four in the National Capital Region. The Price Club on Innes Rd. (now called Costco) in the former City of Gloucester, which was opened in 1992, was the first big-box store in the National Capital Region. **There are no big-box stores in Carleton Place at the present time.**

B. Emergence / Popularity of Dollar Stores:

These stores are often between 1,500 and 3,000 sq ft in size, offering a wide variety of products (mostly low quality imports) at a cost of $1.00 or $2.00 or up to $5.00 each. At the present time, there are few of these stores in Carleton Place, and future developments can be expected.

C. Emergence of Power Centres:

These centres range in size from approximately 200,000 to 500,000 sq. ft. They consist of several big-box stores which may or may not be physically connected to one another, and smaller, mostly service stores. Each store has its own parking and the centre as a whole operates as a number of independent big-box stores in close proximity to one another. Since there is no common mall area, the design of these centres is not conducive to walking from one store to another. **Power centre development has been very strong throughout Canada since the early 1990s. At the present time, there is no power centre in Carleton Place.**

D. Stand-Alone Stores:

These are large, automobile-dependent stores, and often built along major roadways with high visibility. They have many of the same characteristics as Costco stores, and are not all new. Some are new or big-box types, and others are more traditional, such as Leon’s furniture stores. **In Carleton Place, Shoppers Drug Mart on McNeely Ave. is a new stand-alone store.**

E. Emergence of Specialty Retail Stores, such as The Body Shop (which caters to the environmentally and health conscious consumers), Talbot’s (a women’s clothing store), and Mountain Equipment Co-op store are other examples of high quality, luxury and upscale stores which cater to upscale markets (as well as to other market segments who have a need to occasionally reward themselves).

F. Re-merchandising is another strong trend in response to changing consumer taste. Sears department stores have virtually eliminated their hardware department, reduced the home improvement and other departments, and substantially increased their fashion and other soft goods departments. Tip Top Stores, Harry Rosen and several others are among other major stores which have and/or are presently in the process of changing products, and concurrently, their image. **These moves are essentially designed to achieve three objectives:**

a) to retain existing market share;
b) to re-capture lost market share; and
c) to increase market share.

G. Twinning is another increasingly visible trend in the retail industry. It involves two or more retail stores sharing space, reducing delivery, labour and other costs, while at the same time offering more choice to the consumer. Examples include McDonald's restaurants and Wal-Mart stores, the Great Canadian Bagel Company and Second Cup Stores, Chapters Book Stores and Starbucks Coffee Shops.

H. Truck Load Sales were especially common in the 1992-1995 period. Typically large companies, including Harry Rosen which is known for upscale clothing, offer sales in several trailer trucks in parking lots at various places for one to three days. A large volume of merchandise is often sold at these events.

I. Temporary Leasing during in the Christmas season, is another retail industry trend to cut costs. Rather than entering into a five year lease, which is standard practice, some retailers lease space for a number of weeks, or on a month-to-month renewal basis. This arrangement benefits the landlord, the retailer, and ultimately the consumer.

J. Operating In Industrial/Business Parks

Another trend in the retail industry is increased use of land/space in industrial or business parks for retail purposes. These retail businesses often need large amounts of space for storage and wholesaling. However, due to high visibility from passing traffic, the large market base provided by the industrial/business park's employees, and the low cost of offering retail services in addition to storage and wholesale, retail operations are added, or expanded. **In an increasing number of cases, industrial zoned lands are re-zoned to commercial to permit shopping centre development.**

E-Commerce

Purchases through the Internet are a rapidly growing trend, especially in the USA. At the present time, most e-commerce is still conducted amongst businesses. For consumers, the most popular items are books, compact disks, computers, software programs, games and other products whose appeal is not based on their aesthetics. This trend is continuously becoming more popular with consumers everywhere.

The above methods of merchandising and the new retail facilities are in addition to traditional facilities and formats. There are still neighbourhood, community and regional shopping centres, commercial strips, as well as downtown main street retail sectors. All of these facilities exist and compete with one another. **This is normal since the retail industry is dynamic, and it must change continuously to serve the changing values and preferences of consumers.**

4.2 Residual Demand Analysis

One of the most established methods to conduct a retail study is the Residual Demand Analysis. Based on analyses of income, expenditures, sales, and the existing retail facilities, this methodology identifies the extent to which an area's retail and service needs are met by retail category and time frame. On this basis, any residual (i.e., excess or unmet) demand is identified. The key elements of this methodology are addressed below.

4.3 Per Capita Expenditures

Demand for retail products and services depend on numerous socio-demographic and economic factors (e.g., age, relationship status, income). The most influential factor in this regard, however, is income. Up to a point, the higher the average income of a household or an individual, the more this household/individual spends on retail products and services, and vice versa. This direct and strong relationship has been proven by numerous research studies by our firm as well as by other organizations.

Based on data from Statistics Canada, the average per capita expenditures on various products and services can be calculated. Table 38 below shows these expenditures for the Province of Ontario:

Table 38: Annual Per Capita Expenditures, 2005

	Province of Ontario	
Trade Groups	**Total ($M)**	**Per Capita ($)**
A. Retail Products		
Supermarkets	21,451.10	1,717
All other food stores	2,647.00	212
Drugs and patent medicine stores	9,757.50	781
Beer, wine, liquor[8]	6,255.10	501
Shoes, Accessory & Jewellery	2,147.20	172
Clothing stores	6,446.50	516
Home Electronics & Appliance Stores	3,852.50	308
Home furnishing stores	2,060.00	165
Furniture stores	3,184.10	255
Computer & Software Stores	449.7	36
Home Centres & Hardware Stores	6,186.20	495
Building Material & Garden Stores	1,660.00	133
Sporting goods, hobby & music	3,579.60	286
Department Stores[9]	9,030.40	723
Motor and recreational vehicles	31,373.30	2,511
Gasoline & service stations	13,130.80	1,051
General merchandise stores	8,421.00	674
Other retail stores	3,523.50	282
Subtotal: Products	135,155.50	10,818
B. Retail Services		

[8] Based on 1% increase from 2004, excluding catering sales.
[9] For the month of December 2005, the expenditure is estimated.

Trade Groups	Province of Ontario	
	Total ($M)	**Per Capita ($)**
Restaurants, bars, other eateries[10]	14,456.10	1,157
Personal care[11]	NA	604
Education and culture	NA	330
Sports and recreation	NA	1,796
Reading and entertainment	NA	388
Subtotal: Services	NA	4,275
Grand Total: all stores	**NA**	**15,093**
Ontario's Estimated Population	**12,494,228**	**--**

Source: Market Research Corporation based on Statistics Canada's Catalogues No. 63-005, 63-233-XPB, 63-202-SPB, 13-001 XPB, and 63-224-XPB (Market Research Handbook, 2004), and specific data requests from Statistics Canada.

More recent data is not yet available. As well, data is not available for Carleton Place, and the standard methodology is to estimate them based on income comparisons.

While the average per capita expenditures figure is not available for Ontario, we believe that the differences are not significant, and thus we have assumed that the per capita expenditures in Carleton Place and nearby areas are about the same as in the Province of Ontario as a whole. Other aspects of this study further confirm this assumption. However, even if the average per capita incomes are not very close, the expenditures can be (e.g., a 30% income differential does not reflect 30% differential in expenditures at supermarkets, gasoline consumption, etc.).

4.4 Trade Area

The Town of Carleton Place functions as a commercial hub for surrounding villages and towns (this function has recently become stronger due to the opening of a new Your Independent Grocer and a new Canadian Tire store along Highway 7). On a conservative basis, we have defined the trade area for the retail facilities in Carleton Place to consist of Carleton Place and the Township of Beckwith. Combined, they have an estimated 2006 population of 11,300:

[10] Based on Canada-wide data for 2004, increased by 1% for 2005.
[11] Since the trade area income is about the same as in Ontario, the per capita expenditures have been assumed to be about the same in this study.

Table 39: Population of Retail Trade Area

Year	Trade Area: Carleton Place	Beckwith	Total
2001	9,080	6,046	15,126
2006	10,100	6,290	16,390
2008	10,550	6,550	17,100
2009	10,800	6,700	17,500
2011	11,300	7,000	18,300

Source: Market Research Corporation based on the 2001 census data, information from the Town of Carleton Place and Manifold Data Mining Inc *SuperDemographics 2006.*

4.5 Forecasts of Per Capita Expenditures

The categories in the following table have more manageably been combined into four major store types. As well, based on historical experience and normal industry expectations, they have been projected to the year 2011 as indicated below:

Table 40: Per Capita Expenditures By Major Store Types: Trade Area

Store Type	Year and per Capita Spending ($)			
	2006	**2008**	**2009**	**2011**
FCTM	3,307	3,374	3,407	3,476
AHIM	5,065	5,219	5,297	5,376
DSTM	2,554	2,580	2,593	2,619
Services	4,403	4,496	4,503	4,571
Total (In 2006 dollars)	**15,329**	**15,669**	**15,800**	**16,042**

FCTM: Food & Convenience Type Merchandise consisting of supermarkets, corner stores, specialty food stores, drug stores, beer, wine and liquor stores (increased by 3% from 2005 and by 1.0% annually to 2011, excluding inflation).

AHIM: Automotive & Home Improvement Merchandise consisting of new and used motor vehicles, repairs, gasoline, furniture, home electronics, appliances, home centres and building materials (increased by 3% from 2005 and by 1.5% annually to 2011, excluding inflation).

DSTM: Department Store Type Merchandise consisting of shoe, clothing, computer, department, general merchandise and all other retails stores (increased by 3% from 2005 and by 1.0% annually to 2011, excluding inflation).

Services: Consists of all establishments in part B of Table 38 (increased by 3% from 2005 and by 0.75% annually to 2011, excluding inflation).

Source: Market Research Corporation based on Table 38 and other research for this study.

4.6 Total Retail and Service Expenditures

Based on the population forecasts in Table 39 and the forecasts of per capita expenditures in Table 40, we have estimated the total expenditure volume of trade area residents:

Table 41: Estimated Total Expenditure Volumes in Trade Area

	Year ($M)			
Store Type	**2006**	**2008**	**2009**	**2011**
Total Population	16,390	17,100	17,500	18,300
FCTM	54.2	57.7	59.6	63.6
AHIM	83	89.2	92.7	98.4
DSTM	41.9	44.1	45.4	47.9
Services	72.2	76.9	78.8	83.6
Total[12]	**251.3**	**267.9**	**276.5**	**293.5**

Source: Market Research Corporation based on Tables 39 and 40.

These figures are expressed in the **constant** value of the Canadian dollar in 2006 (i.e., inflation is **not** included). As well, they represent the residents' expenditures at stores within, as well as outside Carleton Place.

As indicated, trade area residents are estimated to have spent $251.3 million in 2006 at various retail and service stores. Furthermore, this spending is estimated to increase by $42.2 million or 16.8% to $293.5 million by 2011 (i.e., by $8.4 million per year from 2006 to 2011).

4.7 Total Supportable Space

The next issue to address in this analysis is the determination of how much space trade area residents' expenditures support. This depends on sales of various retail and service stores which can be different from one place to another. There are however, industry productivity rates (i.e., annual sales per sq. ft.) for this purpose. For example, a supermarket is supposed to be economically viable at an average sales per sq. ft. of $450 to $500 annually. Of course, some older stores with low rents and low other costs may be profitable at an average productivity rate of less than $450, while a new one may not initially be viable at a rate of $550 (due to high rents, mortgage, and other costs). Using the range of viable productivity rates as guidelines, we have estimated the total supportable floor space by the trade area residents' expenditures in the following table.

[12] Refers to the trade area residents' spending at stores within, as well as outside the trade area, especially in the City of Ottawa.

Table 42: Estimated Total Supportable Retail Floor Space for Trade Area

Store Type	Year (sq. ft.) 2006	2008	2009	2011
FCTM				
- $550 per sq. ft.[13]	98,500	104,900	108,400	115,600
- $450 per sq. ft.	120,400	128,200	132,400	141,300
AHIM				
- $1,200 per sq. ft.	69,200	74,300	77,200	82,000
- $800 per sq. ft.	103,800	111,500	115,900	123,000
DSTM				
- $300 per sq. ft.	139,700	147,000	151,300	159,700
- $225 per sq. ft.				
Services	186,200	196,000	201,800	212,900
- $275 per sq. ft.	262,500	279,600	286,500	304,000
- $200 per sq. ft.	361,000	384,500	394,000	418,000
Total[14]				
- $441 per sq. ft.	**569,900**	**605,800**	**623,400**	**661,300**
- $326 per sq. ft.	**771,400**	**820,200**	**844,100**	**895,200**

Source: Market Research Corporation based on Table 41, industry standard annual sales per sq. ft., the trade area's socio-demographic characteristics, and the telephone survey.

It is thus concluded that the spending of trade area residents supported a total of 569,900 to 771,400 sq. ft. of retail and service floor space in 2006. By 2011, this space is estimated to increase to a range of 661,300 to 895,200 sq. ft. The increase in the demand for retail and service floor space is thus up to 123,800 sq. ft. by the year 2011.

Table 43: Estimated Increase in Demand for Total Supportable Retail Floor Space

Store Type	Time Period (sq. ft.) 2006-2008	2008-2009	2009-2011	2006-2011
FCTM				
- Minimum	6,400	3,500	7,200	17,100
- Maximum	7,800	4,200	8,900	20,900
AHIM				
- Minimum	5,100	2,900	4,800	12,800
- Maximum	7,700	4,400	7,100	19,200
DSTM				
- Minimum	7,300	4,300	8,400	20,000
- Maximum	9,800	5,800	11,100	26,700
Services				
- Minimum	17,100	6,900	17,500	41,500
- Maximum	23,500	9,500	24,000	57,000

[13] Refers to average annual sales per sq. ft.
[14] Refers to the total supportable space within, as well as outside the trade area.

Total				
- Minimum	**35,900**	**17,600**	**37,900**	**91,400**
- Maximum	**48,800**	**23,900**	**51,100**	**123,800**

Source: Market Research Corporation based on Table 42.

Conclusion: Regardless of the existing shortages of floor space in the trade area, the spending of the trade area residents will require an additional 91,400 to 123,800 sq. ft. of floor space by 2011.

4.8 Existing Retail and Service Floor Space

In the last five years, there have been retail changes in the Town of Carleton Place. Based on field research and visual estimation, we estimate there is a total of 498,300 sq. ft. of retail space in this town:

Table 44: Summary of Existing Inventory

Area	**Store Type (sq. ft.)**						
	FCTM	AHIM	DSTM	Services	Vacant	Total	Vacancy Rate (%)
Highway 7	50,300	96,500	6,200	21,000	0	174,000	0
Beckwith Mall (Franktown St.)	4,900	4,200	10,800	15,300	1,500	36,700	6.7
The Mews of Carleton Place (Lansdowne Ave.)	38,000	9,700	27,800	16,500	1,500	93,500	1.6
Bridge St. (downtown)	1,600	2,500	26,300	26,200	10,000	66,000	15
Other	34,000	37,300	26,700	27,500	2,000	127,500	1.6
Total (sq. ft.)	**128,800**	**150,200**	**97,800**	**106,500**	**15,000**	**498,300**	**3**
Total (%)	**25.8**	**30.1**	**19.6**	**21.4**	**3**	**100**	**--**

Source: Market Research Corporation based on field research and **visual** estimations, Dec.2006 (sizes are approximate).

Automotive and Home Improvement Merchandise (AHIM) represent the largest share of inventory (30.1%), followed by FCTM (25.8%), Services (21.4%), and DSTM (19.6%). There are three other important observations in Table 44 as follows:

- The overall vacancy rate in Carleton Place is 3.0% which is low, especially compared to the industry standard of 5% to 8%;
- Close to 80% of the total space is used by product-selling businesses. The industry guideline indicates that when an area's product-selling stores represent 60% or more of the total space, its retail market is generally strong and in need of additional retail development;

- Bridge St.'s (i.e., downtown's) vacancy rate of 15.0% and its service share of 39% of the total space are both too high, reflecting its declining status (there were 8 vacant stores on this street in December 2006).

Point C above further confirms the survey finding that Carleton Place's downtown need attention and improvement.

4.9 Warranted Additional Floor Space

There are two factors pointing to the need for additional retail development in the trade area. One is the shortage of existing space compared to the total supportable, and the other is the increase or the growth in demand for more space. By store type, these spaces are identified below:

Table 45: Carleton Place Total Warranted Floor Space By 2011

Store Type	2006 (sq. ft.)			Increase 2006-2011 (sq.ft.)	Total Warranted Addition (sq.ft.)
	Existing Floor Space	Total Supportable	Warranted Addition		
FCTM[15]	128,800	120,400	-8,400	20,900	12,500
AHIM	150,200	103,800	-46,400	19,200	-27,200
DSTM	97,800	186,200	88,400	26,700	115,100
Services	106,500	361,000	254,500	57,000	311,500
Total[16]	**498,300**	**771,400**	**273,100**	**123,800**	**396,900**

Source: Market Research Corporation based on Tables 42 - 44.

Conclusion

If the trade area residents would spend 100% of their shopping dollars at stores within, then up to 396,900 sq. ft. of additional retail and service floor space would be supportable in this area by 2011.

While this would be an unlikely scenario, the spending of tourists, vacationers and pass-by traffic may ultimately require even more than 396,900 sq. ft. in additional development.

As demonstrated, trade area residents require up to an additional 273,100 sq. ft. of retail and service floor space now, and another 123,800 sq. ft. in the next five years, for a total of 396,900 sq. ft.

Figures in Table 45 above are probably quite conservative for the following reasons:

a. For AHIM products, especially for auto dealers and repair shops, Carleton Place already serves an area much larger than the defined trade area;

[15] The excess of the space is supported by the surrounding area residents.
[16] Includes vacant.

b. Within half hour driving distance of Carleton Place, there are numerous lakes, cottages, and camp sites. From May to October/November, thousands of Ottawa and other residents vacation in these areas, and shop at Carleton Place's supermarkets[17], drug stores, liquor stores, restaurants, etc; and
c. A large volume of pass-by traffic goes through Carleton Place on Highway 7. Some of the drivers and/or passengers of these vehicles shop at facilities in Carleton Place.

4.10 Proposed Retail Developments

Our research indicates that approximately 500,000 sq. ft. of additional retail developments are proposed in Carleton Place. Smart Centres on McNeely Ave. opposite Your Independent Grocer is one major proposed development. The other is along Highway 7 on the south side, opposite this grocery store. A RONA store is presently under construction on this site. Once this site and the Smart Centre have been fully developed, the McNeely-Highway 7 node will become a large power centre (up to 550,000 sq. ft.) in Carleton Place and serve an area significantly larger than the defined trade area (which consists of Carleton Place and Beckwith). There is, however, no exact time specified for these developments, and it may take 10 years or longer for all 500,000 sq. ft. of the proposed development to actually be developed.

[17] There are three supermarkets in Carleton Place with a total floor space of approximately 80,000 sq. ft. (Price Chopper, Your Independent Grocer, and IGA). The residents of Carleton Place can support a maximum of 50,000 sq. ft. of supermarket.

5 Industrial Market

5.1 General Market Overview

The Consultant reviewed relevant documents and strategies related to industrial land consumption for Carleton Place and the surrounding area, including the City of Ottawa, the City of Clarence-Rockland, the Town of Arnprior, and the Municipality of North Grenville.

For the Ottawa area as of mid-year 2006, industrial vacancy increased slightly to 4.3%, from 4.1% at the end of the fourth quarter of 2005[18]. Overall, industrial demand for the first 6 months weakened marginally, generating negative absorption of 6,000 square feet (sq. ft.). This reduction in demand resulted in a lower rental rate over the previous 6 months to a weighted average of $7.22 per square foot (PSF).

For mid-year 2006, vacancy rates in the Ottawa's west end were at 6.1%. This market is characterized by a number of large properties of contiguous space available. In particular, 5 buildings account for greater than 100,000 sq. ft. of contiguous space. In this quarter, Ottawa west demand for industrial space was weaker than the east, with a negative absorption rate of 18,000 sq. ft. The East Merivale sub-region has been the area of greatest improvement for Ottawa west. This sub-market has a vacancy rate of 0.8% and the second highest demand in the west end with 31,000 sq. ft. of total positive absorption, 11,000 sq. ft. of which occurred at 1980 Merivale road.

Mid-year 2006, Ottawa west was struggling compared to the east, but positives are emerging in the construction sector. Induspac has a 78,000 sq. ft. facility at 140 Iber Road under construction. Also under construction on Iber Road is Virtucom's 21,000 sq. ft. building.

For the 3rd Quarter of 2006, industrial vacancy rose to 5.9%[19], Ottawa west had been the main contributor to increased vacancy rates. This is due to the addition of two large spaces: 58,000 sq. ft. at 5977 Hazeldean Road, and; 48,000 sq. ft. at 185 Corkstown Road.

During the third quarter of 2006, Central Precast was in the process of building a 25,000 sq. ft. flex building at the Merivale-MacFarlane intersection. Giffels has a new 260,000 sq. ft. headquarters on Palladium Drive under construction. This has been the largest assembly/lab space requirement in years, the last such requirement being for Breconbridge at 500 Palladium Drive.

5.2 Industrial Land Supply

The City of Ottawa represents the largest industrial land supply, and the main competition for industrial land development for Carleton Place.

[18] Cushman & Wakefield. Mid Year 2006. "Marketbeat Snapshot, Industrial Overview, Ottawa, ON"
[19] CB Richard Ellis. Third Quarter 2006. "Marketview Ottawa Industrial."

West of the Rideau River, and within the greenbelt, business parks are fully developed or have limited amounts of vacant land. Current supply is only 36.8 net ha. Three-quarters of this is located within the Merivale-Rideau Heights Business Park.

At the end of 2006, there were a total of 2,162 net hectares (ha) of vacant industrial land in the City of Ottawa. The urban area of the city accounted for 1,259.7 ha of vacant industrial land, with 262.4 ha being inside the greenbelt and 997.3 ha being outside of the greenbelt. Urban industrial land west of the greenbelt is located in the Kanata-Stittsville area. At the end of 2006, Kanata-Stittsville had 316.4 net vacant ha.

Changes have been occurring rapidly to the industrial land supply of western part of Ottawa, especially in Kanata and Stittsville. The Kanata West Business Park has had 126 ha changed to mixed-use centre and general urban use. The Terry Fox business park has also been redesignated to mixed-use centre. 30 ha in the Kanata North Business Park were redesignated general urban as part of amendment 28 to the Official Plan. This amendment also completed the redesignation of the remainder of the Stittsville North Industrial Park to General Urban.

Rural Ottawa has 902.5 vacant ha of industrial land. These lands are on private services and typically cater to land extensive uses such as storage, warehousing, construction and transportation. 70% of rural industrial land (633 net ha) is located west of the Rideau River, with a large concentration along the Carp Road North of Highway 417.

Current inventories of industrial supply for Ottawa's urban and rural areas can be found in the following two tables:

Table 46: Ottawa West Urban Vacant Industrial Land Supply, Dec. 2006

Industrial Park	Net developable ha.
Kanata West Business Park	128.9
Ottawa-Goulbourn Business Park	14.2
Kanata South Business Park	52.0
Terry Fox Business Park	18.1
Hazeldean Industrial Park	0.6
Kanata Town Centre Industrial Park	3.0
Kanata North Business Park	99.6
Total	**316.4**

Source: City of Ottawa and McSweeney & Associates

Table 47: Ottawa West Rural Vacant Industrial Land Supply, Dec. 2006

Industrial Park	Net developable ha.
A.G. Reed Industrial Area	81.3
Cardevco-West Hunt Industrial Area	76.7
Reis Industrial Area	42.3
Pri-Tec Industrial Area	52.1
Carp Airport Industrial Area	213.6
Ashton Industrial Area	23.0
Westwood Industrial Area	31.5
Total	**520.5**

Source: City of Ottawa and McSweeney & Associates

While the above vacant land supply would seem to be abundant, in fact, very little of the land is actually available on the market. The serviced (urban) vacant industrial land supply in the Kanata-Stittsville area represents the main competitive supply to Carleton Place.

The following table presents information related to serviced industrial land supply in municipalities surrounding Ottawa. The table indicates a relatively small serviced land supply outside of Ottawa.

Table 48: Surrounding Municipalities: Industrial Land Consumption, Availability and Price Range

Municipality	Estimated annual Consumption (ha)	Serviced Land Available (ha)	Price Range ($/ha)
North Dundas	0.3	27.5	$105,017
Carleton Place	<0.0	8.4	$123-182,500
North Grenville	<0.5	0.0	-
Mississippi Mills	<0.5	18.2	
Beckwith	0.0	0.0	-
Clarence-Rockland	<0.5	29.1	
Arnprior	<0.5	101.2	$49,420 - $54,362

Source: Ontario East Economic Development Commission, municipalities

5.3 Demand for Industrial Land

The consumption of vacant industrial land in Ottawa due to development has been 35 ha in each of the past three years. The loss of industrial land through redesignation to other uses has been much greater. Supply has tightened significantly, particularly in the western part of Ottawa, and as a result prices are rising rapidly. Recent sale prices for Ottawa west urban industrial land area range from $700,000 to $900,000 per ha[20]. Historically, the industrial development has been strongest in the western part of the City, followed by the south, with weakest demand in the east.

[20] Joel Freedman, Metro-Suburban Realty

5.4 Competitive Locational Advantages/Disadvantages

Carleton Place offers the following competitive locational advantages for industrial development:

- It is situated west of Ottawa, traditionally an area of the strongest industrial demand;
- It is likely to be one of the first areas to receive "spill-over" demand not capable of being satisfied in Ottawa (closer than Perth and Smiths Fall to Ottawa);
- The twinning of the highway will significantly "shorten the perceptual distance" to/from Ottawa, thereby making industrial development more attractive;
- Carleton Place can offer lower land costs and quicker (and hopefully less expensive) development approvals.

Carleton Place has the following competitive locational disadvantages for industrial development:

- It is not served by a 400 series highway, and is not on a major transportation corridor;
- Carleton Place has insufficient serviced designated industrial land;
- Carleton Place may at this time be <u>perceived</u> by many to be "too far".

5.5 Market Potential for Industrial Land

As noted in the preceding "surrounding municipalities" table, annual consumption of industrial land in municipalities outside of Ottawa is almost non-existent. It is the opinion of both the consultant, and that of Joel Freedman of Metro-Suburban Realty:

- that tightening supply, and rising prices, combined with higher costs of development will begin driving industrial development outside of Ottawa within the next two years;
- that Carleton Place must offer fully serviced lands to be able to attract industrial development;
- and that a serviced land price of approximately 185,000 to 210,000/ha would be attractive to small industrial owner-occupant users requiring small lots of approximately 0.25 to 0.5 ha.

It is therefore realistic to expect that Carleton Place (with reasonable market exposure) could see approximately 0.5 to 1.0 ha of industrial development per annum, provided that the land was serviced and competitively priced as noted above, and provided that development costs and approval timeframes are significantly more favourable than in Ottawa.

Appendix A: Carleton Place Residential Resale Price Listings

MLS® #	Listing Price	# Beds	# Baths
649963	$72,500	2	1
636933	$79,900	2	1
648411	$89,900	2	1
644411	$99,900	2	1
625444	$114,900	0	1
646761	$142,000	3	1
650934	$149,900	4	2
646437	$151,900	2	1
650556	$154,900	2	1
649767	$154,900	3	2
651066	$159,900	3	1
651721	$159,900	3	1
648841	$161,500	3	1
641365	$162,500	3	2
649514	$163,900	3	1
650941	$164,900	2	1
651896	$164,900	3	2
649682	$165,900	3	2
651895	$167,900	3	1
647827	$169,900	2	2
646538	$169,900	3	2
649992	$169,900	3	2
651087	$171,200	3	2
651468	$172,500	6	2
650996	$176,500	3	2
651849	$179,900	3	2
650067	$179,900	4	2
650499	$183,000	3	2
651833	$184,900	2	2
646422	$184,900	2	2
648292	$184,900	3	2
648927	$188,900	3	1
643165	$189,900	3	2
645971	$189,900	4	2
650701	$189,900	2	2
651009	$189,900	3	1
651818	$189,900	2	2
650700	$189,900	2	2
649878	$191,900	2	1
651175	$194,000	3	3
651819	$199,900	2	3
649038	$199,900	3	2
648935	$199,900	3	3
648790	$199,900	3	2
638642	$209,900	4	2
650449	$214,900	4	3
645294	$225,000	4	2
650022	$229,900	3	3
651290	$234,900	4	2
648603	$239,900	2	2

MLS® #	Listing Price	# Beds	# Baths
649705	$239,900	2	2
650262	$259,900	3	2
648448	$267,500	3	3
649502	$269,900	3	3
648295	$269,900	4	2
647097	$274,500	3	3
641943	$279,900	3	2
649893	$289,000	3	3
651277	$297,500	4	2
646008	$299,000	6	2
646250	$299,900	4	3
646930	$329,900	3	3
646492	$330,000	3	2
645282	$424,900	3	2
651431	$850,000	3	1

Source: Ottawa Real Estate Board

Appendix B: Telephone Survey Methodology

A. Questionnaire Design

Based on the objectives of the study, its Terms of Reference and discussions with the members of the Committee and the public, the survey instrument was designed in draft and submitted to the Chair of the Committee. Due to the strong public involvement from the beginning from representatives of different groups as well as general public interest, the Committee therefore distributed the draft questionnaire to all who had asked for it.

A number of additional issues were suggested to be included in the survey. Issue related to transportation, public transit, university students, manufacturing employment, arts and culture were each strongly demanded by the public. The inclusion of all of these important and highly valuable issues would have made the questionnaire unrealistically long, and incompatible with the study's Terms of Reference. After several revisions, the Committee finally approved the questionnaire which is presented in Appendix B.

B. Telephone Interviews

Using the questionnaire and the structured random sampling technique, interviews were conducted with adult members of households in the Town of Carleton Place. Interviews were conducted in the month of November 2006 during the following hours:

Monday - Friday
5.00 P.M. - 9.00 P.M
Saturday 11.00A.M. - 6.00 P.M.
Sunday 12.00 noon – 8.00 P.M.

Altogether, 404 successfully completed telephone interviews were returned. In view of the total of approximately 3,840 households in Carleton Place, this sample size is very large, and its results are valid statistically. The average interview time was 11.5 minutes.

C. Survey Analysis

Completed surveys were reviewed, coded, and entered into ACCESS. Tables of analysis, distributions, totals, averages, and cross-correlations were then prepared. Based on the findings of the survey, the telephone survey section in this report was written.

Appendix C: Carleton Place Survey

By:____________________ Date: _______________________ Tel: _____________________

Good _________________ I am ________________________ from Market Research Corporation. We are doing an economic study for the Town of Carleton Place. **I am not selling anything**, and I would appreciate your participation for about 5 minutes in this survey (as necessary mention that the results will only be used for statistical purposes, ensure he/she is 18+ years old and make call-back appointments. If not able to, or not interested, thank and terminate). Call-back: ______________________________

1. Record Gender a)male b) female

Quality of Life

2. First, including yourself, please tell me how many people live in your household in each of the following age group (read a-e):

   a) under 18 __________ d) 50-65 _________________
   b) 19-29 ____________ e) 65 and over _____________
   c) 30-49 ____________ f) Refused

3. Now, tell me what is **the single most important thing you like** about Carleton Place (help, but do not read, and accept only one response).

   a) Its small size
   b)Rural/country location
   c) Heritage/historical buildings
   d) Friendliness of people
   e) Strong sense of community
   f) Close to Ottawa
   g) Natural amenities and beauty
   h) Its main street
   i) Other (write verbatim) ________________

4. Next, please tell me the **single most important thing which you do not like** about Carleton Place (help, but do not read, and accept only one response).

   a) Too small
   b) Its location
   c) Not enough choice of stores/shopping
   d) Store hours/not open evenings
   e) Not enough recreational facilities
   f) Nothing to do here/boring
   g) Not enough jobs/work
   h) Other (write verbatim) __________

5. In your opinion, what is the **single most important opportunity** which Carleton Place would take advantage of?

(write key words): ____

6. How would you rate the **availability of Arts and Culture** in Carleton Place (read a-c and rotate)

   a) There are plenty of programs and activities
   b) There is the right amount of programs and activities
   c) There are not enough programs and activities
   d) Don't know/not sure

   Comments (write key words):____

Employment Status

7. For transportation planning purposes, please tell me how many adults in your household **work full-time** in:

a) Carleton Place b) City of Ottawa (incl. Kanata & Stittsvile) c) Elsewhere (specify)

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8. And how many **work part-time** in:

a) Carleton Place b) City of Ottawa (incl. Kanata & Stittsville) c) Elsewhere (specify)

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9. In your opinion, should Carleton Place encourage the **creation of more jobs**?

   a) Yes b) No (go to no. 11) c) Don't Know/ Not Sure/ Undecided

10. What **types of jobs or businesses** should Carleton Place try to attract? (Accept more than one, and give examples **IF** necessary):

a) High Technology b) Call Service Centres c) Clean industries
d) Storage/Warehouse Facilities e) Manufacturing Industry f) Other (write verbatim): ____________________

Comments:____________________________________

11. In your opinion, should Carleton Place **expand its geographic boundaries** in order to accommodate new jobs and residents?

a) Yes b) No C) Don't Know/ Not Sure/Undecided

Retail Market

I would next like to ask you a few questions about the retail market in Carleton Place.

12. How would you rate the **quantity** of the retail stores in Carleton Place (Read a-e and rotate):

a) There are not enough stores
b) There are too many stores (go to 14)
c) There is just the right number of stores (go to 14)
d) Don't know/not sure

Comments ___________________________________

13. What types of **additional** stores would you like to see added to Carleton Place (Write up to 3):

a) ______________________ b) ______________________ c) ____________________

14. How would you rate the **quality** of the stores in Carleton Place (Read a-e and rotate):

a) They are excellent (go to 16)
b) They are good (go to 16)
c) They are average
d) They are poor
e) Don't know/Not Sure

Comments: __________________________________

15. Please tell me what aspect(s) of the stores in Carleton Place you consider to be average or poor:

a) Service
b) Variety/choice of product
c) Price
d) Limited choice of shopping places
e) Limited store hours
f) Other (specify): _______________

16. In your estimation, approximately how much have **all** members of your household spent at stores **outside** Carleton Place in the last month?

a) $ ______________________ b) Don't know/not sure c) Refused

Internet, Education, and Transportation

17. Do you have access to the **Internet** from your home?

a) Yes
b) No (go to no.19)
c) Don't know/Not sure (go to no.19)
d) Refused (go to no.19)

18. Do you also have **high speed** service at your home? (read a-e and rotate)

a) Yes c) Don't know/Not sure
b) No d) Refused

19. What is **your** highest level of education (Read a-e and rotate):

a) High school or less d) Masters Degree
b) Community college or less e) Ph.D.
c) University degree or less f) Refused

20. In total, how many vehicles are there at your household (include pick-ups):

a) One c) Three or more
b) Two d) Refused

21. Lastly, what is the **range** of your household's **total** annual income? (Read a-e and rotate):

a) Under $30,000 d) 80,000-100,000
b) 30,000-50,000 e) Over 100,000
c) 50,000-80,000 f) Refused

Thank you for your cooperation and have a nice ________________________________.