

Commercial Inventory and Market Analysis

City of Kingston, ON

Prepared for: City of Kingston

Date: May 12, 2008

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May 12, 2008

Ms. Sonya Bolton
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Dear Ms. Bolton:

Re: Commercial Inventory and Market Analysis

urbanMetrics inc. is pleased to submit this Commercial Inventory and Market Analysis to the City of Kingston. This study will provide background support as the City proceeds with the preparation of its new Official Plan. The purpose of this study is to review the supply and need for additional commercial land in the municipality.

Our research and analysis have been conducted in accordance with the terms of reference for this assignment and our authorized scope of work. The findings and recommendations presented in this report represent our best judgement based upon the information available to us as of the date of our research. Accordingly, the findings, and recommendations presented herein should be reviewed and interpreted with reference to evolving circumstances and economic conditions.

It has been a pleasure to conduct this study on your behalf. Should you have any further questions please do not hesitate to contact me at 416-351-8585 ext. 223.

Yours truly,
urbanMetrics inc.



Rowan Faludi
Partner

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Executive Summary

The City of Kingston is currently updating its Commercial Policies as part of preparations for its new Official Plan Review. The purpose of this Commercial Inventory and Market Analysis is to review the supply and need for additional commercial land in the municipality. Our conclusions are based on an extensive work program that included: the completion of a commercial inventory in September 2007; the review of recent market demand and impact analysis studies submitted for site specific development applications together with the associated peer reviews; the review of recent commercial development applications and known proposals, the analysis of potential future commercial land supply; and the assessment of future commercial space needs.

Our key findings include the following:

1. The Trade Area for the City of Kingston is based on a review of the consumer research conducted as part of the 1999 Kingston Regional Commercial System Study (KRCSS) and the more recent empirical research conducted in support of a number of commercial development applications. It extends from the Town of Greater Napanee in the West to the Township of Leeds and the Thousand Islands in the East. To the north it extends to Highway 7. This Trade Area is marginally smaller than that delineated as part of the KRCSS.
2. Based on the population data available from the 2006 Census, population growth was substantially below that on which the KRCSS conclusions were based. In the KRCSS, the Trade Area population was projected to increase by 32,800 persons between 1996 and 2006 (base case). The actual increase was only 9,394 persons.
3. Projected growth in Kingston beyond 2006 is also more conservative than that relied on by the KRCSS. Based on projections prepared for the City by TeraTrends in January 2006, which have been adjusted to account for 2006 Census data, combined with Ministry of Finance projections for the surrounding Townships, the Trade Area population is projected to increase from approximately 206,000 in 2007 to 245,000 by 2026.
4. There is just over 9 million square feet of retail and services space in the City of Kingston. This represents an increase of approximately 500,000 square feet since the previous inventory conducted in 1998 as part of the KRCSS. The largest increase in space occurred in the non-food retail category, which grew by 1.1 million square

feet. In contrast, the amount of vacant space declined by 465,000 square feet and the services category declined by about 225,000 square feet.

5. On a per resident basis, the amount of retail and services space in the City remained virtually constant at just over 75 square feet per capita. This is exceptionally high, but to some extent, reflects the tourist role of Kingston and its role as a regional service centre. The non-food retail category, however, increased from 24.0 square feet per capita to 31.8 square feet per capita. The current per capita level of non-food retail space is also above the expected norm.
6. Of the total inventory, about 19% of retail and service space is contained in the downtown area. The largest amount of space is found at arterial commercial locations (30.4%). This is reflective of a trend occurring in urban areas across Canada, where by the advent of power centre retailing has distorted the traditional retail hierarchy in favour of a system of agglomerations of clusters and corridors. The emergence of the Gardiners Road Corridor is consistent with this trend. Depending on the approval of new commercial space in the City, new large scale clusters could materialize at Division Street and Highway 401 and around the Kingston Centre at Sir John A. Macdonald Boulevard and Princess Street.
7. The overall vacancy rate for the City amounts to 4.6%, which is considered representative of a balanced market. The vacancy rate for the downtown is 7.7%, which is indicative of a healthy economy and is lower than the downtowns in many other Ontario communities.
8. Proposed retail space in Kingston could potentially result in the addition of 1.4 million square feet to the inventory, an increase of about 15%. The largest proposals include a Wal-Mart anchored power center at Sir John A. Macdonald Boulevard and Princess Street (600,000 square feet); a power centre and outlet mall at Division Street and Dalton Avenue (555,000 square feet) and a Lowe's home improvement store on Gardiners Road (174,000 square feet). The vast majority of this space (1.2 million square feet) will comprise non-food retail space. These proposals would increase this category by over 30%. This is a very significant increase for a City the size of Kingston with only modest future growth potential.
9. In addition to these proposals, there are approximately 82 acres of vacant land designated and zoned for commercial development. This land comprises small to mid-sized sites up to 14.7 acres in size. Based on typical retail coverage ratios, these lands could accommodate approximately 900,000 square feet of commercial space, although none of the parcels would be large enough to accommodate large

power centres, such as those currently proposed at Princess Street and Sir John A. Macdonald Boulevard or at Dalton Avenue and Division Street.

10. There are significant differences between our inventory and that conducted by Tate Economic Research (TER) in 2006, with regards to the proposed retail development on the Alcan property. In most categories, the TER inventoried space is below urbanMetrics totals. Further investigation is required to determine the source of these discrepancies.
11. Based on our inventory and the analysis for the Food and Non-food retail categories, the existing sales per square foot levels are indicative of a competitive market.
12. The warranted additional commercial space based on our detailed demand analysis is summarized in the following table.

**CITY OF KINGSTON
SUMMARY OF ADDITIONAL WARRANTED SPACE (\$,F)**

	2011	2016	2021	2026
FSR				
Supermarket	55,800	110,200	159,800	204,300
Other Food Store	3,000	13,200	29,700	44,800
Total FSR	58,800	123,400	189,500	249,100
NFSR				
Department Store	83,100	148,000	212,000	272,100
Other NFSR	240,000	558,600	866,200	1,245,000
Total NFSR	323,100	706,600	1,078,200	1,517,100
TOTAL Additional Retail Space Warranted	381,900	830,000	1,267,700	1,766,200
Other Retail/Services	198,265	590,887	1,042,771	1,498,631
TOTAL (excluding transfers from existing)	580,165	1,420,887	2,310,471	3,264,831

Source: urbanMetrics inc.

Based on our key findings and an analysis of residual market demand and impact, our conclusions include the following:

- Kingston has an appropriate supply of retail space, with the overall vacancy rate and sales performance levels for the City indicating a good balance between supply and demand.

- The downtown core is one of the most successful downtowns in Ontario, in terms of the size of its commercial sector, retail selection and the balance between chain stores and independent retailers. Furthermore, its relatively low vacancy rate is indicative of a healthy retail sector. New investments, such as Market Square and the new K-Rock Centre will assist in ensuring the continued vitality of the core. In our opinion, downtown Kingston is a major asset to the community and to the regional visitor base. In examining the experience of other small to mid-sized cities across the province, the overall health of a downtown core cannot be taken for granted. In planning future commercial space, the City must ensure that sufficient market is available to enable downtown to continue to expand its commercial vitality.
- By 2026, there will be a demand for some 3.3 million square feet of new retail and services space. There will be a shortfall of approximately 900,000 square feet, beyond that which could be accommodated on vacant commercial sites, approved and proposed retail developments. However, about half of the warranted space will be in the services category, which would not necessarily require space in traditional retail environments. On the other hand, most of the proposed commercial space is in the non-food retail category. Even by 2026, there would not be sufficient demand to accommodate all of the potential non-food retail development including vacant designated sites, approved developments and proposed projects.
- There is currently 1.4 million square feet of commercial space proposed at 12 separate locations throughout the City. Almost 95% of this potential future space is contained at three locations (Dalton Avenue and Division Street, the former Alcan site at Princess Street and Sir John A. Macdonald Boulevard, and the former Lafarge property at Gardiners Road and Princess Street). Robin Dee & Associates undertook a peer review of the market studies in support of the Alcan and Lafarge proposals and concluded that they were premature in light of current market support. We would concur with this finding.
- In the future, with the aging baby boom population and higher fuel costs, there will be increasing demand for services rather than retail merchandise and a growing need for more locally accessible retail outlets. For this reason, planning should strive to accommodate a greater balance between big box retail formats and local serving retail facilities, including neighbourhood shopping centres, convenience centres, mixed use developments and main-street pedestrian retail strips.
- In planning future commercial space, the City should focus on:

- o Maintaining and enhancing the strength of the downtown core, main street and local serving commercial nodes;
 - o Ensuring a geographically balanced approach to future big box and regional scale retail uses;
 - o Striving to achieve a better balance between large scale retail developments and more locally accessible retail facilities;
 - o Expanding the availability of retail services in former Pittsburgh Township; and,
 - o Seeking opportunities to enhance the availability of local serving retail facilities at the neighbourhood level throughout the City.
- In 2006, urbanMetrics and Sorensen Gravely Lowes Planning Associates completed a review of the KRCSS and prepared commercial policy recommendations for the City. This 2006 policy review was based on an examination of more recent trends but involved a limited empirical research program. The findings of this more comprehensive statistical study support the recommendations contained in the 2006 urbanMetrics/Sorensen Gravely Lowes study.

1. Introduction

urbanMetrics inc. has been retained by the City of Kingston to review the supply and need for additional commercial land in the municipality. This work will provide background support as the City proceeds with the preparation of its new Official Plan.

1.1 Background

On January 1, 1998, the former City of Kingston was amalgamated with the Township of Kingston and Pittsburgh Township to create a City of approximately 110,000 and an area of 450 square kilometres. The City's population has since grown to 117,207 in 2006.¹ Currently, it still remains governed by the three Official Plans of the former municipalities. Each municipality had a different commercial hierarchy, differing definitions of commercial development and independent structures. These differences create confusion and unequal treatment of commercial applications from different parts of the newly amalgamated City.

In March 1999, the City of Kingston released the Kingston Regional Commercial System Study (KRCSS), prepared by Dillon Consulting Limited, W. Scott Morgan and Paterson Planning & Research Limited. The KRCSS provided an information base, long term strategy, and a monitoring program for the management and growth of commercial land uses in the City of Kingston. In 2006, the Regional Commercial Study Update (RCSU) was completed by Sorenson Gravely Lowes Planning Associates and urbanMetrics inc. The RCSU examined all commercial designations in the KRCSS. Additionally, the RCSU analyzed recent trends in the retail industry, addressed the appropriateness of the current commercial policies in the existing Official Plans, and recommended changes in policy for the new Official Plan along with a harmonized commercial hierarchy.

The City is now facing a number of significant commercial development proposals and requires more specific information with regards to market need and supply. The results of this report will be used to verify the policy recommendations of the RCSU, provide additional direction with regards to the preparation of the new Official Plan and give the City guidance in reviewing commercial development applications.

1.2 Approach

To confirm the findings of the RCSU and to evaluate the existing and potential supply of commercial land, the following steps have been undertaken:

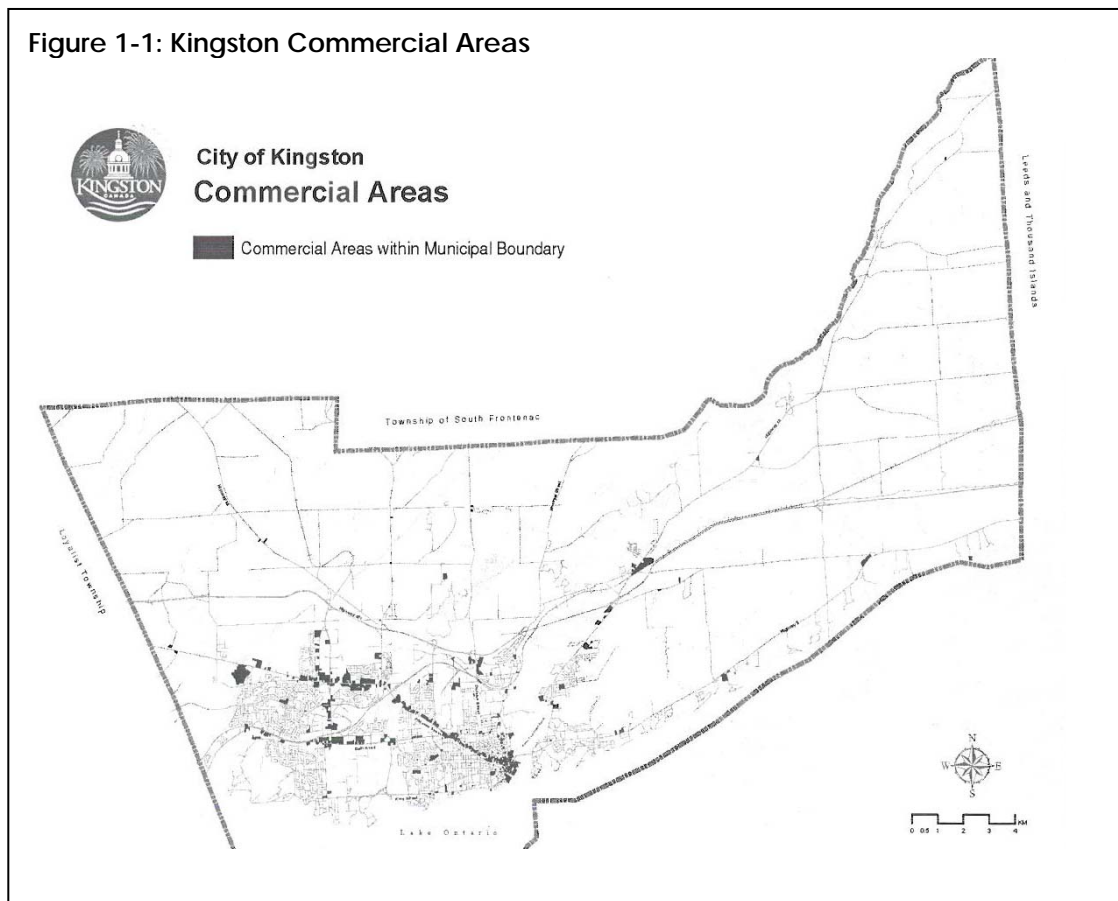
¹ Statistics Canada, 2006 Census

- The completion of a commercial inventory in September 2007.
- The review of recent market demand and impact analysis studies submitted for site specific development applications:
 - *Kingston Home Improvement Market Impact Study*. Prepared for Lowe's Companies Canada. Malone Given Parsons Ltd. November 15, 2007.
 - *Retail Market Demand and Impact Analysis: Princess Street and Sir John A. Macdonald Boulevard*. Prepared for Kingston Shopping Centres Limited. Tate Economic Research Inc. April 2007.
 - *Retail Market Demand and Impact Analysis: Division Street and Dalton Avenue Site Expansion, City of Kingston*. Prepared for Knightstone Capital Management Inc. Clayton Research. June 8, 2006.
- The peer review and summary of recent commercial development applications and known proposals, and the potential future commercial land supply.
- The undertaking of a commercial needs assessment involving:
 - A comprehensive inventory of existing and potential commercial space in the City.
 - A measure of future commercial market demand and supportable space to the year 2026 for each commercial sector.
 - A measure of the future land required to accommodate long term retail commercial demand (projected to the year 2026).
- The review of the RCSU recommendations based on the results of this study.

1.3 Kingston Study Area

The area which is the primary concern of this report is the City of Kingston, and in particular the lands designated 'commercial' in the existing Official Plans of the three former municipalities which comprise the new City. The boundaries of the study area are illustrated in Figure 1-1. This area differs from the "Trade Area" discussed in Section 2-1 of this report in that the Trade Area includes the broader area beyond the City, where Kingston retail facilities would attract customers.

Figure 1-1: Kingston Commercial Areas



1.4 Basic Assumptions

In any analysis requiring estimates of future conditions, it is necessary to make certain basic assumptions, as follows:

- Over the forecast period, to the year 2026, a reasonable degree of economic growth and stability will prevail in Canada, Ontario and specifically in the City of Kingston.
- The population forecasts, which are based on Census data and information provided by the City of Kingston are assumed reasonable and will not vary significantly from actual counts in the future.

- The various sources employed in our analysis to calculate retail expenditures, base year Kingston shares or capture rates, and sales per square foot performance levels for the various retail store types analyzed are considered sufficiently reliable.
- All dollar references are in 2007 dollars, which exclude inflation, unless noted otherwise.

If, for any reason, there are significant deviations from any of these assumptions, the report and its conclusions should be reviewed or re-examined.

2. Market Characteristics

Researching and understanding the City of Kingston's retail market dynamics are essential steps in developing appropriate and effective strategies for accommodating the future retail and service space needs of residents. An evaluation of the future demand for retail and service space facilities in Kingston requires an understanding of the market characteristics which influence both supply and demand. Essential to our analysis is an evaluation of the trade area for Kingston and the characteristics of the residents living in this area, including population levels, income, retail expenditures and shopping patterns.

2.1 Trade Area

A trade area typically represents the geographic area from which retail developments would normally expect to derive the majority of sales volume. The physical size of a trade area typically varies due to outside factors such as the local road network, natural physical barriers (e.g., rivers, bridges, etc.) and the proximity of competing shopping destinations. These influences can all serve to limit and otherwise define a shopping centre's or retailer's geographic drawing power. Furthermore, retail gravity, or the number and concentration of stores at a shopping node or venue, can define the attractiveness of a retail destination. An area where many retail alternatives and stores are concentrated enhances the consumer drawing power, or the distance consumers would be willing to travel to shop there.

In analyzing the trade area for Kingston, we have had the benefit of the research conducted in several market studies. The trade area, delineated as part of the 1999 KRCSS and relied on for the 2006 update, extends from Township of Front of Yonge in the east to City of Prince Edward County in the west and north to the Township of North Frontenac.

More recently, studies were conducted by Tate Economic Research (TER) for a Wal-Mart anchored development on Princess Street at Sir John A. Macdonald Boulevard and by Malone Given Parsons for a Lowe's home improvement store at Gardiners Road in West Kingston.

The trade areas developed for these studies are similar to that developed for the KRCSS. They are, however, based on more current research. The TER study was peer reviewed by the City's peer review consultant – Robin Dee & Associates, who accepted the TER Study Area.

For the purposes of our study, we have chosen to rely on a modified version of the TER Study Area. This defined area has several advantages:

- It is based on current research and has been accepted by the City's peer review consultant.
- By using a trade area similar to the one adapted by TER, the City is also better able to compare the results of our study with those of the TER study and the Robin Dee Peer review.
- The use of the modified TER study Area enables us the opportunity of incorporating the peer reviewed TER consumer research in our analysis

The modification that has been made has been to expand the western border of the TER Study Area to include Greater Napanee and a portion of the Township of Stone Mills. Because the development which TER was studying is in East Central Kingston, the TER defined Study Area did not extend as far west as might be expected for retail nodes in the western portion of the City.

For the purposes of this report, our defined Kingston Trade Area extends from the Township of Leeds and The Thousand Islands in the east, to Greater Napanee in the west, and to Highway 7 in the north. It has been divided into five zones.

The Primary Zone comprises the entire City of Kingston and the community of Amherstview, which has been further subdivided into Kingston East and Kingston West.²

The Secondary Zone comprises the surrounding communities to the east and west (Western Periphery and Eastern Periphery)³ and the Town of Greater Napanee, including a small portion of the Township of Stone Mills.

² The boundaries for Kingston East (Zone 1) consists of the entire former City of Kingston; the eastern portion of the former Township of Kingston east of Perth Road; and the western portion of the former Township of Pittsburgh west of Joyceville Road.

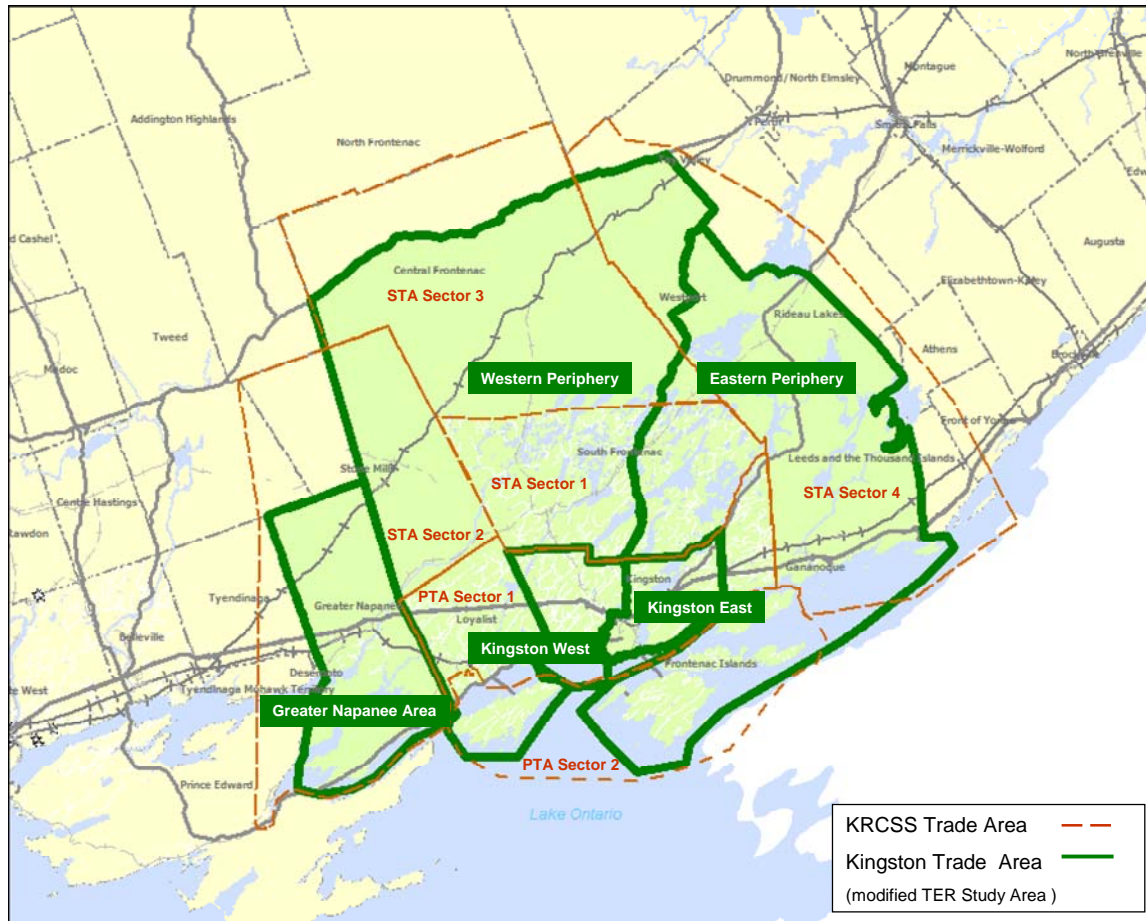
The boundaries for Kingston West (Zone 2) includes the western portion of the former Township of Kingston west of Perth Road and the Small Cataraqui River Valley; and the Community of Amherstview south of Taylor Kidd Boulevard and east of county Road 6.

³ The Western Periphery comprises portions of the following surrounding communities: Loyalist Township; Township of Stone Mills; Township of Central Frontenac; Township of South Frontenac; Township of Bathurst, Burgess, Sherbrooke; Village of Westport; and Township of Rideau Lakes.

The Eastern Periphery consists of portions of the following surrounding communities: Township of South Frontenac; Township of Rideau Lakes; Township of Leeds and The Thousand Islands; Town of Gananoque; the former Township of Pittsburgh east of Joyceville Road; and the Township of Frontenac Islands.

Figure 2-1 compares the modified TER Study Area with the Trade Area delineated as part of the KRCSS.

Figure 2-1: Comparison of Trade Areas



Source: urbanMetrics inc.

2.2 Kingston Trade Area Population

To determine the potential demand and market support for additional retail uses, it is necessary to estimate the future resident population within the defined Kingston Trade Area. Population change, in addition to income, can significantly influence the level of future retail space warranted in a market.

2.2.1 Population Comparison with KRCSS

As part of the RCSU, the actual population growth for the KRCSS Trade Area between 1996 and 2001 was compared to the population projections in the KRCSS. The RCSU determined that actual population growth in the KRCSS Trade Area between this period was substantially lower than anticipated in the KRCSS (Figure 2-2). The overall KRCSS Trade Area population experienced modest growth between 1996 to 2001 with an average growth rate of 1.1%, or approximately 2,194 persons.

FIGURE 2-2
POPULATION GROWTH 1996 TO 2006
ACTUAL VS. KRCSS PROJECTIONS (USING KRCSS TRADE AREA)

	1996 Actual (1)	2001 Actual (1)	2001 Projected (Base Case)	2001 Projected (Low Scenario)	2006 Actual (1)	2006 Projected (Base Case)	2006 Projected (Low Scenario)
Primary Trade Area Sector 1	125,368	126,796	137,600	133,000	130,018	149,900	140,200
Primary Trade Area Sector 2	3,449	3,627	3,720	3,690	4,113	4,000	3,930
TOTAL PRIMARY TRADE AREA	128,817	130,423	141,320	136,690	134,131	153,900	144,130
Secondary Trade Area Sector 1	14,599	15,187	15,930	15,770	16,578	17,330	16,940
Secondary Trade Area Sector 2	31,455	31,423	32,580	32,530	31,397	33,720	33,600
Secondary Trade Area Sector 3	5,727	5,785	6,000	5,980	6,294	6,270	6,230
Secondary Trade Area Sector 4	23,223	23,197	24,320	24,250	24,815	25,440	25,280
TOTAL SECONDARY TRADE AREA	75,004	75,592	78,830	78,530	79,084	82,760	82,050
TOTAL KRCSS TRADE AREA	203,821	206,015	220,150	215,220	213,215	236,660	226,180

Source: urbanMetrics inc.

1) Census of Canada. Population figures have not been adjusted for Census undercount as per KRCSS methodology.

2) 1998 Kingston Regional Commercial System Study (KRCSS)

We have now compared the Census figures for 2001 to 2006 to determine population growth within the KRCSS Trade Area. Once again, the actual population growth in the KRCSS Trade Area between 2001 and 2006 period was substantially lower than anticipated in the KRCSS. The population for the KRCSS Trade Area in 2006 was 213,215, rather than the anticipated 236,660 population on which the KRCSS based its demand projections.

Between 2001 and 2006, actual percentage growth in the KRCSS Secondary Trade Area (4.6%) was higher than in the KRCSS Primary Trade Area (2.8%). The KRCSS Secondary Trade Area population increased from 75,592 in 2001 to 79,084 in 2006, a rise of about 3,500. Within the KRCSS Secondary Trade Area, the areas with the greatest share of growth between 2001 and 2006 occurred in Sector 1 and Sector 3, which covers the central and northern portions of the KRCSS Trade Area. Sector 2 of the Secondary Trade Area, which covers the western portion of the KRCSS Trade Area, was the only sub-trade area to experience population decline between 2001 and 2006. The overall actual KRCSS Trade Area population increased

between 2001 and 2006 with the KRCSS Trade Area growing by 7,200 or 3.5% (see Appendix A).

2.2.2 Kingston Trade Area Population (New Trade Area)

Figure 2-3 indicates the population projections for the Kingston Trade Area described in the previous section (i.e. the modified TER Study Area). The projections incorporate the 2006 Census of Canada population counts, as well as TeraTrends population projections and the Ministry of Finance Population projections. Neither the 2006 Census nor the projections were available to TER when they completed their study.

2.2.3 Future Population Growth

To calculate the future population for the Kingston Trade Area, we have first adjusted the 2006 Census population figures to account for residents that were not included at the time the Census was conducted. For the purposes of this report, the Kingston Trade Area population is adjusted by taking the 2001 Statistics Canada undercount estimate for each of the Census Divisions included in the Trade Area.

The City of Kingston's future population is based on the population projections prepared for the City of Kingston by TeraTrends (formerly Stevens Associates) and the most recent population data released by Statistics Canada. In January 2006, TeraTrends updated the Stevens Associates figures for population and housing projections (dated 2003) that were prepared as part of the Urban Growth Strategy Interim Report No. 2. The Growth Strategy includes low, medium and high growth scenarios. For the purpose of this report, the medium (most likely) scenario is used. Additionally, we have made adjustments to the TeraTrends data to take into consideration 2006 Census figures adjusted for undercount. Growth rates for the medium growth scenario were then applied for the study period.

For the municipalities outside the City of Kingston, the future population estimates have been based on population forecast estimates by Census Division (CD) from the Ontario Ministry of Finance released in Spring 2007. The future population has been estimated by applying the adjusted 2006 population of each municipality to the future population forecast growth rate to the year 2026 (see Appendix A).

FIGURE 2-3
KINGSTON TRADE AREA
POPULATION PROJECTIONS, 2006 - 2026

	Adjusted		Adjusted		Projected Population ³				
	2001	2001	2006	2006	2007	2011	2016	2021	2026
Kingston West	50,070	52,073	54,207	56,353	56,769	58,433	61,837	65,667	69,354
Average Annual Change			827		416	416	681	766	738
Average Annual Growth %			1.7%		0.7%	0.7%	1.2%	1.2%	1.1%
Kingston East	67,679	70,386	67,516	70,189	70,707	72,780	77,020	81,789	86,382
Average Annual Change			-33		518	518	848	954	919
Average Annual Growth %			0.0%		0.7%	0.7%	1.2%	1.2%	1.1%
Primary Zone Total ¹	117,749	122,459	121,723	126,543	127,477	131,214	138,857	147,456	155,736
Western Periphery	30,645	31,858	32,703	33,683	33,915	34,842	36,317	37,806	39,242
Average Annual Change			412	196	232	232	295	298	287
Average Annual Growth %			1.3%	0.6%	0.7%	0.7%	0.8%	0.8%	0.8%
Eastern Periphery	24,969	25,958	26,747	27,616	27,742	28,248	29,140	30,072	30,945
Average Annual Change			356		126	126	178	186	175
Average Annual Growth %			1.4%		0.5%	0.5%	0.6%	0.6%	0.6%
Greater Napanee Area	15,915	16,521	16,160	16,856	16,947	17,334	17,931	18,609	19,286
Average Annual Change			49		91	96	120	135	135
Average Annual Growth %			0.3%		0.5%	0.6%	0.7%	0.8%	0.7%
Secondary Zone Total ²	71,529	74,337	75,610	78,154	78,603	80,424	83,389	86,487	89,474
Total Kingston Trade Area	189,278	196,796	197,333	204,697	206,080	211,637	222,246	233,943	245,210

Source: urbanMetrics inc.

1) Rates of undercoverage for the City of Kingston (Primary Zone) for 2001 and 2006 have been calculated at the Census Division (CD) level based on the Statistics Canada 2001 Census and post-census estimates from Statistics Canada's Annual Demographic Estimates 2001 to 2006. Catalogue no. 91-214-XWE.

2) Rates of undercoverage for the Secondary Zone for 2001 and 2006 have been calculated at the Census Division (CD) level based on Statistics Canada 2001 and 2006 Census and post-census estimates from Statistics Canada's Annual Demographic Estimates 2001 to 2006. Catalogue no. 91-214-XWE.

3) Future growth rates for the City of Kingston have been based on the population forecast by TeraTrends, Population and Housing Projection Update - City of Kingston, January 2006. Growth rates for the Secondary Zone have been based on the County level and derived from Ontario Ministry of Finance, Ontario Population Projections Update, 2006-2031, Spring 2007.

The combined Kingston East and Kingston West Trade Area (Primary Zone) is forecast to grow from 126,543 in 2006 to 155,736 in 2026, an increase of 29,193 or 23%. The combined Western Periphery, Eastern Periphery and Greater Napanee Area (Secondary Zone) is forecast to grow from 78,154 in 2006 to 89,474 in 2026, an increase of 11,320 or 14.5%. The total Kingston Trade Area population is forecast to grow from an estimated 2006 population of 204,697 in 2006 to approximately 245,210 by the year 2026, an increase of 40,513 or 19.8%.

3. Existing Retail and Service Commercial Inventory

As part of this study, we have completed a full inventory of commercial space in the City of Kingston. In this section we have analyzed its implications with regard to the City's retail structure and have compared the current inventory with that completed as part of the KRCSS in 1998. The 1998 KRCSS determined that in 1998 there was then 8,500,000 square feet⁴ of commercial space and an additional 75 vacant acres of commercial land in large parcels.⁵ Based on the projected population of Kingston and the KRCSS Trade Area, the KRCSS concluded that there was no need for additional commercial land within the next 20 year period (i.e. to 2018).

Since the time of the 1998 KRCSS, additional commercial land has been added, particularly in the former Township of Kingston. A Costco has recently opened in the Cataraqui North neighbourhood, north of Princess Street on Centennial Drive. Much of the vacant inventory of designated land in the former Township of Kingston has also been developed or is under construction, particularly along Midland Road; however, sizeable vacant parcels still remain. Since the time of the 1998 KRCSS, the population of Kingston and the surrounding region has failed to meet the expected population growth, and tourism has actually declined rather than grown. The 2006 Regional Commercial Study concluded that, within the context of additional sites having been approved while population growth has lagged significantly below projected levels, it appears that the City has an over-supply of commercial land. If these conditions continue, this situation is likely to result in increasing vacancies in older commercial developments and may potentially undermine the planned function of some areas and could also lead to blighted areas.

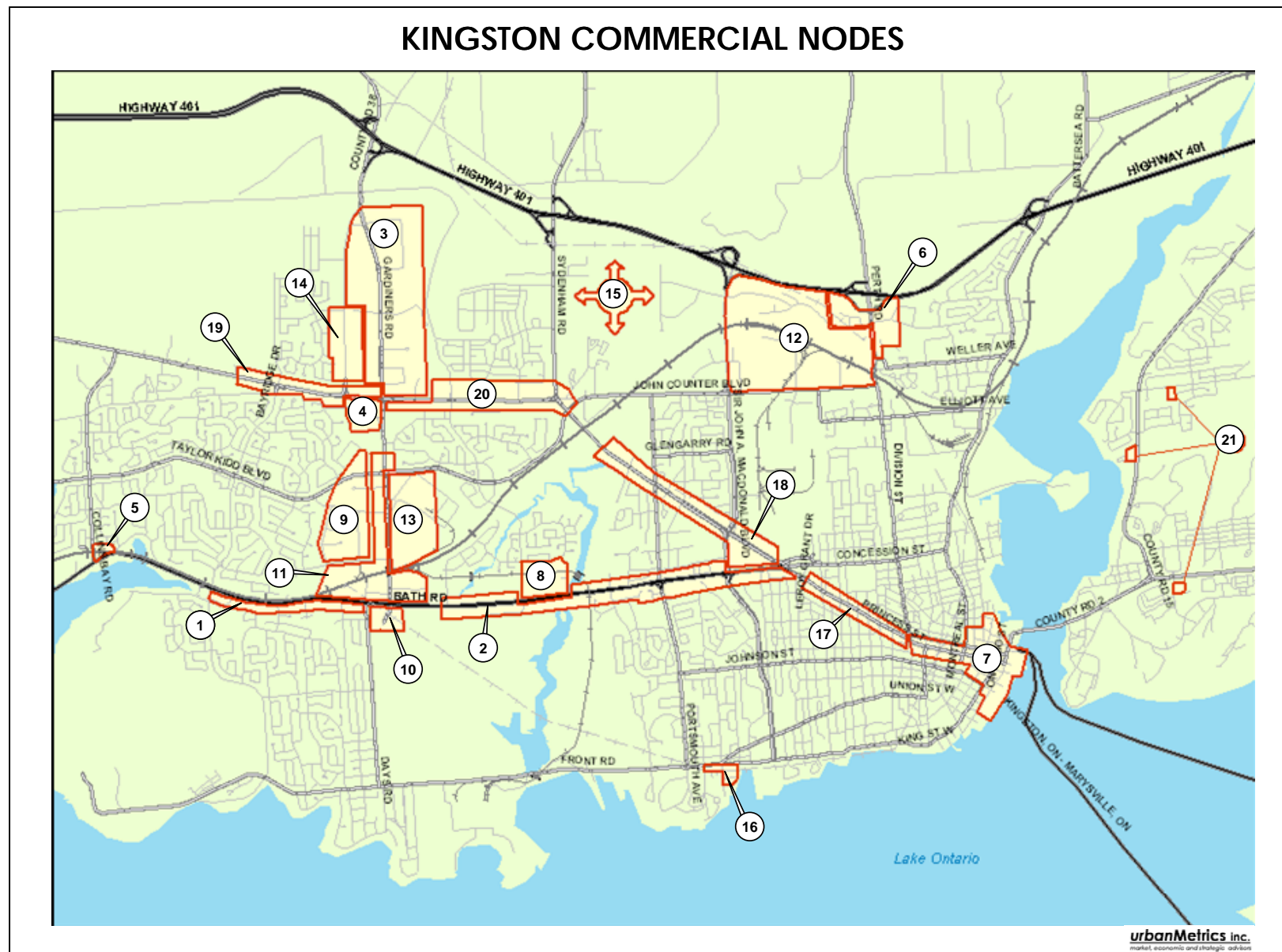
3.1 Kingston Inventory by Node Classification

Figure 3-1 illustrates the distribution of commercial space in the City by major node. Based on the current inventory there is now just over 9 million square feet of commercial space in the City. The detailed inventory has been included in Appendix B and a detailed listing of our retail space classification system has been included in Appendix C. In total there are 21 district commercial nodes in Kingston.

⁴ Kingston Regional Commercial System Study (KRCSS), 1998, p. 18. urbanMetrics has adjusted the total commercial space to account for updated calculations.

⁵ KRCSS, p. 19.

Figure 3-1



Node 1: Bath Road between Days Road & Bayridge Drive – A total of 272,100 square feet of retail/service space is found in this node. This commercial strip features a number of smaller retail and service commercial uses. Also included in this node is a No Frills located at the southeast corner of Bath Road and Bayridge Drive.

Node 2: Bath Road between Princess Street & Gardiners Road – This node has a total of 392,600 square feet of retail/service space. Larger commercial uses located in this node include Rona/Cashway, Produce Town, Treasure Chest Bingo, Clover Leaf Lanes Bowling Alley, and Giant Tiger.

Node 3: Cataraqui Industrial Park – This node contains a mixture of automotive, home and building supplies, and services. A total of 341,300 square feet of retail/service space is found in this node.

Node 4: Cataraqui Town Centre – A total of 587,800 square feet of retail/service space is located in this node. The Cataraqui Town Centre is the largest enclosed shopping centre in the City and is anchored by Sears, The Bay, and Zellers.

Node 5: Collins Bay – This node is comprised of neighbourhood commercial uses with a total of 23,500 square feet of retail/service space.

Node 6: Division/401 – This node is mainly comprised of gas stations, fast food outlets and restaurants. A total of 120,600 square feet of retail/service space is found in this node.

Node 7: Downtown – The historic core of the City of Kingston, or the Lower Princess Street Area, is comprised of many smaller retail uses along with individual stores and restaurants. A total of 1,705,200 square feet of retail/service space is located in this node. This is the tourist centre for the City and unlike the downtown of many mid-sized Ontario City's, still maintains a number of popular fashion chains.

Node 8: Frontenac Mall – A total of 291,100 square feet of retail/service space is found in this node. Formerly occupied by a Wal-Mart store, the Frontenac Mall has been re-tenanted by three smaller users, including a Premier Fitness, Value Village, and Liquidation World.

Node 9: Gardiners Road Industrial Area – The node contains a diverse mixture of industrial type uses from automotive services and supplies to office uses such as dental and legal services. A total of 354,100 square feet of retail/service space is found in this node.

Node 10: Gardiners Town Centre & LaSalle Park Plaza – A total of 152,600 square feet of retail/service space is found in this node. Gardiners Town Centre is anchored by an A&P grocery store.

Node 11: Gardiners Road between Princess Street & Bath Road – This node comprises strip plazas along Gardiners Road, across from and adjacent to the Kingston RioCan Centre. A total of 458,000 square feet of retail/service space is located in this node.

Node 12: Kingston New Industrial Park – A mixture of building and home supply, office, and services is found in this node with a total of 191,100 square feet of retail/service space.

Node 13: Kingston RioCan Centre – This power centre is anchored by The Home Depot, Cineplex Odeon Theatres, Sears Home Store, Home Outfitters and The Brick. The total retail/service space in this node amounts to 768,700 square feet.

Node 14: Midland Avenue north of Princess Street – More recent development along Midland Avenue includes a new format Loblaws and a Wal-Mart. A total of 402,500 square feet of retail/service space is found in this node.

Node 15: Other Kingston – This miscellaneous node comprises a number of smaller retail nodes of various sizes and uses scattered throughout the City that are not part of any larger node. This area contains a total of 625,100 square feet of retail/service space.

Node 16: Portsmouth – A total of 52,900 square feet of neighbourhood retail/service space is found in this node. This node is located in the area of King Street West and Yonge Street with a historic character and mixture of uses.

Node 17: Princess Street between Bath Road & Division Street – Also known as Williamsville Main Street, this node is an older commercial strip area with a variety of uses including motels, two story mixed use buildings (office and retail, or residential above retail and service uses), interspersed with auto sales and repair uses. A total of 500,200 square feet of retail/service space is found in this node.

Node 18: Princess Street between Bath & Taylor-Kidd Boulevard – In addition to several retail plazas along Princess Street, this node contains the Kingston Centre Mall which is anchored by a Canadian Tire and Loblaws. The total amount of retail/service space in this node is 592,000 square feet.

Node 19: Princess Street between Gardiners Road & Municipal Boundary – This node is comprised of several retail plazas and larger stores such as Canadian Tire and Leons. A total of 489,600 square feet of retail/service space is found in this node.

Node 20: Princess Street between Gardiners Road & Taylor-Kidd Boulevard – A total of 656,400 square feet of retail/service space is found in this node. Larger stand alone stores such as Costco and Rona are located in this node.

Node 21: Pittsburgh – Located on the east side of The Great Cataraqui River, this node consists of several small plazas surrounding the area of the Canadian Forces Base. A total of 83,800 square feet of retail/service space is found in this node.

Figure 3-2 provides a summary of Kingston's retail and service commercial space by node and sector.

Figure 3-2

Kingston Retail and Service Commercial Space, October 2007 (Sq.Ft. GLA)

Sum of Area		Node						
		Node #	Node					
Type	Description	1	2	3	4	5	6	7
		Bath Rd between Days Rd & Bayridge Dr	Bath Rd between Princess St & Gardiners Rd	Cataraqui Industrial Park	Cataraqui Town Centre	Collins Bay	Division/ 401	Downtown
Food Store Retail	FSR - Convenience/Specialty Food	4,000	9,800	2,300	700			29,900
	FSR - Supermarket	36,500	23,000					44,900
Food Store Retail Sum		40,500	32,800	2,300	700			74,800
Non-Food Store Retail	NFSR - Apparel			3,800	118,000		15,300	118,900
	NFSR - Building and Outdoor Home Supply	8,200	33,100	31,500				22,400
	NFSR - Department Store				353,300			
	NFSR - General Merchandise		20,000		3,400	1,000	3,000	91,300
	NFSR - Home Furnishings	3,800	3,900	17,500	15,100			83,500
	NFSR - Miscellaneous	25,000	30,700	3,600	42,000	500	1,800	166,600
	NFSR - Pharmacies & Personal Care	18,000	4,400		26,400		20,000	35,000
Non-Food Store Retail Sum		55,000	92,100	56,400	558,200	1,500	40,100	517,700
Services	Service - Repair and Maintenance	1,600						700
	Service - Banks		10,800		5,100		1,600	55,700
	Service - Consumer Services Rental	5,800	1,700					10,000
	Service - Eating/Drinking	45,600	56,000		11,200	7,200	49,400	259,100
	Service - Entertainment	14,000	63,700					61,700
	Service - Medical/Dental	6,200	1,000	5,200	4,400			51,200
	Service - Other	23,100	26,700	196,300	2,100	4,000	3,100	327,100
	Service - Personal	6,400	13,200		4,600	3,700	3,400	67,000
	Service - Public Administration	1,800	1,100	20,700				131,700
Services Sum		104,500	174,200	222,200	27,400	14,900	57,500	964,200
Other Retail: LBW	Beverage		7,600					10,900
Other Retail: LBW Sum			7,600					10,900
Other Retail: Automotive	Other Retail - Automotive	45,600	74,100	19,500		5,600	4,700	5,800
	Other Retail - Automotive TBA	8,800		32,400		1,500		
Other Retail: Automotive Sum		54,400	74,100	51,900		7,100	4,700	5,800
Vacant	Vacant	17,700	11,800	8,500	1,500		18,300	131,800
Vacant Sum		17,700	11,800	8,500	1,500		18,300	131,800
Grand Total		272,100	392,600	341,300	587,800	23,500	120,600	1,705,200

Source: urbanMetrics inc., September 2007

Kingston Retail and Service Commercial Space, October 2007 (Sq.Ft. GLA)

(Kingston Inventory, Page 2 of 3)

Sum of Area		Node						
		8	9	10	11	12	13	14
Type	Description	Frontenac Mall	Gardiners Rd Industrial Area	Gardiners Town Centre & LaSalle Park Plaza	Gardiners Rd between Princess St & Bath Rd	Kingston New Industrial Park	Kingston RioCan Centre	Midland Ave north of Princess St
Food Store Retail	FSR - Convenience/Specialty Food FSR - Supermarket	40,000	4,700	4,700 39,800	6,700			82,000
Food Store Retail Sum		40,000	4,700	44,500	6,700			82,000
Non-Food Store Retail	NFSR - Apparel NFSR - Building and Outdoor Home Supply NFSR - Department Store NFSR - General Merchandise NFSR - Home Furnishings NFSR - Miscellaneous NFSR - Pharmacies & Personal Care	17,600	3,400 75,500	7,100 4,600	5,900 40,800	72,800	133,900 140,600	11,100 133,500
		39,900				22,800	17,500	7,200
			26,000	25,200	88,200	3,600	248,600	20,800
		61,600	6,800	14,100	26,000	6,200	81,600	49,600
				2,800	4,200	1,900	12,500	
Non-Food Store Retail Sum		119,100	111,700	53,800	165,100	107,300	634,700	222,200
Services	Service - Repair and Maintenance Service - Banks Service - Consumer Services Rental Service - Eating/Drinking Service - Entertainment Service - Medical/Dental Service - Other Service - Personal Service - Public Administration		25,900	1,100	3,900 11,600	3,100	14,100	5,000
			12,300	6,400	2,100	2,500		1,800
		6,700		16,000	41,400	6,200	33,000	
		62,400	24,000		31,700	11,500	45,700	10,900
		7,300	6,500	2,800	17,200			4,700
		9,300	93,600	6,800	71,100	50,900	1,800	15,500
		10,400	2,600	3,000	23,200	500	11,300	
					3,600			21,000
Services Sum		96,100	164,900	36,100	205,800	74,700	105,900	58,900
Other Retail: LBW	Beverage			5,800				
Other Retail: LBW Sum				5,800				
Other Retail: Automotive	Other Retail - Automotive Other Retail - Automotive TBA		43,700 15,900		56,000 3,600	6,100 2,500	7,300	26,300
Other Retail: Automotive Sum			59,600		59,600	8,600	7,300	26,300
Vacant	Vacant	35,900	13,200	12,400	20,800	500	20,800	13,100
Vacant Sum		35,900	13,200	12,400	20,800	500	20,800	13,100
Grand Total		291,100	354,100	152,600	458,000	191,100	768,700	402,500

Source: urbanMetrics inc., September 2007

Kingston Retail and Service Commercial Space, October 2007 (Sq.Ft. GLA)

(Kingston Inventory, Page 3 of 3)

Sum of Area		Node							
		15	16	17	18	19	20	21	Grand Total
Type	Description	Other Kingston	Portsmouth	Princess St between Bath Rd & Division St	Princess St between Bath Rd & Taylor Kidd Blvd	Princess St between Gardiners Rd & Municipal Boundary	Princess St between Gardiners Rd & Taylor Kidd Blvd	Pittsburgh	
Food Store Retail	FSR - Convenience/Specialty Food	36,000	3,800	17,500	1,200	14,500		4,900	140,700
	FSR - Supermarket	53,100			112,000		34,600	17,000	482,900
Food Store Retail Sum		89,100	3,800	17,500	113,200	14,500	34,600	21,900	623,600
Non-Food Store Retail	NFSR - Apparel			6,000	16,200	9,300	6,100		461,500
	NFSR - Building and Outdoor Home Supply	4,300	2,000		10,000	2,300	121,200		580,400
	NFSR - Department Store								486,800
	NFSR - General Merchandise	2,100		21,000	111,500	123,500	125,700	12,000	601,900
	NFSR - Home Furnishings	38,700		8,800	20,700	88,500	52,700		745,600
	NFSR - Miscellaneous	11,400	1,200	19,400	31,200	43,900	44,200	4,000	671,400
	NFSR - Pharmacies & Personal Care	28,200	3,200	17,400	30,600	1,400	59,600	3,700	269,300
Non-Food Store Retail Sum		84,700	6,400	72,600	220,200	268,900	409,500	19,700	3,816,900
Services	Service - Repair and Maintenance	9,000		800	4,000	700			55,800
	Service - Banks	7,800		25,000	15,700			1,400	148,800
	Service - Consumer Services Rental	6,200		5,500	6,400	6,600	16,900	1,100	85,300
	Service - Eating/Drinking	28,000	22,100	61,000	48,300	54,700	23,400	10,000	779,300
	Service - Entertainment	16,200		6,400	6,100	7,500		1,400	363,200
	Service - Medical/Dental	19,300		55,600	18,900	10,200	6,100	7,000	223,600
	Service - Other	192,700	10,500	77,700	42,100	55,200	56,800	7,300	1,273,700
	Service - Personal	25,800	1,200	14,300	6,100	15,200	7,200	3,600	222,700
	Service - Public Administration	1,400	7,100	69,100	63,300			2,500	323,300
Services Sum		306,400	40,900	315,400	210,900	150,100	110,400	34,300	3,475,700
Other Retail: LBW	Beverage	20,300		14,600					59,200
Other Retail: LBW Sum		20,300		14,600					59,200
Other Retail: Automotive	Other Retail - Automotive	58,000		44,500	27,700	48,900	49,200	4,200	519,900
	Other Retail - Automotive TBA	32,000			6,500		34,600		145,100
Other Retail: Automotive Sum		90,000		44,500	34,200	48,900	83,800	4,200	665,000
Vacant	Vacant	34,600	1,800	35,600	13,500	7,200	18,100	3,700	420,800
Vacant Sum		34,600	1,800	35,600	13,500	7,200	18,100	3,700	420,800
Grand Total		625,100	52,900	500,200	592,000	489,600	656,400	83,800	9,061,200

Source: urbanMetrics inc., September 2007

Downtown is the largest node in terms of overall space, although the majority of its square footage is devoted to the services sector. In terms of non-food retail space, downtown actually ranks third behind the RioCan Centre and Cataraqui Town Centre.

The Gardiners Road Corridor⁶, including lands identified as “The Loop” in the Kingston Township Official Plan, has emerged as the dominant retail area in the City, including 46% of all retail and services space and 65% of all non-food retail space. This shows definite western bias in terms of the distribution of retail space in the City.

This is representative of a trend common in many Municipalities, whereby new format retailing is attracted to the area in the vicinity of major enclosed shopping centres.

In general, Kingston’s retail structure is evolving in a manner similar to that of many other municipalities. It is characterised by a blurring of the traditional hierarchy, the emergence of large mega clusters and a downtown core that is dominated by services rather than retail outlets.

The City’s industrial areas including Cataraqui Industrial Park, Gardiners Road Industrial Area, and Kingston New Industrial Park play a significant secondary retail and service function with a combined total of about 886,500 square feet.

3.2 Kingston Inventory by Commercial Hierarchy

The RCSU recommended a commercial structure based on an analysis of current market trends and a review of the three Official Plans governing land use in the new City of Kingston. Based on our inventory and analysis of commercial space in the City, we have modified some of the designations in the RCSU to more adequately represent changes and current conditions in Kingston’s commercial market from a market perspective. The distribution of commercial space by hierarchy level was allocated to each node based on predominate use and market function. It should be noted that the distribution of commercial space by hierarchy level is intended for market purposes only, and not necessarily as land use designations for the new Official Plan, which accounts for a wide range of other characteristics aside from the commercial market. The following are the various levels comprising the commercial structure for the City:

- **CBD or Downtown** (Lower Princess Street between Division Street and the Harbour and the surrounding streets which comprise the historic downtown core) is the regional mixed use centre for the Kingston Region, including the greatest concentration of business, institutional facilities and tourist attractions. Retailing in this

⁶ Including nodes 3, 4, 9, 10, 11, 13, 14, 19 and 20

area serves a multiple number of markets, including downtown business and residents, tourists, University students and the specialized needs of the broader regional population.

- **Regional Node** (Cataraqui Mall, Midland Avenue and Gardiners Road) recognizes the regional retail attraction of the Gardiners Road Corridor, including the Loop. It contains the highest concentration of large format retailers and largest cluster of non-service retail space in the City.
- **Main Street** (Williamsville Main Street and Portsmouth Village) represents the historic areas outside of downtown with an orientation to pedestrian commercial traffic and a unique character provided by the heritage structures.
- **District Commercial** (Gardiners Town Centre & LaSalle Park Plaza, etc.) includes those retail facilities with a more local draw, serving predominately the surrounding communities.
- **Arterial Commercial** (including most of the Loop, and Highway Commercial as a special sub-section) incorporates a wide range of retailing and services with an orientation to automotive shopping trips.
- **Neighbourhood Commercial** (small scale) are those facilities which serve small neighbourhoods with predominately convenience retail outlets and services.

The following observations can be made in terms of the distribution of retail and service space by commercial hierarchy classification:

- The largest category of retail/service space is the *Arterial Commercial* classification, which includes most of the commercial developments designated "The Loop" in the Kingston Township Official Plan along with developments on Bath Road and Princess Street. This category accounts for about 2.7 million square feet of retail/service space or approximately 30.4% of Kingston's total commercial space.
- The second largest category of retail/service space is the *Regional* classification, which includes the Cataraqui Town Centre, Kingston RioCan Centre, Gardiners Road, and Midland Avenue north of Princess Street. This category accounts for about 2.2 million square feet of retail/service space or approximately 24.5% of Kingston's total commercial space.
- The third largest category is the *Downtown* which accounts for some 1.7 million square feet of retail/service space, or approximately 18.8% of the City's total commercial space.

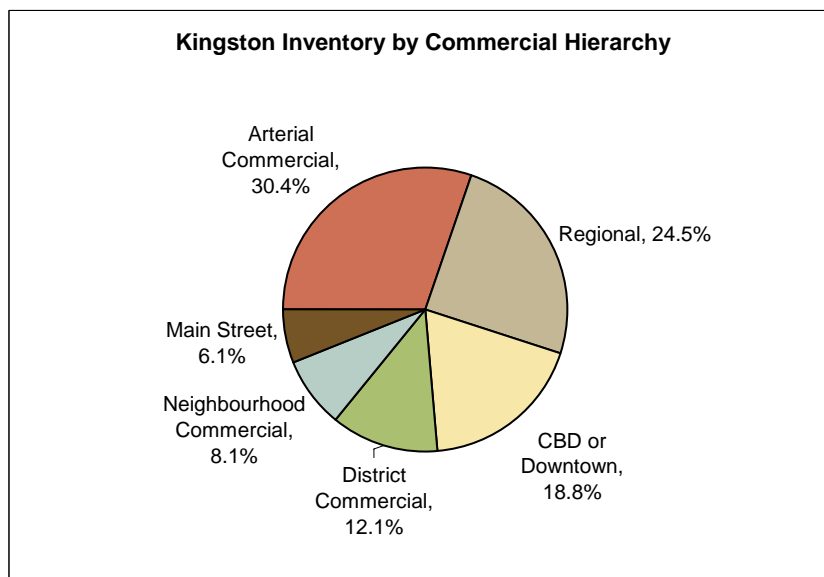
Figure 3-3

DISTRIBUTION OF KINGSTON RETAIL/SERVICE SPACE BY URBANMETRICS COMMERCIAL HIERARCHY

Sum of Area (S.F.)				
urbanMetrics Classification	Node	Node #	Total	% of Total
Arterial Commercial	Bath Rd between Days Rd & Bayridge Dr	1	272,100	3.0%
	Cataraqui Industrial Park	3	341,300	3.8%
	Division/401	6	120,600	1.3%
	Frontenac Mall	8	291,100	3.2%
	Kingston New Industrial Park	12	191,100	2.1%
	Bath Rd between Princess St & Gardiners Rd	2	392,600	4.3%
	Princess St between Gardiners Rd & Municipal Boundary	19	489,600	5.4%
Arterial Commercial Total			2,754,800	30.4%
CBD or Downtown	Downtown	7	1,705,200	18.8%
CBD or Downtown Total			1,705,200	18.8%
District Commercial	Gardiners Rd Industrial Area	9	354,100	3.9%
	Gardiners Town Centre & LaSalle Park Plaza	10	152,600	1.7%
	Princess St between Bath Rd & Taylor Kidd Blvd	18	592,000	6.5%
District Commercial Total			1,098,700	12.1%
Main Street	Portsmouth	16	52,900	0.6%
	Princess St between Bath Rd & Division St	17	500,200	5.5%
Main Street Total			553,100	6.1%
Neighbourhood Commercial	Collins Bay	5	23,500	0.3%
	Other Kingston	15	625,100	6.9%
	Pittsburgh	21	83,800	0.9%
Neighbourhood Commercial Total			732,400	8.1%
Regional	Cataraqui Town Centre	4	587,800	6.5%
	Gardiners Rd between Princess St & Bath Rd	11	458,000	5.1%
	Kingston RioCan Centre	13	768,700	8.5%
	Midland Ave north of Princess St	14	402,500	4.4%
Regional Total			2,217,000	24.5%
Grand Total			9,061,200	100.0%

Source: urbanMetrics inc., September 2007

Figure 3-4



Source: urbanMetrics inc., September 2007

3.3 Kingston Inventory by Commercial Store Type

Figure 3-6 summarizes the distribution of retail/service space by store type in Kingston.

Food Store Retail (FSR) – Included within this category are supermarkets, grocery stores, convenience and specialty food stores. This category accounts for 623,600 square feet of space or 6.9% of total commercial space.

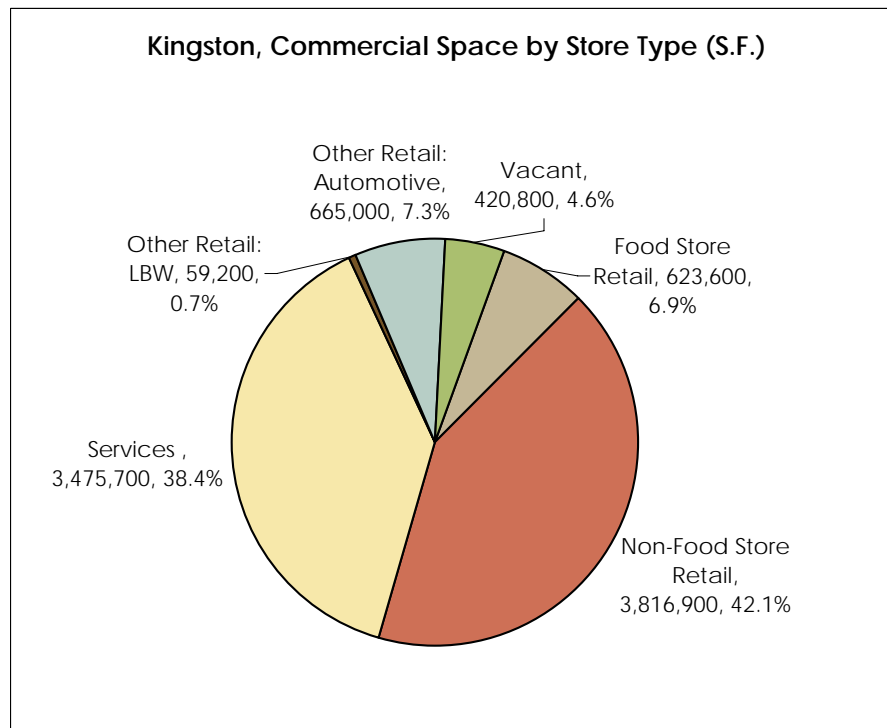
Non Food Store Retail (NFSR) – This category includes Department Stores, Clothing Stores, General Merchandise Stores, Home Furnishings Stores, Pharmacies and Personal Care Stores, and Building and Outdoor Home Supply Stores and Miscellaneous stores (e.g. sporting goods, toy, gift, hobby, etc.) With 3,816,900 square feet of retail/service space or 42.1% of total commercial space, this category represents the largest category by store type.

Services – Included within this category are all services, such as financial services, entertainment, personal services, medical services and others. The services category is the second largest category with 3,475,700 square feet of space or 38.4% of total commercial space.

Other Retail – This category includes Other Retail: Liquor, Beer, Wine; and Other Retail: Automotive. Liquor, Beer, and Wine amounted to 59,200 square feet of space or 0.7% of Kingston's total commercial space. The Other Retail: Automotive (includes Automotive Sales and Service; Tire, Batteries and Automotive Accessories; and Gasoline Stations with Convenience Stores) represents 665,000 square feet or 7.3% of the City's total commercial space.

Vacant – This accounts for 420,800 square feet of retail/service space or 4.6% of Kingston's total commercial space.

Figure 3-5



Source: urbanMetrics inc., September 2007

3.4 Per Capita Distribution of Retail/Service Space

This section examines the distribution of space in Kingston on a per capita basis, which provides a general indication of service level. Figure 3-7 illustrates the per capita retail space based on store type.

A comparison to the 1998 inventory⁷ undertaken as part of the KRCSS has also been provided and the following observation can be made:

- Since 1998, Food Store Retail has decreased by 0.9%, with growth occurring in the Supermarket category (22.0%), but decreasing in the convenience/specialty food category (39.8%). Space per capita decreased slightly during this period by 0.4 square feet. The current ratio of 5.2 square feet per capita is within general industry norms of about 4-6 square feet per capita.

⁷ The 1998 inventory was classified utilizing the Standard Industrial Classification, whereas the 2007 inventory has been classified utilizing the new North American Industry Classification. Where possible, we have attempted to modify the 1998 inventory to correspond to the NAICS, however, in the absence of a detailed 1998 inventory, some variances exist.

- For Non Food Store Retail, the increase in space is about 40.4%, with an increase in space per capita from 24.0 to 31.8 square feet. Within this category, the largest growth has occurred in Building and Outdoor Home Supply (256.0%). The current per capita ratio in this category is higher by industry standards. To some extent it reflects Kingston's regional service role, and this level suggests that some caution may be justified in terms of approving new non-food retail space.
- The Services sector has declined by about 6.1%, with a decrease in space per capita from 32.7 to 28.9 square feet. This level is higher but is not out of line with Kingston's role as a tourist and institutional centre.
- For Other Retail: Liquor, Beer, Wine, decreases in space amount to about 25.6%, with a decrease in space per capita from 0.7 to 0.5 square feet
- Vacant space has declined significantly since 1998 by 52.5%.
- Overall, space has increased by 6.1%, with space per capita remaining virtually constant from 75.4 to 75.5 square feet.

FIGURE 3-6

CITY OF KINGSTON, SQUARE FEET PER CAPITA

Population (1)

113,241

120,080

Retail Category	NAICS	1998 Total S.F.	Space Per Capita	2007 Total S.F.	Space Per Capita	% Change in S.F.	S.F. Per Capita Change
Food Store Retail	FSR - Convenience/Specialty Food	233,694	2.1	140,700	1.2	-39.8%	-0.9
	FSR - Supermarket	395,749	3.5	482,900	4.0	22.0%	0.5
Food Store Retail Sum		629,443	5.6	623,600	5.2	-0.9%	-0.4
Non-Food Store Retail	NFSR - Apparel	357,243	3.2	461,500	3.8	29.2%	0.7
	NFSR - Building and Outdoor Home Supply	163,046	1.4	580,400	4.8	256.0%	3.4
	NFSR - Department Store	614,733	5.4	486,800	4.1	-20.8%	-1.4
	NFSR - General Merchandise	449,619	4.0	601,900	5.0	33.9%	1.0
	NFSR - Home Furnishings	457,524	4.0	745,600	6.2	63.0%	2.2
	NFSR - Miscellaneous	512,320	4.5	671,400	5.6	31.1%	1.1
	NFSR - Pharmacies & Personal Care	164,866	1.5	269,300	2.2	63.3%	0.8
Non-Food Store Retail Sum		2,719,351	24.0	3,816,900	31.8	40.4%	7.8
Services	Service - Repair and Maintenance	n.a	n.a	55,800	0.5	n.a	n.a
	Service - Banks	272,402	2.4	148,800	1.2	-45.4%	-1.2
	Service - Consumer Services Rental	18,914	0.2	85,300	0.7	351.0%	0.5
	Service - Eating/Drinking	732,718	6.5	779,300	6.5	6.4%	0.0
	Service - Entertainment	385,811	3.4	363,200	3.0	-5.9%	-0.4
	Service - Medical/Dental	282,984	2.5	223,600	1.9	-21.0%	-0.6
	Service - Other	1,559,993	13.8	1,273,700	10.6	-18.4%	-3.2
	Service - Personal	223,175	2.0	222,700	1.9	-0.2%	-0.1
	Service - Public Administration	226,907	2.0	323,300	2.7	42.5%	0.7
Services Sum		3,702,904	32.7	3,475,700	28.9	-6.1%	-3.8
Other Retail: LBW	Beverage	79,609	0.7	59,200	0.5	-25.6%	-0.2
Other Retail: LBW Sum		79,609	0.7	59,200	0.5	-25.6%	-0.2
Other Retail: Automotive	Other Retail - Automotive	467,127	4.1	519,900	4.3	11.3%	0.2
	Other Retail - Automotive TBA	54,395	0.5	145,100	1.2	166.8%	0.7
Other Retail: Automotive Sum		521,522	4.6	665,000	5.5	27.5%	0.9
Vacant	Vacant	885,559	7.8	420,800	3.5	-52.5%	-4.3
Vacant Sum		885,559	7.8	420,800	3.5	-52.5%	-4.3
Grand Total (2)		8,538,388	75.4	9,061,200	75.5	6.1%	0.1

Source: urbanMetrics inc.

1) Population estimates have been adjusted for undercount

2) 1998 Inventory from the KRCSS has been adjusted

3) Other Retail: Automotive includes Automobile Sales and Service

4) Direct comparison for some store types/services cannot be made due to differences in the store classification utilized in 1998 and 2007 (i.e. SIC versus NAICS)

3.5 Vacant Space Analysis

Since 1998, there has been a significant redistribution in the overall vacancy rate for the City. The 1998 KRCSS reported that there was some 885,559 square feet of vacant space representing a vacancy rate of 10.4%. The current amount of vacant space is just over 420,000 square feet, less than half the total in the 1998 inventory. The vacancy rate for the City has declined to just 4.6%, representing a balanced market. The highest rates are found at Division Street and the 401, and at Frontenac Mall, where Wal-Mart had vacated (Figure 3-8). At 7.7%, the vacancy rate for downtown Kingston is above average for the City, but not out of line with older retail areas, where there is less flexibility in terms of store size and layouts.

Figure 3-7
City of Kingston Retail Inventory
Vacant Space by Node (Square Feet)

Node #	Node	Vacant Space	Total Space	Vacancy Rate
1	Bath Rd between Days Rd & Bayridge Dr	17,700	272,100	6.5%
2	Bath Rd between Princess St & Gardiners Rd	11,800	392,600	3.0%
3	Cataraqui Industrial Park	8,500	341,300	2.5%
4	Cataraqui Town Centre	1,500	587,800	0.3%
5	Collins Bay	0	23,500	0.0%
6	Division/401	18,300	120,600	15.2%
7	Downtown	131,800	1,705,200	7.7%
8	Frontenac Mall	35,900	291,100	12.3%
9	Gardiners Rd Industrial Area	13,200	354,100	3.7%
10	Gardiners Town Centre & LaSalle Park Plaza	12,400	152,600	8.1%
11	Gardiners Rd between Princess St & Bath Rd	20,800	458,000	4.5%
12	Kingston New Industrial Park	500	191,100	0.3%
13	Kingston RioCan Centre	20,800	768,700	2.7%
14	Midland Avenue north of Princess St	13,100	402,500	3.3%
15	Other Kingston	34,600	625,100	5.5%
16	Portsmouth	1,800	52,900	3.4%
17	Princess St between Bath Rd & Division St	35,600	500,200	7.1%
18	Princess St between Bath Rd & Taylor Kidd Blvd	13,500	592,000	2.3%
19	Princess St between Gardiners Rd & Municipal Boundary	7,200	489,600	1.5%
20	Princess St between Gardiners Rd & Taylor Kidd Blvd	18,100	656,400	2.8%
21	Pittsburgh	3,700	83,800	4.4%
Grand Total		420,800	9,061,200	4.6%

Source: urbanMetrics inc, September 2007

4. Proposed Commercial Developments

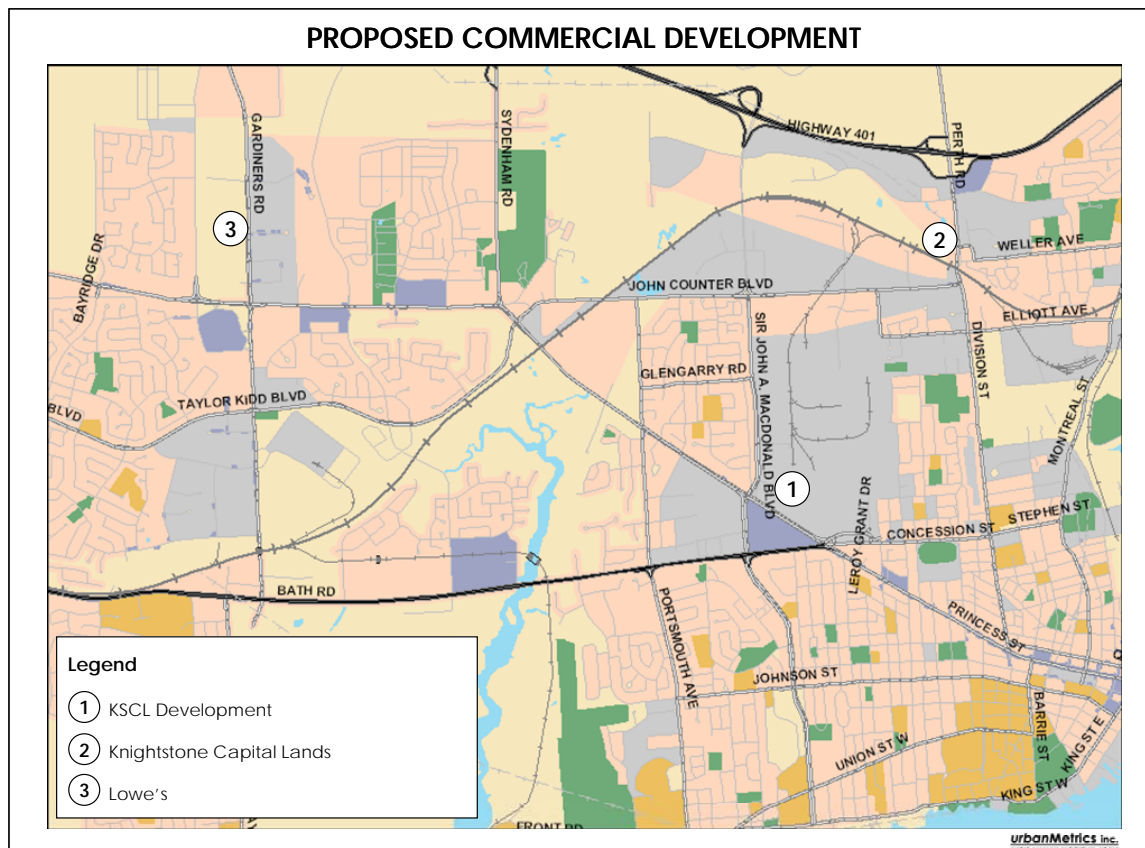
Kingston's commercial structure has developed from the hierarchies of the three former municipalities. Downtown Kingston is still the historic focal point for commercial activity in the region. Over time, however, several other major nodes have become established in the City and Kingston Township, such as the Kingston Centre and Cataraqui Town Centre.

While at one time Bath Road in the former Kingston Township had developed into a secondary retail strip, including a number of discount department store anchored plazas, its function has largely been transferred more recently to a large format retail cluster along Gardiners Road.

4.1 Major Proposed Commercial Developments

There are a number of active applications for commercial development in the City of Kingston. Major proposed commercial developments are shown in Figure 4-1 and described below:

Figure 4-1



1. Princess Street and Sir John A. Macdonald Boulevard (KSCL Development)

Kingston Shopping Centres Limited (KSCL) is proposing a 600,000 square foot retail centre on a 60 acre site located at the north east corner of Princess Street and Sir John A. Macdonald Boulevard. This site is designated as Industrial in the Official Plan for the City of Kingston planning Area (1991). An Official Plan amendment and Zoning By-Law Amendment would be required. The proposed development would be anchored by a Wal-Mart department store (215,000 square feet), a home improvement centre (150,000 square feet) and a relocated and expanded Canadian Tire store (110,000 square feet). The remainder of the development would be comprised of ancillary retail (89,000 square feet) and service uses (36,000 square feet). Based on a Retail Market Demand and Impact Study conducted by Tate Economic Research dated April 2007, the proposed 600,000 square foot development is warranted on the basis of market demand and impact. The study concluded that the KSCL development is expected to satisfy a gap in the Kingston East market and contribute to restoring the balance in the distribution of available retail space throughout the city.⁸

However, a Peer Review of the KSCL proposed development conducted by Robin Dee and Associates concluded that "there would appear to be no justification for approving additional lands for retail commercial development in Kingston at this time". This conclusion was based on recent population projections confirming lower population growth for the City of Kingston than those projected in the 1998 study, and a recognition of the amount of designated unbuilt commercial land in the City. Furthermore, it was concluded that the growth in market potential over the next decade would be best tapped to support the take up of unbuilt designated sites and intensification of existing under-developed sites.⁹

2. Dalton Avenue and Division Street (Knightstone Capital Lands)

Along with the Kingslake Plaza near the Highway 401 Division Street exit, Knightstone owns three development parcels totalling approximately 77 acres. Excluding Kingslake Plaza, the Knightstone lands are zoned for up to approximately 555,000 square feet of new commercial space, in addition to hotel uses permitted on the site. The Knightstone development would occur in phases with a proposed 125,000 square foot fashion outlet mall and up to 430,000 square feet of power centre space. The Knightstone proposed development is summarized below:

⁸ "Retail Market Demand and Impact Analysis, Princess Street and Sir John A. Macdonald, City of Kingston, ON." Tate Economic Research, April 2007.

⁹ Peer Review conducted by Robin Dee & Associates (September 6, 2007) of "Retail Market Demand and Impact Analysis: Princess Street and Sir John A. Macdonald Boulevard, City of Kingston" by Tate Economic Research Inc. April 2007.

- o **King's Crossing Power Centre** – Located on the south side of Dalton Avenue, west of Division Street, the total parcel area is 62.5 acres with permissions for up to 430,000 square feet of commercial space including a supermarket of up to 80,000 square feet.
- o **Sail Point Outlet Mall** – Located on the north side of Dalton Avenue, west of Division Street, the site is approximately 14.6 acres in size. The proposed development is for a 125,000 square foot fashion outlet mall and a 56,000 square foot hotel. A portion of the site, approximately 1.0 acre, would be for restaurant uses.
- o **Kingslake Plaza** - This shopping centre totals approximately 75,000 square feet. Once anchored by an IGA supermarket, the vacated space will be re-tenanted with a Shoppers Drug Mart.

3. Gardiners Road and Princess Street (Lowe's)

The Lafarge property is about 24 acres in size. Lowe's is proposing a 142,000 square foot home improvement warehouse with a 32,000 square foot garden centre on some 15 acres on the northern portion of the Lafarge property. The site plan also identifies a 5,000 square foot CRU space on an outlying pad for commercial use on the southerly portion of the site.

According to the "Kingston Home Improvement Market Impact Study", conducted by Malone Given Parsons (MGP) dated November 15, 2007, the remaining 9 acre southerly portion of the Lafarge property ('the Springer lands') is intended to be developed for assorted retail and service uses in subsequent phases of development. This market study by MGP concluded that "the analysis shows market support is, in theory, available for the proposed entry of Lowe's into the Kingston market during 2008, with a first full year of operations in 2009".¹⁰

These three proposed development parcels alone amount to some 146.5 acres. Additional commercial development potential exists on smaller vacant parcels and at existing shopping centres with approved expansion capability. Furthermore, there are vacancies in current commercial sites.

¹⁰ Kingston Home Improvement Market Impact Study, Malone Given Parsons Ltd., November 15, 2007

FIGURE 4-2

CITY OF KINGSTON

PROPOSED COMMERCIAL DEVELOPMENTS

	Description	Lot Area (acres)	Building Size (S.F.)	Total Proposed Development (S.F.)
1	Division Street & Dalton Avenue	62.5	Power Centre: 430,000 Fashion Outlet Mall: 125,000	555,000
2	Princess Street and Sir John A. MacDonald	60.0	Wal-Mart: 215,000 Home Improvement Centre: 150,000 Canadian Tire: 110,000 Ancillary Retail Space: 89,000 Ancillary Service Space: 36,000	600,000
3	Gardiners Road and Princess Street	24.0	Lowe's: 174,000 Commercial Retail Unit: 5,000	179,000
4	Pharma Plus 434 Taylor Kidd Boulevard	4.6	11,173 proposed	11,173
5	Bath Road at Coverdale Drive (new Pharma Plus + other buildings)	4.0	Pharma Plus: 11,087 being constructed Unit B: 4,200 proposed Unit C: 14,000 proposed	29,287
6	LCBO 1089 Midland Avenue	2.3	10,463 proposed	10,463
7	TDL Group – Tim Horton's Restaurant and vacant building	2.0	Tim Horton's: 3,080 proposed Building "B": 5,000 proposed	8,080
8	Kingston Volkswagen - Addition	1.4	5,156 proposed	5,156
9	The Royal Bank 523 Golden Mile Road	1.0	7,330 proposed	7,330
10	Mercedes-Benz Dealership 1432 Bath Road - New Dealership	0.8	10,567 proposed	10,567
11	841 Hwy No. 15 (New Gas Station and Plaza)	0.7	6,835 proposed	6,835
12	Kincore Holdings 326 Bagot Street (Proposing ground floor commercial with the residential component. Will be resubmitting revised plans in the near future which will effect the floor area of proposed commercial)	0.6	11,302 proposed retail	11,302
Total Area (Acres)		163.9		1,434,193

Source: City of Kingston, September 5, 2007

Figure 4-2 summarizes the location and size of proposed commercial developments. The total space for proposed developments amounts to approximately 1,434,193 square feet. The three largest proposed developments are located in industrial areas including Kingston New Industrial Park (Division Street and Dalton Avenue), Alcan Business Park (Princess Street and Sir John A. Macdonald Boulevard), and Cataraqui Industrial Park (Gardiners Road and Princess Street).

4.2 Vacant Sites Designated & Zoned for Commercial Use

There are also a number of designated commercial sites for which applications have not been submitted. Figures 4-3 and 4-4 summarize the City's vacant sites that are designated and zoned for commercial use. The total amount of land is approximately 82 acres, with the largest lot size at 14.7 acres and the smallest just under 1 acre.

Figure 4-3

CITY OF KINGSTON

VACANT SITES DESIGNATED & ZONED FOR COMMERCIAL USE

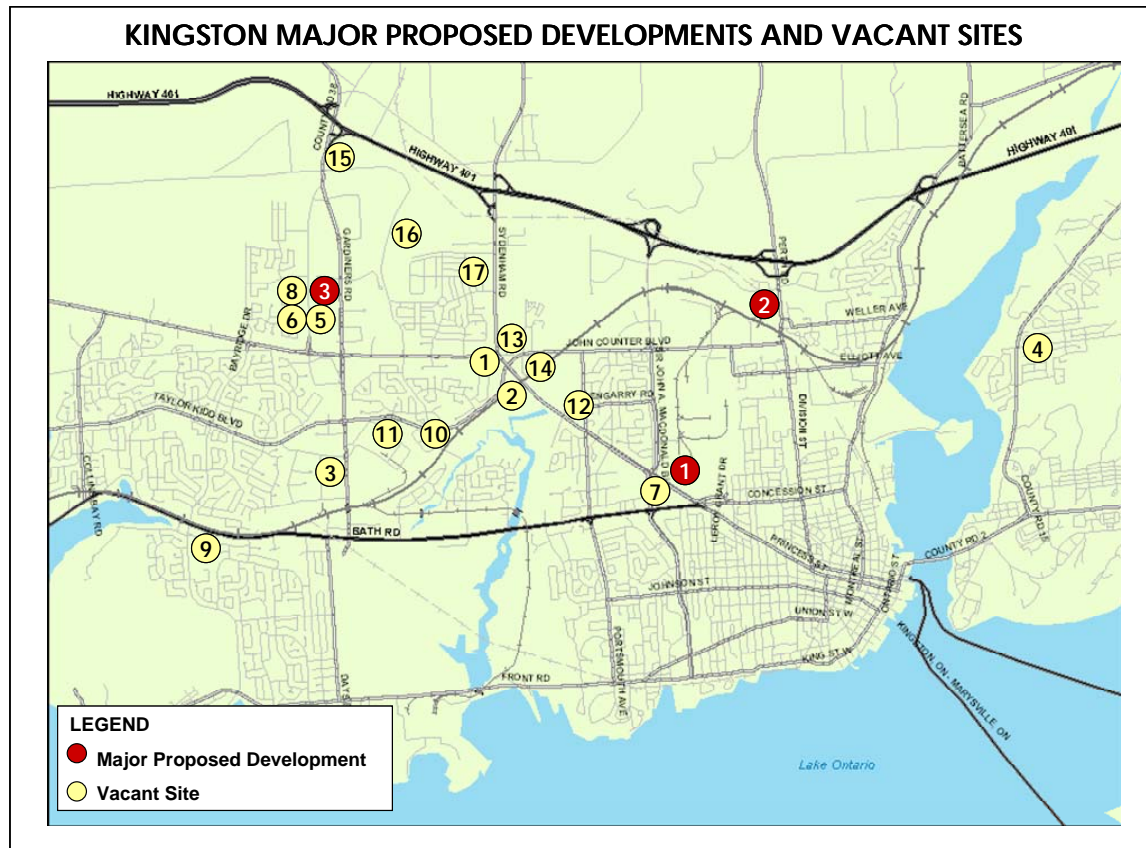
	Description	Lot Area (acres)
1	SW corner of Taylor-Kidd Boulevard & John Counter Boulevard	14.7
2	SE corner of Taylor-Kidd Boulevard & John Counter Boulevard (not including the existing motel)	9.6
3	Dacon lands on Gardiners Rd across from RioCan Centre	9.5
4	Gore Road Plaza	8.5 acres total; half vacant
5	Midland Avenue – north of Loblaws	8.45
6	Midland Avenue – new LCBO and adjacent properties	6.25
7	Kingston Centre (northeast corner of Sir John A. Macdonald Boulevard. & Bath Road)	5 - 7
8	Midland Avenue – north and west of McDonald's	4.14
9	Vacant site next to new Pharma Plus on Bath Rd at Coverdale Drive	4
10	SE corner of Taylor-Kidd Boulevard & Centennial Drive	3.7
11	South side of Taylor-Kidd Boulevard at Bexley Gate	3
12	Former Goodwill site on Princess Street (near Portsmouth Avenue)	2.4
13	NW corner of Taylor-Kidd Boulevard & John Counter Boulevard – seasonal landscaping business	1.7
14	NE corner of Taylor-Kidd Boulevard & John Counter Boulevard – vacant building for sale/lease	0.9
15	Robinson Business Park – NE corner of Gardiners Rd and Centennial Dr, next to Highway 401	Business Park Industrial, but includes permission for a max. of 3000 sq. m. of floor area for a convenience store, vehicle sales establishment, a specialty retail store, and a gasoline retail facility.
16	Intersection of Cataraqui Woods Dr & Centennial Dr (all 4 corners permit commercial; SE corner just re-zoned to permit a retirement home though)	n.a.
17	Another parcel in Cataraqui North, south of Cataraqui Woods Dr, near Sydenham Rd	n.a.

Source: City of Kingston, September 5, 2007

Based on a Peer Review by Robin Dee & Associates, the array of vacant sites available in Kingston could accommodate a variety of types and sizes of new retail format operations.¹¹

¹¹ Peer Review conducted by Robin Dee & Associates (September 6, 2007) of "Retail Market Demand and Impact Analysis: Princess Street and Sir John A. Macdonald Boulevard, City of Kingston" by Tate Economic Research Inc. April 2007, p.14.

Figure 4-4



5. Commercial Market Analysis

In this section, we have undertaken commercial space projections by major retail category including:

- Supermarket;
- Other Food Store Retail;
- Department Stores;
- Other Non-Food Store Retail, and
- Other Retail/Services.

Where appropriate, the space forecasts rely on the assumptions utilized in the Robin Dee & Associates peer review of the TER analysis¹². For the services categories, which were not analyzed in the TER study, a per capita space approach was employed. The detailed tables including our analysis and space projections are found in Appendix D.

5.1 Kingston Trade Area Per Capita Income

In addition to population growth, local income levels can influence future commercial space potential. Based on the 2001 Census¹³, the Kingston East sector has a per capita income level that is 8.1% below the provincial average, while the Kingston West sector is equal to the provincial average. The Secondary Trade Area containing the Western Periphery, Eastern Periphery and Greater Napanee has per capital income levels that are below the province at 13.5%, 8.4% and 23.2%, respectively (Figure 5-1).

**FIGURE 5-1
KINGSTON TRADE AREA
PER CAPITA INCOME, 2001**

	Per Capita Income	Index to Province
Primary Trade Area		
Kingston East	\$22,756	91.9
Kingston West	\$24,772	100.0
Secondary Trade Area		
Western Periphery	\$21,418	86.5
Eastern Periphery	\$22,686	91.6
Greater Napanee	\$19,011	76.8
Ontario	\$24,767	100.0

Source: Statistics Canada, 2001 Census

¹² Tate Economic Research. Retail Market Demand and Impact Analysis, Princess Street and Sir John A. Macdonald Boulevard, City of Kingston, ON. Prepared for Kingston Shopping Centres Ltd., April 2007

¹³ Statistics Canada has not yet released 2006 income statistics.

5.2 Retail Expenditures

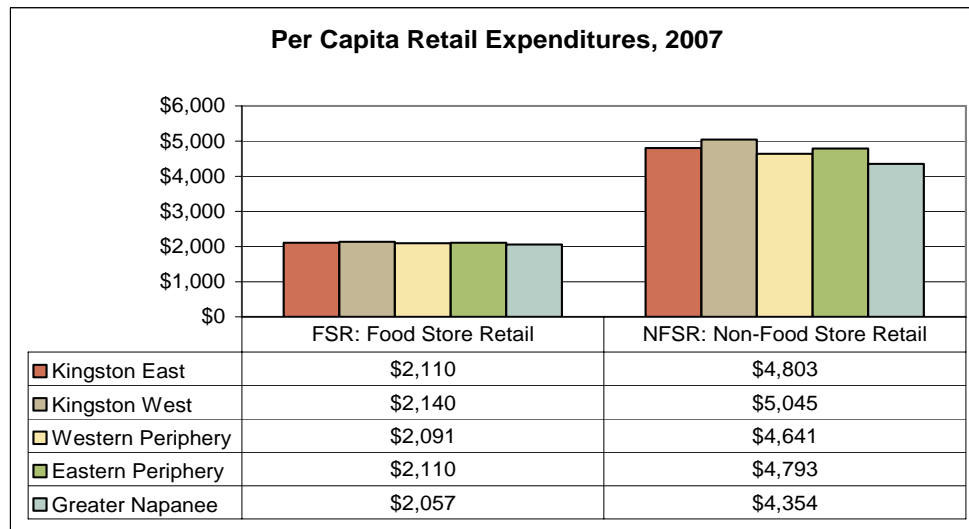
In order to determine the total volume of retail expenditures that are available within the City of Kingston, it is necessary to estimate the expenditures that are made in various types of retail stores by Kingston Trade Area residents.

Based on Statistics Canada, Retail Trade data, we have estimated the per capita expenditures in Ontario for the following retail store types based on the North American Industry Classification System (NAICS) (see Appendix C for details):

Food Store Retail (FSR) – this category consist of supermarkets, grocery stores, convenience and specialty food stores.

Non-Food Store Retail (NFSR) – this category includes:

- Pharmacies and Personal Care Stores including drug stores, optical stores, nutrition and cosmetic stores;
- Clothing and Accessories Stores including shoe stores, jewellery and luggage/leather good stores;
- Furniture, Home Furnishings and Electronics Stores including furniture, furnishings, computer, camera and photographic supply stores;
- Building and Outdoor Home Supplies Stores including home improvement centres, hardware stores, paint and wallpaper stores, nursery/garden centres, and a wide range of building material stores;
- General Merchandise Stores including department stores, warehouse membership clubs, home and auto supply stores, variety stores, and dollar stores; and
- Miscellaneous Retailers including sporting goods, toy, hobby, book, florist, office supply, fabric/wool, gift stores, and pet/pet supply stores.

Figure 5-2

Source: urbanMetrics inc.

FSR per capita expenditures are based on Statistics Canada Retail Trade data, with the 2007 average per capita food store expenditure in Ontario estimated at \$1,990.¹⁴ Food store expenditures include supermarkets, grocery and specialty food stores. The 2007 average per capita food store expenditure for each Trade Area Sector has been estimated based on the income relationship between the Province and the Trade Area Sector, and an expenditure based regression equation, which calculates an expenditure index based on income level. Considering that Kingston East area residents have income levels below the provincial average, the 2007 per capita FSR expenditures have been estimated at \$2,110. The Kingston West FSR per capita expenditures have been estimated at \$2,140. For the Secondary Trade Areas, with income levels below the provincial average, per capita expenditures are \$2,091 for the Western Periphery, \$2,110 for the Eastern Periphery and \$2,057 for the Greater Napanee Area (Figure 5-2).

For Trade Area residents, the 2007 average per capita FSR expenditure is expected to increase at a rate of 0.5% per year on an uninflated basis between 2007 and 2026. As discussed in the underlying assumptions, future changes in expenditure patterns solely due to inflation have not been recognized. Therefore, future expenditure levels reflect the 2007 value of the Canadian dollar.

¹⁴ Based on 1st, 2nd and 3rd quarter data for 2007.

NFSR per capita expenditures are based on Statistics Canada Retail Trade data, with the 2007 average per capita non-food store retail expenditure in Ontario estimated at \$5,195.¹⁵ For Trade Area residents, the 2007 average per capita non-food store retail expenditure has been estimated based on the income relationship between the Province and the Trade Area, and an expenditure related regression equation, which calculates an expenditure index based on income level. The 2007 per capita NFSR expenditures have been estimated at \$4,803 for the Kingston East area and \$5,045 for the Kingston West area. For the Secondary Trade Area, per capita expenditures are \$4,641 for the Western Periphery, \$4,793 for the Eastern Periphery and \$4,354 for the Greater Napanee Area (Figure 5-2).

For residents in the Kingston Trade Area, the 2007 average per capita NFSR expenditure is expected to increase at a rate of 1.5% per year on an uninflated basis during the study period. Again, future changes in expenditure patterns solely due to inflation have not been recognized in this analysis.

5.3 Warranted Commercial Space

Our market analysis has included estimates of warranted space in the City of Kingston for a number of major store types including:

1. NFSR – Department Store
2. NFSR – Other NFSR
3. FSR – Supermarkets
4. FSR – Other Food Store
5. Other Retail/Services

5.3.1 Retail Store Analysis

Our estimates of warranted space for retail store types 1 through 4 have been based on a residual analysis approach which is considered appropriate for long term land use planning as it does not encroach on the sales of existing stores in Kingston to support additional space.

The following summarizes our methodology utilized to calculate warranted space for each store type analyzed:

¹⁵ Based on 1st, 2nd and 3rd quarter data for 2007.

1. The existing Kingston Share (i.e. expenditures made in Kingston) of Trade Area residents expenditures made in Kingston has been estimated based on the consumer survey results contained in the following TER market study and Robin Dee peer review:
 - *"Retail Market Demand and Impact Analysis: Princess Street and Sir John A. Macdonald Boulevard."* Prepared for Kingston Shopping Centres Limited. Tate Economic Research. April 2007
 - Peer Review conducted by Robin Dee & Associates (September 6, 2007) of the *"Retail Market Demand and Impact Analysis: Princess Street and Sir John A. Macdonald Boulevard"* by Tate Economic Research Inc. April 2007.

The existing Kingston share of expenditures by Greater Napanee residents has been based on a review of the KRCSS and more recent market study research.

2. Future Kingston market shares have been forecast over the study period (2007 to 2026) based on an estimate of the opportunity for recapture of expenditures currently leaving the community. These forecast shares have been held constant over the forecast period analyzed.
3. By applying the Kingston shares to the available expenditure potential, the Kingston expenditure potential from Kingston residents has been calculated.
4. The residual potential available or the net additional expenditure growth over the study area period has been calculated.
5. Inflow sales have been added to the residual potential to calculate the total additional sales volume available to new Kingston retail facilities
6. The warranted space in each category has then been calculated based on expected sales performance levels applied to the total sales volume available.

It should be noted our analysis excludes any adjustments in the existing percentage distribution of expenditures by store type, the addition of sales transfers from existing stores in Kingston, or adjustments on a store category basis for sales transfers that may occur from one major store category to another given the merchandise overlaps between categories (e.g. NFSR to FSR).

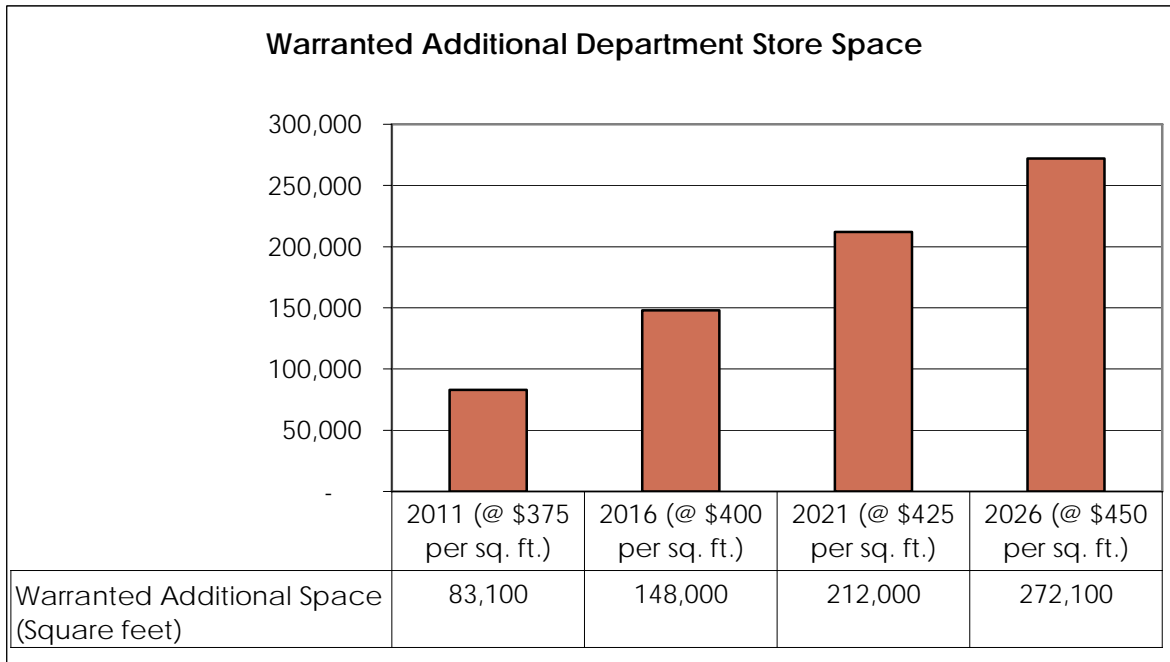
The following summarizes the results of our warranted space analysis (see Appendix D for details).

5.3.1.1 NFSR - Department Store Space Warranted

Kingston Trade Area residents are currently spending some \$179.6 million in department stores of which an estimated \$163.6 million is spent in Kingston department stores (91.1%). Therefore, based on the existing inventory, Kingston department stores are currently achieving average sales per square foot levels of about \$391 per square foot (assuming a 14.0% inflow factor). Currently there is 486,800 square feet of department store space in Kingston including Sears, The Bay, Zellers and Wal-Mart.

The total residual expenditure potential available from Trade Area residents has been estimated at \$26.8 million in 2011, increasing to \$105.3 million by 2026. Based on the residual expenditures available from Trade Area residents and estimated inflow sales of some 14.0%, close to 272,100 square feet of new department store space is warranted in Kingston by 2026 (at \$450 per square foot) (Figure 5-3).

Figure 5-3



Source: urbanMetrics inc.

Based on the residual potential available.

Excludes Sales Transfers from Existing Stores in Kingston

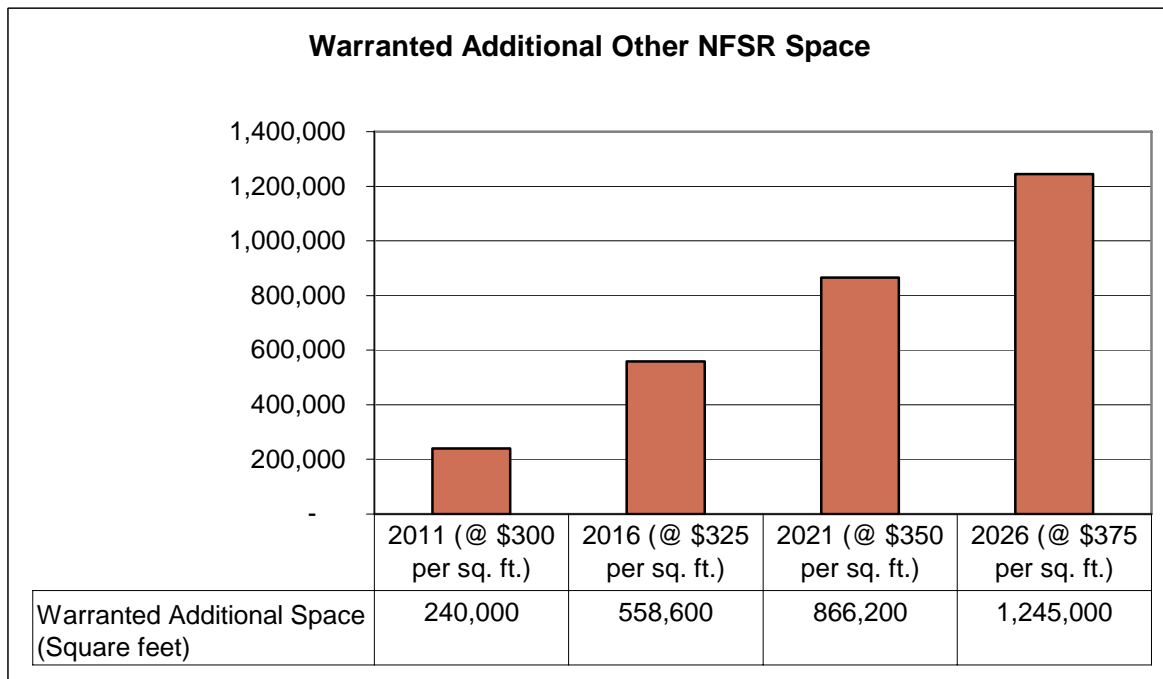
5.3.1.2 Other Non Food Store Retail (NFSR) Space

Trade Area residents are currently spending some \$810.6 million in Other NFSR stores of which an estimated \$671.5 million is spent in Kingston department stores (82.8%). Currently there is 3,330,100 square feet of Other NFSR space which includes the following categories:

- Clothing, Shoes & Accessories
- Furniture, Home Furnishings & Electronics
- Pharmacies and Personal care
- Home Improvement
- General Merchandise (including Costco and Canadian Tire), but excluding department stores
- Miscellaneous Retailers

The total residual expenditure potential available from Trade Area residents has been estimated at \$61.2 million in 2011, increasing to \$365.1 million by 2026. Based on the residual expenditures available from Trade Area residents and estimated inflow sales of some 15.0%, close to 240,000 square feet of new Other NFSR space is warranted in Kingston by 2011 (at \$300 per square foot), increasing to 1,245,000 by 2026 (at \$375 per square foot) (Figure 5-4).

Figure 5-4



Source: urbanMetrics inc.

Based on the residual potential available.

Excludes Sales Transfers from Existing Stores in Kingston

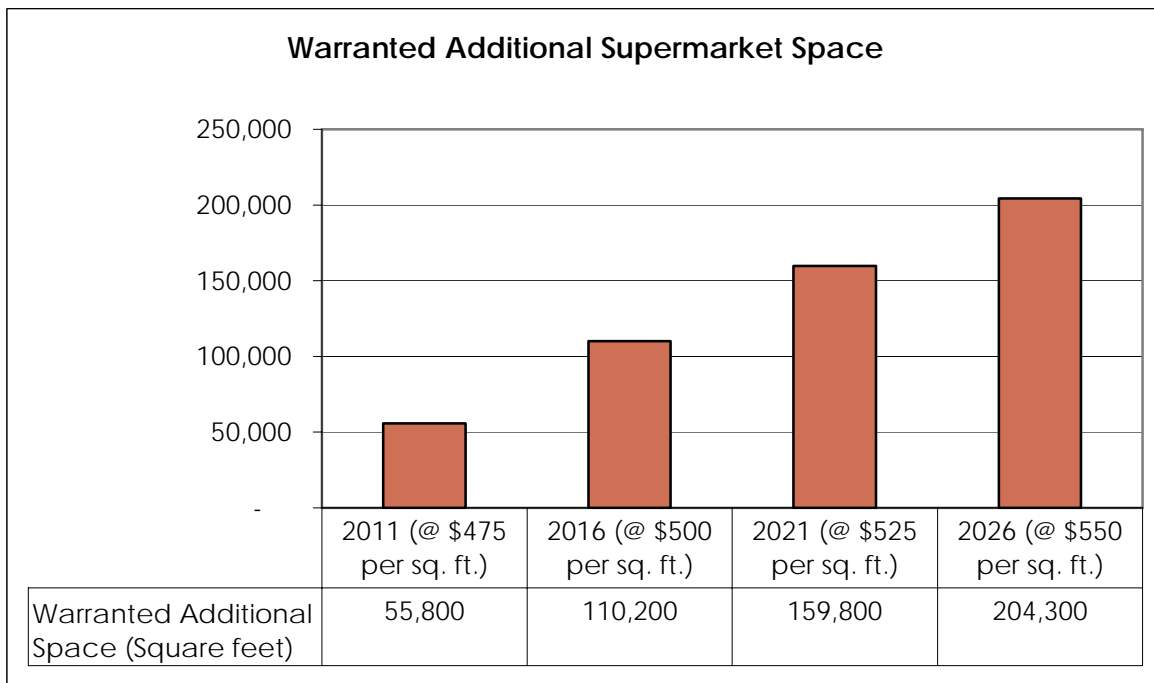
5.3.1.3 FSR - Supermarket Space

Currently supermarkets comprise some 482,900 square feet. The largest supermarkets are Loblaw's stores located at Kingston Centre Mall and Midland Avenue north of Princess Street, each at some 82,000 square feet. All other supermarkets in Kingston are less than 40,000 square feet.

Trade Area residents are currently spending some \$332.4 million in supermarkets of which an estimated \$258.2 million is spent in Kingston supermarkets (77.7%). Therefore, based on the existing inventory, Kingston supermarkets are currently achieving average sales per square foot levels of about \$573 per square foot (assuming a 6.7% inflow factor).

The total residual expenditure potential available from Trade Area residents has been estimated at \$23.2 million in 2011, increasing to \$98.3 million by 2026. Based on the residual expenditures available from Trade Area residents and estimated inflow sales of some 12.5%, at least 55,800 square feet of new supermarket space is warranted in Kingston by 2011 (at \$475 per square foot), increasing to 204,300 square feet by 2026 (at \$550 per square foot) (Figure 5-5).

Figure 5-5



Source: urbanMetrics inc.

Based on the residual potential available.

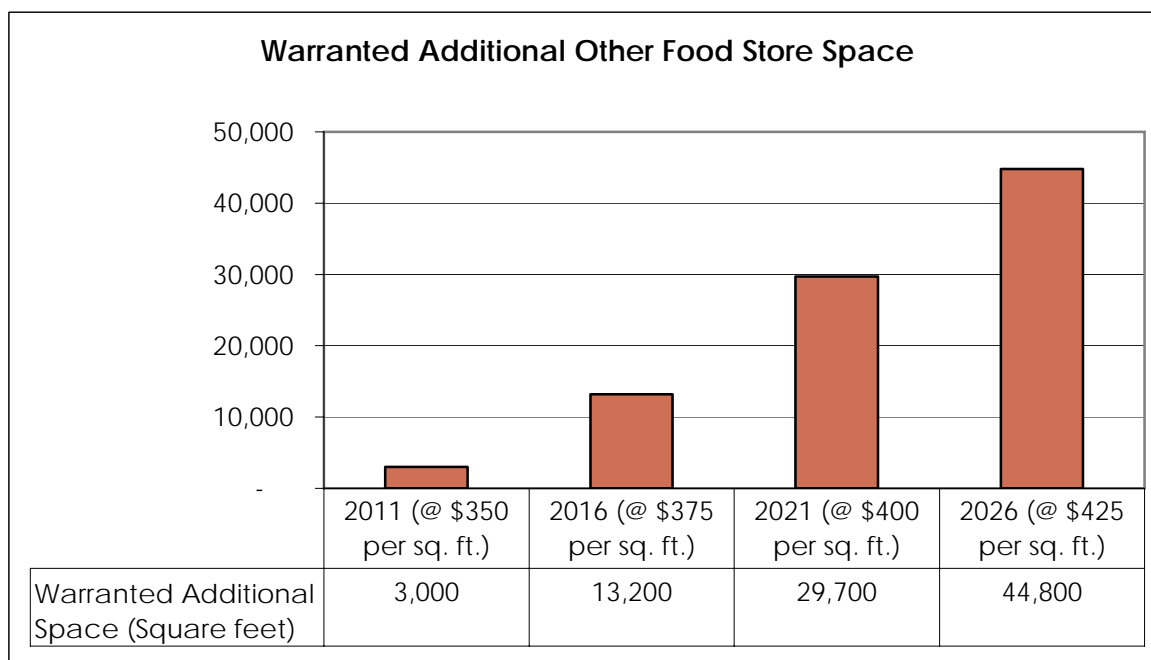
Excludes Sales Transfers from Existing Stores in Kingston

5.3.1.4 FSR - Other Food Stores

Convenience/specialty food store space in Kingston currently comprises some 140,700 square feet. Trade Area residents are currently spending some \$102.6 million in other food stores of which an estimated \$76.0 million is spent in Kingston Other Food stores (74.1%). Therefore, based on the existing inventory, other food stores in Kingston currently achieve an average sales per square foot level of about \$569 per square foot (assuming a 5.0% inflow factor), which is considered above typical industry norms.

The total residual expenditure potential available from Trade Area residents has been estimated at \$18.1 million by 2026. Based on the residual expenditures available from Trade Area residents and estimated inflow sales of some 5.0%, close to 44,800 square feet of new Other Food Store Space is warranted in Kingston by 2026 (at \$425 per square foot) (Figure 5-6).

Figure 5-6



Source: urbanMetrics inc.

Based on the residual potential available.

Excludes Sales Transfers from Existing Stores in Kingston

5.3.2 Other Retail/Service Space Analysis

The following section examines the future demand for Other Retail and Service orientated space in the City of Kingston based on a per capita space ratio technique. It must be recognized that this approach imposes a somewhat generic or "typical" set of market

demand conditions on the current and future population of Kingston. These conditions are based on existing service levels in Kingston and observations made in a variety of other market areas and, as such, cannot directly reflect special circumstances or characteristics such as level of income and regional or local preferences for merchandise lines or store chains. Furthermore, the emergence of new retail industry trends or store formats can result in changing per capita space ratios over time and therefore, flexibility and a realistic interpretation of the findings is important to the application of this approach.

The following retail and service space facilities are included in this analysis:

- Liquor, Beer and Wine;
- Automotive uses including automotive sales and service; and tires, batteries and automotive accessories;
- Food Services including restaurants and fast food;
- Personal Care services including hair salons, dry cleaners;
- Entertainment services including theatres, arcades, bowling alleys, and similar establishments;
- Financial Services including banks, trust companies and credit unions;
- Health Care services including medical and dental;
- Consumer Goods rental and repair; and
- Local serving offices including real estate agencies, travel agencies, accounting and legal offices, financial advisors, and similar establishments.

Currently, there is 35.0 square feet per capita of Other Retail and Service space in Kingston. With a forecast increase in per capita service levels in the future to 38.3 by 2026 and a population growth of close to 39,000 persons, some 1.5 million square feet of Other Retail and Service space would be warranted in Kingston (assuming that inflow is equal to outflow) (see Appendix D).

5.4 Summary of Additional Warranted Space

A summary of the amount of warranted additional retail space in Kingston by major store type over the 2011 to 2026 period is presented in Figure 5-7. In total, by 2026 some 3.3 million square feet of additional retail space is warranted in Kingston. It should be noted that our

analysis of warranted space is considered a guideline only and must be evaluated in the context of the assumptions utilized, including average sales per square foot levels and inflow.

Figure 5-7

CITY OF KINGSTON

SUMMARY OF ADDITIONAL WARRANTED SPACE (S.F)

	2011	2016	2021	2026
FSR				
Supermarket	55,800	110,200	159,800	204,300
Other Food Store	3,000	13,200	29,700	44,800
Total FSR	58,800	123,400	189,500	249,100
NFSR				
Department Store	83,100	148,000	212,000	272,100
Other NFSR	240,000	558,600	866,200	1,245,000
Total NFSR	323,100	706,600	1,078,200	1,517,100
TOTAL Additional Retail Space Warranted	381,900	830,000	1,267,700	1,766,200
Other Retail/Services	198,265	590,887	1,042,771	1,498,631
TOTAL (excluding transfers from existing)	580,165	1,420,887	2,310,471	3,264,831

Source: urbanMetrics inc.

6. Supply and Demand Reconciliation

In this section, we have summarized the reconciliation of the demand projections and potential supply of commercial space to 2026. We have taken into consideration:

- Total supply and demand by the end of 2026;
- The phasing of new supply with the realization of demand;
- The distribution of supply by retail format; and,
- The potential geographic distribution of new commercial space supply.

6.1 Total Supply and Demand by 2026

Figure 6-1 illustrates the total residual demand and supply of commercial space in the City as of 2026. By this date, there will be a demand for some 3.3 million square feet of additional food and non-food retail and services space above that existing as of 2007. At present, there are a number of proposals and other opportunities where a portion of this space could be absorbed.

The current vacancy rate in the City is 4.6%. This is considered representative of a reasonably balanced market and an appropriate planning target would be to maintain a long term City wide vacancy rate of between 4.0% and 7.5%.

There is currently some 82 acres of vacant lands designated for commercial uses. At traditional densities (i.e. 25% site coverage), these lands would yield approximately 900,000 square feet. These sites are situated outside of the core and it is reasonable to assume that they will be developed at historic coverage ratios. If more intensive development is undertaken on any of these sites, such as might be the case, in mixed use formats, then a higher commercial floor space yield may be considered.

There is also 1.4 million square feet of commercial space currently proposed in the City ranging from small sites of under one acre up to the 600,000 square foot Wal-Mart anchored centre on the former Alcan site at Princess Street and Sir John A. Macdonald Boulevard.

The upper portion of Figure 6-1 summarizes the future warranted commercial space to 2026 together with the potential future supply from vacant designated sites and proposed developments. As indicated by this portion of the table, if all of the demand is taken into consideration and all of the proposed developments are built, there would still be a shortfall of approximately 930,731 square feet by 2026.

However, it must be recognized that a large share of the warranted space is in the services category, which can be accommodated within the City with much greater flexibility than retail space. For example, services categories, such as medical space, insurance and real estate brokers, etc. could be accommodated in office buildings. Many business, technical and administrative services could be situated in lands with industrial designations.

**Figure 6-1
Supply and Demand Reconciliation (2026)**

All Commercial Categories

	Square Feet of Commercial Space
Demand in 2026	
Supermarket	204,300
Other Food Stores	44,800
Department Stores	272,100
Other Non-food Retail Stores	1,245,000
Other Retail/Services	1,498,631
TOTAL DEMAND	3,264,831
Potential Supply	
Vacant Commercial Sites (See Figure 4-3)	900,000
Proposed Commercial Development (See Figure 4-2)	1,434,100
TOTAL SUPPLY	2,334,100
UNFULFILLED DEMAND	930,731

Non-Food Store Retail Space

	Square Feet of Commercial Space
Demand in 2026	
Department Stores	272,100
Other Non-food Retail Stores	1,245,000
TOTAL DEMAND	1,517,100
Potential Supply	
Vacant Commercial Sites @ 50% NFSR	450,000
Alcan Site ⁽¹⁾	564,000
Lowes (Gardiners & Princess)	174,000
Division & Dalton Outlet Mall and Power Centre @ 75% NFSR	416,000
Remaining Proposed Space @ 50% NFSR	50,000
TOTAL SUPPLY	1,654,000
Over Supply	- 136,900

SOURCE: urbanMetrics inc.

1) Wal-Mart (215,000), Home Improvement (150,000), Canadian Tire (110,000), Ancillary Retail (89,000)

At the same time, however, the vast majority of proposed space would involve non-food retail facilities, for which demand is less than the potential supply. For example, almost all of the space in the Lowes project and the Alcan development would be non-food retail. Although, there is no space breakdown, outlet centres and power centres, such as those proposed at Division Street and Highway 401, also comprise largely non-food retail space. We have assumed that 75% of the space in the power centre and 90% of the space in the outlet centre would comprise non-food retail uses. For the remainder of the vacant sites and proposed space we have assumed that the non-food retail space would comprise about half of the total space.

Based on these assumptions, if all of the proposed space were developed, there would still be a slight over supply of non-food retail space by 2026. This analysis points to the need to carefully plan the amount and phasing of new retail approvals in the City.

6.2 Potential Phasing of Proposed Space

The City of Kingston is currently facing a number of major development applications with relatively low future growth prospects. One of the mandates of this study is to provide some guidance as to how future space could be absorbed without significant impacts to the existing commercial structure. In this section, we have provided a high-level review of when the space currently proposed in the City might reasonably be absorbed based on the availability of new demand.

Figure 6-2 provides a general indication of when the space currently proposed might be appropriately phased in based on the demand projections. Without a detailed analysis of each application and an understanding of the space composition and tenants, this analysis should be considered only as a general guide.

FIGURE 6-2 – Potential Phasing of Non-Food Retail Space

	Proportion		Zoned or Designated	2011	2016	2021	2026
	Total Space	NFSR					
Demand for NFSR				323,100	706,600	1,078,200	1,517,100
Potential Space Supply							
Vacant Designated Commercial Lands	900,000	50%	450,000				
Proposed Development on Alcan Site ¹	600,000		564,000				
Proposed Division Street Power Centre	430,000	75%	322,500				
Proposed Division Street Outlet Mall	125,000	90%	112,500				
Proposed Lowes Development on LeFarge Site ¹	179,000		174,000				
Other Proposed Commercial Space	100,200	50%	50,100				
			-				
Total Potential Supply	2,334,200		910,000	-	-	-	-
Potential Supply Surplus (Total Supply)				1,350,000	966,500	594,900	156,000
Potential Supply Surplus (Zoned or Designated)				586,900	203,400	n/a	n/a

SOURCE: urbanMetrics inc.

¹ NFSR space based on developer site plans as indicated in market studies.

As noted previously, even by 2026, the warranted demand for non-food retail space would not be sufficient to accommodate all of the current potential future supply. Assuming that approved developments and designated vacant commercial lands had priority; it would still be between 2016 and 2021 when any proposal not currently zoned or designated would be warranted.

It is important to recognize that the existing approved supply may not necessarily be adequate to accommodate future space needs depending on site location, configuration, permitted uses, servicing and other factors affecting the timing and nature of uses that could be developed. Furthermore, a use may be warranted based on market demand and may not necessarily be accommodated on any existing zoned or designated site. For this reason, municipalities often require market studies and peer reviews, which provide more detailed guidance as to whether individual applications should be approved and any restrictions that may be attached to them. With respect to the largest unzoned proposals – the Lowe’s anchored centre on the LaFarge Site and the Wal-Mart development on the Alcan site – market studies and peer reviews have been completed. The peer reviewer has recommended against their approval at this time. This is consistent with the analysis of supply and demand contained in this study.

6.3 Distribution of Warranted Space by Retail Format

In this section, we have provided guidelines for the distribution of future warranted space by retail format.

Figure 6-3 presents the current distribution of the inventory. In municipalities across Canada, there is a blurring of the traditional retail hierarchy. Nodes, particularly in the middle ranges of the hierarchy (i.e. district and neighbourhood scale shopping areas) are unable to compete with newly developing power centres and big box retailers. At the same time, the big box retailers are heavily concentrating around key intersections or along major arterial roadways. These trends are certainly evident in Kingston. For example, Frontenac Mall on Bath Road, with the relocation of Wal-Mart to its present Midland Avenue site, has experienced a diminished function as a district shopping centre. The same is true of the former K-Mart plaza on Bath Road.

The functions of these centres have been usurped by the big box developments along Gardiners Road. Like many regional shopping centres, Cataraqui Town Centre has also attracted big box retailers in its vicinity.

It is difficult to assign a traditional functional classification to big box retail nodes because they perform a multiple number of functions

- They can exert a draw as great or greater than a regional shopping centre;

- Big Box retailers, such as Costco, Wal-Mart, and Loblaws superstore provide a full range of food and convenience merchandise and can replace the function of neighbourhood centres;
- Discount department stores in previous years were the principal anchors of district level shopping centres. Wal-Mart, the dominant department store retailer in Canada, locates almost exclusively in power centres or on freestanding sites.
- Individual big box retailers have expanded their merchandise range so that their competitive range has greatly expanded. For example, Shopper Drug Mart now carries an extensive selection of frozen foods. The majority of space in Loblaws superstores is devoted to services and non-food retailing. Wal-Mart is the leading food retailer in the US and is rapidly expanding its share of the overall food selling market in Canada.

As is the case with most municipalities, almost all of the new commercial development which has occurred in Kingston in recent years has been in the form of big box retailing and power centres. As indicated by Figure 6-3, the largest category in terms of total floor space would be the arterial commercial category, which includes the retail strips along Bath Road, Princess Street and portions of Gardiners Road. The clusters in these areas also include a number of big box uses, such as Costco, Canadian Tire, Rona and others. With about one-quarter of the City's space, regional commercial comprises the next largest category. Although this category includes Cataraqui Town Centre enclosed shopping centre, the majority of this space is contained in the Riocan Power Centre and the big box uses in the vicinity of the Cataraqui Town Centre and the Rio-Can Centre.

Figure 6-3
Distribution of Existing Space by Node Classification

Node Classification	Square Feet of Retail and Services Space	% of Total
Downtown	1,705,200	18.8%
Regional Commercial	2,217,000	24.5%
District Commercial	1,098,700	12.1%
Neighbourhood Commercial	732,400	8.1%
Main Street	553,100	6.1%
Arterial Commercial	2,754,800	30.4%
Total	9,061,200	100.0%

Source: urbanMetrics inc.

In total the power centre and big box retail components, including the Riocan Power Centre and the major retailers in the vicinity of Gardiners Road and Taylor Kidd Boulevard, comprise approximately 1,650,000 square feet. Collectively they would exceed the size of the remaining regional commercial sites and would be comparable in size to the downtown core. In terms of non-food retail space, the largest concentration in Kingston would be the Riocan Power Centre and together big box retailers would comprise over one-third of the total space in the City.

The vast majority of proposed space – 1.3 million square feet – would also be big box and power centre space, which would take this category to approximately 3 million square feet if it were developed, which could represent almost 30% of the City's retail inventory.

Big Box Retailers vs. Local Serving Retail Facilities

In many municipalities, big box retail development has become so dominant in recent years that very little construction has occurred involving other forms of retailing, including more local serving facilities, such as neighbourhood scale centres.

It is important to recognize that there are trade-offs between big box retailers and more local serving commercial facilities. Due to their scale, big box retailers are able to offer a greater variety and selection and offer lower prices than smaller scale retail facilities. Their size and agglomeration also enables them to serve a large market area, drawing sales from outside of the City. At the same time, however, because they tend to concentrate at only a few regionally accessible locations, they are not well positioned to serve local neighbourhoods, resulting in longer drive times and minimal pedestrian usage. In order to minimize costs, the ratio of staff to floor area, is often lower in big box stores than small scale retailers, reducing customer service. Their format is also not consistent with current planning goals aimed at more sustainable development patterns.

In future, with the aging baby boom population and higher fuel costs there will be increasing demand for services rather than retail merchandise and a growing need for more locally accessible retail outlets. For this reason, planning should strive to accommodate a greater balance between big box retail formats and local serving retail facilities, including neighbourhood shopping centres, convenience centres, mixed use developments and main-street pedestrian retail strips.

6.4 Geographical Distribution of Future Warranted Space

With the exception of former Pittsburgh Township east of the Cataraqui River, there is a reasonable balance in terms of the distribution of regional serving retail facilities for a City the size of Kingston. Although most new development in recent years has occurred in the vicinity of Gardiners Road in the western portion of the City, the development of the

proposed power centre, outlet mall and other proposed commercial space on Division Street south of Highway 401, will provide better service for persons living in the northeast portion of the former City. Downtown also plays a key role in serving the residents of eastern Kingston, including former Pittsburgh Township.

In planning future commercial space, the City should focus on:

- Maintaining and enhancing the strength of the downtown core, main street and local serving commercial nodes;
- Expanding the availability of retail services in former Pittsburgh Township;
- Ensuring a geographically balanced approach to future big box and regional scale retail uses; and,
- Seeking opportunities to enhance the availability of local serving retail facilities at the neighbourhood level throughout the City.

7. Conclusions and Recommendations

The key findings and conclusions from the Residual Market Demand and Impact Analysis are summarized as follows:

- Kingston has an appropriate supply of retail space, with the overall vacancy rate and sales performance levels for the City indicating a good balance between supply and demand.
- The downtown core is one of the most successful downtowns in Ontario, in terms of the size of its commercial sector, retail selection and the balance between chain stores and independent retailers. Furthermore, its relatively low vacancy rate is indicative of a healthy retail sector. New investments, such as Market Square and the new K-Rock Centre will assist in ensuring the continued vitality of the core. In our opinion, downtown Kingston is a major asset to the community and to the regional visitor base. In examining the experience of other small to mid-sized cities across the province, the overall health of a downtown core cannot be taken for granted. In planning future commercial space, the City must ensure that sufficient market is available to enable downtown to continue to expand its commercial vitality.
- The rapid spread of big box and power centre retailing has blurred the traditional retail hierarchy. Centres that once played definable community serving roles in the middle of the hierarchy are being squeezed out by large format retailing. The vast majority of new retail space developed in Kingston in recent years has been big box. Similarly most of the space in active proposals also constitutes big box formats.
- In 1999, the City commissioned the Kingston Regional Commercial System Study (KRCSS), which laid the ground work for future commercial development in the City. Based on the population data available from the 2006 Census, population growth has been much slower than that relied on by the study. Consequently demand has not been as great as was assumed in planning new retail projects.
- Recent population projections for the City and surrounding trade area are now assuming much lower future growth than that on which the KRCSS was based.
- In 2006, urbanMetrics and Sorensen Gravely Lowes Planning Associates completed a review of the KRCSS and prepared commercial policy recommendations for the City. This 2006 policy review was based on an examination of more recent trends but involved a limited empirical research program. The findings of this more comprehensive statistical study support the recommendations contained in the 2006 urbanMetrics/Sorensen Gravely Lowes study.

- There is just over 9 million square feet of retail and services space in the City of Kingston. On a per capita basis, this is exceptionally high, but reflects the tourist role of Kingston and its role as a regional service centre.
- By 2026, there will be a demand for some 3.3 million square feet of new retail and services space. There will be a shortfall of approximately 900,000 square feet, beyond that which could be accommodated on vacant commercial sites, approved and proposed retail developments. However, about half of the warranted space will be in the services category, which would not necessarily require space in traditional retail environments. On the other hand, most of the proposed commercial space is in the non-food retail category. Even by 2026, there would not be sufficient demand to accommodate all of the potential non-food retail development including vacant designated sites, approved developments and proposed projects.
- There is currently 1.4 million square feet of commercial space proposed at 12 separate locations throughout the City. Almost 95% of this potential future space is contained at three locations. At Dalton Avenue and Division Street, Knightstone Capital is proposing a 125,000 square foot outlet mall and up to 430,000 square feet of power centre (big box space). These sites are in a designated commercial area with zoning in place to permit this development to proceed. At Princess Street and Sir John A. Macdonald Boulevard, Kingston Shopping Centres is proposing a 600,000 square foot power centre, anchored by a Wal-Mart. This site is on the former Alcan property and would require an Official Plan Amendment and rezoning. On the former Lafarge property, at Gardiners Road and Princess Street, Lowe's is proposing a 174,000 square foot home improvement centre. As with the Alcan site, this proposal would require an Official Plan Amendment and rezoning. Robin Dee & Associates undertook a peer review of the market studies in support of the Alcan and Lafarge proposals and concluded that they were premature in light of current market support. We would concur with this finding.
- In the future, with the aging baby boom population and higher fuel costs, there will be increasing demand for services rather than retail merchandise and a growing need for more locally accessible retail outlets. For this reason, planning should strive to accommodate a greater balance between big box retail formats and local serving retail facilities, including neighbourhood shopping centres, convenience centres, mixed use developments and main-street pedestrian retail strips.
- In planning future commercial space, the City should focus on:
 - Maintaining and enhancing the strength of the downtown core, main street and local serving commercial nodes;

- o Ensuring a geographically balanced approach to future big box and regional scale retail uses;
- o Striving to achieve a better balance between large scale retail developments and more locally accessible retail facilities;
- o Expanding the availability of retail services in former Pittsburgh Township; and,
- o Seeking opportunities to enhance the availability of local serving retail facilities at the neighbourhood level throughout the City.

APPENDIX A: Population

Figure A-1
2001 to 2006 Population based on KRCSS Trade Area

Changes to Municipalities within Trade Area

Trade Area (KRCSS, 1998)	2001 Census Population	Boundary Changes	2006 Census Population
Primary Trade Area - Sector 1			
City of Kingston	54,456	Part of City of Kingston	117,207
Kingston Twp	45,946	Part of City of Kingston	n.a
Pittsburgh	13,793	Part of City of Kingston	n.a
Ernestown	12,601	Part of Loyalist Twp	n.a
Subtotal:	126,796		130,018
Primary Trade Area - Sector 2			
Wolfe Island	1,142	Part of Frontenac Islands Twp	n.a
Amherst Island	406	Part of Loyalist Twp	n.a
Bath	1,583	Part of Loyalist Twp	n.a
Howe Island	496	Part of Frontenac Islands Twp	n.a
Subtotal:	3,627		4,113
TOTAL PRIMARY TRADE AREA	130,423		134,131
Secondary Trade Area - Sector 1			
Storrington	4,886	Part of South Frontenac Twp	n.a
Portland	5,051	Part of South Frontenac Twp	n.a
Loughborough	5,250	Part of South Frontenac Twp	n.a
Subtotal:	15,187		16,578
Secondary Trade Area - Sector 2			
Sophasburgh (30%)	674	Part of City of Prince Edward	n.a.
Town of Picton	4,343	Part of City of Prince Edward	n.a.
Town of Deseronto	1,796	Town of Deseronto	1,824
Hungerford (20%)	673	Part of the Municipality of Tweed	n.a.
Tyendinaga (30%)	1,131	30% Township of Tyendinaga	1,221
Adolphustown	919	Part of Town of Greater Napanee	n.a.
Camden East	5,004	Part of Stone Mills Twp	n.a.
Kaladar (20%)	338	Part of Addington Highlands Twp	n.a.
N. Fredericksburgh	3,391	Part of Town of Greater Napanee	n.a.
Richmond	4,252	Part of Town of Greater Napanee	n.a.
Sheffield	1,601	Part of Stone Mills Twp	n.a.
S. Fredericksburgh	1,219	Part of Town of Greater Napanee	n.a.
Town of Napanee	5,351	Part of Town of Greater Napanee	n.a.
Village of Newburgh	732	Part of Stone Mills Twp	n.a.
Subtotal:	31,423		31,397
Secondary Trade Area - Sector 3			
Bedford	1,228	Part of South Frontenac Twp	n.a.
Hinchinbrooke	1,332	Part of Central Frontenac Twp	n.a.
Kennebec	955	Part of Central Frontenac Twp	n.a.
Olden	812	Part of Central Frontenac Twp	n.a.
Oso	1,458	Part of Central Frontenac Twp	n.a.
Subtotal:	5,785		6,294
Secondary Trade Area - Sector 4			
Gananoque	5,165	Town of Gananoque	5,285
Newboro	305	Part of Rideau Lakes Twp	n.a.
Westport	645	Village of Westport	645
Bastard & S. Burgess (75%)	2,071	Part of Rideau Lakes Twp	n.a.
Front of Escott	1,332	Part of Leeds and the Thousand Islands Twp	n.a.
Front of Leeds & Landsdowne	4,998	Part of Leeds and the Thousand Islands Twp	n.a.
Front of Yonge (25%)	660	25% of Front of Yonge	701
N. Crosby	1,024	Part of Rideau Lakes Twp	n.a.
Rear of Leeds & Landsdowne	2,739	Part of Leeds and the Thousand Islands Twp	n.a.
Rear of Yonge & Escott (25%)	507	Part of Leeds and the Thousand Islands Twp	n.a.
S. Crosby	1,905	Part of Rideau Lakes Twp	n.a.
Bathurst (10%)	323	Part of Tay Valley Twp	n.a.
N. Burgess (50%)	683	Part of Tay Valley Twp	n.a.
S. Sherbrooke	841	Part of Tay Valley Twp	n.a.
Subtotal:	23,197		24,815
TOTAL SECONDARY TRADE AREA	75,592		79,084
TOTAL TRADE AREA	206,015		213,215

Source: urbanMetrics Inc. based on information from Kingston Regional Commercial System Study (KRCSS), March 1998 and Statistics Canada 2001 & 2006 Census of Canada

Figure A-2
Population Forecast Growth Rates

Population Forecasted for City of Kingston and Census Divisions in the Trade Area

	2001	2006 ¹	2011	2016	2021	2026
City of Kingston	114,195	119,200	123,600	130,800	138,900	146,700
Frontenac County	144,100	146,300	152,200	159,800	166,900	173,600
Lennox and Addington County	41,000	42,300	43,500	45,000	46,700	48,400
Hastings County	132,200	136,600	140,000	145,400	151,000	156,200
Prince Edward County	25,800	26,500	27,200	28,200	29,300	30,500
Leeds and Grenville United Counties	100,300	102,900	104,700	107,400	110,400	113,200
Lanark County	64,900	67,600	70,700	74,100	77,300	80,100

¹ Population has been adjusted for Census undercount

Source: urbanMetrics inc. based on TeraTrends, Population and Housing Projection Update - City of Kingston, January 2006 and Ontario Ministry of Finance, Ontario Population Projections Update, 2006-2031, Spring 2007.

APPENDIX B: Kingston Inventory

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
1	Bath Rd between Gardiners Rd & Bayridge Dr	FSR - Convenience/Specialty Food	730	Bath Rd	44521	Greenlee's Meats	1,400
			1724	Bath Rd	44529	Sue's Gluten Free Products	1,200
			1753	Bath Rd	44512	Mac's	1,400
		FSR - Supermarket	1030	Coverdale Dr	44511	No Frills	36,500
		NFSR - Building and Outdoor Home Supply	550	Days Rd	44422	Potter's Nursery	6,000
			1786	Bath Rd	44419	Lakins Tile & Flooring	1,200
			1941	Bath Rd	44419	Leo Aluminium Windows & Doors	1,000
		NFSR - Home Furnishings	550	Days Rd	44221	Décor By Steve	2,600
			1786	Bath Rd	44311	Vacuum Plus	1,200
		NFSR - Miscellaneous	525	Days Rd	453999	St Lawrence Pools	14,200
			541	Days Rd	45331	The Kids Counsel	1,300
			550	Days Rd	45111	JJ Cycle	2,600
					45399	Celebrate With A Game	1,400
			1724	Bath Rd	45322	Cards & Collectables	900
			1730	Bath Rd	45311	The Flower Shop	1,400
			1786	Bath Rd	45391	Pet Food	700
				Days Rd	45331	The Clothesline	2,500
		NFSR - Pharmacies & Personal Care	1786	Bath Rd	44612	A&A Beauty Supply	900
			1875	Bath Rd	44611	Shoppers Drug Mart	17,100
		Other Retail - Automotive	510	Cataraqui Ct	44111	Braden Ford Lincoln	9,000
			736	Bath Rd	8111	Madely Automotive	4,500
			1670	Bath Rd	44111	VW Dealership	2,600
			1671	Bath Rd	8111	D&D Auto Service	3,200

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			1736	Bath Rd	44112	Jack Casselamn Motor Sales	2,000
			1768	Bath Rd	44122	Tony's Cycle	7,000
			1911	Bath Rd	44111	Kingston Toyota	12,000
				Days Rd	44512	Shell Select	2,200
			712	Bath Rd	44512	Esso	3,100
		Service - Repair and Maintenance		Bath Rd	8114	Audio TV Repair	1,600
		Service - Consumer Services Rental	690	Bath Rd	5322	Block Buster Video	5,800
		Service - Eating/Drinking	477	Gardiners Rd	7221	Pizza Hut	3,700
			485	Gardiners Rd	7222	Wendy's	4,000
			515	Days Rd	7221	Wild Stallion Saloon	5,900
			724	Bath Rd	7221	The Loyal Oarsman	4,000
			751	Bath Rd	7221	Pasta Shelf	4,700
			757	Bath Rd	7221	Jade Gardens	1,900
			1720	Bath Rd	7222	McDonald's	3,000
			1730	Bath Rd	7222	Dairy Queen	3,200
			1758	Bath Rd	7221	Lechee Garden	3,800
			1786	Bath Rd	7222	Pita & Pizza Palace	2,000
				Bath Rd	7221	County Style Bistro & Deli	2,600
						Emperors Banquet	1,000
					7222	Taco Bell/KFC	2,500
			1759	Bath Rd	7222	Bon Appetite	1,300
			1763	Bath Rd	7222	Pizza Pizza	2,000
		Service - Entertainment	541	Days Rd	71312	Playtruim	8,000
					71394	Impact Zone martial Arts	2,600

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						Kingston Body Management	1,300
			1724	Bath Rd	71394	Kingston Kung- fu	1,100
						Yoga Samatva	1,000
		Service - Medical/Dental	499	Days Rd	6211	Days Rd Dental Clinic	2,300
			1786	Bath Rd	6211	Denture Clinic	1,700
				Bath Rd	6211	Dental Office	2,200
		Service - Other	1724	Bath Rd	54199	Excel Driving School	800
			1748	Bath Rd	53121	Century 21	2,600
			1752	Bath Rd	54194	MacEwens Animal Hospital	3,500
			1755	Bath Rd	54199	Family Learning Centre	1,400
			1758	Bath Rd	56151	The Travel Broker	1,600
			1770	Bath Rd	5411	Law Office	1,000
			1786	Bath Rd	52421	State Farm Insurance	1,500
					54199	Donahue Group	1,500
						Phone Works	700
						Universal Energy	1,200
				Bath Rd	5411	Law Office	1,500
					54199	Multi Ideas	4,000
			748	Bath Rd	5412	St Lawrence Tax Services	1,800
		Service - Personal	541	Days Rd	8121	Totoiuse & The Hair	1,300
			1724	Bath Rd	8121	Frank Molnar Hair Salon	1,200
			1730	Bath Rd	8123	Ultra Clean Laundromat	1,400
			1751	Bath Rd	8123	Carr's 1 Hour Cleaning	1,400
			1786	Bath Rd	8121	Totally clips	700
			1935	Bath Rd	8121	Family Hair Stylist	400

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
		Service - Public Administration	1792	Bath Rd	91	MTO	1,800
		Vacant	1724	Bath Rd	9999	Vacant	1,100
				Bath Rd	9999	Vacant	3,300
						Vacant (Ex Burger King)	3,000
						Vacant (Pharma Plus Opening Soon)	10,300
		Other Retail - Automotive TBA	1673	Bath Rd	44131	Fisher Auto Parts	8,800
Node 1 Total							272,100
2	Bath Rd between Princess St & Gardiners Rd	Beverage					
			1280	Bath Rd	44531	LCBO	7,600
		FSR - Convenience/Specialty Food	277	Bath Rd	44521	M&M Meats	1,200
			546	Bath Rd	44512	Mac's	1,800
			1530	Bath Rd	44529	Bread & Butter Bakery	2,500
				Bath Rd	44512	Quickie Mart	2,500
					44529	Breadman	1,800
		FSR - Supermarket	400	Bath Rd	44511	Produce Town	23,000
		NFSR - Building and Outdoor Home Supply	277	Bath Rd	44412	Kingston Paint & Decorating	5,400
			349	Bath Rd	44419	WP Brighton Locksmiths	1,100
			546	Bath Rd	44412	Colour Your World	4,400
			555	Bath Rd	44422	Apple Mill Iron World	3,500
			1452	Bath Rd	44411	Rona/Cashway	18,700
		NFSR - General Merchandise	1412	Bath Rd	452999	Giant Tiger	20,000
		NFSR - Home Furnishings	277	Bath Rd	44311	Singer Store	1,200
						Vacuums & Things	1,600

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			1296	Bath Rd	44211	Mark Teske Furniture	1,100
		NFSR - Miscellaneous	277	Bath Rd	45331	Salvation Army Thrift Store	7,800
			323	Bath Rd	45331	Re-Store	5,300
			337	Bath Rd	45331	The Hock Shop	6,000
			540	Armstrong Rd	45331	Thrift Superstore	8,000
			546	Bath Rd	45331	Arigos Army Supplies	3,600
		NFSR - Pharmacies & Personal Care	456	Bath Rd	44611	Pharmasaave	1,200
			1011	Princess St	44619	Shoppers Home Health	3,200
		Other Retail - Automotive	56	Bath Rd	44512	Petro Canada	2,700
			277	Bath Rd	8111	Car Wash	4,300
			401	Bath Rd	44111	Kingston Hyundai	11,100
			556	Bath Rd	8111	Autohouse Kingston	2,900
			1396	Bath Rd	44512	Pioneer Snack Express	1,300
			1404	Bath Rd	44112	Limestone City Car Centre	2,100
			1488	Bath Rd	44111	Kingston Mazda	8,500
			1630	Bath Rd	8111	Mr. Transmission	2,600
			1705	Bath Rd	44111	Edwards Ford	20,000
			357	Bath Rd	44512	Mac's	2,500
			1468	Bath Rd	44111	Mercedes Volvo	10,900
			1504	Bath Rd	44122	Ward's Marine	5,200
		Service - Banks	42	Bath Rd	52211	BMO	6,200
			1646	Bath Rd	52211	RBC	4,600
		Service - Consumer Services Rental	277	Bath Rd	5322	Adult Video	1,700
		Service - Eating/Drinking	277	Bath Rd	7222	Pizza Pizza	3,600

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						Sapporor Sushi	1,200
			331	Bath Rd	7221	The Greek Islands	3,900
					7222	Mr Sub	1,800
			410	Bath Rd	7221	Red Lobster	7,100
			546	Bath Rd	7222	Double Double	1,200
			1288	Bath Rd	7221	Swiss Chalet	7,000
			1474	Bath Rd	7221	Zorba's banquet Hall	10,900
			1530	Bath Rd	7221	McGinnis Landing	5,100
			1540	Bath Rd	7221	Ramekins	6,000
				Bath Rd	7222	Country Style Donuts	2,500
			1284	Bath Rd	7222	Harvey's	3,300
			28	Bath Rd	7221	Wandering Fork Dinning Room	2,400
		Service - Entertainment	18	Bath Rd	71399	Clover Leaf Lanes	24,300
			337	Bath Rd	71399	MJ's Billiards Room	6,000
			1396	Bath Rd	71394	Loyalist Gymnastics Club	11,800
			1590	Bath Rd	71399	Treasure Chest Bingo	21,600
		Service - Medical/Dental		Bath Rd	6211	Dental Office	1,000
		Service - Other	16	Bath Rd	56151	Algonquin Travel	1,800
			277	Bath Rd	54199	The Cash Store	1,200
			331	Bath Rd	54199	Money Mart	2,100
			393	Bath Rd	54194	Beard All Animal Hospital	4,100
			920	Bath Rd	52421	Pilot Insurance	8,700
			1296	Bath Rd	5413	R. Smith Surveyors	1,500
					54199	Edward Jones/Tax Plus	2,200

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			1480	Bath Rd	5411	Law Office	4,100
			1642	Bath Rd	54199	Money Mart	1,000
		Service - Personal	16	Bath Rd	8123	Flindall Dry-Cleaning	1,200
			277	Bath Rd	8121	First Choice Hair Salon	1,200
					8123	Surf's Up Dry Cleaning & Laundromat	4,300
			296	Bath Rd	8123	Bayou West Cleaners	1,800
			546	Bath Rd	8121	Marianna's Hair Salon	1,400
			1296	Bath Rd	8121	Cut & Dried	1,800
			1600	Bath Rd	8121	Debonaires Barber Shop	1,500
		Service - Public Administration		Bath Rd	91	Liberal Campaign Headquarters	1,100
		Vacant	1638	Bath Rd	9999	Vacant	2,300
				Bath Rd	9999	Vacant	9,500
Node 2 Total							392,600
3	Cataraqui Industrial Park	FSR - Convenience/Specialty Food		Gardiners Rd	44529	Tea Connection	2,300
		NFSR - Apparel	598	Norris Ct	44814	VI Village Custom Clothing	3,800
		NFSR - Building and Outdoor Home Supply	497	O'Connor Dr	44411	Town & Country Building Supplies	2,100
			606	Norris Ct	44419	Culligan Water Systems	6,500
						Duca Unlimited	3,100
						Jeld-Wen Doors	2,200
			619	O'Connor Dr	44419	Cataraqui Cabinets	2,500
			637	Gardiners Rd	44419	K&K Plumbing	1,100
			638	Norris Ct	44419	EK Energy Window & Door	1,100
1259	Gardiners Rd	44419	Kinaston Windows & Doors	10,900			

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			605	O'Connor Dr	44419	Noble Trade Plumbing & Heating	2,000
		NFSR - Home Furnishings	522	O'Connor Dr	44211	Blaker Office Furniture	5,000
			606	Norris Ct	44221	Value Experts - Flooring	2,200
			612	O'Connor Dr	44221	Floors & Decors	2,800
					44311	Colborne's TV & Stereo	2,900
			640	Norris Ct	44311	Telus	1,600
			1250	Gardiners Rd	44312	Jankins Computers	3,000
		NFSR - Miscellaneous	1152	Gardiners Rd	45331	Got Junk	1,100
				Fortune Cr	45112	Die Cast Model Car Gallery	1,500
			598	Norris Ct	45111	Kingston Windsurfing	1,000
		Other Retail - Automotive	485	O'Connor Dr	44121	Leisure Days RV Sales	18,400
			1152	Gardiners Rd	8111	Discount Auto Glass	1,100
		Service - Medical/Dental	606	Norris Ct	6215	Acutest Labs	1,800
			621	Norris Ct	6211	Dental Office	2,300
			633	Gardiners Rd	6214	Lets Go Wellness Centre	1,100
		Service - Other	99	Norris Ct	54199	FuseTek	10,400
			495	O'Connor Dr	56143	Goreway Design Print	4,100
			516	O'Connor Dr	54199	Cataraqui Corporate Centre	20,000
			556	O'Connor Dr	54199	Kingston This Week	8,000
						Misc Office	10,000
			560	O'Connor Dr	54199	Service Master	10,000
			593	Norris Ct	52421	Bickerton Insurance Brokers	3,200
					54199	DB Mechanical	4,400
						Hard Core Solutions	3,900
						Kelson Mechanical Contractors	2,400

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						OCWA	2,400
			595	O'Connor Dr	54199	3M Trim Line	5,000
			596	Norris Ct	54199	Siemens	3,700
			606	Norris Ct	54199	ABF Freight Systems	2,200
						CY Interiors	2,200
						Nexinovation	2,200
						PPIWW Distributors	2,200
						Systems Technology	4,400
			615	Norris Ct	54199	Nexum	3,100
			621	Norris Ct	54199	Gardiners Rd Financial	5,900
						Susan Creasy Financial	3,000
			623	Norris Ct	5413	Josselyn Engineering Inc	7,500
			632	Norris Ct	54199	Broadband Maintenance	1,100
			637	Norris Ct	54199	Aecon	1,100
			640	Norris Ct	54199	Hydroclaves Systems	2,300
						Mail Rite Marketing	2,300
						Prologics	2,300
			1000	Gardiners Rd	52421	Raymond James Insurance	8,500
					54199	Investors Group	8,500
			1040	Gardiners Rd	5412	FPR	6,000
						King Reed Associates	6,000
					5413	GD Jewell Engineering	6,000
					52421	State Farm Insurance	6,000
					53121	Realty Executives	6,000
			1044	Gardiners Rd	54199	North American Driving Academy	1,100

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)								
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total	
			1046	Gardiners Rd	5411	CEJ Ecclestone Law Office	1,100	
			1048	Gardiners Rd	54199	Falon Security	1,100	
			1050	Gardiners Rd	54199	OT Group	1,100	
			1060	Gardiners Rd	54199	Bartlet Commercial	1,100	
			1064	Gardiners Rd	54199	McCoy Tours	1,100	
			1066	Gardiners Rd	54199	City Sign	1,100	
			1070	Gardiners Rd	54199	Cranberry Hill Enterprises	1,100	
			1074	Gardiners Rd	54199	Cataraqui School of Music	2,300	
			1080	Gardiners Rd	5413	Smith & Smith land Surveyors	1,100	
			1152	Gardiners Rd	54199	Peach Homes Wylie Electric	1,100 1,100	
				Gardiners Rd	5411	Law Office	1,100	
					54199	FM Man Ltd	1,100	
			1072	Gardiners Rd	54199	Millwrights Union	1,100	
			636	Norris Ct	5413	Ontario & Canada Land Surveyors	2,300	
			Service - Public Administration		1259	Gardiners Rd	91	Min.of Environment
		Vacant		1259	Gardiners Rd	9999	Vacant	8,500
		Other Retail - Automotive TBA		501	O'Connor Dr	44131	Astro Auto Parts	3,900
				505	O'Connor Dr	44131	Napa Auto Parts	9,000
				607	Norris Ct	44132	Kal -Tire	10,300
				1020	Gardiners Rd	44131	Auto Add-ons	9,200
		Node 3 Total						
4	Cataraqui Town Centre	FSR - Convenience/Specialty Food	945	Gardiners Rd	44529	Laura Secord	700	
		NFSR - Apparel	945	Gardiners Rd	44811	Stars Men's Shops	1,600	

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						Tip Top Tailors	3,600
					44812	Addition Elle/A&E Sport Co	5,100
						Bikini Village	1,200
						Bootlegger	8,500
						Cassis	3,800
						Garage	3,500
						Jacob Connexion	3,100
						La Senza/La Senza Express Girl	5,500
						Le Chateau	3,600
						Lindor	3,000
						Northern Reflections	1,800
						Reitmans	3,300
						RW & Co	3,900
						Sirens	2,100
						Smart Set	3,200
						Stefi Lara/Stefe Lara Petites	2,500
						Stitches	3,400
						Tabi	1,800
						Tan Jay	1,700
					44813	Ardene Styles	1,700
						Siblings	1,100
						The Children's Place	4,500
					44814	American Eagle Outfitters	5,700
						Athletes World	3,600
						Bluenotes	3,200

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						Buffalo Shop	2,400
						Jean Machine	1,200
						T-Shirt Gallery	800
						West 49	1,800
					44815	Bizou Accessories	400
						Claire's Boutique	1,300
						Sun Glasses Hut	1,000
					44819	La Senza	2,400
					44821	Aldo	1,800
						Footlocker	3,100
						Naturalizer	900
						Payless Shoes	2,200
						Soft Moc	1,200
						Spring	1,500
					44831	Ben Moss Jewellers	900
						Bijoux Ternier	1,100
						Cobico	500
						Key Man Engravables	700
						Mappins	1,900
						Peoples Jewellers	1,500
						Personally Yours	400
						Charm Diamond Centre	1,100
					44832	Bentley	1,900
		NFSR - Department Store	945	Gardiners Rd	45211	Sears	124,900
						The Bay	113,100

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						Zellers	115,300
		NFSR - General Merchandise	945	Gardiners Rd	452999	A Buck or Two	3,400
		NFSR - Home Furnishings	945	Gardiners Rd	44229	Benix	1,100
						Quilts Inc	2,100
						Rob Macintosh	1,800
					44311	Bell World	1,600
						Personal Edge	600
						Rogers Wireless	600
						Telus	1,300
						The Sony Store	1,900
						The Source By Circuit City	1,900
						The Telephone Booth	600
					44312	Island Ink Jet	400
					44313	Blacks Photography	1,200
		NFSR - Miscellaneous	945	Gardiners Rd	45111	Sport Chek	19,100
					45112	EB Games	1,200
					45121	Coles	2,400
					45122	HMV	3,100
						Sunrise Records	3,100
					45321	Grand & Toy	2,100
					45322	Carlton Cards	2,400
						Hallmark	2,800
						Neat Things	1,900
						San Diego Gifts	1,200
					45391	The Pet Store	1,800

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
					453991	Smoke & Gift Tobacco Plus	500
							400
		NFSR - Pharmacies & Personal Care	945	Gardiners Rd	44611	Shoppers Drug Mart	9,800
					44612	Beauty Express	900
						Christine Dufault Cosmetics	400
						Couture Perfume	1,000
						Lush Fresh Handmade Cosmetics	1,200
						The Body Shop	1,200
						Yves Rocher	1,200
					44613	Laurier Optical	3,100
						Lenscrafters	4,200
						Pearl Vision	2,200
					44619	GNC	1,200
		Service - Banks	945	Gardiners Rd	52211	BMO	4,300
						BMO (Instant Teller)	800
		Service - Eating/Drinking	945	Gardiners Rd	7221	Moxie's	6,200
					7222	A&W	400
						Ben & Jerry's	400
						Bourbon St Grill	400
						KFC	400
						Manchu Wok	500
						New York Fries	300
						Place Tavers	400
						Saint Cinnamon	500
						Subway	400

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						Tim Horton's	1,300
		Service - Medical/Dental	945	Gardiners Rd	6211	Cataraqui Dental Centre	4,400
		Service - Other	945	Gardiners Rd	54199	Cogeco Cable	1,200
					56151	Algonquin Travel	900
		Service - Personal	945	Gardiners Rd	8121	Creation Hair Design	1,400
						LA Nails	1,000
						Quattro Hair Style	600
						Regis Hair Stylists	1,600
		Vacant	945	Gardiners Rd	9999	Vacant	1,500
Node 4 Total							587,800
5	Collins Bay	NFSR - General Merchandise	4037	Bath Rd	452999	Rainbow Variety & Gas	1,000
		NFSR - Miscellaneous		Bath Rd	45111	Dive Centre	500
		Other Retail - Automotive		Bath Rd	8111	Carwash	4,100
					44112	Collins Bay Auto Sales	1,500
		Service - Eating/Drinking	1151	Bath Rd	7221	Chinese Palace	2,000
			4050	Bath Rd	7221	Bella Bistro	3,100
				Bath Rd	7222	Tim Horton's	2,100
		Service - Other	4037	Bath Rd	54194	Collins Bay Animal Hospital	2,000
					54199	Dukes Place Pet Daycare	2,000
		Service - Personal	4037	Bath Rd	8121	First Choice Hair Salon	1,200
			4042	Bath Rd	8121	Hair Trends	700
				Bath Rd	8123	Rainbow Laundromat	1,800
		Other Retail - Automotive TBA	4000	Bath Rd	44132	Township Tire	1,500
Node 5 Total							23,500

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
6	Division/401	NFSR - Apparel	1201	Division St	44812	Designer Fashion	3,100
						Jones Of New York	3,400
						Liz Claiborne	8,800
		NFSR - General Merchandise	1201	Division St	452999	The Buck-It Shop	3,000
		NFSR - Miscellaneous	1201	Division St	45391	Barry's Pet Choice	1,800
		NFSR - Pharmacies & Personal Care	1201	Division St	44611	Shoppers Drug Mart	20,000
		Other Retail - Automotive	45	Dalton Ave	44512	Petro Canada	1,000
			1213	Division St	44512	Shell Select	1,000
			1185	Division St	44512	Esso On The Run	1,900
			1188	Division St	44512	Sunoco Horizon	800
		Service - Banks	1201	Division St	52213	Kingston Community Credit Union	1,600
		Service - Eating/Drinking	29	Warne Cres	7222	KFC	3,100
			33	Benson St	7221	Denny's	7,300
			39	Warne Cres	7221	Pizza Hut	3,500
			69	Dalton Ave	7222	Dairy Queen	900
			85	Dalton Ave	7221	Swiss Chalet	6,500
			417	Weller Ave	7221	East Side Mario's	6,400
			1141	Division St	7222	Harvey's	2,200
			1151	Division St	7222	Tim Horton's	2,700
			1155	Division St	7222	A&W	2,600
			1165	Division St	7222	McDonald's	6,000
			1201	Division St	7222	Mr Sub	1,800
				Division St	7222	Arby's	2,600
			17	Warne Cres	7222	Wendy's	3,800

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
		Service - Other	1201	Division St	54199	Citi Financial	1,800
						Soccer Association	1,300
		Service - Personal	1201	Division St	8121	Herbal Magic	1,300
					8123	Coin Laundry	2,100
		Vacant	1201	Division St	9999	Vacant	16,500
	Division St		9999	Vacant (Ex Tim Horton's)	1,800		
Node 6 Total							120,600
7	Downtown	Beverage	34	Barrack St	44531	LCBO	10,900
		FSR - Convenience/Specialty Food	44	Princess St	44529	Pan Chanco Bakery	3,200
			61	Brock St	44529	Cookes Fine Foods	3,200
			81	Princess St	44529	Tara Natural Foods	5,500
			120	Princess St	44512	Downtown Lotto Centre	2,100
			185	Division St	44529	Friutalicious	1,100
			241	Princess St	44529	Sweet Stuff Candy The Tea Store .ca	1,400 1,800
			304	Bagot St	44529	Cards Bakery	3,200
			311	Queen St	44529	Wolfe Island Bakery	3,300
			322	King St	44521	Block & Cleaver Meat Market	1,600
			354	Princess St	44512	Asian Market Grocery	1,800
			425	Princess St	44512	Madelien Convenience	1,700
			FSR - Supermarket	33	Barrack St	44511	Food Basics
		310		Barrie St	44511	A&P	28,500
		NFSR - Apparel	7	Queen St	44831	The Arthur Room Eco Jewellery	900
			34	Princess St	44811	Sir Gawains	2,800

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			36	Princess St	44832	Bagot Leather Goods	1,600
			48	Princess St	44812	Fancy That	2,300
			50	Princess St	44812	The Round Stone	2,000
			51	Montreal St	44812	Niiyaan Clothing	600
			55	Montreal St	44831	Dock Time Watch & Clock Repair	700
			60	Brock St	44813	Designer Baby	1,200
			62	Princess St	44821	A One of A Kind Footwear	1,100
			63	Brock St	44812	Cybil Scott Boutique	1,500
			68	Brock St	44812	Coquette	600
			70	Princess St	44812	Namaste	1,600
			72	Princess St	44812	Modern Primitive Boutique	1,300
			73	Brock St	44831	Sacred Gem Source	1,100
			75	Brock St	44811	Cunningham & Poupore	2,800
				Princess St	44831	Frontenac Jewellers	800
			86	Brock St	44812	Hatley	1,600
			101	Princess St	44812	Tweed & Hickory	2,700
			115	Princess St	44831	Tribal Voices	2,800
			123	Princess St	44831	Jungle	2,500
			155	Princess St	44811	Dovers Men's Wear	4,200
			168	Princess St	44831	Tres O's Jewellery	1,700
			177	Wellington St	44821	Walkwell Shoes	2,800
			185	Division St	44812	Just Stylz	1,900
			201	Princess St	44811	Urban Trade	1,900
			202	Princess St	44812	Next Exit	2,800

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			206	Princess St	44812	Steilman	2,600
			210	Princess St	44812	Rocki Boutique	2,600
			212	Princess St	44821	Heel Boy Shoes	3,000
			214	Princess St	44811	Alexander Newman's	3,000
			216	Princess St	44831	Fiancee Jewellers	2,300
			225	Princess St	44819	Willow	1,100
			229	Princess St	44814	Roots	2,900
			232	Princess St	44813	Gap Kids	3,900
			234	Princess St	44812	The Straight Fit	5,500
			244	Princess St	44812	Agent 99	1,900
			248	Princess St	44812	Blue Print	1,900
			260	Princess St	44814	Runners Choice	2,100
			270	Princess St	44814	Lululemon Athletica	3,100
			274	Princess St	44814	American Apparel	4,000
			275	Princess St	44811	Syd Silver	2,800
			277	Princess St	44814	The Running Room	2,300
			286	Princess St	44812	Novellino	2,300
			292	Queen St	44812	Cynthia's	1,200
			294	Queen St	44811	Muranos Formal Wear	900
			296	Queen St	44819	Bridal Creations	1,900
			297	Princess St	44812	Two Ninety Seven	1,200
			303	Bagot St	44812	Neva's Boutique	500
					44831	Kimberly Jewellery & Apparel	700
						Paul Rudolf Jewellers	500

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			318	Princess St	44821	Forward	1,200
			320	King St	44821	Catwalk Shoes	1,000
			326	King St	44812	Gracies	2,100
			328	Princess St	44812	Eco Boutique	800
					44821	Felicity & Fritz	800
			330	Princess St	44812	Space FB	2,000
			342	Princess St	44831	Beads Jewellery	800
			352	King St	44831	Metal Works Goldsmithing	900
			353	Princess St	44814	Phase Two	4,000
			356	King St	44814	A One of A Kind Clothing Outfitters	1,800
			367	King St	44831	Kingston Jewellery Repair	600
			77A	Princess St	44831	Sterling	900
		NFSR - Building and Outdoor Home Supply	56	Queen St	44419	Gallery Fireworks	2,300
			77	Princess St	44413	Vandervoorts Hardware/Jawa Fine Furniture	15,700
			159	Queen St	44419	The Copper Mill Stained Glass	1,800
			174	Princess St	44412	Shamand Decorating Centre	2,600
		NFSR - General Merchandise	27	Princess St	452999	S&R Department Store (3rd flr True Value)	68,400
			103	Princess St	452999	Deals For You	3,700
			178	Princess St	452999	Dollarama	10,300
			185	Princess St	452999	The Dollar Club	4,200
			213	Princess St	452999	Beaver Variety & Take-Out	1,200
				Montreal St	452999	The \$9.99 Store	1,100
			196	Ontario St	452999	Mac's General Store	2,400
		NFSR - Home Furnishings	56	Brock St	44229	River Myste	900

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			57	Brock St	44229	Oderin Kitchen Supply	1,700
			58	Queen St	44229	Black Dog Pottery	1,600
			62	Queen St	44211	Advanced Business Interiors	1,500
			93	Princess St	44313	Japan Camera	1,700
			114	Princess St	44313	Camera Kingston	2,600
			122	Princess St	44311	Rogers Wireless	1,700
			131	Princess St	44311	Telus	700
			166	Princess St	44229	Dansk Factory Outlet	2,000
			168	Division St	44312	Micro Play	1,700
			198	Princess St	44229	Frameworks	2,900
			208	Princess St	44211	Le Cache	4,300
			215	Princess St	44229	For Every Season	900
			239	Princess St	44311	Just Hi-Fi	4,600
			253	Ontario St	44211	Serendipity	1,900
			255	Princess St	44229	Very Shari	6,300
			256	Princess St	44211	J Reid Furniture	20,000
			262	Princess St	44211	Modern Furniture	13,500
			271	Princess St	44311	The Source By Circuit City	2,800
			282	Princess St	44211	Futon Frame Outlet	1,600
			298	Princess St	44312	Canada Computers	2,800
			333	Princess St	44211	Easy Home	4,700
			350	King St	44211	Lakes End Trading Co.	1,100
		NFSR - Miscellaneous	11	Montreal St	45111	Seppi Ski's & Snow Board	2,800
			21	Queen St	45392	Modern Fuel Gallery	1,700

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			40	Clarence St	45331	Classic Video	1,000
			48	Queen St	45111	Gears & Grinds	1,200
			55	Brock St	45322	Hardy Har Har	1,200
			62	Brock St	45111	The Peak Experience	1,100
			65	Brock St	45322	Trug's Gifts	1,500
			66	Brock St	45121	As The Plot Thickens	1,100
			68	Princess St	45311	Paradiso Flowers	1,600
			78	Princess St	45322	Olden Green Gifts	3,300
			79	Brock St	45391	Bird's & Paws	1,200
			85	Princess St	45331	Wayfarer Books/Ally Antiques	3,600
			86	Princess St	45331	Army Surplus	2,200
			90	Brock St	45331	Treasure Cove Antiques	2,900
			95	Clarence St	45114	Kingston Guitar Shop	1,100
			105	Queen St	45321	Staples/Business Depot	23,000
			109	Princess St	45121	Bookmarket	3,100
			110	Princess St	45331	Era	3,800
			112	Princess St	45392	Chameleon Nation Gallery	1,300
			117	Princess St	45311	McMahon's House of Flowers	2,800
			119	Princess St	45111	Downtown Kingston Source For Sports	15,900
			120	Princess St	45322	Send In The Clowns	3,200
			122	Princess St	45121	The Book Shop	2,800
			155	Wellington St	453991	Smoker's Haven	400
			156	Division St	45331	Relate Used Clothing	700
				Princess St	45121	Novel Idea	3,500

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			157	Wellington St	45113	Gwin Gryffon	1,400
			160	Princess St	45112	The Rocking Horse	2,600
			162	Division St	45114	Limestone Music	3,200
			165	Princess St	45112	Minotaur Games & Gifts	3,200
			193	Princess St	45322	The Card Merchant	2,300
			197	Wellington St	45331	Antiques Ect	900
			201	Wellington St	45331	The Village Time keeper	600
			219	Princess St	45111	Big House Skate Shop	1,600
			222	Wellington St	45392	Delvalle's Art Corner	1,200
			233	Princess St	45122	Sunrise DVD's	2,200
			235	Princess St	45331	Ten Thousand Villages	2,200
			239	Brock St	45331	Selma Park Antiques	1,300
			255	Ontario St	45322	Cornerstone Arts & Crafts	2,900
			259	Princess St	45121	Indigo Books	8,700
			267	Ontario St	45114	Kingston Soundworks	1,200
			272	Princess St	45111	Trail Head Canoe & Kayak	3,700
			281	Princess St	45331	Turk's Antiques	4,400
			289	Princess St	453991	Smoke King	1,400
			290	Princess St	45321	Wallabecks Stationary	6,600
			334	Princess St	45392	Gallery Raymond	1,100
			335	Princess St	45331	CD Exchange	3,400
			338	Barrie St	45111	Frontenac Cycle & Sports	2,100
				Princess St	45331	What' il' I Wear	800
			339	Princess St	45111	Cycle path	3,400

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			340	King St	45322	Earth & Spirit Trading Co.	2,700
				Princess St	45331	Zap Records	700
			341	King St	45322	Saltini Bazaar & Gifts	2,400
			346	Princess St	45331	Chumleigh's CD's	2,800
			348	King St	45331	Berry & Peterson Book Sellers	1,900
			381	Princess St	45331	Brian's Record Option	1,500
			346A	Princess St	45322	Hemporium	1,700
			207B	Wellington St	45331	Alley Cat Antiques	2,500
		NFSR - Pharmacies & Personal Care	78	Brock St	44611	Market Pharmacy	1,900
			100	Princess St	44611	Quarry Medical Pharmacy	4,400
			135	Princess St	44613	Optical Factory	800
			136	Princess St	44611	Shoppers Drug Mart	17,700
			158	Wellington St	44613	Precision Optical	3,400
			199	Wellington St	44619	Green Door Vitamins	500
			217	Princess St	44612	Perfume Plus	900
			238	Princess St	44612	The Body Shop	3,900
			332	Barrie St	44619	Titan Nutrition	1,500
		Other Retail - Automotive	283	Queen St	44112	Euro Imports	5,800
		Service - Repair and Maintenance	167	Wellington St	8114	Tom's Shoe Repair	700
		Service - Banks	18	Market St	52213	Kingston Community Credit Union	2,100
			94	Princess St	52211	TD Canada Trust	7,200
			145	Princess St	52211	Scotiabank	4,700
			153	Wellington St	52211	Wellington Foreign Exchange	1,400
			168	Wellington St	52211	Scotiabank	7,000

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			181	Wellington St	52211	TD Canada Trust	7,600
			256	Bagot St	52211	CIBC	10,000
			328	King St	52211	National Bank	2,900
			366	King St	52211	RBC	12,800
		Service - Consumer Services Rental	226	Queen St	5322	Block Buster Video	6,800
			333	Barrie St	5323	Discount Car & Truck Rental	200
				Garrett St	5322	Jumbo Video	3,000
		Service - Eating/Drinking	6	Princess St	7221	The Merchant Tap Lounge	5,500
			14	Market St	7221	Old Specked Hen Pub	10,400
				Garrett St	7221	Elixir	4,000
			30	Montreal St	7222	Wok In	600
			33	Brock St	7222	Sipps Coffee & Desert Bar	1,400
			34	Clarence St	7221	Kingston Brew Co.	3,400
				Princess St	7221	Restaurant	1,200
			35	Brock St	7221	Casa Domineco	2,900
			46	Montreal St	7221	Shakers Lounge	8,100
			53	Princess St	7222	Coffee & Company	1,900
			64	Princess St	7222	Ben & Jerry's	1,600
			69	Brock St	7221	Chieri Noir Bistro	1,600
			71	Brock St	7221	Atomica	2,500
			74	Princess St	7221	Chez Piggy	3,300
			76	Princess St	7221	The Toucan/Kirkpatricks	4,300
			91	Princess St	7221	The Sleepless Goat	1,800
			95	Princess St	7222	Starbucks	1,800

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			105	Clergy St	7221	Ben's Pub	2,100
			111	Princess St	7221	Golden Rooster	2,800
			120	Princess St	7221	Take Sushi	2,600
			125	Brock St	7221	The Queen's Inn Copper Bar	3,100
			137	Princess St	7221	Coffee's Cake	1,100
			161	Brock St	7221	Cambodiana	1,100
				Princess St	7221	Mango	2,300
			164	Princess St	7221	Bistro Delight	1,800
			167	Ontario St	7221	Frankie Pestos	2,400
				Princess St	7221	Grecos Wine & Grill Bar	2,100
			171	Wellington St	7221	Right Spot Restaurant	1,700
			176	Ontario St	7222	White Mountain Ice Cream	800
			177	Princess St	7221	Asha	5,600
			178	Ontario St	7221	Brandee's Joy Supper Club	2,400 6,200
			184	Princess St	7221	Wind Mills	1,600
			192	Ontario St	7221	Stoney's Wooden Head	4,400 2,200
			226	Princess St	7221	Megalos	3,900
			234	Wellington St	7221	Pasta Genova	1,400
			237	Ontario St	7221	WJ's	3,200
			240	Princess St	7221	Copper Penny	2,900
			248	Ontario St	7221	Aroma	4,500
			251	Ontario St	7221	Lonestar	6,600

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
				Princess St	7222	Second Cup	1,400
			253	Ontario St	7221	Curry Original	2,100
			257	Ontario St	7222	Subway	1,700
			264	Princess St	7221	Luke's	1,200
			266	Johnson St	7221	The Pilot House	1,400
			274	Bagot St	7221	Stuffed Urban Eats	1,500
			276	Bagot St	7221	Saigon Delights	1,300
			279	King St	7221	King St Sizzle	3,200
			284	Princess St	7221	Little Saigon	1,600
			285	King St	7222	Sizzles To Go	2,300
				Ontario St	7222	Tim Horton's	2,500
				Princess St	7222	McDonald's	2,600
			294	Princess St	7222	241 Pizza	1,000
			296	Princess St	7221	Café India	1,300
			303	Bagot St	7221	Golden Viet Thai	700
			310	King St	7221	The Keg	10,400
			318	King St	7221	Morison's Restaurant	3,000
			331	King St	7221	Tango	2,400
			335	King St	7221	Phnom Penh	2,900
			338	Barrie St	7222	Mino's Take-Out	1,900
			343	King St	7221	Forno Pizzeria & Grill	2,400
			344	Princess St	7221	Royal Tavern	3,700
			347	King St	7221	Cambodia Village	1,000
			349	King St	7221	Bubba's Pizzeria	1,200

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			354	King St	7221	Retorante Linguine	2,100
			358	Princess St	7222	Subway	2,200
			373	King St	7221	Silver Wok	3,800
			375	Princess St	7222	El Asador	800
			383	Princess St	7222	The Pita Grill	2,400
			393	Princess St	7224	Stages	8,700
			394	Princess St	7221	Mekong	3,600
			395	Princess St	7221	The Grizzly Grill	6,100
			397	Princess St	7222	Samatva	2,700
			399	Princess St	7222	Classics Tea Lounge	3,600
						Dairy Queen	2,600
			400	Princess St	7222	Burger King	2,300
			401	Princess St	7222	Bubba's Pizzeria	2,100
			403	Princess St	7221	The Brass Pub	2,900
			421	Princess St	7222	The Pita Pit	1,300
			424	Princess St	7221	Gusto Italian Restaurant	2,000
			572	Princess St	7222	Pizza Pizza	2,700
				Division St	7222	Pizza Pizza	2,900
						Smilies Take-Out	3,600
				Montreal St	7221	Windmills Café	1,400
				Ontario St	7222	Summers Ice Cream	1,600
				Princess St	7221	Ale House Canteen	8,500
						Andrew's Café	2,300
			269	Princess St	7222	Quiznos	3,000
			312	Princess St	7222	Tim Horton's	4,100

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
		Service - Entertainment	64	Barrack St	71394	Goodlife Fitness	30,200
			80	Princess St	71394	Hot Yoga	1,400
			223	Princess St	51213	Empire Theatre	20,000
				Bagot St	71394	YMCA Relaxation Camp	2,200
			126	Wellington St	71399	Wellington St Theatre	7,900
		Service - Medical/Dental	5	Queen St	6211	Dental Office	2,200
			20	Market St	6211	Dr Macklin-Eye Surgeon	2,100
			94	Brock St	6214	Helix Hearing Care	1,100
			113	Johnson St	6211	Dr O'Neil - Orthodontist	3,000
			115	Clarence St	6214	Queen Family Health	1,300
			135	Clergy St	6211	Dr. Morrison	2,400
			149	Brock St	6214	Canada Hearing Centre	2,200
			155	Brock St	6211	Dr Hanson/Dr Taylor	3,500
			163	Brock St	6214	Limestone Dermatology	2,600
			165	Ontario St	6211	Dental Office	2,200
			240	Brock St	6213	Detox Centre	4,000
			242	Wellington St	6214	Wellington Acupuncture & Massage	700
			262	Wellington St	6211	Dental Office	2,400
			275	King St	6211	Dental Office	1,800
			279	King St	6214	Lasik MD Vision	3,500
			303	Bagot St	6214	Namzak Labs	3,700
			324	King St	6213	Marc Raymond - Optician	2,300
			328	Queen St	6214	Health Support & Fitting Services	1,400
				Brock St	6211	Queen St Family Health	5,200

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
				King St	6214	Kingston Physiotherapy	3,600
		Service - Other	4	Montreal St	5412	Quality tax	1,500
			14	Montreal St	54199	The Street Smart Centre	6,200
			16	Market St	53121	Zakos James Thomas Real Estate Broker	1,900
			45	Johnson St	5411	Law Office	1,500
			49	Princess St	53121	Realty Concepts	1,500
			67	Brock St	54199	Kingston Chamber of Commerce	2,800
			75	Queen St	54199	AMC Group	2,800
						Rankin Sound Recording	1,700
			80	Johnson St	54199	Homestead Land Holdings	11,200
				Queen St	53121	Royal Lepage	4,000
					54199	Edward Jones	3,100
			82	Princess St	5412	H&R Block	1,900
			93	Queen St	54199	Birth Right	1,400
			104	Johnson St	5411	Law Office	1,800
			120	Clarence St	54199	Canada Post	88,000
			127	Princess St	56143	Copy Express	2,200
			130	Johnson St	54199	Kingston Public Library	49,600
			153	Brock St	5411	Good Elliot Hawkins	1,900
			164	Queen St	54199	Ross Crichton Financial	900
			165	Ontario St	5411	Lefrance Law Office	400
					52421	Empire Life Insurance	6,600
					54199	ADAPCS	4,200
						Canadian Metlaurgical Quarterly	2,200
						Community Foundation Of Kingston	2,000

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						Day Care	2,200
			172	Division St	54199	The Cash Store	2,100
			175	Wellington St	5411	Ecco Shoes	1,700
			182	Wellington St	54199	Kaluta Buddhist Centre	1,900
			186	Princess St	56151	Odyssey Travel	1,300
			207	Wellington St	52421	State Farm Insurance	1,900
			208	Division St	54199	Money Mart	700
			209	Ontario St	54199	Tourist Information Centre	1,900
				Wellington St	56143	Digraphics	1,100
			214	Wellington St	56151	Merit Travel	1,600
			225	Bagot St	5411	Black & Black	1,300
			230	Brock St	54199	Council On Aging	1,000
				Wellington St	54199	Philippino	1,000
			232	Brock St	5411	A. Thompson Law	2,000
			234	Brock St	54199	Youth Centre	3,000
			238	Wellington St	5411	JR Gate law	700
			247	Brock St	5411	Black Lloyd Caron	3,700
			248	Wellington St	54199	Canada Cash Advance	600
			249	Brock St	5413	A. Wilson Architect	2,800
			259	Ontario St	54199	The Haunted Walk	600
			263	Ontario St	54199	1000 Island Cruises	1,000
			267	Queen St	54199	Leopard Frog	600
			270	Wellington St	52421	Co Tal Co. Insurance	600
			273	King St	5411	Chorry & O'Neill	2,300

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			274	Wellington St	53121	Weatherbee Real Estate	1,100
			278	Ontario St	54199	Xentel	900
			284	King St	54199	Assante Wealth Management	3,700
			295	Queen St	5411	The Law Firm	6,000
			303	Bagot St	5411	Meddel Copp Law	500
					54199	Can Tek Solutions	1,500
						First Step Kingston	2,000
						On-Line KOS	1,900
						Young Drivers of Canada	1,700
			308	Bagot St	56143	Print Three	2,100
			310	Bagot St	54199	Oxford Seminars	2,300
			322	Queen St	54199	Joe's Driving School	1,300
			324	Princess St	54199	Green Party Headquarters	1,400
			332	Barrie St	56143	Printing Shop	1,200
			348	Princess St	56143	4 Colour 8 Bit	2,300
			370	King St	54199	Drake Consulting	900
			377	Princess St	54199	Limestone Cyberspace	1,500
			382	King St	54199	Mill's & Ross Architects	6,300
			388	King St	5411	Law Office	500
			427	Princess St	56143	The UPS Store	600
				Brock St	54199	Hartworks Studio	1,600
				Princess St	54199	The Family Resource Centre	8,900
				Queen St	54199	Corus Entertainment	30,000
			89-93	Clarence St	5411	Hurley Fasano	8,000
		Service - Personal	9	Queen St	8121	Glow Hair Salon	2,800

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			35	Johnson St	8121	Aesthetics On Johnson	800
				Montreal St	8121	Sir Johnnie's Barber Shop	600
			39	Montreal St	8121	Crystal Nails	1,600
			41	Montreal St	8121	Sun Nails	1,100
			49	Montreal St	8123	Super Sews Tailors & Dry Cleaners	800
			57	Montreal St	8121	Mi Linns Dress making	700
			64	Montreal St	8121	Exotic Tan	1,600
			82	Brock St	8121	Hair Hair	900
			110	Clergy St	8121	Edges Salon	2,100
			154	Division St	8121	Greg Birch Hair Studio	600
			165	Ontario St	8123	Carr's Dry Cleaning	1,100
			170	Division St	8123	Central Laundromat	5,700
				Princess St	8121	Andrea's Tailors	2,300
			172	Princess St	8121	Luce	2,600
			181	Division St	8121	Better Bodies	1,100
			186	Wellington St	8121	Lush Nail Bar	1,500
			189	Princess St	8121	James Brett	1,400
			223	Bagot St	8121	Hair Salon	1,300
			224	Wellington St	8123	Hillary's Dry-Cleaning	700
			250	Queen St	8123	Econo Coin Laundry	2,100
			253	Princess St	8121	Vecchio's Barber Shop	600
			285	King St	8121	Taylor Studio's	2,000
			288	Wellington St	8121	Franselly Hair	1,100
			292	Princess St	8121	Snippets	1,000

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			295	Brock St	8121	Serenity Spa	9,300
			296	Bagot St	8121	LuLu's Hair	1,800
			318	Princess St	8121	Beauty Bar	800
			329	Barrie St	8121	Quik Sew	800
			336	Barrie St	8121	Pauls Barbering	1,200
				Princess St	8121	Diva Salon	1,200
			340	Barrie St	8123	Carr's Dry Cleaning	1,900
			351	Princess St	8121	Dino's Barber Shop	700
			390	King St	8121	F.A.B. Hair Salon	1,000
			394	Division St	8121	The Beach tanning	3,600
					8123	Princess Coin laundry	1,600
				Queen St	8121	Cornacchai Tailoring	1,400
						Creations Barber Shop	1,600
						Weight Watchers	2,000
		Service - Public Administration	11	Queen St	91	Kingston Police Department	38,800
			86	Clarence St	91	Federal Building	12,400
			130	Queen St	91	Canadian Forces Recruitment Office	4,400
			216	Ontario St	91	Kingston City Hall	40,000
			271	Brock St	91	Fire Station 4	16,500
			294	King St	91	Customs House	8,100
			295	Ontario St	91	Wolfe Island Ferry Terminal	4,600
			303	Bagot St	91	Gerretsten MPP Office	1,600
						Peter Miliken MP	5,300
		Vacant	15	Montreal St	9999	Vacant	1,000
			19	Queen St	9999	Vacant	19,400

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			32	Montreal St	9999	Vacant	600
			37	Montreal St	9999	Vacant	2,500
			122	Princess St	9999	Vacant	4,200
						Vacant (Ex Fabricland)	3,300
			125	Princess St	9999	Vacant	800
			149	Brock St	9999	Vacant	700
			165	Wellington St	9999	Vacant	1,200
			166	Wellington St	9999	Vacant	5,200
			169	Princess St	9999	Vacant (Ex Curry Village)	3,500
			172	Ontario St	9999	Vacant	1,800
			173	Princess St	9999	Vacant	4,000
			185	Division St	9999	Vacant	1,900
			187	Princess St	9999	Vacant (Ex Subway)	1,400
			203	Wellington St	9999	Vacant	1,900
			205	Wellington St	9999	Vacant	2,500
			207	Princess St	9999	Vacant	7,900
			227	Princess St	9999	Vacant	1,700
			266	Princess St	9999	Vacant	800
			268	Princess St	9999	Vacant	1,600
			275	Queen St	9999	Vacant	3,200
			291	Princess St	9999	Vacant	1,400
			293	Princess St	9999	Vacant	1,400
			303	Bagot St	9999	Vacant	700
			320	Princess St	9999	Vacant	1,900

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			330	King St	9999	Vacant	5,500
			347	Princess St	9999	Vacant (Ex My Bar)	7,200
			350	Princess St	9999	Vacant	1,600
			369	King St	9999	Vacant	2,500
			371	Princess St	9999	Vacant	4,400
				Brock St	9999	Vacant (Ex Greek Village)	2,700
				King St	9999	Vacant (Ex Laurier Optical)	3,200
				Ontario St	9999	Vacant	2,300
				Princess St	9999	Vacant	10,000
			128-134	Ontario St	9999	Vacant	8,300
			218-224	Princess St	9999	Vacant	7,600
Node 7 Total							1,705,200
8	Frontenac Mall	FSR - Supermarket	1300	Bath Rd	44511	Food Basics	40,000
		NFSR - Apparel	1300	Bath Rd	44812	Haki Fashions	1,100
						Mariposa	3,100
						Peaches	2,200
					44814	Mr Jackets	1,900
					44815	Ardene	1,800
					44821	Payless Shoes	4,400
						Shalimar Shoes	1,700
		44831	Gold For Less	1,400			
		NFSR - General Merchandise	1300	Bath Rd	452999	Dollar World Plus	1,100
Dollarama	9,700						
Liquidation World	25,000						

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						Super Discount City	4,100
		NFSR - Miscellaneous	1300	Bath Rd	45112	Paintball Store	2,200
					45121	Half Price Books	4,200
					45311	Plants & Pots	2,000
					45321	Inkwell	800
					45331	Play It Again Sports	4,000
						Value Village	40,000
					45391	Pet Paradise	8,300
					453991	Quality Smoke	100
		Service - Eating/Drinking	1300	Bath Rd	7221	Dickey's Barbeque Pit	5,600
					7222	Chit Chat Café	1,100
		Service - Entertainment	1300	Bath Rd	71394	Premier Fitness	60,000
					71399	Bridge Centre	2,400
		Service - Medical/Dental	1300	Bath Rd	6211	Dr Office	900
						Medical Offices	2,600
					6213	Optometrist	1,900
		Service - Other	1300	Bath Rd		Optometry Clinic	1,900
					54199	Mall Offices	900
						Trillium College	7,900
		Service - Personal	1300	Bath Rd	56151	Marlin Travel	500
					8121	Avante Beauty Club	1,600
						Beauty Academy	3,400
						LA Nails	1,100
						Marelo Hair Stylists	1,100
						Stitch This	900

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
					8123	Pires Laundry	2,300
		Vacant	1300	Bath Rd	9999	Vacant	35,900
Node 8 Total							291,100
9	Gardiners Rd Industrial Area	FSR - Convenience/Specialty Food	759	Progress Ave	44529	Multatuli Coffee Merchant	2,600
			834	Development Dr	44512	Bayridge Grocery	2,100
		NFSR - Apparel	775	Arlington Park Place	44811	The Kiltmaker	1,700
					44821	Superior Shoe & Footcare	1,700
		NFSR - Building and Outdoor Home Supply	621	Justus Dr	44419	Hawthorne Kitchens	3,800
			639	Justus Dr	44419	CD'S Door Systems	3,000
			649	Justus Dr	44419	Grants Tile	6,200
			700	Progress Ave	44419	AABEN Windows & Doors	5,400
						Emerald Tile & Marble	4,700
			731	Development Dr	44411	Aitkinson Home Building Centre	20,200
			745	Development Dr	44419	Solar Can Windows & Doors	2,900
			759	Progress Ave	44419	Fasten-all	6,400
						Progressive Kitchens	5,200
			770	Development Dr	44419	De La Fontaine	6,000
			800	Development Dr	44412	Parade Of Paint	7,500
				Mckay St	44419	Direct Factory Outlet - Windows & Doors	2,200
			605	Justus Dr	44422	Garden Depot	2,000
		NFSR - Home Furnishings	601	Mckay St	44311	ITS Wireless	2,200
			637	Justus Dr	44211	Timberlake Furnishings	2,100
			750	Progress Ave	44311	Altair Electronics	1,000

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			759	Progress Ave	44221	Carpets Plus	5,200
			780	Development Dr	44211	CR Shops & Furniture	6,700
			820	Development Dr	44221	Action Flooring	3,700
			834	Development Dr	44311	At Home Electronics	1,200
				Justus Dr	44229	Fire Place Store	3,900
		NFSR - Miscellaneous	745	Development Dr	45321	Grand & Toy	3,200
			777	Arlington Park Place	453999	Aquatica Pool & Spa	3,600
		Other Retail - Automotive	616	Mckay St	8111	Kingston Transmission	4,000
			648	Mckay St	8111	Dynamic Auto	11,100
			654	Mckay St	8111	Vic's Auto Service	5,200
			660	Development Dr	8111	Kingston Auto Glass	3,100
						McLaughlin Motor Works	1,200
			680	Development Dr	8111	La Salle Autobody - Bldg 1	6,900
						La Salle Autobody - Bldg 2	6,900
			682	Mckay St	8111	Bayridge Collision Centre	5,300
		Service - Repair and Maintenance	597	Justus Dr	8114	Exclusive Cooling Centre	3,600
			740	Development Dr	8114	Potters Appliance Repair	12,100
			745	Development Dr	8114	Direct Energy	3,500
			770	Development Dr	8114	Jen AI Heating & Air	3,000
			820	Development Dr	8114	Brunell Heating & Air	3,700
		Service - Consumer Services Rental	710	Development Dr	5323	United Rental's	9,000
			759	Progress Ave	5323	CRS Equipment Rental	3,300
		Service - Entertainment	759	Progress Ave	71394	Progress Fitness & Aquatics Centre	24,000
		Service - Medical/Dental	676	Development Dr	6211	Denture Clinic	1,700

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			722	Arlington Park Ct	6211	Dental Office	2,000
			735	Arlington Park Ct	6214	VON	1,600
			834	Development Dr	6211	Dental Office	1,200
		Service - Other	595	Mckay St	54199	Tyco Fire & Security	2,200
			645	Arlington Park Ct	54199	PYXIS	1,600
			685	Justus Dr	54199	Edwards Sprinklers	1,200
						Taggart Construction	2,600
			698	Mckay St	54199	Regional Carpet Cleaning	2,000
			700	Progress Ave	54199	Micro Market Business Centre	2,800
			716	Arlington Park Ct	53121	Kingston Are Real Estate Board	2,900
					54199	Evans financial	1,400
			720	Progress Ave	54199	Heart & Stroke Foundation	4,600
			722	Arlington Park Ct	5412	Ralph park	1,000
					54199	Financial Horizons	1,000
			734	Arlington Park Ct	5411	Willoughby MacLeod Law	1,000
			735	Arlington Park Ct	5411	Law Office	3,200
					5413	Architect Firm	1,600
					54199	Cumming Cockburn	1,600
						OSSTF	1,600
						Phil-Insul Group	1,600
						Teachers Federation	1,600
						The Commisionarries	1,600
			736	Arlington Park Ct	54199	Wright Financial	1,000
			739	Arlington Park Ct	54199	Can Wealth	1,600
						Crawford Adjusters	1,600

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			745	Development Dr	54194	Frontenac Animal Hospital	2,900
					54199	Otis	2,700
			759	Progress Ave	54199	Bray Corp	0
			760	Development Dr	54199	Swish Clean-it Centres	1,400
			775	Arlington Park Place	54199	CUE	2,000
						MicroAge Computer Training	4,000
						Thyroid Foundation	1,700
						Kingston Learning Centre	1,400
			779	Midpark Dr	54199	Bay Electric	4,200
			785	Blackburn Mews	54199	Park Centre	20,000
			834	Development Dr	54199	Literacy Link	1,200
						SWYRICH Corp	4,100
			850	Development Dr	54199	Dundee Wealth Management	2,400
				Arlington Park Ct	54199	LMS Security	1,600
				Progress Ave	56143	Digraphics	2,700
		Service - Personal	735	Arlington Park Ct	8121	Better Health Acupuncture	1,600
			759	Progress Ave	8121	Reflection Hair Styling	1,000
				Development Dr	8121	Belle Tattoo	0
		Vacant	688	Mckay St	9999	Vacant	2,000
			745	Development Dr	9999	Vacant	4,500
						Vacant (Ex Sears Home Centre)	5,300
				Justus Dr	9999	Vacant	1,400
		Other Retail - Automotive TBA	601	Justus Dr	44131	Car Quest	5,600
			660	Justus Dr	44131	Auto Function Parts	2,000
						National Battery	1,600

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			700	Progress Ave	44131	Benson Auto Parts Extra	5,200
			745	Development Dr	44131	Import Auto Supply	1,500
Node 9 Total							354,100
10	Gardiners Town Centre & LaSalle Park Plaza	Beverage	1681	Bath Rd	44531	The Beer Store	5,000
						Wine Rack	800
		FSR - Convenience/Specialty Food	1681	Bath Rd	44521	Baltic Deli	600
					44529	Hind Quarter Meats	900
						Reid's Dairy	1,900
						The Plain Food Store	1,300
		FSR - Supermarket	466	Gardiners Rd	44511	A&P	39,800
		NFSR - Apparel	502	Gardiners Rd	44821	Reebok Store	7,100
		NFSR - Building and Outdoor Home Supply	506	Gardiners Rd	44419	The Glass Shop	3,100
					44419	Bentley Windows & Doors	1,500
		NFSR - Home Furnishings	1681	Bath Rd	44211	Scan Design Furniture	24,700
					44311	Vacuum Shop	500
		NFSR - Miscellaneous	484	Gardiners Rd	45113	Fabricland	9,600
			1681	Bath Rd	45111	Sports Excellence	1,100
					45121	Family News Stand	1,000
			488	Gardiners Rd	45391	Pet Value	2,400
		NFSR - Pharmacies & Personal Care	460	Gardiners Rd	44619	Medigas	2,800
		Service - Repair and Maintenance	1681	Bath Rd	8114	Thanasi's Shoe Repair	1,100
		Service - Consumer Services Rental	478	Gardiners Rd	5322	Jumbo Video	6,400
		Service - Eating/Drinking	492	Gardiners Rd	7222	Pita Pit	1,400

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)								
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total	
			506	Gardiners Rd	7222	Tim Horton's	2,600	
			1681	Bath Rd	7221	La Salle Park restaurant	2,000	
					7222	24 You Pizza	2,000	
						Cha Cha Tea	800	
				Subway	2,000			
		494	Gardiners Rd	7221	Lee Gardens Buffet	5,200		
		Service - Medical/Dental		Gardiners Rd	6211	New Family Physician	2,800	
		Service - Other	1681	Bath Rd	5411	Law Office	1,000	
					52421	Co-Operators	1,500	
					53121	Easten Real Estate	2,100	
					498	Gardiners Rd	54199	Stop n Cash
		Service - Personal	480	Gardiners Rd	8121	First Choice Hair Salon	1,200	
			1681	Bath Rd	8121	Laurie's Alterations	500	
						Laurie's Layer	700	
				Tangles & Co.	600			
		Vacant		Gardiners Rd	9999	Vacant	2,000	
Vacant (Ex Shoppers Drugmart)	10,400							
Node 10 Total							152,600	
11	Gardiners Rd between Princess St & Bath Rd	FSR - Convenience/Specialty Food	645	Gardiners Rd	44521	Keith's Deli & Catering	3,900	
			785	Blackburn Mews	44529	Pure Water Co	1,400	
			795	Gardiners Rd	44521	M&M Meats	1,400	
		NFSR - Apparel	540	Gardiners Rd	44819	Once Upon A Bride	1,500	
			648	Gardiners Rd	44819	Collins Safety Clothing	1,200	
			699	Gardiners Rd	44819	Audrey's Costume House	1,800	

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			785	Blackburn Mews	44821	Eagle Orthopaedics	1,400
		NFSR - Building and Outdoor Home Supply	510	Gardiners Rd	44419	Kitchen Craft Cabinetry	4,100
			540	Gardiners Rd	44419	Limestone Kitchen & Bath	7,700
			550	Gardiners Rd	44419	Givesco Brick & Stone	12,500
			607	Gardiners Rd	44419	Torbram Electric	3,300
			699	Gardiners Rd	44419	Bathworks	2,400
						Kitchen Design Studio	1,800
			735	Arlington Park Place	44419	Plumbing Plus	2,800
				Gardiners Rd	44419	Water Store	6,200
		NFSR - Home Furnishings	540	Gardiners Rd	44211	Surplus Freight Furniture	13,100
					44221	Flooring Warehouse	7,800
			645	Gardiners Rd	44211	Master Bedroom	3,700
					44221	Carpet Masters	2,300
			675	Arlington Park Place	44229	Unlimited Lighting	6,400
			687	Gardiners Rd	44312	MDG Computers	2,500
			695	Gardiners Rd	44221	End of The Roll	14,100
			759	Gardiners Rd	44211	Sleep Country	5,700
			811	Gardiners Rd	44221	Stradwick Carpet/Rug Loft	13,200
			885	Arlington Park Place	44311	FW Black Ltd	13,700
			1650	Bath Rd	44311	Aerus Vacuum	2,000
					44312	Red Wing Computer	900
		NFSR - Miscellaneous		Gardiners Rd	44211	Big Savings Furniture	2,800
			645	Gardiners Rd	45113	The Perfect Stitch	2,200
					45121	RG Mitchell Books	1,700

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
					45331	Your next Step	2,400
			660	Progress Ave	45111	The Soccer Post	1,200
			699	Gardiners Rd	45112	Leading Edge Hobbies	2,500
					45399	Party Centre	1,800
			725	Gardiners Rd	45113	Wool Tyme	2,800
			731	Gardiners Rd	45113	The Quilters Choice	1,900
			795	Gardiners Rd	45111	The Peak Experience	2,700
			672D	Golden Mile Rd	45331	McColmans Recycled Sporting Goods	1,500
			749	Gardiners Rd	45111	Treadmill Factory	5,300
		NFSR - Pharmacies & Personal Care	687	Gardiners Rd	44613	Hakim Optical	2,500
			759	Gardiners Rd	44612	Beauty Supply Outlet	1,700
		Other Retail - Automotive	523	Gardiners Rd	44111	Mitsubishi Motors	6,200
			655	Arlington Park Place	44112	The Car Store	2,300
			691	Gardiners Rd	8111	Speedy Muffler	4,900
			765	Gardiners Rd	44512	Petro Canada	3,300
			775	Gardiners Rd	44111	Nissan Motors	10,800
			780	Gardiners Rd	8111	DPD Auto Centre	5,500
			805	Gardiners Rd	44111	Thompson Chrysler	10,600
			845	Gardiners Rd	44512	Esso	1,400
			1654	Gardiners Rd	44111	Car Kingston	1,000
				Taylor Kidd Blvd	44111	GM Dealership	10,000
		Service - Repair and Maintenance	540	Gardiners Rd	8114	Steamatic	1,500
			607	Gardiners Rd	8114	Consumer Service Depot	2,400
		Service - Banks	729	Gardiners Rd	52211	HSBC Financial	900

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			785	Gardiners Rd	52211	CIBC	5,200
			795	Gardiners Rd	52213	Kingston Credit Union	5,500
		Service - Consumer Services Rental	672	Golden Mile Rd	5323	Discount Car & Truck Rental	2,100
		Service - Eating/Drinking	599	Gardiners Rd	7221	Fasooli's Grill	2,900
			660	Arlington Park Place	7222	Tim Horton's	3,200
			665	Development Dr	7224	Raxx Bar	15,000
			739	Gardiners Rd	7222	Mr Sub	2,200
			755	Gardiners Rd	7221	Boston Pizza	6,000
			785	Blackburn Mews	7222	Domino's Pizza	1,400
			850	Taylor Kidd Blvd	7221	Whisky Willy's	5,200
				Gardiners Rd	7221	Talk Tuesday Pub	5,500
		Service - Entertainment	785	Blackburn Mews	71394	Canada Women's Fitness	1,400
			820	Taylor Kidd Blvd	71394	Power Play Centre	7,700
			830	Taylor Kidd Blvd	71399	Prost Bowling Centre	21,400
				Gardiners Rd	71394	Yoga Togi	1,200
		Service - Medical/Dental	772	Taylor Kidd Blvd	6214	Canada Hearing Centre	1,200
			776	Blackburn Mews	6215	Kingston MRI	3,700
			785	Blackburn Mews	6213	Chiropractor	800
						Kingston West Chiropractic Centre	1,400
					6214	Progress Physiotherapy	800
			786	Blackburn Mews	6214	Ontario Breast Cancer Screening Program	6,400
			920	Taylor Kidd Blvd	6211	Doctor's Office	2,000
				Gardiners Rd	6213	Hendely Chiropractic Clinic	900
		Service - Other	515	Gardiners Rd	52421	Halway & Hutchison	2,500

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			540	Gardiners Rd	56143	Minute Man Press	1,500
			607	Gardiners Rd	54199	Kingston This Week	6,600
			645	Gardiners Rd	54199	Group 4 Securities	3,800
					56151	Guaranteed Travel Service	4,100
			652	Gardiners Rd	54199	Learning For Life	1,200
			655	Arlington Park Place	56143	Kwik Copy	2,800
			662	Gardiners Rd	54199	Rainbow Horizon Publishing	2,400
			715	Arlington Park Place	54199	Garafalo Construction	4,200
			747	Gardiners Rd	54199	E-sell for U	1,800
			772	Taylor Kidd Blvd	54199	Edward Jones	1,400
						Canada Paraplegic Centre	1,400
			785	Blackburn Mews	5411	Law Office	800
						Vadatta Law Office	1,400
					53121	Century 21	800
						McLean & Chard Realty	1,300
						Mortgage Group	800
						Mortgage Professionals	2,800
					54199	Generations	900
						John Howard Society	500
						Oxford Learning	1,400
						T.Wright Contractors	800
			790	Blackburn Mews	53121	Royal Lepage	1,500
			795	Gardiners Rd	54199	Citi Financial	1,600
			842	Gardiners Rd	53121	The Mortgage Centre	1,300
				Taylor Kidd Blvd	52421	The Prudential	5,200

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			1040	Gardiners Rd	52421	State Farm Insurance	1,200
			1650	Bath Rd	54199	Cash Money	900
				Gardiners Rd	52421	Johnson Insurance	3,100
				Taylor Kidd Blvd	54199	Howard Maitland Professional Building	11,100
		Service - Personal	645	Gardiners Rd	8121	Dr Bernstein Diet Clinic	1,200
			662	Gardiners Rd	8121	Limestone Embroidery	2,400
			753	Gardiners Rd	8121	Spice nails	1,100
			772	Taylor Kidd Blvd	8121	Tanning Salon	1,400
			785	Blackburn Mews	8121	Danne Skin Revitalization	1,400
						Mr Suntan	2,600
			795	Gardiners Rd	8121	Herbal Magic	1,600
			838	Gardiners Rd	8121	Body Beautiful	6,000
			844	Taylor Kidd Blvd	8121	Epidermal	1,500
			920	Gardiners Rd	8121	Hair After	600
			1650	Bath Rd	8121	Fabutan	1,000
						Star Nails	1,000
				Taylor Kidd Blvd	8121	Harris Steam Hair Care	1,400
		Service - Public Administration	645	Gardiners Rd	91	Manpower Office	1,400
			687	Gardiners Rd	91	Government of Canada	2,200
		Vacant	650	Gardiners Rd	9999	Vacant	1,200
			846	Taylor Kidd Blvd	9999	Vacant	1,200
				Arlington Park Place	9999	Vacant	2,500
				Gardiners Rd	9999	Vacant	10,700
						Vacant (Sutton Group Opening Soon)	5,200
		Other Retail - Automotive TBA	638	Gardiners Rd	44131	Final Lap	3,600

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
Node 11 Total							458,000
12	Kingston New Industrial Park	NFSR - Building and Outdoor Home Supply	5	John A. MacDonald Blvd	44411	Rigney Building Supply	16,900
			190	John A. MacDonald Blvd	44419	WestBram Electric	20,700
			407	Counter Court	44419	Nedco Electrical Supplies	10,200
			1041	John Counter Blvd	44419	Kitchen Cabinet Factory Outlet	2,000
			1149	John Counter Blvd	44411	Glen Building Supply	8,800
			1407	John Counter Blvd	44419	Brafasco	7,600
		NFSR - General Merchandise	1093	John Counter Blvd	452999	Countrywide Kitchen	3,600
						Kingston Plate	3,000
		NFSR - Home Furnishings	1093	John Counter Blvd	452999	Kingston Feed & Farm	2,000
						The Country Depot	20,800
		NFSR - Miscellaneous	1121	John Counter Blvd	44312	Bayridge Printer Pros	1,100
			1407	John Counter Blvd	44229	Kingston Lighting	2,500
		NFSR - Pharmacies & Personal Care	1407	John Counter Blvd	453994	Wine Kitz	3,900
					453999	Shelin Pools	2,300
		Other Retail - Automotive	1407	John Counter Blvd	44612	Salon Essential Beauty Supply	1,900
			1407	John Counter Blvd	8111	Jim's Auto Service	3,900
			1479	John Counter Blvd	8111	Ultramart/Precision Service	1,200
		Service - Repair and Maintenance			44512	Olco Gas Station	1,000
			9	Terry Fox Dr	8114	A World of Home Heating	2,600
		Service - Consumer Services Rental	1479	John Counter Blvd	8114	Angli Heating	500
			15	Terry Fox Dr	5323	Hertz Equipment Rental	2,500
		Service - Eating/Drinking	681	John Counter Blvd	7222	Tim Horton's	2,500

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			1407	John Counter Blvd	7222	Wishbone Deli & Catering	3,700
		Service - Entertainment		John A. MacDonald Blvd	71399	Bingo Town	11,500
		Service - Other	40	Rigney St	54194	St Lawrence Veterinary Clinic	4,600
			1121	John Counter Blvd	54199	New Beginning Learning	1,200
					56143	Superior Printing	1,100
			1175	John Counter Blvd	54199	Coach Canada	6,700
			1479	John Counter Blvd	54199	Children's Aid Society	10,000
				John A. MacDonald Blvd	54199	City Place 1	12,600
					City Place 2	14,700	
		Service - Personal	1121	John Counter Blvd	8121	Toms barber Shop	500
		Vacant	1121	John Counter Blvd	9999	Vacant	500
		Other Retail - Automotive TBA	37	Rigney St	44131	Car Medics Auto Pro	2,500
Node 12 Total							191,100
13	Kingston RioCan Centre	NFSR - Apparel	616-670	Gardiners Rd	44811	Moores	6,000
					44812	Addition Elle +14	5,300
						Cotton Ginny	6,000
						Jacob Connexion	5,500
						Laura	12,900
						Mexx	5,000
					44814	Marks Work Warehouse	10,100
						Old Navy	20,200
Thyme Maternity	3,100						
Urban Planet	14,100						

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						Winners	28,000
					44819	Danier Leather	6,900
						La Vie En Rose	5,000
					44821	Kiddie Kobbler	1,700
		NFSR - Building and Outdoor Home Supply	616-670	Gardiners Rd		The Shoe Company	4,100
					44411	The Home Depot	137,000
					44412	Colour Your World	3,600
		NFSR - General Merchandise	616-670	Gardiners Rd	452999	A Buck Or Two	7,500
						Dollarama	10,000
		NFSR - Home Furnishings	616-670	Gardiners Rd	44211	La-Z-boy Furniture Gallery	18,000
						The Bombay Company	5,000
						The Brick	34,000
						Sears Home Store	43,300
					44229	Bouclair	12,600
						Home Outfitters	31,800
						Homesense	23,300
						JYSK	19,000
						Pier One Imports	9,500
					44311	Bell World	1,300
						Best Buy	26,200
						Future Shop	18,200
						Telus	1,500
					44313	Henry's	4,900
		NFSR - Miscellaneous	616-670	Gardiners Rd	45111	Sport Mart	8,500
					45112	EB Games	1,800

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
					45321	Staples/Business Depot	25,700
					45322	Hallmark	4,600
					45391	Pet Smart	16,400
					453992	Michael's	24,600
		NFSR - Pharmacies & Personal Care	616-670	Gardiners Rd	44612	Metro Beauty Supply	2,200
						Sally Beauty	1,300
						Trade Secrets	2,800
					44613	Pearl Vision	4,900
		Service - Banks	616-670	Gardiners Rd	44619	Popeye's Supplements	1,300
					52211	Scotiabank	6,100
		Service - Eating/Drinking	616-670	Gardiners Rd		TD Canada Trust	8,000
					7221	Chuck E Cheese	8,300
						Denny's	6,000
						East Side Mario's	5,300
						Kelsey's	5,100
						Montana's	5,200
		Service - Entertainment	616-670	Gardiners Rd	7222	Quiznos	1,300
						Starbucks	1,800
		Service - Other	616-670	Gardiners Rd	51213	Cineplex Odeon	45,700
		Service - Personal	616-670	Gardiners Rd	52421	All State Insurance	1,800
			616-670	Gardiners Rd	8121	James Bred Salon	3,800
						LA Weight Loss	3,100
						Nice One Nails	1,400
						Palm Beach Mega Tan	3,000
		Vacant	616-670	Gardiners Rd	9999	Vacant	20,800

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
		Other Retail - Automotive TBA	616-670	Gardiners Rd	44131	Partsource	7,300
Node 13 Total							768,700
14	Midland Ave north of Princess St	FSR - Supermarket	1048	Midland Ave	44511	Loblaws	82,000
		NFSR - Building and Outdoor Home Supply	1129	Midland Ave	44422	Stone Edge Garden Centre	3,000
			1281	Midland Ave	44419	Bathfitter	2,500
			1353	Midland Ave	44419	DS Windows & Doors	1,800
			1365	Midland Ave	44419	Bill Chapman's Pump Shop	1,800
			1381	Midland Ave	44419	Cataraqui Granite	2,000
		NFSR - Department Store	1130	Midland Ave	45211	Wal-mart	133,500
		NFSR - General Merchandise		Midland Ave	452999	Ex Cargo	7,200
		NFSR - Home Furnishings	1353	Midland Ave	44211	Murray's Home Furnishings & Accessories	3,500
			1403	Midland Ave	44311	Nationwide Telcom Service	3,500
				Midland Ave	44211	Country Time Furniture (Opening Soon)	13,800
		NFSR - Miscellaneous	1020	Midland Ave	45112	Toys R Us	28,000
			1057	Midland Ave	45114	Renaissance Music	6,600
			1157	Midland Ave	453999	Pioneer Pool & Spa	5,800
			1175	Midland Ave	453999	Aqua Bay.com	2,200
			1365	Midland Ave	45114	McAdoo Piano	7,000
		Other Retail - Automotive	1155	Midland Ave	8111	Brian Overvelde Auto Service	3,700
			1165	Midland Ave	44112	Tallon Auto Sales	1,700
			1257	Midland Ave	8111	Auto Shop Plus	4,000
			1391	Midland Ave	8111	Engines Extra	4,200
			1403	Midland Ave	8111	BJ Creative painting	500

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						DJ Auto	3,500
			1407	Midland Ave	8111	MCS Truck & Trailer Repair	5,300
				Midland Ave	8111	Benson Suspension & Brakes	3,400
		Service - Repair and Maintenance	1281	Midland Ave	8114	Kingston Home Heating	5,000
		Service - Consumer Services Rental	1341	Midland Ave	5323	Ryder Truck Rentals	1,800
		Service - Entertainment	1343	Midland Ave	71394	Kingston Gymnastics Club	7,200
				Midland Ave	71394	Dance Works	3,700
		Service - Medical/Dental	743	Cataraqui Woods Dr	6211	Kingston West Dental Clinic	2,900
			805	Blackburn Mews	6214	We Care Home Health Service	1,800
		Service - Other	1183	Midland Ave	54194	Urban paws Pet Hospital	4,800
			1257	Midland Ave	54199	Sentry Security Systems	4,000
			1365	Midland Ave	54199	McAdoo Park Office	1,300
						Prax Air	1,800
			1381	Midland Ave	(blank)	Direct Signs	1,500
				Midland Ave	5411	Law Office	1,000
					54199	North Star Gas	1,100
		Service - Public Administration	1425	Midland Ave	91	City of Kingston Municipal Office	21,000
		Vacant		Midland Ave	9999	Vacant	13,100
Node 14 Total							402,500
15	Other Kingston	Beverage	121	Cataraqui St	44531	The Beer Store	15,500
			290	Concession St	44531	The Beer Store	4,800
		FSR - Convenience/Specialty Food	66	Concession St	44512	John's Place Grocery	2,000
			73	Bay St	44512	Cochran Foods	2,200
			83	Railway St	44529	Weston Bakerv Outlet	1,000

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
				Aberfoyle Rd	44512	Mac's	1,900
					44521	Smokey Joe's Deli	1,200
			105	Sutherland Dr	44512	Family Mart	2,000
					44521	Greenlee's Meats	1,300
			155	Concession St	44512	Quick Stop	1,000
			265	Concession St	44512	Merry Market	1,800
			451	Division St	44512	Mac's	1,000
			545	Montreal St	44529	Reids Dairy	1,100
			662	Montreal St	44523	Quattrocchi's Fruit Market	5,200
			726	Milford Dr	44512	Mac's	1,800
			732	Front Rd	44512	Quick Chek	1,500
					44521	Bob's Butcher Shop	1,000
			744	Montreal St	44529	Home Baking Of Kingston	1,000
			817	Taylor Kidd Blvd	44512	Medical Clinic	3,500
			1163	Montreal St	44512	Ken & Marg's Grocery	1,800
			1473	Montreal St	44512	Gordon's Grocery	1,500
				Division St	44512	Convenience Store	1,200
				Montreal St	44512	Good Morning Mart	1,000
		FSR - Supermarket	600	Bagot St	44511	Grant's No-Frills	22,400
			775	Bayridge Dr	44511	Loeb	30,700
		NFSR - Building and Outdoor Home Supply	877	Division St	44422	Plant Factory	1,200
			1751	John Counter Blvd	44422	Earthworks	1,000
			1905	John Counter Blvd	44422	Pyke Farm Garden Centre	100
			221	Concession St	44419	Oomen's Glass & Mirror	2,000

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
		NFSR - General Merchandise		Montreal St	452999	Kimmies Variety	1,000
				Taylor Kidd Blvd	452999	Dollar Club	1,100
		NFSR - Home Furnishings	33	Railway St	44211	Elite Furniture Warehouse	1,000
			351	Montreal St	44221	1000 Islands Flooring	2,000
			400	Elliot Ave	44311	Rent To Own	2,300
			743	Bayridge Dr	44229	Frameworks	1,200
			775	Bayridge Dr	44312	Acadian Computers	1,100
					44313	Camera Kingston	1,100
			981	Division St	44221	MC Décor	8,000
			1573	John Counter Blvd	44229	Hendrix Restaurant Supply	2,000
			1880	John Counter Blvd	44211	James Ried Furniture	20,000
		NFSR - Miscellaneous	235	Montreal St	45331	Second Hand Store & More	1,200
					45391	Berry's Pet Food	1,000
			350	Bagot St	45331	Reid & Siemonse Design Services	3,000
			472	Division St	45331	Salvation Army Thrift Store	2,500
				Division St	45331	Division St Antiques	1,000
				Montreal St	45331	Golden Pawn	1,000
			749	Bayridge Dr	453994	Bitters & Grapes	1,200
			1231	Montreal St	45321	Jan's Discount Office Supply	500
		NFSR - Pharmacies & Personal Care	105	Sutherland Dr	44611	Shoppers Drug Mart	3,000
			540	Montreal St	44619	Kingston Oxygen & Home Health Care Products	7,500
			732	Front Rd	44611	Reddendale Pharmacy	2,100
			775	Strand Blvd.	44611	Shoppers Drug Mart	14,100
				Montreal St	44611	RME Drug Store	1,500

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						RX Pharmacy	0
		Other Retail - Automotive	77	Concession St	44112	Clancy Motors	4,000
			120	Railway St	8111	AGC Auto Glass	1,000
			121	Days Rd	8111	King St Auto	3,200
			213	Concession St	8111	Van Zuylin Auto	3,000
			225	Concession St	8111	Elliot's Alignment	1,000
			434	Taylor Kidd Blvd	44512	Ultramar	1,500
			459	Taylor Kidd Blvd	44512	Sunoco Horizon	1,500
			524	Montreal St	8111	Cosme Auto Service	6,700
			580	Division St	44112	Performance Imports	7,500
			701	Front Rd	8111	Svendson Bros. Auto repair	3,100
			795	Division St	8111	Greenwood Motors	1,500
			917	Montreal St	8111	Maaco	3,500
			1705	John Counter Blvd	8111	Edwards Body Shop	10,000
				Concession St	8111	Mister Muffler	4,000
			312	Montreal St	8111	A1 Auto Repair	1,500
			553	Montreal St	8111	Doran Auto & Rad	3,000
			106	Sutherland Dr	44512	Eso Mac's	2,000
		Service - Repair and Maintenance	285	Montreal St	8114	Paul's Upholstery	1,000
			765	Montreal St	8114	Lemman Heating & Air	8,000
		Service - Banks	700	Front Rd	52211	BMO	1,900
			741	Bayridge Dr	52211	TD-Canada Trust	3,100
			775	Bayridge Dr	52213	Community Credit Union	2,800
		Service - Consumer Services Rental	154	Railway St	5323	A World of Rentals	5,000

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			743	Bayridge Dr	5322	Bayridge Centre Video	1,200
		Service - Eating/Drinking	19	Concession St	7222	Franconis Pizzeria	900
			83	Aberfoyle Rd	7222	Franks Chip Shop	800
			179	Division St	7221	New Garden Chop Suey	1,000
			213	Montreal St	7221	New Henry's Restaurant	1,500
			217	Division St	7221	Saigon Restaurant	1,000
			240	Montreal St	7222	KFC	1,200
			353	Division St	7222	Division St Fish & Chips	1,000
			400	Elliot Ave	7222	Paradiso Pizza & Subs	1,100
			472	Division St	7221	Godfathers Pizza	1,400
					7222	Coffee Way	1,900
			700	Front Rd	7222	The Hoagie House	800
			732	Front Rd	7221	Pauline's	2,200
					7222	Mama Mia Pizza	1,900
			753	Bayridge Dr	7221	Godfathers Pizza	1,200
			759	Bayridge Dr	7221	Copper Penny Grill	1,200
			785	Montreal St	7222	Coffee Way	1,000
			887	Division St	7221	Kimmies Kitchen	1,200
			900	Montreal St	7222	Country Style Donuts	3,100
				Montreal St	7222	Tim Horton's	3,000
			384	Division St	7222	The Hoagie House	600
		Service - Entertainment	63	Charles St	71399	Olympia Billiards	1,200
			732	Front Rd	71394	ABA Skate & Dance Den	1,300
			900	Montreal St	71399	Community Spirit Bingo	12,500

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
				Division St	71394	Kingston Fencing Club	1,200
		Service - Medical/Dental	105	Sutherland Dr	6211	Dental Office	1,200
			265	Concession St	6213	St Lawrence Optometry	1,800
			400	Elliot Ave	6211	North Kingston Health Centre	6,900
			730	Milford Dr	6213	Balance Chiropractic Clinic	1,000
			732	Front Rd	6211	Lakeview Family Health Care	2,500
					6214	Kingston naturopathic Centre	1,600
			775	Bayridge Dr	6211	Dental Office	1,100
						Medical Clinic	1,700
				Taylor Kidd Blvd	6211	Dental Office	1,500
		Service - Other	105	Sutherland Dr	54199	NDP Headquarters	1,400
						Softwhere to Learn	1,200
			121	Days Rd	54199	Video Production	700
			206	Concession St	56143	Digraphics	5,000
			234	Concession St	54199	Cornell Towers	30,000
			334	Montreal St	5411	Law Office	1,000
			400	Elliot Ave	54199	Skebo Associates	1,100
			435	Division St	54194	Kingston Veterinary Clinic	1,500
			665	Montreal St	54199	Modern Taxi	800
			732	Front Rd	52421	State Farm Insurance	1,500
				Milford Dr	54194	Bayridge Animal Hospital	1,700
			775	Bayridge Dr	54199	Beam Security	1,700
			805	Bayridge Dr	54199	Aztec Associates	5,000
				Taylor Kidd Blvd	54199	Miscellaneous Office	6,600

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			887	Division St	54199	Mr Clean-Up	1,200
			1670	Montreal St	54194	Hemlock Veterinary Clinic	3,000
			1900	John Counter Blvd	54199	James Ried Funeral Home	10,200
				Bagot St	54199	Miscellaneous Office	10,000
				Division St	54199	Kingston Immigration Services	6,500
						Network Security	1,000
				Taylor Kidd Blvd	52421	All State	1,100
				Concession St	54199	Professional Office Building	40,000
			299	Concession St	54199	Cornell Corporate Centre	60,000
			1327	Montreal St	54199	Spa For Paws	500
		Service - Personal	83	Aberfoyle Rd	8121	Ultimate Hair Salon	1,100
					8123	Fluff & Fold	1,100
			105	Sutherland Dr	8121	Curves Weight Loss Centre	2,400
			303	Montreal St	8123	Lavern's laundry	1,000
			327	Division St	8123	Snow White Laundromat	1,000
			344	Bagot St	8121	Echo	1,000
			351	Division St	8121	Spiral Styles	500
			472	Concession St	8121	First Choice Hair Salon	1,700
			629	Division St	8121	Solo Hair Studio	800
			700	Front Rd	8121	Studio B Salon	800
			732	Front Rd	8121	Snip & Clip	1,300
			755	Bayridge Dr	8121	The Mane Obsession	1,200
			775	Bayridge Dr	8121	Elements Natural Therapy	1,100
						Tan Right	1,100

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			900	Montreal St	8121	Family Dollar Store	1,800
						First Choice Hair Salon	1,600
				Division St	8121	Always Hair Style	900
				Montreal St	8123	Dry-Cleaners	900
				Taylor Kidd Blvd	8123	Flindall's Fabric Care Service	1,100
				Concession St	8123	Coin Laundry	2,000
						King Coin Laundry	1,400
		Service - Public Administration		Concession St	91	MTO	1,400
		Vacant	83	Aberfoyle Rd	9999	Vacant	2,300
			105	Sutherland Dr	9999	Vacant	2,300
			185	Concession St	9999	Vacant	1,200
			372	Division St	9999	Vacant	1,000
			603	Montreal St	9999	Vacant	2,100
			700	Front Rd	9999	Vacant	1,800
			732	Front Rd	9999	Vacant	3,300
			900	Montreal St	9999	Vacant	5,200
				Division St	9999	Vacant	1,000
				Montreal St	9999	Vacant	1,000
				Taylor Kidd Blvd	9999	Vacant (Ex Shoppers Drugmart)	10,800
				Concession St	9999	Vacant	2,600
		Other Retail - Automotive TBA	100	Railway St	44131	Benson Auto Parts	10,000
			575	Montreal St	44131	Fisher Auto Parts	16,000
				Montreal St	44131	Steps Auto Supply	1,000
				Railway St	44131	A World of Parts	5,000

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
Node 15 Total							625,100
16	Portsmouth	FSR - Convenience/Specialty Food	662	King St W	44529	Cowan's Foodmarket	2,900
				King St	44512	King Mart	900
		NFSR - Building and Outdoor Home Supply	692	King St W	44413	Portsmouth Hardware	2,000
		NFSR - Miscellaneous	676	King St	45322	Puff-a-lot	600
				King St	45311	ISP Design Flowers	600
		NFSR - Pharmacies & Personal Care	640	King St W	44611	Peters Drugs (Pharma Choice)	3,200
		Service - Eating/Drinking	682	King St	7221	Health Habit	900
			692	King St	7222	Subway	600
				Yonge St	7221	Banquet Hall Portsmouth Tavern	15,700 2,700
			704	King St	7222	Tim Horton's	2,200
		Service - Other	53	Yonge St	5412	Santo Mazzeo	1,300
					54199	Canadian Yachting Association	9,200
		Service - Personal		King St	8123	Coin Wash	600
			658	King St	8121	Hue Greene Locksmithing	600
		Service - Public Administration	53	Yonge St	91	City Of Kingston Offices	7,100
		Vacant		King St	9999	Vacant	1,800
		Node 16 Total					
17	Princess St between Bath Rd & Division St	Beverage	500	Princess St	44531	The Beer Store	5,400
			905	Princess St	44531	LCBO	9,200
		FSR - Convenience/Specialty Food	455	Princess St	44529	Oriental Grocery	4,100

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			509	Princess St	44521	John's Meat & Deli	5,500
			637	Princess St	44521	The Hind Quarter Meat Shop	3,600
			791	Princess St	44521	Casey's Deli	1,100
			853	Princess St	44529	168 Market	2,100
			490	Princess St	44512	Mac's	1,100
		NFSR - Apparel	347	Alfred St	44814	Circle H Western Wear	2,300
			563	Princess St	44819	Rufin's Uniform	1,700
			662	Princess St	44831	Khean Jewellery	2,000
		NFSR - General Merchandise	837	Princess St	452999	Dollar Store	2,800
			811-813	Princess St	452999	Giant Tiger	18,200
		NFSR - Home Furnishings	477	Princess St	44312	Kinston Computer Planet	3,500
			772	Princess St	44211	Inside Out Home & Garden	5,300
		NFSR - Miscellaneous	573	Princess St	45331	Thrift Store	1,700
			641	Princess St	45114	Xanadu Music	1,100
			647	Princess St	45121	Book market	2,200
			724	Princess St	45331	Golden Pawn	1,000
			726	Princess St	45121	Metcalf Music	4,400
			728	Princess St	45121	Action packed Comics	900
			793	Princess St	45311	Pam's Flowers Garden	5,300
			857	Princess St	45121	Paperbacks	2,800
		NFSR - Pharmacies & Personal Care	445	Princess St	44611	Shoppers Drug Mart	11,300
			617	Princess St	44613	Hakim Optical	3,000
			789	Princess St	44611	Frontenac Medical Pharmacy	1,300
			797	Princess St	44611	Shoppers Drug Mart	1,800

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
		Other Retail - Automotive	471	Princess St	8111	Transmission Unlimited	2,000
			480	Princess St	44112	Central City Auto Sales	3,000
			505	Albert St	44112	Capital Motor Sale	1,200
			555	Princess St	44512	Seven Eleven	3,000
			600	Princess St	44112	Ace Auto Sales	2,300
			627	Princess St	44112	Burton Motor Sales	200
			647	Princess St	8111	Auto Glass Pluss	4,600
			691	Princess St	8111	Speedy Muffler	4,500
			700	Princess St	8111	Automax Automotive	2,800
			768	Princess St	8111	Performance Plus Auto Service	3,300
			787	Princess St	44112	CC Auto Sales	2,300
			900	Princess St	8111	Fielding Tire & Automotive Centre	9,900
			677	Princess St	44112	Jerry Jackson's Used Cars	1,800
			630	Princess St	44512	Sunoco	1,700
			531	Princess St	44112	Tom Blacklock Auto Sales	1,900
		Service - Repair and Maintenance	686	Princess St	8114	Michael Angel Upholstery	800
		Service - Banks	464	Princess St	52213	Federal Employees Credit Union	3,200
			823	Princess St	52211	Royal Bank	6,900
			850	Princess St	52213	Unity Credit Union	4,800
			863	Princess St	52211	Scotiabank	6,400
			912	Princess St	52211	HSBC Financial	3,700
		Service - Consumer Services Rental	600	Princess St	5323	National Car Rental	2,100
			607	Princess St	5323	Budget Car rental	1,400
			676	Princess St	5323	Hertz Car Rental	2,000

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
		Service - Eating/Drinking	479	Princess St	7221	Darbar Restaurant	1,700
			493	Princess St	7221	Rhea's	2,000
					7222	Domino's Pizza	1,600
			499	Princess St	7222	Discover Japan	2,000
			505	Princess St	7222	Famous King Donair	1,900
			506	Princess St	7221	Philthy McNasty's	10,000
			523	Princess St	7221	Royal Anchor	1,400
			528	Princess St	7221	VIP Chinese restaurant	3,300
			551	Princess St	7222	Gino's Pizza & Spegetti	2,200
			563	Princess St	7221	New Chinese restaurant	2,800
			569	Princess St	7221	Tata's House of Pizza	2,200
			572	Princess St	7221	Pizza Hut	3,000
			575	Princess St	7221	Asian Star Restaurant	1,200
						Dong Nai	1,100
			625	Princess St	7221	Rahims Cuisine	2,500
			633	Princess St	7221	Martha's Table & Friendship Room	2,500
			681	Princess St	7222	Tim Horton's	2,900
			840	Princess St	7221	Sandwich Construction Co Bar	3,700
			842	Princess St	7221	Oriental restaurant	3,500
			849	Princess St	7221	Star Diner	1,900
			890	Princess St	7222	Harvey's	2,400
				Princess St	7222	Dixielee Fried Chicken	1,600
						Sushi Take-Out	800
			689A	Princess St	7222	Ho-Lee Chow	1,600

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			689	Princess St	7222	Subway	1,200
		Service - Entertainment	579	Princess St	71394	56&8 Dance Studio	4,000
			851	Princess St	71394	Academy Martial Arts	2,400
		Service - Medical/Dental	182	Nelson St	6213	Chiropractic Centre	1,500
			460	Princess St	6214	Kingston Heart Clinic	9,600
			501	Princess St	6214	Helix Hearing Care Centre	1,700
			635	Princess St	6214	Health For Life	900
				Princess St	6211	Kingston Medical Building	40,300
					6214	Murray Family Foot Clinic	1,600
		Service - Other	347	Alfred St	5412	Accounting Office	2,000
			462	Princess St	5411	Murray Reilly Law	2,500
			495	Princess St	56143	Business Machine Service Centre	1,000
			507	Princess St	5411	Legal Aid	3,500
			552	Princess St	54199	Open Text	8,400
			559	Princess St	54199	OATC	1,500
			561	Princess St	54199	Excel Driving School	2,800
			562	Princess St	54199	Harbourlight Centre	12,400
			574	Princess St	5411	RZCD Law	5,200
					52421	State Farm Insurance	1,600
			647	Princess St	54199	Kingston School Of Art	5,800
			797	Princess St	54199	Blood Doner Clinic	2,700
			826	Princess St	54199	CNIB	4,100
			912	Princess St	53121	RG Davey Real Estate	1,100
					54199	David Hutchison	1,500

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						Ontario Tutors	3,000
				Princess St	5411	Law Office	1,900
			844A	Princess St	54199	HIV/AIDS Regional Service	16,700
		Service - Personal	347	Alfred St	8129	Hunter Photography Studio	2,300
			432	Princess St	8121	Envy Hair Studio	600
			457	Princess St	8121	Hair With Attitude	2,000
			477	MacDonnell St	8121	Silhouette Hair	1,600
			503	Princess St	8121	Looking Good Esthetics	1,600
			514	Princess St	8121	Don't Tell Mama Tattoo	900
			520	Princess St	8121	Maisa Paul Coffuire	1,500
			637	Princess St	8121	Tres Chic hair	1,000
			662	Princess St	8121	TP Princess Nails	800
			728	Princess St	8121	Blackstar Piecing & Tatooing	1,200
						Express U Tattoo	800
		Service - Public Administration	449	Princess St	91	Federal Building	65,900
				Princess St	91	NDP Headquarters	3,200
		Vacant	461	Princess St	9999	Vacant	3,100
			481	Princess St	9999	Vacant	3,100
			521	Princess St	9999	Vacant	2,200
			527	Princess St	9999	Vacant	2,200
			545	Princess St	9999	Vacant	1,300
			574	Princess St	9999	Vacant	3,500
			662	Princess St	9999	Vacant	1,800
			686	Princess St	9999	Vacant	2,900

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			843	Princess St	9999	Vacant	1,700
			859	Princess St	9999	Vacant	4,500
				Princess St	9999	Vacant	6,800
						Vacant (Ex Hock Shop)	2,500
Node 17 Total							500,200
18	Princess St between Bath Rd & Taylor Kidd Blvd	FSR - Convenience/Specialty Food	1469	Princess St	44512	Parkway Grocery	1,200
		FSR - Supermarket	1100	Princess St	44511	Loblaws	82,000
							1225
		NFSR - Apparel	847	Portsmouth Ave	44821	BioPed	2,400
			1187	Princess St	44814	Marks Work Warehouse	13,800
		NFSR - Building and Outdoor Home Supply	848	Portsmouth Ave	44412	The Decorating Warehouse	4,000
			1111	Princess St	44412	Randall's Paints	6,000
		NFSR - General Merchandise	2560	Princess St	452991	Canadian Tire	111,500
		NFSR - Home Furnishings	900	Portsmouth Ave	44211	Allen Furnishings	6,600
			1100	Princess St	44211	Easy Home	3,800
					44311	Bell World	1,600
						Rogers Wireless	2,300
						The Source By Circuit City	1,500
						44313	Blacks Camera
			1187	Princess St	44211	Canadian Kid's Furniture	2,600
			1267	Princess St	44311	Sewings My Business	600
NFSR - Miscellaneous	1045	Princess St	45114	Centre Stage Musical Instruments	1,200		

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			1085	Princess St	45112	Stationary Live Hobbies	1,600
			1111	Princess St	45391	Global Pet Foods	4,900
			1187	Princess St	45321	Paper Memories	1,900
					45391	Pet Value	2,300
					453994	Lyon's Winery & Brewery Supply	2,000
			1440	Princess St	45322	Seasons Promise Cards & Gifts	2,800
					45331	We Share Toys & More	2,200
			1469	Princess St	45331	Goodwill	12,300
		NFSR - Pharmacies & Personal Care	1011	Princess St	44611	Shoppers Drug Mart	13,000
			1100	Princess St	44611	Rexall Pharma Plus	10,300
					44612	West Maine Beauty Supply	6,400
					44619	Nutrition House	900
		Other Retail - Automotive	825	Portsmouth Ave	8111	Herman's Auto Repair	3,200
			1412	Princess St	44112	Find A Car	3,400
			1429	Princess St	44111	Kinston Chrysler	17,700
			1465	Princess St	44512	Sunoco	3,400
		Service - Repair and Maintenance	833	Portsmouth Ave	8114	Boyd's Electric Co	4,000
		Service - Banks	1100	Princess St	52211	CIBC	5,900
						TD Canada Trust	7,900
						Wells Fargo	1,900
		Service - Consumer Services Rental	1100	Princess St	5322	Jumbo Video	4,900
			1412	Princess St	5323	Avis Car Retal	1,500
		Service - Eating/Drinking	1043	Princess St	7222	Wendy's	3,100
			1100	Princess St	7221	Jiffy Grill	4,000
						Panda Garden Buffet	7,600

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						Wild Wing	1,900
					7222	Baskin Robbins	1,100
						Joe Dough Pizza	800
						Quiznos	1,300
			1155	Princess St	7221	Golden Stars Restaurant	2,600
			1187	Princess St	7221	Kelsey's	5,800
			1217	Princess St	7221	Bistro Stefan	5,000
			1399	Princess St	7221	Aunt Lucy's Restaurant	8,100
			1407	Princess St	7222	KFC	1,900
			1469	Princess St	7221	Golden Griddle	5,100
		Service - Entertainment	1187	Princess St	71394	Karate Club	6,100
		Service - Medical/Dental	1006	Princess St	6211	Limestone City Dental	2,600
			1100	Princess St	6211	Altama Dental	1,400
			1187	Princess St	6211	Maple Family Health Clinic	10,100
						Dental Office	1,300
			1317	Princess St	6211	Family Clinic	1,600
						Kingston Denture Clinic	500
			1343	Princess St	6213	Chiropractic Clinic	1,400
		Service - Other	1006	Princess St	54199	Citi Financial	3,300
			1085	Princess St	54199	APL Payday Loans	1,600
			1100	Princess St	5412	H&R Block	2,300
					53121	Mortgage Intelligence	900
			1187	Princess St	56151	Cleland Travel & Cruise	1,900
			1309	Princess St	52421	Co-Operators	500
			1333	Princess St	52421	State Farm Insurance	1,700

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)								
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total	
			1379	Princess St	5412	MP Bookkeeping	1,000	
					54199	Fontain - Associates Credit Counselling	1,000	
			1412	Princess St	54199	Community Living Kingston	13,500	
						Roch Financial	1,300	
			1440	Princess St	54199	Investors Group	1,600	
						Kinston Injury management Centre	2,900	
						Loyola Community Learning Centre	6,200	
			1095	Princess St	54199	Morning Star Dog Academy	2,400	
			Service - Personal	1006	Princess St	8121	Magic Cuts	1,400
							Sarah's nails	1,000
		1100		Princess St	8121	Bellagio Salon	1,700	
		1283		Princess St	8121	Hot Stove Gallery & Aesthetics	400	
		1334		Princess St	8121	All Hair Alternatives	400	
		1469		Princess St	8121	All About You Salon	1,200	
		Service - Public Administration	1155	Princess St	91	Government of Ontario Building	63,300	
		Vacant	1100	Princess St	9999	Vacant	1,700	
						Vacant (99 Cent store opening soon)	3,800	
			1137	Princess St	9999	Vacant	5,700	
			1187	Princess St	9999	Vacant	1,000	
		1412	Princess St	9999	Vacant	1,300		
		Other Retail - Automotive TBA	1356	Princess St	44131	Bayview Auto Parts	6,500	
Node 18 Total							592,000	
19	Princess St between Gardiners Rd & Municipal	FSR - Convenience/Specialty Food	830	Norwest Rd	44529	Bulk Barn	6,500	

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
	Boundary					Fred's Bread	1,200
			2790	Princess St	44529	Classic Bakery	1,600
			2806	Princess St	44521	The Butchers Block	2,700
			2814	Princess St	44512	Mac's	2,500
		NFSR - Apparel	830	Norwest Rd	44812	Pennington's	6,300
			2815	Princess St	44812	Expression Fashion	2,600
				Princess St	44831	Edwards Jewellery	400
		NFSR - Building and Outdoor Home Supply	2980	Princess St	44419	Brunel Plumbing Supply	1,300
				Gardiners Rd	44422	Landscape Products Factory Outlet	1,000
		NFSR - General Merchandise	59	Bath Rd	452991	Canadian Tire	122,000
			2798	Princess St	452999	As Seen on TV	1,500
		NFSR - Home Furnishings	2730	Princess St	44211	Leons	75,200
			2776	Princess St	44311	Linden Audio	6,400
			2791	Princess St	44311	New City Vacuum	1,700
			2792	Princess St	44312	PC Office	2,400
			2802	Princess St	44229	Classic Custom Framing	1,300
			2901	Princess St	44229	Franks Pizza Supply	1,500
		NFSR - Miscellaneous	830	Norwest Rd	45391	Petcetera	23,000
			2776	Princess St	45111	Golf Experts	2,600
						Soccer International	1,400
			2784	Princess St	453994	Wine Kit	2,400

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			2790	Princess St	453999	Arctic Spa	2,400
			2791	Princess St	453994	Make Wine Hear	3,700
			2799	Princess St	45311	Flower Market	1,500
					45321	Lasting Memories	1,500
					453999	Total Tech Pool & Spa	2,000
			2800	Princess St	45121	Bookland	1,300
			2901	Princess St	45331	Just Like New	2,100
		NFSR - Pharmacies & Personal Care	831	Norwest Rd	44611	Focus Pharmacy	1,400
		Other Retail - Automotive	2820	Princess St	44111	KIA Motors	10,000
			2839	Princess St	44111	Honda Dealership	24,700
			2856	Princess St	8111	George & Janes Auto Repair Service	2,800
			2889	Princess St	44112	Allen Philip Auto Sales	700
				Princess St	8111	Carwash	6,800
			2821	Princess St	44512	Esso Tiger Express	600
			2853	Princess St	8111	John Overvelde Auto Service	3,300
		Service - Repair and Maintenance	2924	Princess St	8114	Team Small Engine repair	700
		Service - Consumer Services Rental	830	Norwest Rd	5322	Block Buster Video	3,600
			2784	Princess St	5322	Movie Experts	1,700
			2799	Princess St	5322	Movie Express	1,300
		Service - Eating/Drinking	841	Norwest Rd	7221	Cora's	4,100
			2658	Princess St	7222	McDonald's	4,000
			2762	Princess St	7221	Mino's	12,400
			2776	Princess St	7221	China Buffet	15,000
			2777	Princess St	7222	Subway	2,200

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						Tata's	1,200
			2784	Princess St	7221	Curry Original	1,800
						KT Sports Lounge	3,600
			2790	Princess St	7222	Mino's Take-Out	1,200
			2799	Princess St	7221	Carmalinda's	3,000
			2806	Princess St	7221	Siam Reap	1,300
					7222	Tony's Pizza	1,300
			2815	Princess St	7221	Rose & Crown	1,900
					7222	Mary Browns Fried Chicken	1,700
		Service - Entertainment	2777	Princess St	71394	Karate Club	2,500
			2791	Princess St	71394	Changes For Women	2,000
			2901	Princess St	71394	Mister Fitness Centre	3,000
		Service - Medical/Dental	837	Norwest Rd	6214	Frontenac Hearing Centre	1,400
			863	Norwest Rd	6214	Kingston Laser Medi Spa	3,000
			2777	Princess St	6213	Chiropractor	2,000
			2815	Princess St	6211	Dental Office	2,500
		Service - Other				Dr Thomas	1,300
			835	Norwest Rd	56151	Cleland Travel & Cruise	1,400
			851	Norwest Rd	53121	Remax	7,200
			1020	Bayridge Dr	54199	HRC Business Centre	18,500
			1027	Bayridge Dr	54194	Princess Animal Hospital	4,000
			2777	Princess St	5412	H&R Block	2,800
					53121	Sutton Group	3,400
					54199	Edward Jones	3,600

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)									
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total		
			2799	Princess St	54199	Canadian Cancer Society	1,800		
			2804	Princess St	52421	State Farm Insurance	1,300		
			2806	Princess St	56151	Cruise Ship Centre	1,300		
			2929	Princess St	54199	Enviromasters	2,500		
			1035	Bayridge Dr	54199	Bayridge Childcare Centre	2,500		
			819	Norwest Rd	5412	DWCA Accounting	3,900		
			829	Norwest Rd	56143	The UPS Store	1,000		
		Service - Personal	827	Norwest Rd	8121	Clock Tower Beauty Salon	1,000		
			2776	Princess St	8121	Weight Watchers	1,800		
			2777	Princess St	8121	First Choice Hair Salon	1,200		
			2790	Princess St	8121	Styles For Miles Trend Setter Hair	1,300 1,300		
			2791	Princess St	8121	Headlines Wayne Halliday Barbershop	2,200 1,500		
			2799	Princess St	8123	Discount Dry Cleaners	1,500		
			2802	Princess St	8123	Coin Laundry	1,000		
			2815	Princess St	8121	Chez Renne House of Hair	1,200 1,200		
			Vacant	2776	Princess St	9999	Vacant	4,100	
		2799		Princess St	9999	Vacant	1,300		
				Norwest Rd	9999	Vacant	1,800		
		Node 19 Total							489,600
		20	Princess St between Gardiners Rd & Taylor Kidd Blvd	FSR - Supermarket	2327	Princess St	44511	Price Chopper	34,600

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
		NFSR - Apparel	2435	Princess St	44814	Outlet Inc	6,100
		NFSR - Building and Outdoor Home Supply	2342	Princess St	44411	Rona	120,000
			3212	Princess St	44422	Pleasant View Greenhouses	1,200
		NFSR - General Merchandise	1015	Centennial Dr	45291	Costco	125,700
		NFSR - Home Furnishings	351	Select Dr	44211	United Furniture	27,000
			944	Future Gate	44211	Mattress Mart	7,800
			2452	Princess St	44221	Kingston Carpet World	7,800
			2456	Princess St	44229	Globe Custom Framing	2,300
			2495	Princess St	44211	Haven Home Climate Care	2,800
			2511	Princess St	44211	The Sleep Factory	3,600
					44229	Framing Art	1,400
		NFSR - Miscellaneous	2376	Princess St	45121	Chapters	26,600
					453999	Beachcomber	4,100
			2435	Princess St	45331	The Revolving Door	3,500
					453994	Cellar Classic	2,900
			2511	Princess St	45112	The Parent Teacher Store	7,100
		NFSR - Pharmacies & Personal Care	2435	Princess St	44611	Herbies Drug & Food	59,600
		Other Retail - Automotive	292	Princess St	44112	Ace Auto Sales	8,100
			990	Gardeners Rd	8111	Apple Auto Glass	7,200
			2236	Princess St	44512	Pioneer Snack Express	1,500
			2268	Princess St	44512	Ultramar	800
			2280	Princess St	8111	Jiffy's Auto Service/Goodyear	11,400
			2440	Princess St	44111	Taylor Cadillac	10,400
				Princess St	8111	Carwash	6,000

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
						Drive Thru Oil Change	2,600
			2444	Princess St	44512	Petro Canada	1,200
		Service - Consumer Services Rental	624	Princess St	5323	Enterprise Rent-a-Car	1,700
			2459	Princess St	5323	U-Haul	15,200
		Service - Eating/Drinking	970	Princess St	7222	A&W	1,800
			2360	Princess St	7221	La Salle Dining Room (Travel Lodge)	3,600
			2376	Princess St	7221	Smitty's	7,000
			2435	Princess St	7221	Sentry Plaza Restaurant	3,500
					7222	Tim Horton's	2,500
			2511	Princess St	7221	Captain's Plate	2,700
			2260	Princess St	7222	Tim Horton's	2,300
		Service - Medical/Dental	375	Select Dr	6214	Para Medical Services	5,100
			2267	Princess St	6214	Aroma Therapy	1,000
		Service - Other	381	Select Dr	54199	Drive Test Examination Centre	6,000
			2263	Princess St	54199	Professional Building	2,800
			2288	Princess St	5412	York Bookkeeping	1,100
			2300	Princess St	54199	CAA	7,600
			2400	Princess St	52421	Co-Operators	1,200
			2435	Princess St	54199	Groommers	2,300
			2447	Princess St	54199	Miscellaneous Office	8,500
			2511	Princess St	54199	Scholars Education Centre	2,200
				Princess St	54199	Star Tek Call Centre	21,100
				Select Dr	54199	Miscellaneous Office	4,000
		Service - Personal	2435	Princess St	8121	A-1 Looks Salon	2,300

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
					8123	Laundromat	3,200
			2511	Princess St	8123	Hillary's Dry Cleaning	1,700
		Vacant	2511	Princess St	9999	Vacant	2,200
				Princess St	9999	Vacant	1,000
						Vacant (Ex Buffet Delight)	7,300
			Select Dr	9999	Vacant	7,600	
		Other Retail - Automotive TBA	2435	Princess St	44132	Tire Craft	34,600
Node 20 Total							656,400
21	Pittsburgh	FSR - Convenience/Specialty Food	235	The Gore Rd	44522	Mike Mundels Surf & Turf	1,400
			760	County Rd 15	44512	Barriefield Convenience	2,400
					44521	Barriefilld Meat Market	1,100
		FSR - Supermarket	235	The Gore Rd	44511	Bennets Value Mart	17,000
		NFSR - General Merchandise	29	Niagara Park Dr	452999	Canex	12,000
		NFSR - Miscellaneous	61	Yonge St	45111	Limestone Dive Centre	1,000
			235	The Gore Rd	45311	In Bloom Floral & Home Design	1,600
					453994	The Wine Making Shop	1,400
		NFSR - Pharmacies & Personal Care	235	The Gore Rd	44611	Bryan's Pharmacy	3,700
		Other Retail - Automotive	760	County Rd 15	8111	Carwash	3,000
				County Rd 15	44512	Convenience Store	1,200
		Service - Banks	235	The Gore Rd	52211	TD-Canada Trust	1,400
		Service - Consumer Services Rental	760	County Rd 15	5322	Movie Express	1,100
		Service - Eating/Drinking	33	Niagara Parkway	7222	McDonald's	2,500
			235	The Gore Rd	7221	Golden Gate	1,200
7222	Bon Bons Coffee				1,400		

Figure B-1

City of Kingston Retail and Service Commercial Inventory, September 2007

Sum of Area (S.F.)							
Node #	Node	Description	Address	Street Name	Naics	Store Name	Total
			760	County Rd 15	7221	The Blue Moose	2,200
					7222	Barriefiled Town Pizza	1,100
				Hwy 2	7222	Tim Horton's	1,600
		Service - Entertainment	235	The Gore Rd	71394	Martial Arts	1,400
		Service - Medical/Dental	235	The Gore Rd	6211	Rideau Family Dental	1,200
						Rideau Family Medical	2,500
			760	County Rd 15	6211	Dental Office	1,100
					6213	Barriefield Chiropractic	1,100
				Hwy 2	6211	Dental Office	1,100
		Service - Other	235	The Gore Rd	52421	Co-Operators	1,400
					54199	Rideau Childcare Centre	2,500
			760	County Rd 15	52421	State Farm Insurance	1,300
					53121	Century 21	1,100
				Hwy 2	54199	SISIP Financial	1,000
			Service - Personal	235	The Gore Rd	8121	Angels Hair Salon
		760		County Rd 15	8121	Head Trip	1,100
					8123	Dry Cleaners	1,100
		Service - Public Administration	760	County Rd 15	91	French Employment Centre	2,500
		Vacant	235	The Gore Rd	9999	Vacant	1,200
			667	King St	9999	Vacant	1,400
			760	County Rd 15	9999	Vacant	1,100
		Node 21 Total					
Grand Total							9,061,200

APPENDIX C: Background Data and Definition of Terms

Appendix C: Background Data and Definition of Terms

Gross Leasable Area (GLA)

Gross leasable area (GLA) is the total retail floor area designed for tenant occupancy and exclusive use, including basements, upper floors and mezzanines. It is expressed in square feet, and measured from the centre line of joint partitions and from outside wall faces. GLA is the area on which tenants pay rent, and which produces income for a tenant. Since it lends itself readily to measurement and comparison, GLA has been adopted by the shopping centre industry as its standard for statistical comparison.

Per Capita Income

Per capita income represents average total personal income before tax, as defined by Statistics Canada. The Study Area income indices are based on the results of the 2001 Census of Canada.

Population

The 2001 and 2006 population has been calculated based on Statistics Canada, Census of Canada data utilizing our in-house PCensus software. Forecast data is based on Ontario Ministry of Finance Population Projections, Spring 2007.

Per Capita FSR AND NFSR Expenditures

Our calculations for per capita FSR (food store retail) and NFSR (non-food store retail) sales for the Province of Ontario based on Statistics Canada, Retail Trade data. The distribution of NFSR store sales has also been calculated.

Study Area Resident Per Capita Expenditures

Per Capita expenditures in this report for Study Area residents have been calculated based on the regression equation for the various store types. Expenditure potential is the total annual expenditures made by Study Area residents. This includes purchases made both inside and outside of the Study Area. It is calculated by multiplying the average per capita expenditure in each store category by the total population of a Study Area or zone.

Real Growth

Real growth refers to the amount that sales volumes or expenditures would increase in future years with inflation eliminated. Therefore, references to the Canadian dollar, dealing with both the present and future period, reflect its 2007 value in this report. For the purposes of our

study, a real growth of 0.5% per year has been utilized for FSR, and 1.5% for NFSR, based on historic real growth in Ontario.

Retail/Service Space Classification

A detailed listing of our retail space classification according to the NAICS has been included in Figure C-1.

Figure C-1

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RETAIL/SERVICE STORE CLASSIFICATION (BASED ON NORTH AMERICAN INDUSTRY CLASSIFICATION (NAICS))

Trade Group	NAICS	Description
FOOD (FSR)		
90	Supermarkets	
	44511	Supermarkets and Other Grocery (except Convenience) Stores
100	Convenience and Specialty Food Stores	
	44512	Convenience Stores
	44521	Meat Markets
	44522	Fish and Seafood Markets
	44523	Fruit and Vegetable Markets
	44529	Other Specialty Food Stores, including Baked Goods Stores, & Confectionary & Nut
BEVERAGE STORES		
110	Beer, Wine and Liquor Stores	
	44531	Beer, Wine and Liquor Stores
NON-FOOD STORE RETAIL (NFSR)		
Furniture, Home Furnishings and Electronics Stores		
30	Furniture Stores	
	44211	Furniture Stores
40	Home Furnishings Stores	
	44221	Floor Covering Stores
	44229	Other Home Furnishings Stores (e.g. window treatments, kitchen and tableware, bedding and linens, brooms and brushes, lamps and shades, and prints and picture frames).
50	Computer and Software Stores	
	44312	Computer and Software Stores
60	Home Electronics and Appliance Stores	
	44311	Appliance, Television and other Electronics Stores
	44313	Camera and Photographic Supplies Stores
Building and Outdoor Home Supplies Stores		
70	Home Centres and Hardware Stores	
	44411	Home Centres
	44413	Hardware Stores
80	Specialized Building Materials and Garden Stores	
	44412	Paint and Wallpaper Stores
	44419	Other Building Material Dealers
		<i>Aluminum doors and screens, retail</i>
		<i>Brick and tile dealers, retail</i>
		<i>Cabinets, kitchen (to be installed), retail</i>
		<i>Concrete and cinder block dealers, retail</i>
		<i>Electrical supplies stores selling primarily to other business but also selling to household consumers</i>
		<i>Electrical supplies, retail</i>
		<i>Fencing dealers, retail</i>
		<i>Garage doors, retail (wood)</i>
		<i>Glass stores, retail</i>
		<i>Lumber and planing mill product dealers, retail</i>
		<i>Plumbing supplies stores selling primarily to other businesses but also selling to household consumers</i>
		<i>Plumbing supplies, retail</i>
		<i>Prefabricated house and building dealers, retail</i>
		<i>Retailers of ceramic floor and wall tiles</i>
		<i>Roofing material dealers, retail</i>
		<i>Sales of aluminum doors and installation</i>
		<i>Tile and brick dealers, retail</i>
	44421	Outdoor Power Equipment Stores
	44422	Nursery Stores and Garden Centres
Pharmacies and Personal Care Stores		
120	Pharmacies and Personal Care Stores	
	44611	Pharmacies and Drug Stores
	44612	Cosmetics, Beauty Supplies and Perfume Stores
	44613	Optical Goods Stores
	44619	Other Health and Personal Care Stores (includes stores retailing health and personal care items, such as vitamin supplements, hearing aids, and medical equipment and supplies)

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RETAIL/SERVICE STORE CLASSIFICATION (BASED ON NORTH AMERICAN INDUSTRY CLASSIFICATION (NAICS))

NON-FOOD STORE RETAIL (NFSR) (Continued)

Clothing and Accessories Stores

140 Clothing Stores

- 44811 Men's Clothing Stores
- 44812 Women's Clothing Stores
- 44813 Children's and Infant's Clothing Stores
- 44814 Family Clothing Stores
- 44819 Other Clothing Stores

150 Shoe, Clothing Accessories and Jewellery Stores

- 44815 Clothing Accessories Stores
- 44821 Shoe Stores
- 44831 Jewellery Stores
- 44832 Luggage and Leather Goods Stores

General Merchandise Stores

170 Department Stores

- 45211 Department Stores

180 Other General Merchandise Stores

- 45291 Warehouse Clubs and Superstores
- 45299 All Other General Merchandise Stores:
- 452991 Home & Auto (i.e. Canadian Tire)
- 452999 Other General Merchandise Stores (e.g. general stores, variety stores, "dollar" stores)

Miscellaneous Retailers

160 Sporting Goods, Hobby, Music and Book Stores

- 45111 Sporting Goods Stores
- 45112 Hobby, Toy and Game Stores
- 45113 Sewing, Needlework and Piece Goods Stores
- 45114 Musical Instrument and Supplies Stores
- 45121 Book Stores and News Dealers
- 45122 Pre-Recorded Tape, Compact Disc and Record Stores

190 Miscellaneous Store

- 45311 Florists
- 45321 Office Supplies and Stationery Stores
- 45322 Gift, Novelty and Souvenir Stores
- 45331 Used Merchandise Stores
- 45391 Pet and Pet Supplies Stores
- 45392 Art Dealers
- 45399 All Other Miscellaneous Store Retailers:
- 453991 Tobacco & Tobacco supplies
- 453992 Artist Supplies
- 453993 Collectors items (cards, stamps etc.)
- 453994 Beer & Wine Making
- 453995 Swimming Pool Accessories
- 453996 Religious Goods and Accessories

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RETAIL/SERVICE STORE CLASSIFICATION (BASED ON NORTH AMERICAN INDUSTRY CLASSIFICATION (NAICS))

SERVICES		
200	Consumer Services Rental	
	5322	Consumer Goods Rental (including formal wear, costume, video, tape & disc rental)
	5323	General Rental Centres (including tools, party rental)
210	Finance and Insurance	
	52211	Banks
	52213	Credit Unions
220	Insurance and Real Estate	
	52421	Insurance Agencies and Brokerages
	53121	Offices of Real Estate Agents and Brokers
230	Professional, Scientific & Technical Services	
	5411	Legal Services
	5412	Accounting, Tax Preparation, Bookkeeping and Payroll Services
	5413	Architectural, Engineering and Related Services
	5414	Specialized Design Services
	5415	Computer Systems Design and Related Services
	5416	Management, Scientific and Technical Consulting Services
	5417	Scientific Research and Development Services
	5418	Advertising and Related Services
	54191	Marketing Research and Public Opinion Polling
	54192	Photographic Services
	54194	Veterinary Services
	54199	All Other Professional, Scientific and Technical Services
240	Selected Office Administrative Services	
	5613	Employment Services
	56143	Business Service Centres (eg. printing, copying, mail centres)
	56144	Collection Agencies
	56145	Credit Bureaus
241	56151	Travel Agencies
250	Health Care Services	
	6211	Offices of Physicians
	6212	Offices of Dentists
	6213	Offices of Other Health Practitioners
	6214	Out-Patient Care Centres (e.g. Family Planning, Community Health)
	6215	Medical and Diagnostic Laboratories
260	Entertainment	
261	71312	Amusement Arcades
262	71394	Fitness & Recreational Sports Centres
263	71399	All other Amusement and Recreation Industries (includes billiards parlours)
264	51213	Motion Picture and Video Exhibition (includes cinemas)
270	Food Services and Drinking Places	
271	7221	Full-Service Restaurants
272	7222	Limited-Service Eating Places
273	7224	Drinking Places (Alcoholic Beverages)
280	Personal and Household Goods Repair and Maintenance	
281	8111	Automotive Repair & Maintenance (includes lubrication, diagnostic centre, tire repair, undercoating, car washes etc.)
282	8114	Personal and Household Goods Repair and Maintenance (including appliance repair, reupholstery & furniture repair, shoe repair, key duplication etc.)
290	Personal Care Services	
	8121	Personal Care Services (including hair, beauty, tanning salon, weight reduction centres, electrolysis, estheticians etc.)
	8123	Dry Cleaning and Laundry Services
	8129	Other Personal Services (e.g. pet care (except Veterinary), Photo Finishing)
300	VACANT	
	9999	VACANT RETAIL/SERVICE SPACE

APPENDIX D: Market Analysis

FIGURE D-1
PER CAPITA NFSR EXPENDITURE POTENTIAL

<i>2007 Dollars</i>	<i>2007</i>				
Province of Ontario					
Per Capita NFSR Expenditure (excluding WMC Food)	\$ 5,045	(1)			
<i>2007 Dollars</i>	<i>2007</i>	<i>2011</i>	<i>2016</i>	<i>2021</i>	<i>2026</i>
Kingston East					
Income Index to Province	91.90				
NFSR Expenditure Index to Province	95.20				
Per Capita NFSR Expenditure	\$ 4,803	\$ 5,091	\$ 5,451	\$ 5,812	\$ 6,172
Population	70,707	72,780	77,020	81,789	86,382
TOTAL NFSR POTENTIAL (\$Millions)	\$ 339.6	\$ 370.5	\$ 419.8	\$ 475.4	\$ 533.1
<i>Department Store (2</i>	17.0%	19.0%	19.0%	19.0%	19.0%
<i>Non-Department Store</i>	83.0%	81.0%	81.0%	81.0%	81.0%
	100.0%	100.0%	100.0%	100.0%	100.0%
<i>Department Store (2</i>	\$ 57.7	\$ 70.4	\$ 79.8	\$ 90.3	\$ 101.3
<i>Non-Department Store</i>	\$ 281.9	\$ 300.1	\$ 340.0	\$ 385.1	\$ 431.8
Total	\$ 339.6	\$ 370.5	\$ 419.8	\$ 475.4	\$ 533.1
Kingston West					
Income Index to Province	100.00				
NFSR Expenditure Index to Province	100.00				
Per Capita NFSR Expenditure	\$ 5,045	\$ 5,348	\$ 5,726	\$ 6,104	\$ 6,483
Population	56,769	58,433	61,837	65,667	69,354
TOTAL NFSR POTENTIAL (\$Millions)	\$ 286.4	\$ 312.5	\$ 354.1	\$ 400.8	\$ 449.6
<i>Department Store (2</i>	19.5%	19.5%	19.5%	19.5%	19.5%
<i>Non-Department Store</i>	80.5%	80.5%	80.5%	80.5%	80.5%
	100.0%	100.0%	100.0%	100.0%	100.0%
<i>Department Store (2</i>	\$ 55.8	\$ 60.9	\$ 69.0	\$ 78.2	\$ 87.7
<i>Non-Department Store</i>	\$ 230.6	\$ 251.6	\$ 285.1	\$ 322.6	\$ 361.9
Total	\$ 286.4	\$ 312.5	\$ 354.1	\$ 400.8	\$ 449.6
Western Periphery					
Income Index to Province	86.50				
NFSR Expenditure Index to Province	92.00				
Per Capita NFSR Expenditure	\$ 4,641	\$ 4,919	\$ 5,268	\$ 5,616	\$ 5,964
Population	33,915	34,842	36,317	37,806	39,242
TOTAL NFSR POTENTIAL (\$Millions)	\$ 157.4	\$ 171.4	\$ 191.3	\$ 212.3	\$ 234.0
<i>Department Store (2</i>	18.5%	20.5%	20.5%	20.5%	20.5%
<i>Non-Department Store</i>	81.5%	79.5%	79.5%	79.5%	79.5%
	100.0%	100.0%	100.0%	100.0%	100.0%
<i>Department Store (2</i>	\$ 29.1	\$ 35.1	\$ 39.2	\$ 43.5	\$ 48.0
<i>Non-Department Store</i>	\$ 128.3	\$ 136.3	\$ 152.1	\$ 168.8	\$ 186.0
Total	\$ 157.4	\$ 171.4	\$ 191.3	\$ 212.3	\$ 234.0

.../cont'd

FIGURE D-1 (CONTINUED)
PER CAPITA NFSR EXPENDITURE POTENTIAL (Continued)

<i>2007 Dollars</i>	2007	2011	2016	2021	2026
<u>Eastern Periphery</u>					
Income Index to Province	91.60				
NFSR Expenditure Index to Province	95.00				
Per Capita NFSR Expenditure	\$ 4,793	\$ 5,081	\$ 5,440	\$ 5,800	\$ 6,159
Population	27,742	28,248	29,140	30,072	30,945
TOTAL NFSR POTENTIAL (\$Millions)	\$ 133.0	\$ 143.5	\$ 158.5	\$ 174.4	\$ 190.6
<i>Department Store (2</i>	17.5%	18.0%	18.0%	18.0%	18.0%
<i>Non-Department Store</i>	82.5%	82.0%	82.0%	82.0%	82.0%
	100.0%	100.0%	100.0%	100.0%	100.0%
<i>Department Store (2</i>	\$ 23.3	\$ 25.8	\$ 28.5	\$ 31.4	\$ 34.3
<i>Non-Department Store</i>	\$ 109.7	\$ 117.7	\$ 130.0	\$ 143.0	\$ 156.3
Total	\$ 133.0	\$ 143.5	\$ 158.5	\$ 174.4	\$ 190.6
<u>Greater Napanee Area</u>					
Income Index to Province	76.80				
NFSR Expenditure Index to Province	96.10				
Per Capita NFSR Expenditure	\$ 4,354	\$ 4,615	\$ 4,942	\$ 5,268	\$ 5,595
Population	16,947	17,334	17,931	18,609	19,286
TOTAL NFSR POTENTIAL (\$Millions)	\$ 73.8	\$ 80.0	\$ 88.6	\$ 98.0	\$ 107.9
<i>Department Store (2</i>	18.5%	19.5%	19.5%	19.5%	19.5%
<i>Non-Department Store</i>	81.5%	80.5%	80.5%	80.5%	80.5%
	100.0%	100.0%	100.0%	100.0%	100.0%
<i>Department Store (2</i>	\$ 13.7	\$ 15.6	\$ 17.3	\$ 19.1	\$ 21.0
<i>Non-Department Store</i>	\$ 60.1	\$ 64.4	\$ 71.3	\$ 78.9	\$ 86.9
Total	\$ 73.8	\$ 80.0	\$ 88.6	\$ 98.0	\$ 107.9
<u>TOTAL TRADE AREA</u>					
TOTAL NFSR POTENTIAL (\$Millions)	\$ 990.2	\$ 1,077.9	\$ 1,212.3	\$ 1,360.9	\$ 1,515.2
<i>Cumulative Growth</i>		\$ 87.7	\$ 222.1	\$ 370.7	\$ 525.0

SOURCE: urbanMetrics inc.

1) Based on Statistics Canada, Retail Trade. Adjusted to exclude food store related WMC amount of \$150 per capita

2) Based on Dee Peer Review

FIGURE D-2
DEPARTMENT STORE ANALYSIS

2007 Dollars	2007	2011	2016	2021	2026
Kingston East					
Department Store (\$Millions)	\$ 57.7	\$ 70.4	\$ 79.8	\$ 90.3	\$ 101.3
Estimated Kingston Share %(1)	99.2%	99.5%	99.5%	99.5%	99.5%
Estimated Kingston Share (\$ Millions)	\$ 57.2	\$ 70.0	\$ 79.4	\$ 89.8	\$ 100.8
Residual Potential		\$ 12.8	\$ 22.2	\$ 32.6	\$ 43.6
Kingston West					
Department Store (\$Millions)	\$ 55.8	\$ 60.9	\$ 69.0	\$ 78.2	\$ 87.7
Estimated Kingston Share %(1)	99.3%	99.5%	99.5%	99.5%	99.5%
Estimated Kingston Share (\$ Millions)	\$ 55.4	\$ 60.6	\$ 68.7	\$ 77.8	\$ 87.3
Residual		\$ 5.2	\$ 13.3	\$ 22.4	\$ 31.9
Western Periphery					
Department Store (\$Millions)	\$ 29.1	\$ 35.1	\$ 39.2	\$ 43.5	\$ 48.0
Estimated Kingston Share %(1)	94.3%	94.5%	94.5%	94.5%	94.5%
Estimated Kingston Share (\$ Millions)	\$ 27.4	\$ 33.2	\$ 37.0	\$ 41.1	\$ 45.4
Residual		\$ 5.8	\$ 9.6	\$ 13.7	\$ 18.0
Eastern Periphery					
Department Store (\$Millions)	\$ 23.3	\$ 25.8	\$ 28.5	\$ 31.4	\$ 34.3
Estimated Kingston Share %(1)	74.5%	75.0%	75.0%	75.0%	75.0%
Estimated Kingston Share (\$ Millions)	\$ 17.4	\$ 19.4	\$ 21.4	\$ 23.6	\$ 25.7
Residual		\$ 2.0	\$ 4.0	\$ 6.2	\$ 8.3
Greater Napanee Area					
Department Store (\$Millions)	\$ 13.7	\$ 15.6	\$ 17.3	\$ 19.1	\$ 21.0
Estimated Kingston Share %(1)	45.0%	46.0%	46.0%	46.0%	46.0%
Estimated Kingston Share (\$ Millions)	\$ 6.2	\$ 7.2	\$ 8.0	\$ 8.8	\$ 9.7
Residual		\$ 1.0	\$ 1.8	\$ 2.6	\$ 3.5
TOTAL TRADE AREA					
Total Department Store Expenditures (\$Millions)	\$ 179.6	\$ 207.8	\$ 233.8	\$ 262.5	\$ 292.3
Total Estimated Kingston Share (\$Millions)	\$ 163.6	\$ 190.4	\$ 214.5	\$ 241.1	\$ 268.9
Estimated Kingston Share %	91.1%	91.6%	91.7%	91.8%	92.0%
Existing Sales from Trade Area Residents (\$Millions)	\$ 163.6	\$ 163.6	\$ 163.6	\$ 163.6	\$ 163.6
Residual Potential (\$Millions)		\$ 26.8	\$ 50.9	\$ 77.5	\$ 105.3

Existing Department Store Stores(486,800 sq.ft.) Sales/Sq.Ft. Levels (Including average Inflow of 14%):	\$ 391
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WARRANTED ADDITIONAL Department Store SPACE - Kingston (including inflow, excluding sales transfers)

Additional Residual Potential Available	\$ 26.8	\$ 50.9	\$ 77.5	\$ 105.3
Plus Inflow Sales @ 14.0% (2)	\$ 4.4	\$ 8.3	\$ 12.6	\$ 17.1
TOTAL ADDITIONAL SALES POTENTIAL AVAILABLE	\$ 31.2	\$ 59.2	\$ 90.1	\$ 122.4
WARRANTED ADDITIONAL SQUARE FEET (3)				
	2011	2016	2021	2026
@ \$375 per sq. ft.	83,100	157,800	240,300	326,500
@ \$400 per sq. ft.	77,900	148,000	225,300	306,100
@ \$425 per sq. ft.	73,300	139,300	212,000	288,100
@ \$450 per sq. ft.	69,300	131,500	200,300	272,100

SOURCE: urbanMetrics inc.

1) Based on TER survey 2005 and Robin Dee Peer Review

2) urbanMetrics estimates.

FIGURE D-3
NON-DEPARTMENT STORE NFSR ANALYSIS

2007 Dollars	2007	2011	2016	2021	2026
Kingston East					
Non-Department Store NFSR (\$Millions)	\$ 281.9	\$ 300.1	\$ 340.0	\$ 385.1	\$ 431.8
Estimated Kingston Share %(1)	98.3%	98.5%	98.5%	98.5%	98.5%
Estimated Kingston Share (\$ Millions)	\$ 277.1	\$ 295.6	\$ 334.9	\$ 379.3	\$ 425.3
Residual Potential		\$ 18.5	\$ 57.8	\$ 102.2	\$ 148.2
Kingston West					
Non-Department Store NFSR (\$Millions)	\$ 230.6	\$ 251.6	\$ 285.1	\$ 322.6	\$ 361.9
Estimated Kingston Share %(1)	96.3%	97.0%	97.0%	97.0%	97.0%
Estimated Kingston Share (\$ Millions)	\$ 222.1	\$ 244.1	\$ 276.5	\$ 312.9	\$ 351.0
Residual		\$ 22.0	\$ 54.4	\$ 90.8	\$ 128.9
Western Periphery					
Non-Department Store NFSR (\$Millions)	\$ 128.3	\$ 136.3	\$ 152.1	\$ 168.8	\$ 186.0
Estimated Kingston Share %(1)	69.9%	72.5%	72.5%	72.5%	72.5%
Estimated Kingston Share (\$ Millions)	\$ 89.7	\$ 98.8	\$ 110.3	\$ 122.4	\$ 134.9
Residual		\$ 9.1	\$ 20.6	\$ 32.7	\$ 45.2
Eastern Periphery					
Non-Department Store NFSR (\$Millions)	\$ 109.7	\$ 117.7	\$ 130.0	\$ 143.0	\$ 156.3
Estimated Kingston Share %(1)	61.6%	65.5%	65.5%	65.5%	65.5%
Estimated Kingston Share (\$ Millions)	\$ 67.6	\$ 77.1	\$ 85.2	\$ 93.7	\$ 102.4
Residual		\$ 9.5	\$ 17.6	\$ 26.1	\$ 34.8
Greater Napanee Area					
Non-Department Store NFSR (\$Millions)	\$ 60.1	\$ 64.4	\$ 71.3	\$ 78.9	\$ 86.9
Estimated Kingston Share %(2)	25.0%	26.5%	26.5%	26.5%	26.5%
Estimated Kingston Share (\$ Millions)	\$ 15.0	\$ 17.1	\$ 18.9	\$ 20.9	\$ 23.0
Residual		\$ 2.1	\$ 3.9	\$ 5.9	\$ 8.0
Total Estimated Kingston Share (\$Millions)					
Total Other NFSR (\$M)	\$ 810.6	\$ 870.1	\$ 978.5	\$ 1,098.4	\$ 1,222.9
Total Estimated Kingston Share (\$Millions)	\$ 671.5	\$ 732.7	\$ 825.8	\$ 929.2	\$ 1,036.6
Estimated Kingston Share %	82.8%	84.2%	84.4%	84.6%	84.8%
Existing Sales from Trade Area Residents (\$Millions)	\$ 671.5	\$ 671.5	\$ 671.5	\$ 671.5	\$ 671.5
Residual Potential (\$Millions)		\$ 61.2	\$ 154.3	\$ 257.7	\$ 365.1
<div style="display: flex; align-items: center;"> <div style="border: 1px solid black; padding: 5px; flex-grow: 1;"> Existing Other NFSR Stores (3,330,100 sq.ft.) Sales/Sq.Ft. Levels (Including average Inflow of 12%)(3): </div> <div style="margin-left: 10px;"> (excludes Automotive retail) \$ 229 </div> </div>					
WARRANTED ADD'L Other NFSR SPACE - Kingston (including inflow, excluding sales transfers)					
Additional Residual Potential Available		\$ 61.2	\$ 154.3	\$ 257.7	\$ 365.1
Plus Inflow Sales @ 15.0% (2)		\$ 10.8	\$ 27.2	\$ 45.5	\$ 64.4
TOTAL ADDITIONAL SALES POTENTIAL AVAILABLE		\$ 72.0	\$ 181.5	\$ 303.2	\$ 429.5
WARRANTED ADDITIONAL SQUARE FEET (3) (excluding transfers)					
@ \$300 per sq. ft.		240,000	605,100	1,010,600	1,431,800
@ \$325 per sq. ft.		221,500	558,600	932,900	1,321,600
@ \$350 per sq. ft.		205,700	518,700	866,200	1,227,200
@ \$375 per sq. ft.		208,700	526,200	878,800	1,245,000

SOURCE: urbanMetrics inc.

1) Based on TER survey 2005 and Robin Dee Peer Review

2) urbanMetrics estimates.

FIGURE D-4
PER CAPITA FOOD STORE RETAIL (FSR) EXPENDITURE POTENTIAL

PER CAPITA FSR EXPENDITURE (INCLUDING WMC)						
2007 Dollars		2007				
Province of Ontario						
Per Capita FSR Expenditure (including WMC)		\$ 2,140 (1)				
2007 Dollars		2007	2011	2016	2021	2026
Kingston East						
Income Index to Province		91.90				
FSR Expenditure Index to Province		98.60				
Per Capita FSR Expenditure		\$ 2,110	\$ 2,152	\$ 2,205	\$ 2,258	\$ 2,310
Population		70,707	72,780	77,020	81,789	86,382
TOTAL FSR POTENTIAL (\$Millions)		\$ 149.2	\$ 156.6	\$ 169.8	\$ 184.7	\$ 199.5
FSR - Supermarket Share (2)		75.5%	77.0%	78.5%	78.5%	78.5%
FSR - Grocery/Other Food Store Share (2)		24.5%	23.0%	21.5%	21.5%	21.5%
Total		100.0%	100.0%	100.0%	100.0%	100.0%
FSR - Supermarkets (2)		\$ 112.6	\$ 120.6	\$ 133.3	\$ 145.0	\$ 156.6
FSR - Grocery/Other Food Store Share (2)		\$ 36.6	\$ 36.0	\$ 36.5	\$ 39.7	\$ 42.9
Total		\$ 149.2	\$ 156.6	\$ 169.8	\$ 184.7	\$ 199.5
Kingston West						
Income Index to Province		100.00				
FSR Expenditure Index to Province		100.00				
Per Capita FSR Expenditure		\$ 2,140	\$ 2,183	\$ 2,236	\$ 2,290	\$ 2,343
Population		56,769	58,433	61,837	65,667	69,354
TOTAL FSR POTENTIAL (\$Millions)		\$ 121.5	\$ 127.6	\$ 138.3	\$ 150.4	\$ 162.5
FSR - Supermarket Share (2)		75.5%	77.0%	77.0%	77.0%	77.0%
FSR - Grocery/Other Food Store Share (2)		24.5%	23.0%	23.0%	23.0%	23.0%
Total		100.0%	100%	100%	100%	100%
FSR - Supermarkets (2)		\$ 91.7	\$ 98.3	\$ 106.5	\$ 115.8	\$ 125.1
FSR - Grocery/Other Food Store Share (2)		\$ 29.8	\$ 29.3	\$ 31.8	\$ 34.6	\$ 37.4
Total		\$ 121.5	\$ 127.6	\$ 138.3	\$ 150.4	\$ 162.5
Western Periphery						
Income Index to Province		86.50				
FSR Expenditure Index to Province		97.70				
Per Capita FSR Expenditure		\$ 2,091	\$ 2,133	\$ 2,185	\$ 2,237	\$ 2,290
Population		33,915	34,842	36,317	37,806	39,242
TOTAL FSR POTENTIAL (\$Millions)		\$ 70.9	\$ 74.3	\$ 79.4	\$ 84.6	\$ 89.9
FSR - Supermarket Share (2)		78.0%	79.5%	79.5%	79.5%	79.5%
FSR - Grocery/Other Food Store Share (2)		22.0%	20.5%	20.5%	20.5%	20.5%
Total		100.0%	100%	100%	100%	100%
FSR - Supermarkets (2)		\$ 55.3	\$ 59.1	\$ 63.1	\$ 67.3	\$ 71.5
FSR - Grocery/Other Food Store Share (2)		\$ 15.6	\$ 15.2	\$ 16.3	\$ 17.3	\$ 18.4
Total		\$ 70.9	\$ 74.3	\$ 79.4	\$ 84.6	\$ 89.9
Eastern Periphery						
Income Index to Province		91.60				
FSR Expenditure Index to Province		98.60				
Per Capita FSR Expenditure		\$ 2,110	\$ 2,152	\$ 2,205	\$ 2,258	\$ 2,310
Population		27,742	28,248	29,140	30,072	30,945
TOTAL FSR POTENTIAL (\$Millions)		\$ 58.5	\$ 60.8	\$ 64.3	\$ 67.9	\$ 71.5
FSR - Supermarket Share (2)		78.0%	78.5%	79.0%	79.0%	79.0%
FSR - Grocery/Other Food Store Share (2)		22.0%	21.5%	21.0%	21.0%	21.0%
Total		100.0%	100%	100%	100%	100%
FSR - Supermarkets (2)		\$ 45.6	\$ 47.7	\$ 50.8	\$ 53.6	\$ 56.5
FSR - Grocery/Other Food Store Share (2)		\$ 12.9	\$ 13.1	\$ 13.5	\$ 14.3	\$ 15.0
Total		\$ 58.5	\$ 60.8	\$ 64.3	\$ 67.9	\$ 71.5
Greater Napanee Area						
Income Index to Province		76.80				
FSR Expenditure Index to Province		96.10				
Per Capita FSR Expenditure		\$ 2,057	\$ 2,098	\$ 2,150	\$ 2,201	\$ 2,252
Population		16,947	17,334	17,931	18,609	19,286
TOTAL FSR POTENTIAL (\$Millions)		\$ 34.9	\$ 36.4	\$ 38.6	\$ 41.0	\$ 43.4
FSR - Supermarket Share (2)		78.0%	78.5%	78.5%	78.5%	78.5%
FSR - Grocery/Other Food Store Share (2)		22.0%	21.5%	21.5%	21.5%	21.5%
Total		100.0%	100%	100%	100%	100%
FSR - Supermarkets (2)		\$ 27.2	\$ 28.6	\$ 30.3	\$ 32.2	\$ 34.1
FSR - Grocery/Other Food Store Share (2)		\$ 7.7	\$ 7.8	\$ 8.3	\$ 8.8	\$ 9.3
Total		\$ 34.9	\$ 36.4	\$ 38.6	\$ 41.0	\$ 43.4
TOTAL TRADE AREA						
TOTAL FSR POTENTIAL (\$Millions)		\$ 435.0	\$ 455.7	\$ 490.4	\$ 528.6	\$ 566.8
TOTAL FSR - Supermarkets (\$Millions)		\$ 332.4	\$ 354.3	\$ 384.0	\$ 413.9	\$ 443.8
Cumulative Growth			\$ 21.9	\$ 51.6	\$ 81.5	\$ 111.4
TOTAL FSR - Grocery/Other Food (\$Millions)		\$ 89.7	\$ 88.3	\$ 92.9	\$ 100.4	\$ 108.0
Cumulative Growth			-\$ 1.4	\$ 3.2	\$ 10.7	\$ 18.3

SOURCE: urbanMetrics Inc.

1) Based on Statistics Canada, Retail Trade. Adjusted to include food store related expenditures in Warehouse Membership Clubs (WMC) of \$150 per capita, as assumed by Tate Economic Research (April 2007)

2) NFSR Potential Shares based on Robin Dee & Associates (September 6, 2007) peer review of Tate Economic Research Market Analysis (April 2007). These are the same shares utilized in the TER report (TER). For Greater Napanee, these are urbanMetrics estimates.

FIGURE D-5
SUPERMARKET ANALYSIS

2007 Dollars	2007	2011	2016	2021	2026
<u>Kingston East</u>					
Supermarket Expenditures (\$Millions)	\$ 112.6	\$ 120.6	\$ 133.3	\$ 145.0	\$ 156.6
Estimated Kingston Share %(1)	99.9%	99.9%	99.9%	99.9%	99.9%
Estimated Kingston Share (\$ Millions)	\$ 112.5	\$ 120.5	\$ 133.2	\$ 144.9	\$ 156.4
Residual Potential		\$ 8.0	\$ 20.7	\$ 32.4	\$ 43.9
<u>Kingston West</u>					
Supermarket Expenditures (\$Millions)	\$ 91.7	\$ 98.3	\$ 106.5	\$ 115.8	\$ 125.1
Estimated Kingston Share %(1)	99.8%	99.8%	99.8%	99.8%	99.8%
Estimated Kingston Share (\$ Millions)	\$ 91.5	\$ 98.1	\$ 106.3	\$ 115.6	\$ 124.8
Residual		\$ 6.6	\$ 14.8	\$ 24.1	\$ 33.3
<u>Western Periphery</u>					
Supermarket Expenditures (\$Millions)	\$ 55.3	\$ 59.1	\$ 63.1	\$ 67.3	\$ 71.5
Estimated Kingston Share %(1)	57.0%	60.0%	60.0%	60.0%	60.0%
Estimated Kingston Share (\$ Millions)	\$ 31.5	\$ 35.5	\$ 37.9	\$ 40.4	\$ 42.9
Residual		\$ 4.0	\$ 6.4	\$ 8.9	\$ 11.4
<u>Eastern Periphery</u>					
Supermarket Expenditures (\$Millions)	\$ 45.6	\$ 47.7	\$ 50.8	\$ 53.6	\$ 56.5
Estimated Kingston Share %(1)	42.9%	50.0%	50.0%	50.0%	50.0%
Estimated Kingston Share (\$ Millions)	\$ 19.6	\$ 23.9	\$ 25.4	\$ 26.8	\$ 28.3
Residual		\$ 4.3	\$ 5.8	\$ 7.2	\$ 8.7
<u>Greater Napanee Area</u>					
Supermarket Expenditures (\$Millions)	\$ 27.2	\$ 28.6	\$ 30.3	\$ 32.2	\$ 34.1
Estimated Kingston Share %(3)	11.5%	12.0%	12.0%	12.0%	12.0%
Estimated Kingston Share (\$ Millions)	\$ 3.1	\$ 3.4	\$ 3.6	\$ 3.9	\$ 4.1
Residual		\$ 0.3	\$ 0.5	\$ 0.8	\$ 1.0
<u>TOTAL TRADE AREA</u>					
Total Supermarket Expenditures (\$Millions)	\$ 332.4	\$ 354.3	\$ 384.0	\$ 413.9	\$ 443.8
Total Estimated Kingston Share (\$Millions)	\$ 258.2	\$ 281.4	\$ 306.4	\$ 331.6	\$ 356.5
Estimated Kingston Share %	77.7%	79.4%	79.8%	80.1%	80.3%
Existing Sales from Trade Area Residents (\$Millions)	\$ 258.2	\$ 258.2	\$ 258.2	\$ 258.2	\$ 258.2
Residual Potential (\$Millions)		\$ 23.2	\$ 48.2	\$ 73.4	\$ 98.3
<div>Existing Supermarkets (482,900 sq.ft.) Sales/Sq.Ft. Levels (Including average Inflow of 6.7%):</div> <div>\$ 573</div>					
<u>WARRANTED ADDITIONAL SPACE - Kingston (including inflow, excluding sales transfers)</u>					
Additional Residual Potential Available		\$ 23.2	\$ 48.2	\$ 73.4	\$ 98.3
Plus Inflow Sales @ 12.5% (3)		\$ 3.3	\$ 6.9	\$ 10.5	\$ 14.0
TOTAL ADDITIONAL SALES POTENTIAL AVAILABLE		\$ 26.5	\$ 55.1	\$ 83.9	\$ 112.3
<u>WARRANTED ADDITIONAL SQUARE FEET (4)</u>					
	2011	2016	2021	2026	
@ \$475 per sq. ft.	55,800	116,000	176,600	236,500	
@ \$500 per sq. ft.	53,000	110,200	167,800	224,700	
@ \$525 per sq. ft.	50,500	104,900	159,800	214,000	
@ \$550 per sq. ft.	48,200	100,200	152,500	204,300	

SOURCE: urbanMetrics inc.

1) Based on the TER survey conducted in 2005.

2) Inflow based on the Dee Peer Review, adjusted to exclude Greater Napanee.

3) urbanMetrics estimates for new space.

FIGURE D-6
OTHER FOOD STORE ANALYSIS

OTHER FOOD STORE ANALYSIS					
2007 Dollars	2007	2011	2016	2021	2026
<u>Kingston East</u>					
Other Food Store Expenditures (\$Millions)	\$ 36.6	\$ 36.0	\$ 36.5	\$ 39.7	\$ 42.9
Estimated Kingston Share %(1)	93.9%	97.5%	97.5%	97.5%	97.5%
Estimated Kingston Share (\$ Millions)	\$ 34.4	\$ 35.1	\$ 35.6	\$ 38.7	\$ 41.8
Residual Potential		\$ 0.7	\$ 1.2	\$ 4.3	\$ 7.4
<u>Kingston West</u>					
Other Food Store Expenditures (\$Millions)	\$ 29.8	\$ 29.3	\$ 31.8	\$ 34.6	\$ 37.4
Estimated Kingston Share %(1)	95.3%	97.5%	97.5%	97.5%	97.5%
Estimated Kingston Share (\$ Millions)	\$ 28.4	\$ 28.6	\$ 31.0	\$ 33.7	\$ 36.5
Residual		\$ 0.2	\$ 2.6	\$ 5.3	\$ 8.1
<u>Western Periphery</u>					
Other Food Store Expenditures (\$Millions)	\$ 15.6	\$ 15.2	\$ 16.3	\$ 17.3	\$ 18.4
Estimated Kingston Share %(1)	40.8%	41.0%	41.0%	41.0%	41.0%
Estimated Kingston Share (\$ Millions)	\$ 6.4	\$ 6.2	\$ 6.7	\$ 7.1	\$ 7.5
Residual		-\$0.2	\$ 0.3	\$ 0.7	\$ 1.1
<u>Eastern Periphery</u>					
Other Food Store Expenditures (\$Millions)	\$ 12.9	\$ 13.1	\$ 13.5	\$ 14.3	\$ 15.0
Estimated Kingston Share %(1)	41.2%	42.0%	42.0%	42.0%	42.0%
Estimated Kingston Share (\$ Millions)	\$ 5.3	\$ 5.5	\$ 5.7	\$ 6.0	\$ 6.3
Residual		\$ 0.2	\$ 0.4	\$ 0.7	\$ 1.0
<u>Greater Napanee Area</u>					
Other Food Store Expenditures (\$Millions)	\$ 7.7	\$ 7.8	\$ 8.3	\$ 8.8	\$ 9.3
Estimated Kingston Share %(2)	20.0%	21.0%	21.0%	21.0%	21.0%
Estimated Kingston Share (\$ Millions)	\$ 1.5	\$ 1.6	\$ 1.7	\$ 1.8	\$ 2.0
Residual		\$ 0.1	\$ 0.2	\$ 0.3	\$ 0.5
<u>TOTAL TRADE AREA</u>					
Total Other Food Store Expenditures (\$Millions)	\$ 102.6	\$ 101.4	\$ 106.4	\$ 114.7	\$ 123.0
Total Estimated Kingston Share (\$Millions)	\$ 76.0	\$ 77.0	\$ 80.7	\$ 87.3	\$ 94.1
Estimated Kingston Share %	74.1%	75.9%	75.8%	76.1%	76.5%
Existing Sales from Trade Area Residents (\$Millions)	\$ 76.00	\$ 76.0	\$ 76.0	\$ 76.0	\$ 76.0
Residual Potential (\$Millions)		\$ 1.0	\$ 4.7	\$ 11.3	\$ 18.1
<div>Existing Other Food Stores (140,700 sq.ft.) Sales/Sq.Ft. Levels (Including average Inflow of 5%): \$ 569</div>					
<u>WARRANTED ADDITIONAL SPACE - Kingston (including inflow, excluding sales transfers)</u>					
Additional Residual Potential Available		\$ 1.0	\$ 4.7	\$ 11.3	\$ 18.1
Plus Inflow Sales @ 5.0% (2)		\$ 0.1	\$ 0.2	\$ 0.6	\$ 1.0
TOTAL ADDITIONAL SALES POTENTIAL AVAILABLE		\$ 1.1	\$ 4.9	\$ 11.9	\$ 19.1
<u>WARRANTED ADDITIONAL SQUARE FEET (3)</u>					
		2011	2016	2021	2026
@ \$350 per sq. ft.		3,000	14,100	34,000	54,400
@ \$375 per sq. ft.		2,800	13,200	31,700	50,800
@ \$400 per sq. ft.		2,600	12,400	29,700	47,600
@ \$425 per sq. ft.		2,500	11,600	28,000	44,800

SOURCE: urbanMetrics inc.

1) Based on the TER survey conducted in 2005

2) urbanMetrics estimate.

3) Rounded to the nearest 100 square feet.

FIGURE D-7
PER CAPITA SPACE ANALYSIS
ADDITIONAL OTHER RETAIL/SERVICE SPACE WARRANTED BASED ON POPULATION GROWTH

2011	S.F./Capita Existing 2007	Future Target Ratio S.F./Capita (1)	Population Growth 2007 - 2011	2011 Additional Space Warranted (2)
Other Retail: LBW (Liquor, Beer, Wine)	0.5	0.5	5,557	2,795
Other Retail: Automotive	5.5	5.6	5,557	31,393
Service - Repair and Maintenance	0.5	0.5	5,557	2,634
Service - Banks	1.2	1.3	5,557	7,024
Service - Consumer Services Rental	0.7	0.7	5,557	4,027
Service - Eating/Drinking	6.5	6.6	5,557	36,788
Service - Entertainment	3.0	3.1	5,557	17,146
Service - Medical/Dental	1.9	1.9	5,557	10,555
Service - Other	10.6	10.8	5,557	60,128
Service - Personal	1.9	1.9	5,557	10,513
Service - Public Administration	2.7	2.7	5,557	15,262
Sub Total - Services	28.9	29.5		
Total	35.0	35.7		198,265

2016	S.F./Capita Existing 2007	Future Target Ratio S.F./Capita (1)	Population Growth 2007 - 2016	2016 Additional Space Warranted (2)
Other Retail: LBW (Liquor, Beer, Wine)	0.5	0.5	16,167	8,329
Other Retail: Automotive	5.5	5.8	16,167	93,559
Service - Repair and Maintenance	0.5	0.5	16,167	7,851
Service - Banks	1.2	1.3	16,167	20,935
Service - Consumer Services Rental	0.7	0.7	16,167	12,001
Service - Eating/Drinking	6.5	6.8	16,167	109,640
Service - Entertainment	3.0	3.2	16,167	51,099
Service - Medical/Dental	1.9	1.9	16,167	31,458
Service - Other	10.6	11.1	16,167	179,198
Service - Personal	1.9	1.9	16,167	31,332
Service - Public Administration	2.7	2.8	16,167	45,485
Sub Total - Services	28.9	30.2		
Total	35.0	36.5		590,887

2021	S.F./Capita Existing 2007	Future Target Ratio S.F./Capita (1)	Population Growth 2007 - 2021	2021 Additional Space Warranted (2)
Other Retail: LBW (Liquor, Beer, Wine)	0.5	0.5	27,864	14,698
Other Retail: Automotive	5.5	5.9	27,864	165,109
Service - Repair and Maintenance	0.5	0.5	27,864	13,854
Service - Banks	1.2	1.3	27,864	36,945
Service - Consumer Services Rental	0.7	0.8	27,864	21,179
Service - Eating/Drinking	6.5	6.9	27,864	193,488
Service - Entertainment	3.0	3.2	27,864	90,177
Service - Medical/Dental	1.9	2.0	27,864	55,516
Service - Other	10.6	11.3	27,864	316,240
Service - Personal	1.9	2.0	27,864	55,293
Service - Public Administration	2.7	2.9	27,864	80,270
Sub Total - Services	28.9	31.0		
Total	35.0	37.4		1,042,771

2026	S.F./Capita Existing 2007	Future Target Ratio S.F./Capita (1)	Population Growth 2007 - 2026	2026 Additional Space Warranted (2)
Other Retail: LBW (Liquor, Beer, Wine)	0.5	0.5	39,130	21,124
Other Retail: Automotive	5.5	6.1	39,130	237,289
Service - Repair and Maintenance	0.5	0.5	39,130	19,911
Service - Banks	1.2	1.4	39,130	53,096
Service - Consumer Services Rental	0.7	0.8	39,130	30,437
Service - Eating/Drinking	6.5	7.1	39,130	278,074
Service - Entertainment	3.0	3.3	39,130	129,599
Service - Medical/Dental	1.9	2.0	39,130	79,786
Service - Other	10.6	11.6	39,130	454,488
Service - Personal	1.9	2.0	39,130	79,465
Service - Public Administration	2.7	2.9	39,130	115,362
Sub Total - Services	28.9	31.7		
Total	35.0	38.3		1,498,631

Source: urbanMetrics inc.

1) Future Target Ratios based on urbanMetrics estimates

2) Assuming Inflow = Outflow