

# Richmond Hill Economic Policy Review Recommendations Report



**HEMSON**  
Consulting Ltd.

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## **I THE TOWN OF RICHMOND HILL HAS DEVELOPED A VISION FOR THE COMMUNITY**

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The Town of Richmond Hill's new official plan will set the context for growth and change in the community over the period to 2031. At the centre of the Greater Toronto Area and Hamilton (GTAH), Richmond Hill has grown steadily and its economy includes concentrations of service-producing industries, high technology and life science activities and one of the largest office markets outside of the City of Toronto.

Town Council, staff and residents are looking forward to further improving on the Town's economic performance, while building upon the unique physical and cultural character of the community. In preparing its new official plan, the Town will be setting out its vision for the future, as well as bringing its planning policies into conformity with new Provincial policies set out in the 2006 Provincial Growth Plan for the Greater Golden Horseshoe (the *Growth Plan*) as well as the Region of York official plan conformity exercise.

In order to assist the Town in developing its new official plan, Hemson Consulting Ltd. has been retained to undertake an Economic Policy Review. The Economic Policy Review is one of several studies to inform the preparation of the new official plan, including over a dozen background studies and discussion papers and two area-specific studies.

The purpose of this report is to recommend key land use planning policy directions and to describe economic development initiatives that the Town may wish to consider. The report identifies some of the key economic development issues to be addressed as part of the new official plan, including sectors that should be targeted and actions taken to maintain the Town's competitiveness.

Recommended policy directions for consideration by the Town in preparing the new official plan have been included. The recommended policies are based on our research and experience, a review of official plan policies in other similar GTAH communities, and the consultation through the People Plan Richmond Hill process. The existing Richmond Hill official plan and series of official plan amendments were reviewed in terms of their employment and commercial policy framework.

The report builds upon our March 2009 background research and policy report, which reviewed the Town's past economic performance, identified key issues and opportunities for the future and recommended economic policy directions to be considered in the new official plan. This report draws upon feedback received from an extensive program of public and stakeholder consultation undertaken by the Town as part of the broader study process.

The report is intended to serve as a resource document for the Town of Richmond Hill staff as they formulate the text and schedules to the new official plan. Its recommendations on economic policy will need to be considered together with the results of other background studies and policy recommendations.

**A. LONG-TERM VISION IS TO DIRECT ECONOMIC GROWTH TO EMPLOYMENT AREAS AND CENTRES AND CORRIDORS**

The long-term vision for the Town is for continued strong economic performance on employment land, but with an increased emphasis on the centres and corridors as a focus for economic activity. Employment areas are major economic assets and will remain a key component of the Town's economic structure. In addition, the vision for the Town's future will direct market demand and future development to create an urban structure of mixed use centres and corridors, consistent with the vision set out in the *Growth Plan* and the Region of York's Official Plan.

The Town's vision conforms to the new Provincial and Regional planning policies, which seek to accommodate growth through intensification and redevelopment. It takes into account the results of the background studies undertaken as part of the official plan review and is based on feedback received from the community as part of an extensive program of public and stakeholder consultation.

**1. Richmond Hill's Vision for the Future is Set Out in the Town's Strategic Plan**

The planning for the Town's vision to transform the urban structure into a series of centres and corridors is consistent with the recently approved Strategic Plan (2009), which sets out a number of goals for encouraging change and improvement. Particularly related to the economy, the Strategic Plan calls for:

- Stronger Connections in Richmond Hill including stronger connections to transit from other modes of transportation;
- Better Choice in Richmond Hill including better choice for employment, diversity in the economic base and the facilitation of business development along Yonge Street in the Richmond Hill Regional Centre, Downtown and Oak Ridges Local Centres;
- A More Vibrant Richmond Hill including the enhancement of the Town's unique places, improving the look of the urban environment and the creation of a vibrant downtown; and
- Wise Management of Resources in Richmond Hill including continued financial responsibility, the creation of more energy efficient businesses and improving the balance of jobs to population, or the "Live-Work" balance in the community.

## 2. Official Plan Guiding Principles Take Their Direction From the Strategic Plan

Consistent with the Strategic Plan and based on comments received through public consultation, a set of Official Plan Guiding Principles were developed to achieve the future land use vision for the Town. The Guiding Principles have been approved by Council and are reproduced below.

### Complete Communities

Create an integrated, vibrant and diverse community that provides a mix of land uses, including a balance of housing, employment, community services, parks and open spaces.

Direct growth to built-up urban areas with existing infrastructure and services in a network of centres and corridors.

### Environment

Protect and enhance natural environmental systems, functions and resources over the long term.

Incorporate and promote sustainable development practices and initiatives.

### Economy

Promote economic vitality and provide for a balanced and diverse range of employment opportunities.

Protect employment areas over the long term.

### Place-making

Recognize and enhance the inherent and unique aspects of Richmond Hill and create focal points, gateways, experiences and landmarks.

Strive for design excellence in the public and private realm.

### Connectivity and Mobility

Plan for transit and pedestrian oriented development.

Promote connectivity, mobility and accessibility within and between neighbourhoods, employment areas, parks and open spaces.

## 3. Urban Structure Provides the Framework For Implementation

In order to implement the Town's Strategic Plan and Guiding Principles, an urban structure has been developed to guide the physical development of the community. The urban structure has been endorsed by Town Council and is made up of the following major elements:

- **Richmond Hill Regional Centre**, identified by the Province of Ontario as an Urban Growth Centre in the *Growth Plan* and by York Region to become a major hub of business, cultural, government and social activity. It is envisioned to contain the highest concentration and greatest mix of uses, including intense employment opportunities such as major offices and other uses such as retail;

- **Regional Corridors**, identified by the Region of York as Yonge Street and Highway 7, which are envisioned as mixed-use corridors served by rapid transit with different characteristics along their length;
- **Local Centres**, identified by the Town of Richmond Hill as the historic Downtown and Oak Ridges at Yonge Street and King Road, are envisioned to accommodate smaller-scale intensification, provide Live–Work opportunities and promote transit;
- **Local Corridor**, identified by the Town of Richmond Hill as Major Mackenzie Drive and considered a good location for infill and intensification but at a smaller scale and also with different characteristics along its length; and
- **Employment Areas**, intended to be maintained as locations to accommodate new industrial-type and office development.

Richmond Hill has also identified specific locations within the urban structure as key locations for intensification and redevelopment. Consistent with Regional planning objectives, three Key Development Areas (KDAs) have been identified along the Regional Corridors:

- The first two are located to the north and south of the downtown core on Yonge Street: one just north of Elgin Mills Road at Bernard Avenue and one at 16th Avenue; and

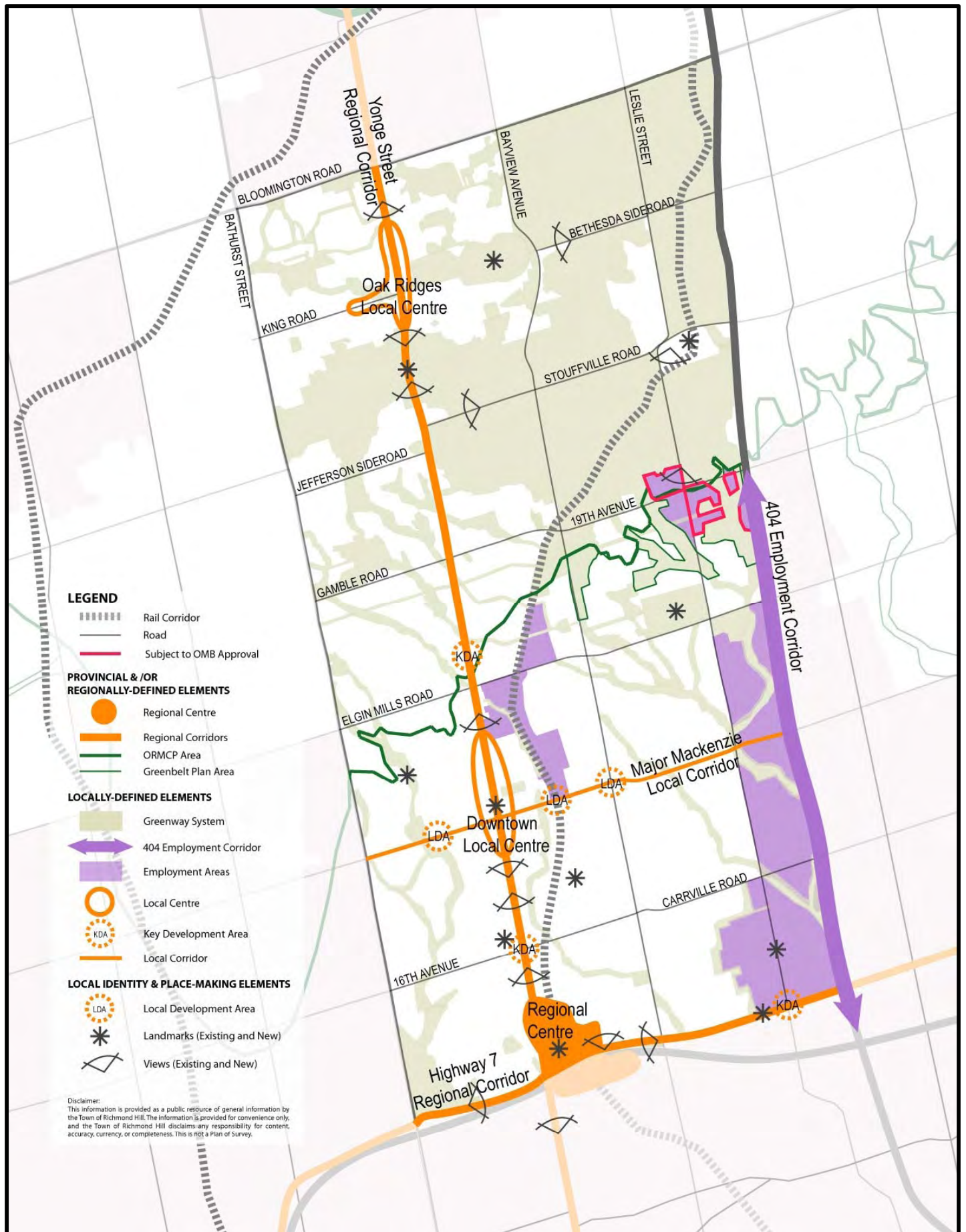
- An Employment KDA is located at the intersection of Leslie Street and Highway 7, where the Regional Corridor meets the Beaver Creek Employment Area. This KDA is intended to permit employment intensification.

Consistent with the Town’s growth management objectives, three Local Development Areas (LDAs) have been identified along the Major Mackenzie Drive Local Corridor:

- The first LDA is located to take advantage of potential economic opportunities around the York-Central Hospital;
- The second LDA is located at the Newkirk GO Station, to take advantage of opportunities associated with access to higher order transit; and
- The third LDA is located further east at the intersection of Bayview Avenue and Major Mackenzie Drive.

The Town of Richmond Hill’s urban structure is illustrated on the map on the following page. Other initiatives beyond land use planning will play a role in achieving the Town’s vision, including the Town’s forthcoming Economic Development Strategy and plans related to transportation, and cultural and heritage resources.

# TOWN OF RICHMOND HILL URBAN STRUCTURE



Source: Town of Richmond Hill, Department of Planning and Development.

## **B. PROCESS TO DETERMINE POLICIES**

Currently, the Town's four designated Employment Areas — Beaver Creek, Headford, Barker and Newkirk—accommodate approximately half of the Town's employment, the bulk of which are in sectors such as manufacturing and business and related services, as well as nearly three-quarters of its major office inventory (major office being office buildings greater than 20,000 net sq. ft. in size). Today, the centres and corridors accommodate mainly community-serving uses such as retail, education and social services and a relatively limited amount of major office development.

With the build-out of existing areas, however, future economic activity will be increasingly accommodated in the centres and corridors, including major offices and new retail development. Employment Areas will remain key locations for office and industry but with the diminishing supply of greenfields for new employment uses, investment in higher density built forms and more intense activity should be directed to specific intersections and corridors. Along corridors, the employment intensification of existing commercial areas and strips should be encouraged.

### **1. Key Findings Were Identified in The March 2009 Background Report**

The March 2009 background research report concluded that Richmond Hill's economy has been performing well, and is well-positioned to compete for new investment as a result of its advantages, including a central location, a well-educated labour force, the heritage character of the Downtown Local Centre and the York-Central Hospital.

As discussed in the March 2009 report, one of the main reasons for the Town's past economic success has been a highly competitive supply of employment land, particularly the Employment Areas in the Highway 404 corridor. The Region of York's official plan recognizes the importance of these lands as major drivers of economic activity. The Region's official plan directs municipalities to protect employment land, particularly in a number of strategic locations along major transportation routes.

To this end, over the next 10 to 15 years, the Town's Employment Areas will be built out and — within the existing context of roads and living and working areas — the structure of the Town will develop into a series of centres and corridors. The Town is well positioned to achieve this urban structure given its central location within the broader economic region. Reflecting these conclusions, the Town's Strategic Plan, Official Plan Guiding Principles and new Provincial and Regional policies, a number of economic policy directions were recommended, including:

- Improving the “Live–Work” balance in the community;
- Encouraging economic activity within an urban structure of centres and corridors in addition to employment areas;
- Encouraging higher employment densities and employment intensification across the Town; and
- Planning for new retail and office development as an integrated part of vibrant, mixed use nodes.

## **2. Public Consultation Provided Input on Key Implementation Issues**

Public consultation in the form of an Economic Policy Review Discussion Paper was undertaken in January 2009. The discussion paper highlighted key issues related to employment land supply and the Live–Work balance. At the February 2009 Economic Policy Roundtable, stakeholders discussed the Town’s market outlook, built-form trends, supply of employment land and planning policies.

A draft urban structure for the Town was prepared incorporating the key findings identified in the March 2009 report, along with the key findings identified in the other background studies and public feedback from an Urban Structure Workshop on Intensification and Employment held in March 2009. The proposed urban structure was presented to the community at the Official Plan Summit in May 2009.

At the May 2009 Official Plan Summit, a series of multi-stakeholder roundtable discussions were held to obtain feedback on the key elements of the proposed urban structure, including the vision for economic activity. Broad public support was demonstrated for the protection of employment lands and the Town’s vision to accommodate growth in a series of centres and corridors. Particular issues with respect to the Town’s economy were discussed and the public demonstrated strong support for:

- A more intensive pattern of employment development within the Town’s designated employment areas, by encouraging structured or underground parking, targeting economic sectors with higher employment densities and providing incentives to promote particular types of development, including buildings constructed to progressive environmental certification standards;
- A better integration of new commercial uses within and proximate to residential areas, in particular the Oak Ridges Local Centre, including additional small-scale retail and commercial uses, personal service uses, “professional” home-office and more Live–Work opportunities throughout the Town;
- The accommodation of retail uses within existing commercial areas, such as the Richmond Hill Regional Centre and the Regional Corridors, but not the Employment Areas along Highway 404; and
- The accommodation of retail uses in different forms, such as at the base of new high density residential buildings to provide access for the resident population and encourage a more compact, pedestrian friendly environment.

### 3. A Commercial Needs Study was Undertaken as Part of the Economic Policy Review

As part of the Economic Policy Review, a Commercial Needs Study (CNS) was undertaken. The purpose of the CNS was to:

- Identify the amount of new retail space required to accommodate growth in the community to 2031 (called a “residual demand analysis”); and
- Review the Town’s commercial land use policies and recommend new policies, within the context of Provincial and Regional plans as well as the Town’s evolving planning context.

The CNS finds that the Town’s retail sector has performed well and that the existing retail structure is relatively mature and contains all of the necessary elements to attract a wide array of retail uses. According to the CNS, the Town of Richmond Hill will require approximately 835,000 square feet of new retail space over the planning period to 2031.

A key policy recommendation of the CNS is that the Town’s future retail space requirements be accommodated through intensification within the centres and corridors. More specifically, the CNS recommends that:

- The Town’s future retail need should be accommodated through an incremental expansion of the existing retail structure, in particular Yonge Street, as part of new development; and

- Additional large format retail approvals are not required to accommodate market demand, which should instead be accommodated within the mixed-use intensification areas identified in the Town’s urban structure.

The CNS report is attached as an appendix to this report.

The built commercial structure of the Town has been guided by a planned hierarchy of commercial types in the existing Official Plan. The commercial designations of the current plan are intended to provide for a broad range of commercial activities and, according to the CNS, have been implemented very effectively. The commercial policy hierarchy has, however, largely been built out. In this regard, the CNS concludes that:

- Existing commercial areas should be used to attract investment over the planning period: rather than stand-alone buildings or plazas. Commercial uses should be integrated with residential and office commercial development instead of as stand-alone uses; and
- Within the centres and corridors structure, existing commercial sites should be designated for a multi-storey mix of uses combining residential, office, educational, institutional, employment with ground floor retail.

The Town’s current policy framework is recommended to be replaced by one that manages change in commercial areas through the urban structure of centres and corridors. It is recommended that:

- “Regional Commercial”, “Community Commercial” and “General Commercial” policies should be replaced along Yonge Street by “Regional Corridor” in the official plan and mixed-use policies in the secondary plans;
- “Central Business District Area” and “Town Centre” (2.2.1.2) should be incorporated into the Downtown Local Centre designation;
- Existing “General Commercial” uses in the Richmond Hill Regional Centre should be replaced;
- The Local Centres, Local Corridor, Key Development Areas and Local Development Areas should be identified; and
- The Neighbourhood Commercial category should remain, to continue to provide smaller scale, local-serving retail uses for the immediate surrounding neighbourhoods, even through they are not identified for intensification within the urban structure.

### **C. RECOMMENDED POLICY APPROACH**

Richmond Hill’s current official plan is more than 25 years old and has been amended many times. A new approach to planning for economic uses within the Town is required to address its changing context and ensure economic viability for the long-term. The recommended policy approach, produced through the Economic Policy Review, is that existing Employment Areas must be retained to meet forecasted job growth while supporting an emerging urban structure of centres and corridors.

The recommendations are to be translated by Town staff into appropriate policies for the draft official plan. The policy recommendations in this report are from the perspective of the findings of the economic policy review process and must be considered in combination with existing official plan policy and the findings from the other background work and initiatives including intensification, transportation, heritage, infrastructure, and urban design.

This report is divided into the following sections:

- The next chapter recommends key land use based economic planning policy directions, specifically for Employment Areas, the Centres and Corridors, and home occupations;
- This chapter is followed by a chapter describing the key economic development initiatives that the Town may wish to consider.

## **II ECONOMIC POLICY DIRECTION FOR THE URBAN STRUCTURE**

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This chapter discusses land use based economic planning policy directions recommended to support the Town's urban structure, drawing upon guidance provided by Provincial and Regional plans, input received from the public (particularly some of the suggested policy approaches identified at the recent Official Plan Summit) and the findings in our March 2009 background report.

In brief, Town-wide economic policy directions should be clearly established in the new official plan. Economic activity should be encouraged to develop within the Town's urban structure by focusing on Employment Areas as well as centres and corridors. As Richmond Hill transforms from a greenfield community to a mature town, the Employment Areas should be protected as major economic assets.

Specific policies for the Richmond Hill Regional Centre and the Downtown Local Centre are being determined through area-specific studies and these should be incorporated into the official plan. However, the general economic objectives for these areas are discussed in this report as key elements to the overall economic direction for the Town. More detailed economic policies will be identified for the Local Centres and Key Development Areas through secondary plans.

### **A. DIRECTION FOR NEW ECONOMIC POLICIES**

A key finding and Town-wide goal recommended is to improve the relationship of jobs to residents in Richmond Hill, or the "Live-Work" balance. Improving the Live-Work balance is also identified as a goal in the Town's Strategic Plan, and is reflected in the Region of York's forecasting and land budgeting work, which anticipates a continuation in historic levels of employment growth with a relative reduction in population growth as greenfield lands for housing are built out.

The 2009 draft Region of York Official Plan supports the objective of creating a competitive and flexible environment that encourages investment and a diversity of employment opportunities. As previously noted, the Town of Richmond Hill's guiding principle for the economy is to promote economic vitality and provide for a balanced and diverse range of employment opportunities and protect Employment Areas over the long term. The Town's Strategic Plan also speaks to promoting diversity in the economic base and directing business development in the centres and corridors as well as Employment Areas.

In order to plan for improving the community's Live–Work balance and diversifying the economic base, it is important to highlight the Town's regional locational advantages, its recognition of a changing global and local economy, its desire to continue to accommodate highly skilled jobs and the need to remain flexible and responsive to future economic opportunities, as they relate to land use and urban design.

The next step for the new official plan is to translate the conclusions and recommendations reached to date into specific direction for each element of the urban structure. It is recommended that land-use based economic policies in the Town's new official plan be developed based on the following major policy directions:

- Protect the Town's limited employment land supply over the long term;
- Establish policies to direct appropriate economic growth within the Employment Areas;
- Encourage a more intensive use of land within the Town's Employment Areas as well as in the centres and corridors;

- Encourage a better integration and diversity of retail and commercial uses as part of mixed-use intensification areas;
- Direct major retail uses towards the centres and corridors, in a more compact urban form; and
- Provide direction for home occupations, and Live–Work forms of development within the Town.

## **B. DIRECTIONS FOR EMPLOYMENT AREAS**

The Town has four existing designated Employment Areas — Beaver Creek, Headford and Barker along the Highway 404 corridor and the older Newkirk industrial park located north-east of the Downtown.<sup>1</sup> The local economy is served well by these Employment Areas. With respect to the Town's Employment Areas, the Economic Policy Review reached three major conclusions:

- First, the entire supply of employment land in the Town of Richmond Hill is required to meet forecast demand to 2031, including the Town-planned supply in North Leslie;

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<sup>1</sup> *The Town approved employment lands as part of the North Leslie Secondary Plan are considered part of the Town's future employment land supply, but are currently under appeal at the Ontario Municipal Board.*

- In order to achieve the Region of York’s 2031 employment target of 99,400 jobs for the Town of Richmond Hill, the remainder of the Town’s employment land supply will need to develop at relatively high densities; and
- As a result, the Town should take action through new economic policies to promote higher employment densities, including employment intensification, in order to achieve the Region’s employment target for Richmond Hill.

### 1. Protecting the Town’s Employment Areas

The Town already has relatively strong policies for protecting employment land, as implemented through Official Plan Amendment (OPA) 246. Recommended policy direction for the Town’s employment land non-conversion policy is that:

- The Town should maintain the employment land non-conversion policies that are set out in OPA 246, which clarify “non-employment uses” and clearly indicate that conversion of lands within Employment Areas shall only be permitted through a municipal comprehensive review and where a number of tests are met; and
- These policies should be incorporated into the new official plan with clear language confirming that the Town’s entire supply of land in the Employment Areas is to be protected.

In addition to the tests in OPA 246, the Town should add two additional tests:

- the conversion will not prevent, nor place in doubt, the ability of the Town to meet the employment forecasts established by the Region of York; and
- the conversion will not adversely affect the ability of lands abutting or nearby the proposed conversion site to be used or continue to be used for employment purposes over the long term.

### 2. Encouraging Higher Employment Densities

New policies are required to encourage employment intensification and higher employment land densities while still allowing for flexibility in employment use. Feedback from the public at the Official Plan Summit provided some key insights as to how the Town might achieve a more intensified pattern of employment, which include:

- Changing parking standards, including a move towards underground and structured parking, and encouraging the redevelopment of existing parking lots and underutilized sites;
- Expanding transit service to the Employment Areas to make them more competitive for employment intensification;
- Attracting higher density employment uses including prestige industrial and multi-storey “flex” space, as well as more of the high technology uses already concentrated in the community and the Employment Areas;

- Providing incentives to increase the density and environmental quality of development, e.g. “green business”;
- Limiting ancillary retail to maximize the efficiency of the Employment Areas and direct retail uses to the centres and corridors outside of the Employment Areas;
- Where Regional and local corridors extend through an Employment Area, maintaining employment uses along that corridor. Retail uses should not be permitted, with the exception of ancillary retail uses to the Employment Areas; and
- Encouraging the intensified employment reuse of older industrial buildings and sites, particularly within the Newkirk Employment Area.

The following policy directions are recommended to help support intensification of the Town’s Employment Areas:

- The Town should set out policies acknowledging the need for alternative standards in Employment Areas, including changes to landscaping standards, the shared use of entrances and parking and truck turning areas or the provision of structured parking; and
- The siting of major office buildings should also be carefully considered to maximize the potential for future redevelopment of parking areas and peripheral uses. Standards for landscaping, setbacks, and buffers in Employment Areas, should also be addressed.

### **3. Designating Employment Areas for Appropriate Uses**

The Town’s four designated business parks currently accommodate a wide range of economic activities, with a particular emphasis on sectors such as manufacturing, wholesale trade, transportation, warehousing, construction and business and related services:

- The Beaver Creek Business Park is the Town’s largest and most intensive employment area, containing over 80% of the Town’s employment in wholesale trade and nearly half of the Town’s employment in business and related services.

Beaver Creek is the primary location of the Town’s high technology cluster and also contains key elements of the Town’s life science cluster.

- The Newkirk Business Park is the Town’s smallest and oldest employment area. It is a rail-based area that is focussed on more traditional industrial activities, in particular manufacturing; and
- The Headford and Barker business parks are the Town’s newest employment areas and are being developed with a range of employment uses.

The Town’s existing policy for the business parks is made up of several secondary plans adopted by way of official plan amendment. This policy framework has served the Town well, but needs to be updated to reflect Provincial and Regional policy direction and the Council endorsed urban structure.

It is recommended that the Town:

- Provide one general “Employment Area” designation with specific policies to recognize unique characteristics of individual business parks as appropriate;
- Provide a clear definition of “Employment Area”, consistent with OPA 246, that outlines permitted and prohibited uses, consistent with new Provincial policies and Regional planning directions; and
- Should continue to focus on attracting advanced manufacturing, head office functions and sectors such as wholesale trade and other industrial uses commonly associated with Employment Areas, in which the Town has demonstrated a strong competitive advantage.

In order to encourage the Town’s employment land supply to develop at relatively high densities, the focus should be on encouraging high-performance industrial and office use development.

The following uses should be permitted.

- office development, including research and development facilities;
- High performance industrial uses within wholly enclosed buildings, including: manufacturing, assembly, processing, fabricating, warehousing and enclosed storage of goods; and

- Limited types of institutional, retail and personal service uses which serve the office and industrial uses within Employment Areas, such as: financial institutions, business and professional offices, restaurants and private clubs and daycare facilities; provided that the predominant use of the Employment Area remains for industrial and office use.

The Town’s business parks should permit the same or similar range of employment uses, however the Newkirk Business Park may require additional policies because of its unique context:

- The Newkirk Business Park is the Town’s best short-term opportunity for employment intensification since it is an older employment area containing some land extensive uses and facilities that may be nearing the end of their functional life.
- The Newkirk Business Park benefits from a central location within the community and access to GO transit, suggesting that the area may be attractive to range of more intensive employment uses, including business and related services, for which a central location and access to transit is an advantage.
- Employment intensification should be encouraged in the Newkirk Business park, subject to criteria to ensure land use compatibility with planned development along Yonge Street, around the Newkirk GO station and abutting residential communities.

Such criteria should include distance separation and mitigation policies, such as buffering, to address noise, emissions, lighting and other externalities that may not be compatible with residential uses.

To reinforce the centres and corridors as locations for economic activity, the following policy directions are recommended:

- While office uses would be permitted use within all of the Employment Areas, major offices as defined in the Growth Plan should be encouraged to locate in the centres and corridors, particularly the Beaver Creek Employment KDA, the Regional Corridors and the Richmond Hill Regional Centre.
- New retail uses should be prohibited within Employment Areas, unless ancillary to existing employment uses. Limited sales of retail goods up to 15% of the Total Ground Floor Area of any building may be permitted provided that the goods are manufactured, processed and/or assembled on the premises. Such retail should only be permitted if clearly subordinate and directly related to the functioning of the permitted use on the site.
- Likewise, institutional and personal service uses should be restricted to those uses that are intended to serve the needs of employees within the Employment Areas.
- Consistent with the *Growth Plan* and regional and Town planning policy directions, major institutional and retail uses should also be directed to the centres and corridors, particularly the major transit station areas or areas with planned transit infrastructure.

To this end, it is recommended that a clear policy position be taken on the vision for the centres and corridors as they relate to uses permitted in the Employment Areas. Accordingly, it is recommended that:

- Where Employment Areas intersect with Regional or local corridors, the Town should clearly indicate that an Employment Area designation applies and that the vision or intention is for these areas is to encourage employment intensification; and
- The Town should further indicate that any development proposal for non-employment uses in such locations are counter to objectives to protect and preserve Employment Areas and to direct non-employment uses to the centres and corridors.

The Town may wish to permit a broader range of economic uses within the centres and corridors that are within Employment Areas, including hotels, offices, and institutional uses, in particular at major intersections and in the Employment KDA identified in the Beaver Creek Business Park.

The Town should maintain high standards of urban design and architectural control, recognizing that it is increasingly the design and scale of buildings that determines the quality of development within Employment Areas. Consistent with Regional planning directions, the Town should also encourage the incorporation of “green building” or renewable energy system elements in the design of the buildings, parking areas or site design and landscaping.

### **C. DIRECTIONS FOR THE CENTRES AND CORRIDORS**

In addition to the Employment Areas, economic activity should be directed to support centres and corridors, which together represent significant components of the future urban structure. There are a number of reasons why this direction is appropriate:

- Land supply in the Town of Richmond Hill will become increasingly constrained during the next 20 years as the Town approaches full build-out requiring employment and commercial growth to locate within the built-up area rather than greenfield sites;
- To accommodate forecasted continued strong employment growth, higher density forms and intensification will be required. Planned investments in transit are anticipated by the Province, the Region and the Town to play a key role in supporting this type of economic activity;
- The Town, the Region and the Province have declared an interest in accommodating more growth through the intensification and infill of existing areas than has been the case in the recent past, a period characterized largely by greenfield development;
- A review of the supply and demand for new retail space in the Town of Richmond Hill has concluded that there will be demand for additional retail space, but that this should be accommodated through intensification of existing commercial areas and in mixed-used Regional Corridors;
- From an urban structure perspective, there is an advantage to accommodating new retail uses through intensification as part of an integrated approach to the design of mixed-use centres and corridors, including the Richmond Hill Regional Centre, Highway 7, Yonge Street and other key locations in the community; and
- The public has shown support for intensification through the redevelopment of underutilized retail sites with an integration of residential and additional retail uses. Such redevelopment may entail the provision of new retail forms, such as animating the space at the base of new apartment buildings. The development of large-format retail, or “big box” forms does not support this preference.

Within this context, it is expected that centres and corridors can be achieved and will provide locations for economic activity. The Town’s urban structure adopts the Richmond Hill Regional Centre, plus Regional Corridors and fills out the urban structure of centres and corridors with locally defined areas. Richmond Hill Regional Centre should be planned to emerge over the long term as the highest-order mixed-use centre within the Town, containing major office, commercial, retail and residential uses, in accordance with Provincial and Regional policy.

The general economic policy direction for the Town’s centres and corridors is as follows:

### **Richmond Hill Regional Centre**

The Richmond Hill Regional Centre is located at the intersection of the Yonge Street and Highway 7 Regional Corridors, just north of Highway 407. The Regional Centre is to be planned as an urban growth centre as defined by the *Growth Plan* and the Region of York official plan. It is a gateway to the Town from the south and is recognized in the existing official plan as “General Commercial”, “Industrial” and “Residential”. Currently, this area includes major government offices, retail development and higher density apartments. It is expected to develop over the long term as an intensive, urban central destination and inter-modal transit hub in Town.

The Richmond Hill Regional Centre is well-positioned for future intensification because of the regional nature of existing uses, and excellent transportation and existing and future transit access. Challenges include the existing stand-alone buildings and automobile-oriented character of the area, and placement of buildings within the area.

New official plan policies should guide development within the Regional Centre to maximize its potential as a central, urban destination that incorporates a number of uses, an inter-modal transit hub and high design quality standards. Specific land use policies for this area are being developed through the Richmond Hill Regional Centre Design and Land Use Study.

From an economic policy perspective, directions for the Regional Centre include:

- Planning for a diverse mix of economic uses, including major office, commercial and retail uses, and accompanying densities and built form, creating vibrant precincts with enhanced Live–Work opportunities tied to “transit first” priorities. Developments within this designation should contribute to a high quality pedestrian-oriented and transit supportive environment;
- Planning to achieve a minimum density of 3.5 floor space index per development block, at, and adjacent to the Richmond Hill Centre Station on the Yonge Subway Extension as required by the draft Region of York Official Plan;
- Planning for the Regional Centre to accommodate the most significant major office development in the community; and

- Planning for major office development or redevelopment within the Richmond Hill Regional Centre that does not undermine the long term vision for higher density development. Major offices should be required to use structured or underground parking.

With respect to encouraging a diverse mix of economic uses within the Regional Centre, the following directions may also be considered:

- Providing an overall resident-to-employee target ratio of 1:1 as identified by the draft Region of York Official Plan.
- Incorporating a mix of economic uses including major offices, commercial, institutional and retail uses. Commercial uses may include business and professional office (non-Major Office), hotels and related conference facilities, restaurants and entertainment facilities.
- Incorporating a mix of economic uses within buildings. In a mixed use structure, commercial and retail uses may be permitted at or below grade and office and residential uses should be permitted above. Stand alone major office buildings should be permitted and should include commercial and retail uses at grade. Live-Work forms of development should be encouraged.
- Requiring underground and/or structured parking for the Richmond Hill Regional Centre. Opportunities for parking reductions may be considered through the planning application process and be implemented through minimum and maximum standards in accordance with the Town's zoning by-law and any other applicable by-laws or requirements.

### **Regional Corridors : Yonge Street and Highway 7**

Yonge Street and Highway 7 are designated Regional Corridors by the York Region draft Official Plan. They are the main arteries linking and unifying the regional structure and providing higher-order transit connecting to the GTAH:

- The Highway 7 Regional Corridor borders the Richmond Hill Regional Centre and the Beaver Creek Employment Area. Nearing the interchange with Highway 404, a number of major office buildings have been developed housing real estate, rental and leasing, finance and insurance sectors;
- Yonge Street is an important corridor for economic activity itself, and it runs through the Richmond Hill Regional Centre, the Downtown Local Centre and the Oak Ridges Local Centre. It is a major transit spine and currently supports economic activity with concentrations of retail at key nodes.

These Regional Corridors are planned to be developed intensively and to support transit but in different concentrations and activity levels along their length. Consistent with Regional planning objectives, the Regional Corridors are identified as locations for employment intensification. Under the draft Region of York Official Plan, the following directions must be considered:

- Encourage higher density and higher intensity economic activities, including office, commercial and retail uses, within the Regional Corridors; and

- That new development and intensification along Regional Corridors support an overall, long-term density target of 2.5 FSI for developable lands.

### **Key Development Areas**

Key Development Areas (KDA) are envisioned as strategic places or sub-centres for intensification along Regional Corridors. Intended to support higher densities and a mix of uses, they are located around existing and planned transit investment. As part of the urban structure, three Key Development Areas (KDA's) have been identified:

- an Employment KDA within the Beaver Creek Employment Area on Highway 7 at Leslie Street;
- a mixed use KDA at the intersection of Yonge Street and 16th Avenue; and
- a mixed use KDA at intersection of Yonge Street and Bernard Avenue.

#### **a) Employment KDA**

The Employment KDA has many advantages including a highly visible and accessible location along the Highway 7 transit corridor and, as part of the Beaver Creek Employment Area, proximity to a large base of prestige industrial and office uses.

To take advantage of the KDA's proximity to transit, including the future Leslie Street Light Rapid Transit Line, intensification of employment uses should be encouraged. Supporting a high quality public realm including landscaping and services for workers should be major policy considerations, while allowing a range of employment uses.

As part of a designated Employment Area, the types of employment uses permitted should be consistent with Town and Provincial policies regarding employment land conversion and residential uses should not be permitted. Further, residential uses should not be permitted on the Regional Corridor throughout the Employment Area. Similarly, any retail uses should be ancillary to the Employment Area.

The detailed plan for the Employment KDA should encourage the intensification of existing employment uses, including major offices. It should also permit some ancillary retail development to animate the areas, but be consistent with Town and Provincial policies regarding employment land conversion.

From an economic policy perspective, directions for the Employment KDA may include:

- Encouraging intensification of existing employment uses and mixed use employment development consistent with policies outlined in OPA 246, particularly major office and other uses permitted by OPA 246;
- Locating ancillary retail within the base of mixed-use office and commercial development; and

- Ensuring that new development and redevelopment is consistent with the Region and Town’s policies for transit-oriented development, in order to enhance the public realm and support proposed transit improvements.

**b) 16th Avenue KDA**

The KDA at Yonge Street and 16th Avenue/Carville Road includes Hillcrest Mall and South Hill Shopping Centre, both one storey retail developments with extensive surface parking on large parcels of land. This KDA is envisioned to evolve as a hub for office, commercial, retail and residential uses at high densities, building on the existing opportunity of Yonge Street as the Town’s commercial spine.

Consistent with recommendations from the Commercial Needs Study and complementary to other recommended policies along Yonge Street (including land use and design studies for the Downtown and Regional Centre), directions for the 16th Avenue KDA may include:

- Encouraging mixed use development that requires commercial and/or retail at grade with office and/or residential above; and
- Ensuring that new development and redevelopment is consistent with the Region and Town’s policies for transit-oriented development, in order to enhance the public realm and support proposed transit improvements.

**c) Bernard Avenue KDA**

The KDA at Yonge Street and Bernard Avenue is located north of Yonge and Elgin Mills and is focused around the Yonge-Bernard Transit Terminal. This terminal functions as a public transit node for VIVA Bus Rapid Transit, GO Transit, and York Region Transit routes.

The KDA acts as a sub-centre between the Downtown and Oak Ridges Local Centres and contains a number of single-storey commercial developments with extensive surface parking and auto-related uses. This KDA is envisioned to re-urbanize in the long term as a mixed-use service hub with commercial and retail amenities serving the surrounding neighbourhoods and future redevelopment along Yonge Street.

Consistent with recommendations from the Commercial Needs Study and complementary to other recommended policies along Yonge Street (including land use and design studies for the Downtown and Regional Centre), directions for the Bernard Avenue KDA may include:

- Encouraging mixed use development that requires commercial and/or retail at grade with office and/or residential above; and
- Ensuring that new development and redevelopment is consistent with the Region and Town’s policies for transit-oriented development, in order to enhance the public realm and support proposed transit improvements.

Consistent with direction from the draft Regional official plan, Secondary Plans for all of the KDAs will determine the specific mix of uses, design and other policies required to complete the Town’s vision for the Yonge Street corridor.

### **Local Centres**

Local Centres are intended to function as a focal point of activity and culture that serve the surrounding community and play a supporting role to the Regional Centres and Corridors. Within the Town’s urban structure, two Local Centres have been identified: the Downtown Local Centre and Oak Ridges Local Centre.

Specific policies for the Downtown Local Centre will be developed based on recommendations from the Downtown Design and Land Use Study and more detailed study will be needed for the Oak Ridges Local Centre.

The Local Centres are anticipated to accommodate smaller-scale intensification, provide Live–Work opportunities and promote transit. From an economic perspective, policies will need to be as flexible as possible in terms of land use to take advantage of market trends. Consideration should be given to built form and urban design to maintain the historic character of the Downtown and to promote a “destination” in the Oak Ridges Local Centre.

Local Centres should be planned to retain or develop their local character, but should still be targeted for program and policy support to encourage infill and employment intensification. Policies should recognize differences between local character areas.

From an economic policy perspective, general directions for Local Centres may include:

- Identification that outside of the Richmond Hill Regional Centre — the Town’s primary intensification area — the two local centres will be a focus for economic activity;
- Planning to ensure that the local centres develop as mixed use areas, accommodating transit-supportive commercial, retail and office development; and
- Adopting secondary plans for both the Downtown and the Oak Ridges Local Centres which will, among other matters, describe a set of economic land use planning objectives and policies to encourage a greater amount and wider range of economic activity.

#### **a) Downtown Local Centre**

Richmond Hill’s Downtown is focused around Yonge Street, north and south of Major Mackenzie Drive, and is the historic, symbolic, cultural and civic heart of the municipality. This area is envisioned to be a pedestrian-oriented, compact and mixed use centre, enhanced by a high quality public realm and building design, including the integration of heritage structures within new development.

Existing economic activity in the downtown includes retail, health care and social assistance, as well as emerging commercial and cultural activities as a result of the Town’s new Performing Arts Centre. Feedback from the public has also shown considerable support for relocating the Town’s municipal offices back to the Downtown Local Centre.

Policy directions for this area should allow the flexibility to accommodate a range of employment uses, including existing economic sectors, institutional uses, as well those in new knowledge economy and niche businesses (such as high-technology computer businesses and new media industries involved in the production and distribution of knowledge) who cannot afford newly constructed space, yet are looking for central locations.

From an economic policy perspective, directions for the Downtown Local Centre may include:

- Encouraging the adaptive reuse of older buildings and consideration to built heritage and landscape character;
- Encouraging redevelopment and new development that fits into the existing built form and settlement patterns and supports the built character of the area; and
- Encouraging higher concentrations of employment to support the existing concentrations of employment in administrative, information and cultural industries, and health care and social assistance located within and in proximity to the area.

#### **b) Oak Ridges Local Centre**

The Oak Ridges Local Centre is focused around the historic core area of Yonge Street and King Road and is intended to provide a focal point for residents in the Oak Ridges community. Feedback from the public consultation has indicated a desire for more commercial and retail uses to serve local needs as well as to capitalize on potential economic opportunities associated with proximity to the Oak Ridges Moraine.

The attractions of the Oak Ridges Moraine for visitors to the Greenbelt include recreation, trails, and shopping, perhaps with a focus on “eco-tourism” activities. In making specific plans for the Oak Ridges Local Centre, urban design and streetscape considerations should be major policy considerations, with flexibility given to specific land use permissions.

From an economic policy perspective, directions for the Oak Ridges Local Centre may include:

- Development of more detailed policies for the Oak Ridges Local Centre subject to further study.
- Creation of a destination-style centre with jobs in tourism and recreation to maximize the competitive advantage of the scenic small-town landscape character of the Oak Ridges community; and
- Creation of a “main street” mixed-use area concentrated on Yonge Street and King Road. Built form and design should be emphasized and any new residential development should incorporate commercial and/or retail uses at grade.

### **Local Corridor - Major Mackenzie**

Major Mackenzie Drive is identified as a Local Corridor within the Town's overall urban structure as a location for mixed use intensification (except where it crosses Employment Areas, where only employment uses shall be permitted). Consistent with Regional policy direction, intensification along the Local Corridor is anticipated to be at a lesser scale than the Regional Corridors.

Major Mackenzie Drive is also viewed as a corridor in transition and one that can play an elevated economic role over the life of the plan because of key employment development opportunities such as the York-Central Hospital and the Newkirk GO Station. Over the long term, the Town recognizes the potential for Major Mackenzie Drive to evolve into a Regional Corridor based on potential expansions to the Regional rapid transit network.

From an economic policy perspective, direction for the Major Mackenzie Local Corridor may include:

- Consistent with policies outlined in OPA 246, where sections of the Local Corridor cross an Employment Area, only employment uses shall be permitted.
- Within Local Development Areas along the Local Corridor, intensification and infilling of employment and commercial uses should be permitted, including retail and office uses in stand-alone and mixed use residential buildings.

- For remaining sections of the Local Corridor outside of the Employment and Local Development Areas, new residential development should include commercial and retail uses at grade. Where commercial and retail uses exist, these uses should be permitted to remain.

### **Local Development Areas**

The Town's urban structure includes three Local Development Areas (LDA's) along the Major Mackenzie Drive Local Corridor: York-Central Hospital; Newkirk GO Station, and Bayview Avenue/Major Mackenzie Drive. Local Development Areas (LDAs) are intended to function in a similar way as KDA's along the Regional Corridors, but at lower intensities.

#### **York-Central Hospital Local Development Area**

Located on lands around the York-Central Hospital, this LDA is envisioned to serve as a sub-centre along the Local Corridor with an institutional/employment focus related to health industries. The York-Central Hospital is the Town's largest single employer and provides the opportunity to attract other health-related industries. From an economic policy perspective, directions for York-Central Hospital LDA may include:

- Increased permissions for office and medical office uses, as well as complementary commercial, retail, institutional and residential uses to complement the employment in the area; the mix of functions and uses will serve to improve and animate the streetscape within the LDA;

- Provision of opportunities for home occupations, particularly those supporting the health-related industries; and
- Support for the intensification of existing institutional and employment uses through the provision of structured parking on the hospital lands.

#### **The GO Station LDA**

The GO Station LDA on Major Mackenzie Drive contains the Newkirk GO Station and its commuter parking lot which is located within the Newkirk Employment Area. This LDA can be encouraged to redevelop as a pedestrian-oriented environment focused on access to transit, in a compact urban form, with higher density and higher intensity land uses. This LDA builds on the existing mid-rise residential and Employment Area surrounding the station.

From an economic perspective, directions for this LDA may include:

- Maintaining the lands within the Newkirk Employment Area for employment uses, consistent with OPA 246; and
- Encouraging the intensification of employment uses, including office uses, within proximity to the GO station. Residential intensification in this LDA will be encouraged outside of the Employment Area.

#### **Bayview & Major Mackenzie LDA**

The intersection of Major Mackenzie Drive and Bayview Avenue is defined by a variety of commercial and retail uses which serve the regional and local population. To build on the current commercial focus of the area, this LDA is intended to serve as a mixed-use sub-centre.

Feedback from the public recognized the desire to maintain commercial and retail uses, with the possible integration of these uses in a mixed-use format over time. From an economic perspective, directions for the Bayview/Major Mackenzie LDA may include:

- Allowing existing commercial and retail uses to remain with flexibility to intensify over time; and
- Encouraging new development and redevelopment to incorporate a mix of uses including residential and/or office with commercial and retail uses at grade.

#### **D. ADDITIONAL DIRECTION TO PROMOTE ECONOMIC ACTIVITY IN THE CENTRES AND CORRIDORS**

In addition to the policy directions set out for each element of the urban structure above, the Town may also wish to consider other complementary policies to encourage economic activity in the centres and corridors, including policies to encourage structured parking, the development of new office and retail facilities home occupations and Live-Work forms of development. These policy directions are described in more detail in the following sections.

### **1. Encouraging Structured Parking to Promote More Intense Urban Forms**

Specific policies to encourage structured or underground parking may also be considered to promote an intensification of retail and office uses in these locations. The following directions may be considered:

- providing exemptions, where appropriate, from parking requirements for commercial and office uses;
- encouraging the provision of centralized or shared parking lots;
- limiting the portion of any lot that may be used for surface parking; and
- the establishment of parking restriction zones or reduced off street parking requirements;
- the establishment of municipal parking facilities in the Centres and Corridors; and
- permitting on-street parking, where appropriate.

Also, parking standards should be updated in the Town's zoning by-laws. A parking study is currently underway as part of the Town's Transportation Master Plan update.

### **2. Encouraging Economic Activity in the Centres and Corridors**

In order to further support a concentration of new economic activity within the centres and corridors, additional policies may be considered which make clear the Town's intention to accommodate new retail and office uses in the centres and corridors. The following directions are recommended for consideration:

- Applications for major retail and-or service commercial development or redevelopment outside of the centres and corridors that require an amendment to the OP are counter to the Town's planning objectives;
- The planning objectives and policies established through the official plan which are in conformity with the *Growth Plan* should not be undermined by site specific applications which seek to solely maximize the development potential and intensity of use on a site in a location not supported by the principles or foundations of this plan; and
- The official plan recognizes that some economic growth may occur outside of the Town's identified growth areas, but the intent is to clearly define the limits to such activity to ensure that the urban structure of the Town is upheld. Economic activity outside of the centres and corridors, the Employment Areas and home occupations may be considered where it conforms with the policies of the official plan, the Regional official plan and applicable Provincial policies and legislation.

The Town may also wish to take a more aggressive approach, that would require that a minimum amount of office space be provided as part of all new developments and that certain uses that are not consistent with the Town's vision be restricted. Some municipalities are taking this approach in some identified intensification areas.

### **3. Encouraging Home Occupations.**

The Town currently does not have a Town-wide policy regarding home occupations. However, secondary uses are permitted in residential areas subject to criteria.

As identified in our March 2009 Background report, the profile of home occupations and related employment suggests that there may be opportunities to attract more employment in business and related service and contribute to the local economy.

Feedback from the public supported opportunities for Live-Work within the Town, including policies to allow home occupations and Live-Work forms of development that are unobtrusive to the surrounding neighbourhood.

For home occupations, the following directions may include:

- Providing for expanded and appropriate home occupations subject to a number of compatibility criteria:
  - Locational and functional criteria (among others consideration should be given to the primary and secondary functions of the residential dwelling);
  - Occupation-based criteria;
  - Form-based criteria; and
  - Impact-based criteria, including parking, traffic, signage and noise.

Once these economic land use policies are in place, the Town will need to provide additional economic development and municipal support to attract and retain the type of business and development envisioned. The next chapter turns to a discussion of some of the key initiatives that could be considered.

### **III ECONOMIC DEVELOPMENT INITIATIVES TO IMPLEMENT THE TOWN'S VISION**

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Economic development initiatives will be required to support the Town's vision, in particular higher-density employment uses and a wider range of economic activity in the centres and corridors. The initiatives involve the targeting of specific economic sectors that will make the most efficient use of the limited land supply, and encouraging economic activity to locate in the centres and corridors.

Given the importance of transit in achieving the vision for the centres and corridors, the Town must continue to advocate for investment in transit and provide and expand existing community development tools and programs to maintain the attractiveness of the local business environment for new investment.

#### **A. SPECIFIC ECONOMIC SECTORS SHOULD BE TARGETED**

In order to fully capitalize on its existing strengths, the first group of sectors that the Town should be targeting are those in which the Town already shows an advantage reflected in particularly high "location quotients" relative to other communities, and those with growth in employment in recent periods. As discussed in our March 2009 report, these sectors include:

- Wholesale Trade;
- Retail Trade;
- Business and Related Services;
- Culture, Recreation, Accommodation and Food; and
- Education, Health Care and Social Assistance.

Within these sectors, particularly high concentrations of economic activity are shown for activities such as Machinery, Equipment and Supplies wholesalers, Internet Publishing and Broadcasting, Internet service providers and publishing industries. The Town also has a concentration of employment in the manufacture of medical equipment and supplies, and should continue to encourage links between this sector and the existing life-science cluster.

The Town should continue targeting the economic sectors in which it already demonstrates a strong competitive position, in addition to other sectors that are considered to have good growth potential, such as:

**Advanced Manufacturing** including: research and development; new or advanced materials and products or processes; robotics and information technology; and waste reduction and energy conservation. The Town's manufacturing sector may not necessarily be all that large, but it is one already focussed on specialized activities;

**Environmental and Green Industries** including businesses producing goods and services related to the protection and wise use of natural resources. Environmental industries have been identified as an emerging growth sector by various levels of government including the Province of Ontario.

There are over 230 "green" firms currently located within the Region of York and recent work by the Greater Toronto Area and Marketing Alliance (GTMA) concluded that the GTA is well-positioned to attract new investment in activities such as research, development and production of fuel cells and renewable energy technology;

**Corporate Headquarters** The Town of Richmond Hill currently accommodates the corporate headquarters of nearly 40 businesses engaged in a wide range of economic activities, including health care, public administration and manufacturing. Given the Town's demonstrated attractiveness for major office uses, corporate headquarters should continue to be prime targets of economic development efforts; and

**Tourism.** The Town of Richmond Hill has the opportunity to promote unique destinations on the Oak Ridges Moraine where near-urban agriculture, eco-tourism (recreational and educational opportunities) and other services can be developed. The Town may wish to actively promote these types of activities through new economic development initiatives.

In its efforts to capitalize on up-and-coming economic activities, the emphasis should be on uses that may produce more job-intensive facilities in order to achieve the most efficient use of the Town's remaining land supply. The Town should continue to build upon existing high-technology and life science clusters by attracting new businesses to the community.

## **B. INCENTIVES WILL NEED TO BE PROVIDED**

In addition to the targeting of specific economic sectors through policy and practice, the Town will need to provide incentives to design and build higher density forms. As described in the March 2009 Background Report, three groups of incentives are likely required:

- Investment in infrastructure to maintain the attractiveness of the Town of Richmond Hill as a location for business investment, particularly continued investment in transportation infrastructure;

- The provision of development incentives to encourage higher densities through employment intensification. Development incentives may be required to promote redevelopment or intensification of uses within the existing Employment Areas, especially older sites as they come up for redevelopment within the Newkirk Employment Area; and
- The provision of development incentives may be required to encourage major offices to locate in the areas within centres and corridors which will best meet the Town's urban structure vision. In particular, the Town may need to consider methods to facilitate the provision of structured or underground parking, and pedestrian amenities along with the provision of great urban design, to support intensified urban forms.
- The use of Community Improvement Plans, Brownfield Redevelopment and Tax Increment Financing, among other developments tools;
- The provision of incentives for building retrofitting or land could be offered for sale with conditions related to the achievement of specific policy objectives, such as higher density building forms or, should the Town choose, specific economic sectors;
- The provision of infrastructure, such as wireless telecommunications or district heating or power; and
- Revitalization of local roads and the public realm, especially, but not limited to enhancing the historic landscape of the Downtown Local Area and the local character and sense of place in KDAs and LDAs.

A range of incentives could potentially be provided to advance these objectives, including:

- The establishment of a parking authority and/or parking lot surcharges to reduce the need for parking and to promote transit use;
- The implementation of programs or incentives designed to reduce the cost of doing business;

The Town, through its forthcoming Economic Development Strategy, will have the opportunity to further explore specific actions to identify those likely to be the most practical and effective in providing the types of development incentives required to deliver the vision.

### **C. TOWN SHOULD CONTINUE TO ADVOCATE FOR INVESTMENT IN TRANSIT**

From a land use planning perspective, it is clear that the Town's vision for the future is broadly supported by Regional and Provincial policies, the public and other stakeholders. It is also clear that the Town, through its new Economic Development Strategy, will have the opportunity to take innovative actions to encourage the attraction of higher-density employment and direct economic activity to the centres and corridors.

However, the provision of transit infrastructure remains the central determining factor in whether the Town can fully achieve its vision. The Town's vision for the Centres, the Corridors, and Key and Local Development Areas in the community all depend on the success of transit, in particular:

- The extension of the Yonge subway to the Richmond Hill Regional Centre, projected to be completed in 2017 though funding has yet to be committed; and
- Planned improvements to transit along the Highway 7 and Yonge Street Regional Corridors with a view to providing connections to other transit services including conventional bus services, in GO Transit, and the TTC network. It is expected that these improvements will be completed within the 2015 to 2020 period. Other initiatives are also planned including Light Rail and Bus Rapid Transit systems, including Major Mackenzie, and expansion to GO services.

In order to strengthen its position, the Town should continue to strongly advocate for transit investment, as currently identified as a goal in the Strategic Plan. The Town's forthcoming Economic Development Strategy may wish to address the issue of transit investment more directly, along with a number of other key issues likely to have an effect on the Town's future economic growth, including:

- The continuation of support for programs to existing businesses, including programs to assist business to navigate the development approvals process, informing companies of funding and training programs, and identifying strategic linkages between companies and research institutions;
- The potential to encourage at home, or Live-Work opportunities to provide a better match between population and employment;
- The potential to reduce out-commuting through the provision of employment opportunities throughout the urban structure, including the Employment Areas and Centres and Corridors. As described in our March 2009 report, the Town exports labour across all economic sectors, particularly business and related services and other office-type activities, which can be accommodated in a variety of locations;
- The potential to attract a major educational facility, such as a post-secondary institution; and

- Related to the potential for new educational facilities, the potential to create a cluster of life-sciences and technology uses adjacent to the York-Central Hospital, building upon the Town's existing clusters of life science and high technology uses.

The Town may also wish to consider the establishment of performance measures to monitor the Town's competitive position and success in achieving the vision:

- Based on the success of the community consultation undertaken as part of the Strategic Plan and official plan review, the Town may wish to consider implementing an annual business survey to gauge the perceptions of the Town's business community; and
- The Town may wish to consider the establishment of specific targets for business indicators such as non-residential construction, employment and assessment growth, attraction of knowledge-based jobs or industrial and office lease rates.

In order for the Town of Richmond Hill to achieve its vision for the future, new directions will need to be taken in both land use planning and economic development. The Town has a unique opportunity to use its new economic policies to implement its vision and concentrate economic growth in the Employment Areas and centres and corridors. This report has recommended the employment land use planning policy directions as well as identified the main economic development initiatives that the Town may wish to consider.

**APPENDIX**  
**Commercial Needs Study**

# **COMMERCIAL NEEDS STUDY**

**TOWN OF RICHMOND HILL**

**SEPTEMBER 2009**

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**COMMERCIAL NEEDS STUDY**  
**TOWN OF RICHMOND HILL**  
**PROJECTIONS OF RESIDUAL MARKET DEMANDS &**  
**RECOMMENDED POLICY DIRECTIONS**  
**SEPTEMBER 2009**

**Acronyms:**

FSR:	Food Store Retail (formerly FCTM or Food & Convenience Type Merchandise)
NFSR:	Non-Food Store Retail (formerly DSTM or Department Store Type Merchandise)
GAFO:	General Merchandise / Apparel / Furnishings / Other Retail
HAAS:	Home and Auto Supply
TBA:	Tires, Batteries & Accessories
HI:	Home Improvement (formerly HIRM or Home Improvement Related Merchandise)
GLA:	Gross Leasable Area
CBD:	Central Business District
CPR:	Commercial Policy Review
WMC:	Warehouse Membership Club

**Summary Findings and Recommended Policy Directions:**

The residual space estimates featured in this study confirm the need for the hierarchy to expand to accommodate growing residual demands.

After reaching an approximate equilibrium position in **2013** (where the market is neither over-stored nor under-stored), the additional land requirements approximate:

- **30** acres by 2016,
- **55** acres by 2021, and
- **75** acres by 2031.

These land requirements are **over and above** the land requirements for the proposed supply (**266,000** square feet per listing in Table 18) **plus** an unassigned notional test allocation of **304,000** square feet. Of the latter, about one-third represents vacancy uptake, and about two-thirds, an allowance for the potential expansion / intensification of existing designations. Together, these total **570,000** square feet of potential supply that could enter the market by **2013** before the additional acreages are required.

Richmond Hill's retail commercial hierarchy is relatively mature and contains all the necessary structural elements to have successfully attracted a wide array of conventional and new format tenancies.

However, it should be emphasized that with limited additional anchor store prospects in the short to medium term, there will be a questionable need for additional power centre and conventional shopping centre uses for some time.

Richmond Hill's hierarchy benefits from a healthy array of retail commercial offerings ranging from higher order enclosed regional shopping facilities and power centre uses to lower order community and neighbourhood shopping centres. Accordingly, one guiding principle should be to maintain and strengthen the retail commercial offerings that the Town already possesses.

The Yonge Street spine (or Main Street) strongly defines the retail commercial structure on a north-south axis, with concentrated nodes at major intersections, including:

- the node around Hillcrest Mall at Carreville Road / 16<sup>th</sup> Avenue,
- the downtown node north of Major Mackenzie Drive, and
- power centre uses at Elgin Mills Road.

These nodes are linearly connected by intervening general commercial uses and community shopping centres.

The typical separation of land uses adopted in most municipalities has led to a pattern of retail commercial uses being differentiated by function, separated by distance, yet linked by road or transit. The built form is typically stand-alone one-storey buildings or a cohesive grouping of one-storey structures catering to the car culture. This retail commercial development model is wasteful of the land on which the buildings sit and requires large parking areas that sterilize even larger amounts of land.

As a separated land use, retail commercial is a propulsive land use that structures and changes adjoining land uses to overcome land use incompatibilities. This has been the predominant model in retail commercial planning.

This model has been variously applied to conventional enclosed and unenclosed shopping centres, and more recently to WMC's (Warehouse Membership Clubs), retail warehouse complexes, manufacturers' outlet malls, and power centres with new format tenancies. The changes in retail formats have come in waves as new forms of commercial development are favoured over their predecessors.

Power centres in various forms have been around since 1991. Planning safeguards for existing competitive infrastructure have variously included power centre regulations specifying minimum store sizes, maximum scale and phasing, and certain use restrictions (e.g. typically banks, movie theatres, and liquor and beer outlets).

With ever increasing cannibalization of sales and markets as more power centres are developed, the power centre developmental wave has now crested. Essentially, the concept has begun the slide towards the end of its developmental life cycle.

Neo-traditional developments and manufacturers' outlet malls have had some success, but are not widespread. Lifestyle centres have not yet come to Ontario, but the GTA would probably not support more than two such centres at GTA-west and GTA-east locations.

Investment in mixed-use intensification areas, commercial corridors, main streets, and downtowns is currently gaining momentum as investment in infrastructure and transit intensifies.

As an integrated land use (i.e. integrated by combining a mix of uses such as upper-storey office, educational, institutional, employment (e.g. "live-work"), recreational, and residential uses in the same building or node with ground floor retail), retail commercial adds an essential at-grade element that makes for a cohesive vibrant whole, increases the street activity around such diversified mixed-use intensification areas day and night, and helps create demand for the ground floor retail.

This is an emerging model in retail commercial planning. Beyond the big box phenomenon, the new frontier (or planning framework) lies in downtown renewal and the development of mixed-use intensification areas.

Rapid transit initiatives along the Yonge Street corridor will contribute greatly to the attractiveness of this corridor for redevelopment, infilling, and intensification of uses, and can be expected to speed up the introduction of retail commercial uses into mixed-use intensification areas.

To help protect the opportunities for diversified mixed-use intensification areas, retail commercial development in industrial designations should generally be limited to industrially serving business services and restaurants.

In my professional opinion, the Town should resist dilution of the emerging retail commercial development opportunities through additional power centre and shopping centre approvals, and instead, adopt strategic incentives to encourage intensification on the Yonge Street (i.e. Main Street) corridor, and allow the marketplace to expand incrementally over time in line with emerging market demands. This recommendation extends to Oak Ridges where smaller scale uses should be encouraged to intensify on Main Street.

The prescription is to hold the line on new designations and divert or redirect retail commercial development to mixed-use intensification areas in the Yonge Street corridor.

## **Introduction:**

I was retained on March 31, 2009 by the Town of Richmond Hill to prepare the following Commercial Needs Study.

The Town is proceeding with an update of its Strategic Plan and Official Plan. The Commercial Needs Study forms part of this process.

The Commercial Needs Study has two main objectives.

The first objective is to carry out a residual demand analysis for the Town of Richmond Hill.

The second objective is to provide a solid quantified basis for reviewing Richmond Hill's commercial land use policies for the New Official Plan, which comply with provincial legislation (*PPS* and *Growth Plan for the Greater Golden Horseshoe*) and the Region's Growth Strategy.

Specifically, the following matters will need to be considered during the commercial policy review:

- Current and potential future trends, patterns, needs and the locational criteria of the retail industry in the Town of Richmond Hill;
- The effect of socio-demographic characteristics on retail trends;
- The role of commercial in mixed use intensification areas and the opportunities for such development in Richmond Hill;
- Role of commercial in certain industrially designated locations;
- Inventory of vacant and occupied retail/service space;
- Inventory of designated commercial land;
- Evaluation of the supply and demand of retail/service commercial space across the Town, including existing inventories of retail/service space; and,
- Identification of issues and opportunities regarding the location, scale, and amount of retail and service commercial space in the Town of Richmond Hill.

This study is reliant on comprehensive empirical research (including licence plate surveys, a consumer telephone survey, and a floor space inventory) undertaken by the firm of "urbanMetrics inc." in a public and recent study entitled "Mackenzie Commons, A Mixed-Use Employment Centre, Retail Market Demand and Impact Analysis, Major Mackenzie Drive and Highway 404, Richmond Hill, Ontario, December 8, 2008", prepared for Major Mac Realty Inc..

For purposes of this Commercial Needs Study, I found no need to repeat urbanMetrics' consumer survey research since the data are still current and usable.

However, because urbanMetrics conducted only a partial inventory of existing retail commercial space (in September 2008 for FSR, NFSR, HAAS/TBA, HI, WMC, restaurant, and vacant space), an expanded and updated inventory has been prepared as part of this study (see **Appendix B**).

The purpose of urbanMetrics' licence plate data is to confirm the geographical extent of the current draws of Richmond Hill's retail commercial facilities (current trading geography) and inflow levels. Licence plate surveys were conducted from September 25-27, 2008 by urbanMetrics at four locations:

- Baymac Shopping Centre at Bayview Ave. /Major Mackenzie Blvd.
- Bayview Glen Power Centre north of Highway 7 between Yonge St. and Bayview Ave.
- Elgin Mills Crossing at NE Leslie St./Elgin Mills Rd.
- Hillcrest Mall at NW Yonge St./16<sup>th</sup> Ave.)

A consumer telephone survey was conducted by urbanMetrics in September to October 2008 within the trade area of existing facilities as indicated by the license plate surveys. Out of a total sample size of 800 surveys, 50% of the surveys were drawn from the defined "Primary Zone", 25% from the Richmond Hill Secondary Zone and 25% from the Markham Secondary Zone.

The important matter is that local capture rates by Richmond Hill retailers can be derived from urbanMetrics inc.'s consumer telephone survey data.

In my opinion, this empirical research provides an entirely suitable empirical foundation upon which to base the market projections in this Commercial Needs Study. Hence, for current study purposes, I have adopted urbanMetrics' trade area definition and survey-based base year market shares.

### **Methodology:**

The scope of this Commercial Needs Study is fairly broad. It tests a wide array of retail and commercial space categories, and factors in test allocations for all known proposals within a forecast period extending to 2031. The study takes into account the following:

- Population growth forecasts within the defined Study Area boundaries;
- Income characteristics;
- Sales distribution estimates;
- Supermarket, specialty food, Department Store NFSR, Non-Department store NFSR, HI, personal service, restaurant, and liquor/beer/wine residual potentials and warranted space calculations;
- Warranted space (planning ratio) estimates for other retail commercial uses;
- Potential supply; and,
- Policy and development recommendations.

The Commercial Needs Study concludes with calculations of residual (warranted) space and associated commercial land requirements over the forecast period.

The residuals represent "ease of entry" estimates for new space without causing sales transfers away from existing retailers, and hence are a conservative measure of the amount of space the market can absorb.

**Defined Study Area:**

The study area defined by urbanMetrics (see Study Area Map) has a Primary Zone consisting of Richmond Hill and Markham portions, and two Secondary Zones.

The Primary Zone extends from 16<sup>th</sup> Avenue to the south to Elgin Mills Road to the north, and from Yonge Street to the west to Warden Avenue (approximately) to the east.

The Secondary Zone West includes the balance of Richmond Hill, although there is also a small Markham component west of Highway 404 and north of Highway 407.

The Secondary Zone East takes in part of Markham west of Kennedy Road.

The study area defined by urbanMetrics is centered on the Highway 404 / Major Mackenzie interchange, and includes populations within 5 minutes and 10 minutes travel time to that location, thereby defining the respective limits of the Primary Zone and Secondary Zones.

Precisely how urbanMetrics divided the Study Area into primary and secondary zones matters little to the purposes of this Commercial Needs Study. This is because urbanMetrics' consumer telephone survey, which sampled 12 areas within those zones, yields market shares accruing to Richmond Hill retailers from each zone. This is good practice and the data is in usable form.

The overall Study Area boundary is a good representation of the trade area of Richmond Hill due to the strong back and forth shopping and other interactions between Richmond Hill and Markham. Sampling within Markham (which was indicated by urbanMetrics' licence plate surveys) allowed urbanMetrics to obtain detailed expenditure flow data on the market support coming from Markham. Otherwise, the market support coming from Markham would need to be estimated as a factor of inflow.

**Potential Supply:**

The following sites could contribute up to **266,000** square feet of potential supply across all retail commercial categories:

<u>Potential Supply</u>	<u>Sq. Ft.</u>
NW Vogell / 16th	45,300
SW Leslie / Elgin Mills	9,000
9821 Leslie / North of Staples	15,500
NW Yonge / Elgin Mills	16,600
SE 16th / Yonge	14,500
SE Church / Major MacKenzie proposed 5 storey mixed use with retail	31,000
NW Bayview / Major MacKenzie proposed Baythorn Plaza	12,000
NW Yonge / May proposed plaza	21,500
NW Bayview / 16th proposed plaza	20,500
Yonge / Lorne Downtown Tridel Renaissance Condo with gr. floor retail	7,100
NW Yonge / Elgin Mills proposed plaza with Loblaws supermarket	<u>73,000</u>
Subtotal	266,000

This amount of space, along with an unassigned notional test allocation of **304,000** square feet for the intensification or expansion of existing space, including vacancy uptake of about 90,000 square feet, totals **570,000** square feet of potential supply.

**Market Projections:**

The attached tables (**Tables 1-18**) project the market demands for retail commercial space in Richmond Hill.

Residual market demands across certain retail commercial space categories and per capita space ratio projections for other commercial categories are combined to test how much additional land would be needed to meet short to longer-term demands in Richmond Hill.

**Table 1:**

The population projections featured in Table 1 are estimates by traffic zone (York Region – September 2008) adjusted for the 2006 Census undercount for York Region for the primary and secondary zones. The undercount in 2006 (6.2%) is higher than the 2001 undercount (4.1%) used in the Region’s projections, with the result that the figures in Table 1 are somewhat higher than the Region’s.

**Tables 2-7:**

**Tables 2 to 7** multiply the population projections in Table 1 by appropriate per capita expenditures to yield expenditure potentials for seven spending categories:

- Table 2: “NFSR” (GAFO + Drug) + “HI” Expenditure Potential
- Table 3: “HI” Expenditure Potential
- Table 4: “FSR” Expenditure Potential
- Table 5: Personal Service Expenditure Potential
- Table 6: Restaurant Expenditure Potential
- Table 7: Liquor/Beer/Wine Expenditure Potential

The Ontario per capita expenditure and the real growth assumptions are footnoted for each of these seven expenditure categories.

The per capita expenditures are developed in the following appendices:

- Appendix A-1           Income / Expenditure Indexing Methodology (Regression Equations linking per capita household income to expenditures)
- Appendix A-2           2007 Estimates of Ontario Retail Sales by Trade Group
- Appendix A-3           Trade Area Income and Expenditure Indexes
- Appendix A-4           Trade Area FSR, NFSR (GAFO + DRUG) + HI, HAAS/TBA, Personal Service, Restaurant, and Liquor/Beer/Wine Expenditure Levels

The updated floor space inventory is presented in Appendix B-1.

**Tables 8-18:**

**Tables 8 to 18** differ from **Tables 2 to 7** by combining the “Primary Zone – Richmond Hill” and the “Primary Zone – Markham” portions into one combined Primary Zone. The same applies to the Secondary Zone West.

These tables calculate residual space demands based on base year local capture rates(%) and future increments or “bump-ups” in the local capture rates.

As previously stated, the residuals represent the ease of entry of such space into the market without sales transfers, and hence are conservative measures of market opportunity.

**Table 8:**

**Table 8** calculates the residual demands for department store space assuming future local capture rates (market shares) in the Primary Zone, Secondary Zone West, and Secondary Zone East of 47.5%, 67.5%, and 3.5% respectively, together with 25% inflow.

The residual space estimates (rounded) range from:

- 35,000 square feet by 2011,
- 55,000 square feet by 2013,
- 80,000 square feet by 2016,
- 100,000 square feet by 2021, and
- 115,000 square feet by 2031.

The dollars behind the department store residuals are available for the expansion of the existing department store space, or for the increased sales productivity of the existing space.

Given the current representation of department stores and the significant population growth forecast for Richmond Hill, a second full line department store cannot be ruled out, although specialized big box affiliate stores are a more probable outcome.

**Table 9:**

**Table 9** calculates the residual demands for non-department store “NFSR” (GAFO + Drug) + “HI” space assuming maximum future local capture rates in the Primary Zone, Secondary Zone West, and Secondary Zone East of 43.5%, 60.0%, and 7.5% respectively, together with 5% inflow.

The residual space estimates (rounded) range from:

- 295,000 square feet by 2011,
- 445,000 square feet by 2013,
- 540,000 square feet by 2016,
- 740,000 square feet by 2021, and
- 885,000 square feet by 2031.

The overleaf portion of **Table 9** breaks the residuals down into warranted square footages within the 6 individual “GAFO + Drug” and “HI” categories.

**Table 10:**

**Table 10** calculates the impacts on existing space of the potential supply of non-department store “NFSR” (GAFO + Drug) + “HI” space if the following sites contribute up to 250,000 square feet of potential supply:

<u>Potential Supply</u>	<u>Sq. Ft.</u>
SE Church / Major MacKenzie proposed 5 storey mixed use with retail	5,000
NW Bayview / Major MacKenzie proposed Baythorn Plaza	5,000
NW Yonge / May proposed plaza	5,000
NW Bayview / 16th proposed plaza	10,000
Yonge / Lorne Downtown Tridel Renaissance Condo with gr. floor retail	5,000
NW Yonge / Elgin Mills proposed plaza with Loblaws supermarket	30,000
<b>Unassigned Notional Test Allocation incl. 90,000 sf Vacancy Uptake</b>	<b><u>190,000</u></b>
Subtotal Potential Supply	250,000

This potential supply of non-department store “NFSR” space is factored in with an unassigned notional test allocation of 190,000 square feet (which includes 90,000 square feet of vacancy uptake). Together, these two potential sources of supply total 250,000 square feet of non-department store “NFSR” space.

These test allocations for the potential supply of non-department store “NFSR” space generate progressively larger shortfalls and growing sales performance of existing non-department store “NFSR” plus “HI” space.

**Table 11:**

**Table 11** is a check calculation of **Table 10** that separates out the potential for HI uses.

With future local capture rates in the Primary Zone, Secondary Zone West, and Secondary Zone East of 60.0%, 60.0%, and 3.0% respectively, together with 5% inflow, the warranted space at a mid-range performance level of \$300 per square foot approaches:

- 45,000 square feet by 2011,
- 50,000 square feet by 2013,
- 80,000 square feet by 2016,
- 110,000 square feet by 2021, and
- 125,000 square feet by 2031.

This would be sufficient to support one large-scale home improvement centre as early as 2016, but with some sales transfers. The garden centre component is contained within the sales of the main store.

**Table 12:**

**Table 12** calculates the potential for supermarket and grocery stores.

With base year local capture rates in the Primary Zone, Secondary Zone West, and Secondary Zone East of 48.5%, 64.4%, and 6.6% respectively, and with 10.0% inflow, the existing supermarket space is performing at approximately \$350 per square foot in the 2008 base year.

Future local capture rates in the Primary Zone, Secondary Zone West, and Secondary Zone East of 45.0%, 60.0%, and 6.0% respectively, and 10.0% inflow, generate residual space estimates approximating:

- 20,000 square feet by 2011,
- 40,000 square feet by 2013,
- 80,000 square feet by 2016,
- 115,000 square feet by 2021, and
- 140,000 square feet by 2031.

This would be sufficient residual potential to support one conventional medium scale supermarket (50,000± square feet) plus one grocery store (15,000-25,000 square feet) in the medium term without sales transfers (by 2016), and up to three conventional (medium scale) supermarkets plus one grocery operation at ultimate population capacity without sales transfers (or some other combination of supermarket to grocery store space).

**Table 13:**

This table calculates the residual potential for specialty food store space.

The existing space (171,900 square feet) achieves average base year sales of about \$230 per square foot.

About 2,000 square feet would be warranted by 2013, 9,000 square feet by 2016, 15,000 square feet by 2021, and 20,000 square feet by 2031 at a mid-range performance of \$325 per square foot.

**Table 14:**

This table calculates the residual potential for personal service space.

The existing space (207,130 square feet) achieves relatively low base year sales of about \$125 per square foot.

About 3,500 square feet would be warranted by 2013, 11,000 square feet by 2016, 18,000 square feet by 2021, and 23,000 square feet by 2031 at a mid-range performance of \$275 per square foot.

**Table 15:**

This table calculates the residual potential for new restaurant space.

The existing space (678,200 square feet) achieves average base year sales of about \$150 per square foot.

About 1,500 square feet would be warranted by 2011, 20,000 square feet by 2013, 45,000 square feet by 2016, 70,000 square feet by 2021, and 85,000 square feet by 2031 at a mid-range performance of \$325 per square foot.

**Table 16:**

This table calculates the residual potential for new liquor/beer/wine space.

The existing space (47,300 square feet) is estimated to achieve productive base year sales of \$1,075 per square foot.

About 5,000 square feet would be warranted by 2011, 7,500 square feet by 2013, almost 12,000 square feet by 2016, 16,000 square feet by 2021, and 20,000 square feet by 2031 at a mid-range performance of \$1,100 per square foot.

**Table 17:**

This table simply adds up the residual potentials for the space categories investigated in Tables 8-16. These are summarized in the middle portion of the overleaf of Table 17.

These residuals amount to (rounded):

- 395,000 square feet by 2011,
- 620,000 square feet by 2013,
- 860,000 square feet by 2016,
- 1,100,000 square feet by 2021 (at upper range sales performance), and
- 1,305,000 square feet by 2031 (at upper range sales performance).

To these residuals are added per capita space planning ratios for “other service” space, financial institution space, and local office space (per first box, Table 17 overleaf). With these additional space categories, the combined warranted space estimates (per second box, Table 17 overleaf) rise to:

- 420,000 square feet by 2011,
- 660,000 square feet by 2013,
- 920,000 square feet by 2016,
- 1,180,000 square feet by 2021 (at upper range sales performance), and
- 1,405,000 square feet by 2031 (at upper range sales performance).

**Table 18:**

This table repeats the warranted space estimates (residuals and per capita space ratios) and rounds them off to the nearest 5,000 square feet in the upper box (per upper box of Table 18).

The lower box factors in the “Potential Supply” that represent the site capacities of the various sites listed (266,000 square feet) *plus* an unassigned notional test allocation of 304,000 square feet for the expansion or intensification of existing facilities in Richmond Hill, or vacancy uptake.

By 2013, the market approximates an equilibrium position (whereby the market would be neither understored nor overstored) when a modest 8.3-acre land requirement emerges.

At 25% coverage, the shortfalls of supply in the period 2016 to 2031 progressively increase and translate into demands for 30 acres (rounded) by 2016, 55 acres (rounded) by 2021, and ultimately 75 acres (rounded) by 2031.

**Recommendations on the Future Retail Structure of Richmond Hill:**

The purpose of this section of the report is to provide direction for the Town’s new commercial policies.

The existing policies support a planned commercial hierarchy. Each type of commercial use in the hierarchy will be described in terms of the following:

- Planned Function
- Permitted / Not Permitted Uses, and
- Scale

Richmond Hill’s Commercial Areas are categorized as follows:

- Convenience Commercial Area
- Neighbourhood Commercial Area
- Community Commercial Area
- Central Business District Area
- Regional Commercial Area
- General Commercial Area

**Convenience Commercial Areas**

- Not designated in Official Plan but may be designated in Secondary Plans
- Controlled by policies in Residential Area designation

### **Neighbourhood Commercial Areas**

#### Planned Function:

- To serve the needs of one or more Planning Districts
- Takes the form of a shopping centre at the intersection of a major collector road and arterial road, or two major collectors, integrated with pedestrian and bike networks, and accessible by transit and other transportation modes

#### Permitted / Not Permitted Uses:

- One supermarket plus a broad range of retail, services and local offices
- No department store

#### Scale:

- Maximum 60,000 square feet

### **Community Commercial Areas**

#### Planned Function:

- To serve the needs of all or part of Richmond Hill
- Takes the form of a shopping centre

#### Permitted/ Not Permitted Uses:

- One supermarket plus a broad range of retail, services and local office commercial uses
- One department store

#### Scale:

- Maximum 300,000 square feet

### **Central Business District Area**

#### Planned Function:

- To serve the needs of the adjoining Planning Districts and the entire Town
- Historic core with integrated residential on Yonge Street from Major Mackenzie Dr. to Crosby Ave.

#### Permitted/ Not Permitted Uses:

- A broad range of retail, services and local office commercial uses concentrated along Yonge Street

#### Scale:

- No pre-determined scale
- Renovation of existing structures and infilling between existing structures is permitted subject to being compatible with adjoining uses

### **Regional Commercial Areas**

#### Planned Function:

- To serve the needs of the entire Town of Richmond Hill and a portion of the Region of York
- Takes the form of a shopping centre with integrated residential

#### Permitted / Not Permitted Uses:

- One supermarket plus the broadest range of retail, services and local office commercial uses
- Two department stores

#### Scale:

- Exceeding 400,000 square feet

## **General Commercial Areas**

### **Planned Function:**

- To serve the needs of a wider market area than adjacent residential areas
- Takes the form of plazas or free-standing buildings generally in commercial strip development along Yonge Street

### **Permitted/ Not Permitted Uses:**

- A broad range of retail (with site specific non-shopping centre requirements such as HI Centres, furniture stores, warehouses, auto and recreational vehicle dealers), services (to serve the travelling public such as hotels, motels, restaurants, banquet halls, automobile service stations and repair outlets) and local office commercial uses, private clubs, commercial recreation, personal service, and other non-shopping centre uses that serve the entire Town
- No department store
- No Manufacturers' Outlet Centres
- No supermarket
- No apparel

### **Scale:**

- No pre-determined scale
- Redevelopment and infilling is permitted subject to providing proper access and parking, and buffering for adjacent residential uses

## **Anchor Store Opportunities:**

The short term to longer term prospects for anchor stores are discussed as follows:

### **Supermarket / Grocery Store:**

- These are generally locally-serving lower order functions best located in or close to neighbourhoods they are intended to serve (meeting the needs of one or more Planning Districts)
- growth in residual demand is as follows:
  - 20,000 square feet by 2011,
  - 40,000 square feet by 2013,
  - 75,000 square feet by 2016,
  - 110,000 square feet by 2021, and
  - 135,000 square feet by 2031.
- equals a need for up to one conventional (medium scale) supermarket (50,000± square feet) plus one grocery store (15,000-25,000 square feet) by 2016 without sales transfers, and up to three conventional (medium scale) supermarkets plus one grocery operation at ultimate population capacity (or some other ratio of supermarket to grocery store space)
- new supermarket / grocery store space is suitable for neighborhood, community, mixed use corridor, and CBD commercial areas

**Department Store:**

- existing department stores are oriented to serve the needs of all or part of Richmond Hill (in Community Commercial Areas) and a portion of the Region of York (Regional Commercial Area)
- growth in residual demands yields maximum of one store warranted by 2021:
  - 35,000 square feet by 2011,
  - 55,000 square feet by 2013,
  - 100,000 square feet by 2021, and
  - 115,000 square feet by 2031
- Most likely to take the form of specialized big box affiliates of full line department stores rather than a second full line department store
- suitable for Community Commercial or mixed-use intensification areas
- unused residual potential could support expansion(s) of existing space or increased sales productivity of the existing space, or affiliate big box stores

**New Format HI:**

- community oriented with broad shallow draws
- sufficient residual demand for one large format store as early as 2016 with some sales transfers, or by 2021 without sales transfers:
  - 45,000 square feet by 2011,
  - 50,000 square feet by 2013,
  - 80,000 square feet by 2016,
  - 110,000 square feet by 2021, and
  - 125,000 square feet by 2031.
- suitable for either Community Commercial Area or General Commercial Area locations

**Retail Trends/ Issues/ Opportunities:**

Like many municipalities across Ontario, Richmond Hill's commercial hierarchy is evolving as it adapts to marketplace changes. In order to better understand these changes, it is useful to briefly highlight some of the broader market trends, issues, and opportunities.

General retail trends can be described in summary terms as follows:

- Continued evolution of large format stores from warehouses to power centres and more diverse large format retailers such as large format combination stores (which combine department store and supermarket elements), large format supermarkets with general merchandise components, large home improvement stores, and warehouse membership clubs (e.g. Costco);
- Reconfiguration of traditional malls;
- Hollowing out of older malls;
- Clustering around regional malls;
- Loss of supermarket anchors in regional malls and downtowns;
- Attraction of large format retailers to malls to replace department stores which have been relocated or closed;
- Redevelopment of traditional malls (into power centres or non-retail uses)

- Lifestyle Centres and Town Centre Developments;
- Flattening / broadening of retail hierarchy, transforming into retail nodes and corridors; and,
- Pressure on employment lands for conversion to retail uses.

The spectrum of retailing that the Town can support will change and continue to evolve over time.

These changes are subject to disparate economic pushes and pulls that are so complex in their interaction that any strategic response by the Town can only be formulated in the context of overall trends.

Moreover, the emerging retail trends are sensitive to underlying economic conditions.

As a result, the discussion of emerging retail trends is placed in the context of:

- the macro economic climate
- economic or structural changes affecting manufacturing, retailing and consumption
- changes in consumer demands and preferences
- changes in retailing strategies
- revised (existing) retail formats, and
- new retail formats

Emerging retail trends and their implications for retailing in the Town of Richmond Hill's regional market are summarized in bullet format under appropriate headings as follows:

**Shifts in the Macro Economic Climate including:**

- High Canadian dollar
- Relatively low interest rates
- Recessionary and “stagflation” threats
- Rising government taxation
- Rising energy costs
- Increasing per capita debt

**Implications For Retailing In Richmond Hill:**

- Some price sensitivity.

**New Economics Affecting Manufacturing to Retailing to Consumption:**

- More flexible and dispersed production and distribution systems
- Smaller scales of economy in product manufacturing, distribution and retailing
- Fewer intermediaries between manufacturers and consumers
- New materials and technology improving living standard
- Emergence of electronic & conventional retail hybrids (less traditional space required)
- Growth of virtual organizations:

- network of organizations versus network of one
- secure electronic transmission (SET)
- data mining
- internet transaction processing (ITP)
- Emergence of manufacturer-retailer and virtual chains of specialized manufacturer-retailers
- Emergence of direct manufacturer to consumer delivery
- Emergence of consumer "green" values (durability, recyclability, quality, "less is more", and "least harm" to people and environment)
- Emergence of niche markets
- Commercial transactions from cash to credit/debit cards to electronic commerce

#### Implications For Retailing In Richmond Hill:

- Market adaptation to changes in materials, technology, products and packaging.
- Market adaptation to continued changes in means of production, distribution, delivery, target markets by age and income cohorts, social values, and payment.
- Consumer benefits from continued cost and price reductions.
- Continued restructuring of the retail industry through consolidations, mergers, vertical integration, and the emergence of new format retailing.
- Increased adaptive re-use of vacated retail commercial real estate.

#### Consumer Changes:

- Fewer, shorter personal shopping trips:
  - dominance of two-income families and households
  - home based businesses
  - flexible work force
- Decline in family formation
- Aging:
  - aging of 9.8 million baby boomers lead changes in consumer preferences
  - in 2007, the first baby boomers turned 60
  - by 2026, the peak of the baby boomers (those born in 1961) turn 65

#### Implications For Retailing In Richmond Hill:

- Less time for shopping and leisure
- Changes in consumer demands and preferences propelled by demographics, not marketing.
- Changes in retailers' target markets, and ways to service target markets (e.g. increased home delivery).
- Increased importance of retail competition based on combinations of quality, service, convenience, selection and price in order for retailers to maintain market share.
- Decreased importance of retail competition based on price alone.

### **Changes In Retailing Strategies:**

- Store footprint changes.
- Store distribution and geographical service area changes.
- Cost-cutting and avoidance:
  - Self-serve
  - Relocation to suburban/quasi-industrial quasi-commercial locations
  - Shift of costs from retailers to manufacturers and wholesalers:
    - packaging costs
    - labour costs
    - distribution costs
  - Eliminate intermediaries
  - Reduce realty tax exposure
  - Lease re-negotiation
  - Consolidation/restructuring/merger/strategic alliances
- Just-in-time distribution
- Full-time/part-time employment ratio changes
- New product development to create new markets
- Target market changes
- Advertising and promotional changes
- Store refurbishing / investment
- Store relocation / store expansion / new store locations

### **Implications For Retailing In Richmond Hill:**

- Continued re-positioning of existing retail uses in the market.
- Continued store refurbishings, closure/relocations, expansions, and new store locations as retailers re-focus their target markets.

### **Emergence of New (Non-virtual) Formats:**

- Big box stores, retail warehouse stores, and catalogue stores (direct selling)
- New U.S entrants in target categories (e.g. Lowes HI)
- Manufacturers outlet stores (freestanding or in Manufacturer's Outlet Malls)
- Urban Entertainment Centres (UEC's)
- Power centres
- Clearance centres

### **Implications For Retailing In Richmond Hill:**

- Further market expansion by new format stores which are already in Ontario.
- Additional entrants from the United States.
- Continued pressure to develop non-conventional retail sites.
- Intense competition for conventional retailers.
- Pressure for selective expansion of retail hierarchy in Official Plan.
- Blurring of distinction between retail, wholesale and industrial.

### **Revised Retail Formats:**

- Re-positioned department stores:
  - Stable or increasing department store share of NFSR (non-food store retail) spending
  - New entrants / mergers
  - Closure/takeover / redeployment / relocation
  - Refurbishing / expansion
  - Spin-off of departments as separate retail entities (e.g. Sears Furniture)
  - Enlarged catalogue sales offices (CSO's)
  - Vertical integration of suppliers into retailing (exclusionary contracts)
- Expanded supermarket modules.
- Neo-traditional (external) design in in-fill projects.
- Adaptive re-use of vacated premises.
- Competitive options:
  - Direct competition (mega-stores win on price)
  - Competition by differentiation
- Revival of main street (neighbourhood district) specialty stores where parking adequate.

### **Implications For Retailing In Richmond Hill:**

- Re-positioning of established retailers to adjust to demographic changes.
- Potential closure/relocations.
- Fight-back against new format retailing by conventional retailers.
- Potential gains in market share through re-positioning by established retailers.

### **Changes in Spectrum of Manufacturer to Consumer:**

<u>Players</u>	<u>Process Elements</u>
Manufacturers	Product
Wholesalers/other intermediaries	Price
Retailers/hybrid retailers	Promotion
Consumers	Pipeline

### **Implications For Retailing In Richmond Hill:**

- Players and process elements will continue to adapt and evolve in response to:
  - changes in consumer demands and preferences,
  - the entry of additional new format retailers,
  - changes in technology, goods and goods production, and
  - economic changes.

### **Case Studies:**

The following section discusses the commercial policy approaches taken by 10 municipalities in Ontario, including:

- Town of Huntsville
- Town of Bracebridge
- Town of Aurora
- Town of Whitchurch-Stouffville
- City of Belleville
- City of Cornwall
- City of St. Thomas and Municipality of Central Elgin
- City of Chatham
- Town of Halton Hills
- Town of Milton

The different planned functions served by facilities at all levels of the commercial hierarchy are typically defined by their individual locations and their collective distribution.

A common approach to planning the structure of the hierarchy and its distribution is to ensure that the different designations are separated by distance, differentiated by function, yet strongly linked by a connecting road or transit system that fosters ease of cross shopping.

In recent years, many municipalities across Ontario have had to revise their commercial policies to accommodate new format retailing in power centres or special purpose commercial centres.

In many cases, this was achieved through Commercial Policy Reviews (CPR's) that involved the evaluation of short, medium, and longer-term demands for retail commercial space and the selection of preferred locations for the designation of new commercial lands.

Richmond Hill's ultimate policy regime can take some cues from the approaches adopted by municipalities that have already undergone the CPR process or that have made selective policy interventions to improve the functioning of their commercial hierarchies. These approaches range from those of smaller to larger, but slowly growing communities with or without a strong tourist focus, to larger urban communities undergoing substantial, rapid growth.

Regardless of the community's size or growth potential, a number of commonalities emerge. These can be highlighted by providing brief profiles of a sampling of municipal approaches as follows:

**Town of Huntsville:**

Huntsville is a relatively small, slowly growing community with a strong tourist focus. A CPR was conducted in the early 1980's that resulted in the designation of one of several competing sites for an enclosed district level shopping centre anchored by a supermarket and promotional department store. This provided a second node in addition to Downtown Huntsville. More recently, a CPR resulted in a third designation for a regional power centre node anchored by a supermarket, a promotional department store, and a large format home improvement store. The ancillary retail space, excluding food and personal services, was regulated with a minimum store size of 5,000 square feet as well as use restrictions on movie theatres, banks, and liquor / beer outlets. The minimum store size was later unsuccessfully challenged at the Ontario Municipal Board.

**Town of Bracebridge:**

Bracebridge is also a relatively small, slowly growing community with a strong tourist focus. A CPR was recently conducted as a proactive initiative that resulted in a third designation (in addition to the Downtown and the "Flats") for a regionally serving special purpose commercial centre to accommodate large format power centre uses. The ancillary retail space, excluding food and personal services, was regulated with a minimum store size of 4,000 square feet as well as use restrictions on movie theatres, banks, and liquor / beer outlets.

**Town of Aurora:**

Aurora is a larger growing community. A CPR was recently conducted that resulted in a third designation (in addition to the Downtown and the Bayview-Wellington corridors) for a regionally serving "gateway centre" to accommodate large format power centre uses in close association with prestige business park uses. The ancillary retail space, excluding food and personal services, was regulated with a minimum store size of 4,000 square feet with a maximum of 10 exceptions, as well as phasing requirements.

**Town of Whitchurch-Stouffville:**

The community of Stouffville is a relatively small but growing community. A CPR in 2005 resulted in a third designation (in addition to the Downtown and the Western Approach Area) for a regionally serving "gateway centre" to accommodate large format power centre uses in close association with an as yet undeveloped business park. The ancillary retail space, excluding food but including personal services, was restricted to a minimum store size of 5,000 square feet with no exceptions. Use restrictions were placed on medical/dental/clinic facilities, liquor / beer outlets. A further use restriction on banking facilities would apply until a three-storey, 48,000 square foot prestige office complex was constructed. The Town is currently considering whether to lower the minimum store size to 4,000 square feet for ancillary retail space, excluding food, 1,000 square feet for personal services, and an appropriate number of exceptions to the minimum store size.

**City of Belleville:**

Belleville is a relatively large but slowly growing city, which has never conducted a CPR. The city approved the leapfrog development of large format power centre uses north of Highway 401. Large format uses were already permitted south of Highway 401. In 1991 and years following, the Central Business District suffered the loss of its key anchor stores (its supermarket, Burkes Jewellery, and S & R Department Store) as well as all of its independently operated clothing and accessories stores due to retirements and sickness. A strategic decision to locate a new library in the Downtown in combination with depressed land and building costs throughout the Central Business District are contributing to a long-awaited cascade of renewal efforts.

**City of Cornwall:**

Cornwall is also a relatively large but slowly growing city that is distinct by having in the Downtown a well-functioning enclosed shopping centre (anchored by a major department store and a supermarket) located adjacent to the City's renewed waterfront and recreational facilities. The city recently approved a "brown-fields" commercial development for a limited number of large format uses in association with existing retail in preference to a large format power centre on "green-fields" lands in the far north of the City just south of Highway 401. The green-fields application sought the relocation and expansion of large format stores already in the market, including the City's largest promotional department store. Cornwall's strategic decision to support the incremental expansion of the existing hierarchy on brown-fields sites is directly connected to the City's "green" or conservator OP policies.

**City of St. Thomas and Municipality of Central Elgin:**

St. Thomas is also a relatively large but slowly growing community that is distinguished by having the longest "Main Street" in the province. Through a recent CPR, the City of St. Thomas and Municipality of Central Elgin approved a power centre development on a former 9-hole golf course at the east end of its Main Street in preference to a remote site in outlying Yarmouth Township. The CPR sought to reduce consumer spending outflow to the City of London to provide more optimal conditions for the rehabilitation of the downtown area. The City is currently embarking on an update of the policies for certain commercial and industrial areas.

**City of Chatham:**

Chatham is also a relatively large but slowly growing community. Chatham's enclosed downtown shopping centre has lost some of its original anchor tenants. Through a recent CPR, the City approved an expansion of an existing north-end regional shopping centre and the designation of proximate lands to accommodate a large format home improvement centre and associated uses.

**Town of Halton Hills:**

Halton Hills is a relatively large but moderately growing community with two urban centres (Georgetown and Acton) and a large rural hinterland. Georgetown's enclosed shopping centre has lost its supermarket anchor by a relocation and expansion across the street, but the vacated space has since been filled with smaller replacement anchors. Through a recent CPR, the Town approved an expansion of the commercial hierarchy to serve Georgetown's southern residential growth areas. The Town has approved the designation a power centre development on a "Gateway" site (within its Highway 401 employment lands) that abuts the Town of Milton's regional shopping centre designation at James Snow Parkway and Highway 401.

**Town of Milton:**

Milton is a relatively large and rapidly growing community that will see its urban expansion areas largely converted to urban uses and its population more than triple over the next twenty to twenty-five years. Through several recent CPR's, the Town approved a massive expansion of the Central Business District that now includes the historic downtown core on its west with a centrally located and redeveloped enclosed sub-regional shopping centre (Milton Mall) as well as extensive land holdings to the east of Milton Mall. The expanded CBD has now been largely developed as a Mixed Use Sub-Area on the south side of Main Street, and a complementary Commercial / Office Sub-Area on the north side is in transition. A subsequent CPR resulted in the Town designating regional shopping centre lands at James Snow Parkway and Highway 401. The latest CPR extended the regional shopping centre designation to adjacent lands to the immediate west (onto Halton Region's works yard site), and the adoption of a preferred distribution of supermarket-anchored shopping centres (Secondary mixed Use Nodes) and convenience centres (Local Central Areas) within recently approved secondary plan areas. To provide differentiation from the expanded CBD, the regional shopping centre designation contains a prohibition on supermarket space on lands north of Highway 401 and a minimum non-food retail store size of 4,000 square feet (but with a percentage exemption). Since the power centre approval in Halton Hills is cheek to jowl with Milton's regional shopping centre designation, Milton did not prevail in asking Halton Hills to apply the same minimum store size restrictions.

### **Recommended Policy Directions:**

Richmond Hill's retail commercial hierarchy is relatively mature and contains all the necessary structural elements to attract a wide array of conventional and new format tenancies.

The residual space estimates featured in preceding sections confirm the need for the hierarchy to expand to accommodate the growing residual demands.

However, it should be emphasized that with limited anchor store prospects in the short to medium term, there will be a questionable need for additional power centre uses for some time.

Richmond Hill's hierarchy benefits from a healthy breadth of retail commercial offerings ranging from higher order enclosed regional shopping facilities and power centre uses to lower order community and neighbourhood shopping centres. One guiding principle is to strengthen the retail commercial offerings that the Town already possesses.

The Yonge Street spine (or Main Street) strongly defines the retail commercial structure on a north-south axis, with concentrated nodes at major intersections. This includes the node around Hillcrest Mall at Carreville Road / 16<sup>th</sup> Avenue, the downtown node north of Major Mackenzie Drive, and power centre uses at Elgin Mills Road. These nodes are linearly connected by intervening general commercial uses and community shopping centres.

The typical separation of land uses adopted in most municipalities has led to a pattern of retail commercial uses being differentiated by function, separated by distance, yet linked by road or transit. The built form is typically stand-alone one-storey buildings or a cohesive grouping of one-storey structures catering to the car culture. This retail commercial development model is wasteful of the land on which the buildings sit and requires large parking areas that sterilize even larger amounts of land.

As a separated land use, retail commercial is a propulsive land use that structures and changes adjoining land uses to overcome land use incompatibilities. This has been the predominant model in retail commercial planning.

This model has been variously applied to conventional enclosed and unenclosed shopping centres, and more recently to WMC's (Warehouse Membership Clubs), retail warehouse complexes, manufacturers' outlet malls, and power centres with new format tenancies. The changes in retail formats have come in waves as new forms of commercial development are favoured over their predecessors.

Power centres in various forms have been around since 1991. Planning safeguards for existing competitive infrastructure have variously included power centre regulations specifying minimum store sizes, maximum scale and phasing, and certain use restrictions (e.g. typically banks, movie theatres, and liquor and beer outlets).

With ever increasing cannibalization of sales and markets as more power centres are developed, the power centre developmental wave has now crested. Essentially, the concept has begun the slide towards the end of its developmental life cycle.

Neo-traditional developments and manufacturers' outlet malls have had some success, but are not widespread. Lifestyle centres have not yet come to Ontario, but the GTA would probably not support more than two such centres at GTA-west and GTA-east locations.

Investment in mixed-use intensification areas, commercial corridors, main streets, and downtowns is currently gaining momentum as investment in infrastructure and transit intensifies.

As an integrated land use (i.e. integrated with a mix of uses such as office, educational, recreational, and residential uses in the same building or node), retail commercial adds an essential at-grade element that makes for a cohesive vibrant whole. This is an emerging model in retail commercial planning. Beyond the big box phenomenon, the new frontier (or planning framework) lies in downtown renewal and the development of mixed-use intensification areas.

By combining residential, office, educational, institutional, employment (e.g. "live-work"), and recreational uses with ground floor retail, the street activity around such diversified mixed use intensification areas will be increased 24 hours a day. It will also help create demand for the ground floor retail space.

Rapid transit initiatives along the Yonge Street corridor will contribute greatly to the attractiveness of this corridor for redevelopment, infilling, and intensification of uses.

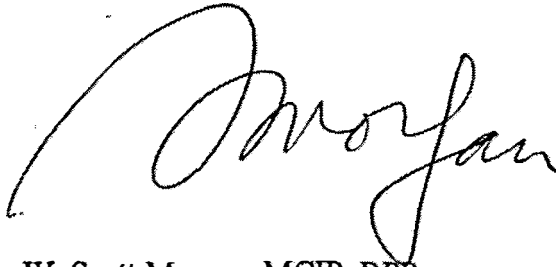
Moreover, the transit initiatives can be expected to speed up the introduction of retail commercial uses into mixed-use intensification areas.

To help protect the opportunities for diversified mixed use intensification areas, retail commercial development in industrial designations should generally be limited to industrially-serving business services and restaurants.

In my professional opinion, the Town should resist dilution of the emerging retail commercial development opportunities through additional power centre and shopping centre approvals, and instead, adopt strategic incentives to encourage intensification on the Yonge Street (i.e. Main Street) corridor, and allow the marketplace to expand incrementally over time in line with emerging market demands. This extends to Oak Ridges where smaller scale uses should be encouraged to intensify on Main Street.

The prescription is to hold the line on new designations and divert or redirect retail commercial development to mixed-use intensification areas in the Yonge Street corridor.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "W. Scott Morgan". The signature is fluid and cursive, with a large initial "W" and "M".

W. Scott Morgan, MCIP, RPP

# Scott Morgan & Associates Map Report - Richmond Hill Project PCensus with Microsoft MapPoint

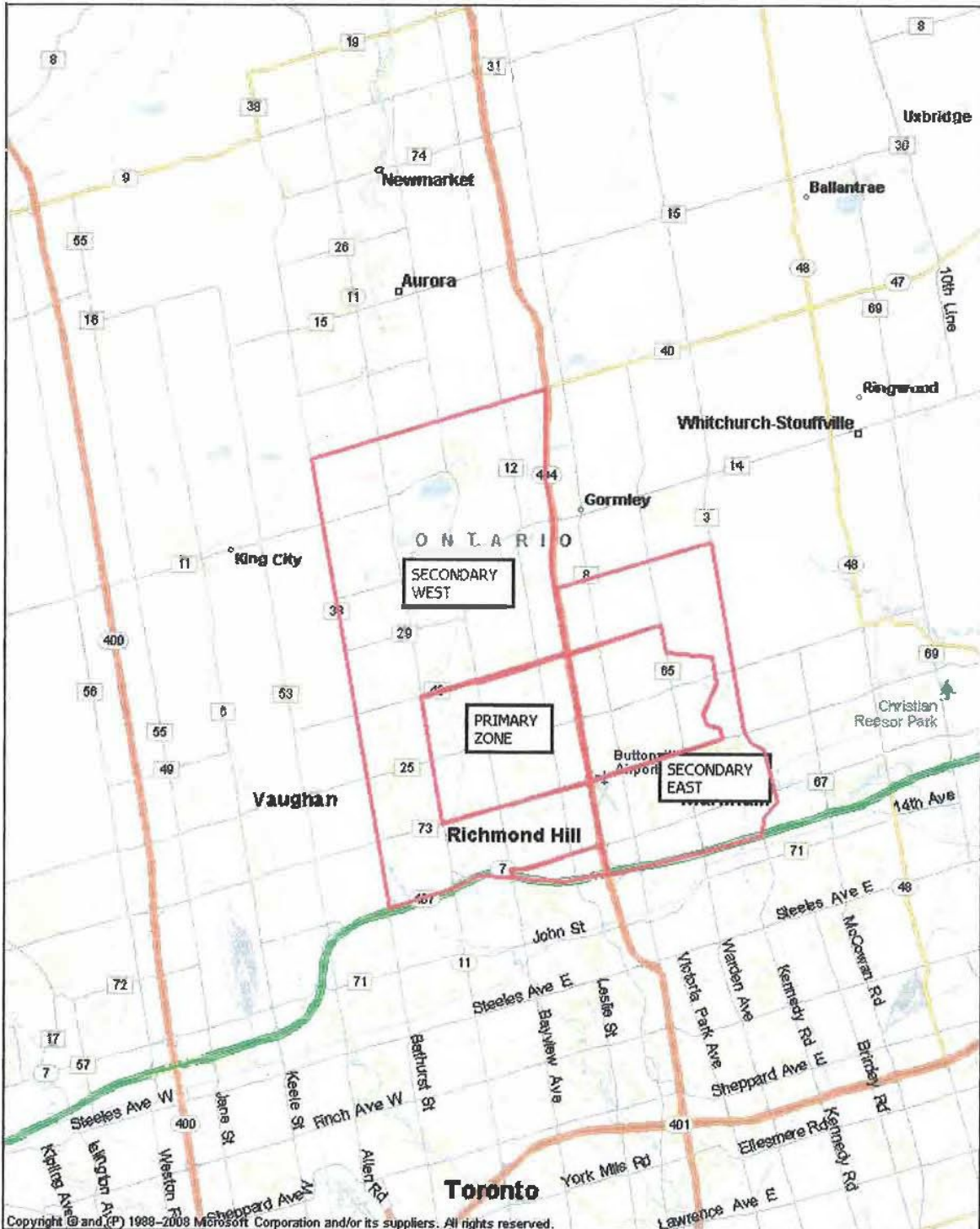


TABLE 1

**STUDY AREA POPULATION PROJECTIONS ADJUSTED FOR CENSUS UNDERCOUNT**  
**(YORK REGION POPULATION PROJECTIONS)**

<u>Study Area:</u>	Census 2006	Base Year 2008	2011	2013	2016	2021	2031
<b>Primary Zone - Richmond Hill</b>							
Population	51,465						
Adjusted Population Projection *	<b>54,660</b>	<b>55,000</b>	<b>55,600</b>	<b>55,415</b>	<b>55,145</b>	<b>55,700</b>	<b>56,050</b>
Cumulative Growth from Base Year			600	415	145	700	1,050
Average Annual Growth (%)			0.4%	0.2%	0.0%	0.1%	0.1%
Average Annual Growth (#)			200	83	18	54	46
<b>Primary Zone - Markham</b>							
Population	15,228						
Adjusted Population Projection *	<b>16,175</b>	<b>17,655</b>	<b>19,875</b>	<b>21,860</b>	<b>24,835</b>	<b>28,090</b>	<b>29,330</b>
Cumulative Growth from Base Year			2,220	4,205	7,180	10,435	11,675
Average Annual Growth (%)			4.2%	4.8%	5.1%	4.5%	2.9%
Average Annual Growth (#)			740	841	898	803	508
<b>Total Primary Zone</b>							
Population	<b>70,835</b>	<b>72,655</b>	<b>75,475</b>	<b>77,275</b>	<b>79,980</b>	<b>83,790</b>	<b>85,380</b>
Cumulative Growth from Base Year			2,820	4,620	7,325	11,135	12,725
Average Annual Growth (%)			1.3%	1.3%	1.3%	1.2%	0.8%
Average Annual Growth (#)			940	924	916	857	553
<b>Secondary Zone West - Richmond Hill</b>							
Population	110,527						
Adjusted Population Projection *	<b>117,385</b>	<b>127,125</b>	<b>141,740</b>	<b>150,650</b>	<b>164,010</b>	<b>178,080</b>	<b>189,065</b>
Cumulative Growth from Base Year			14,615	23,525	36,885	50,955	61,940
Average Annual Growth (%)			3.8%	3.7%	3.6%	3.1%	2.1%
Average Annual Growth (#)			4,872	4,705	4,611	3,920	2,693
<b>Secondary Zone West - Markham</b>							
Population	3,530						
Adjusted Population Projection *	<b>3,750</b>	<b>4,225</b>	<b>4,930</b>	<b>5,055</b>	<b>5,335</b>	<b>4,925</b>	<b>4,635</b>
Cumulative Growth from Base Year			705	830	1,110	700	410
Average Annual Growth (%)			5.6%	3.9%	3.3%	1.3%	0.4%
Average Annual Growth (#)			235	166	139	54	18
<b>Total Secondary Zone</b>							
Population	114,057						
Adjusted Population Projection *	<b>121,135</b>	<b>131,350</b>	<b>146,670</b>	<b>155,705</b>	<b>169,345</b>	<b>183,005</b>	<b>193,700</b>
Cumulative Growth from Base Year			15,320	24,355	37,995	51,655	62,350
Average Annual Growth (%)			3.9%	3.7%	3.6%	3.0%	2.1%
Average Annual Growth (#)			5,107	4,871	4,749	3,973	2,711
<b>Secondary Zone East - Markham</b>							
Population	29,056						
Adjusted Population Projection *	<b>30,860</b>	<b>33,425</b>	<b>37,545</b>	<b>41,465</b>	<b>47,340</b>	<b>63,450</b>	<b>72,085</b>
Cumulative Growth from Base Year			4,120	8,040	13,915	30,025	38,660
Average Annual Growth (%)			4.1%	4.8%	5.2%	6.9%	5.0%
Average Annual Growth (#)			1,373	1,608	1,739	2,310	1,681
<b>Total Study Area</b>							
Population	<b>222,830</b>	<b>237,430</b>	<b>259,690</b>	<b>274,445</b>	<b>296,665</b>	<b>330,245</b>	<b>351,165</b>
Cumulative Growth from Base Year			22,260	37,015	59,235	92,815	113,735
Average Annual Growth (%)			3.1%	3.1%	3.1%	3.0%	2.1%
Average Annual Growth (#)			7,420	7,403	7,404	7,140	4,945

\* Adjustment for census undercount = 1.0620259208 for York Region (Annual Demographic Statistics, Cat.91-213).

**TABLE 2****STUDY AREA "NFSR" (GAFO + DRUG) + "HI" (HOME IMPROVEMENT) EXPENDITURE POTENTIAL**

<u>Study Area</u>	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Primary Zone - Richmond Hill</b>						
Population	55,000	55,600	55,415	55,145	55,700	56,050
Per Capita Expenditure (\$) *	<u>\$5,321</u>	<u>\$5,564</u>	<u>\$5,620</u>	<u>\$5,705</u>	<u>\$5,705</u>	<u>\$5,705</u>
Expenditure Potential (\$ m's)	<b>\$292.7</b>	<b>\$309.4</b>	<b>\$311.4</b>	<b>\$314.6</b>	<b>\$317.7</b>	<b>\$319.7</b>
<b>Primary Zone - Markham</b>						
Population	17,655	19,875	21,860	24,835	28,090	29,330
Per Capita Expenditure (\$) *	<u>\$5,652</u>	<u>\$5,910</u>	<u>\$5,969</u>	<u>\$6,059</u>	<u>\$6,059</u>	<u>\$6,059</u>
Expenditure Potential (\$ m's)	<b>\$99.8</b>	<b>\$117.5</b>	<b>\$130.5</b>	<b>\$150.5</b>	<b>\$170.2</b>	<b>\$177.7</b>
<b>Secondary Zone West - Richmond Hill</b>						
Population	127,125	141,740	150,650	164,010	178,080	189,065
Per Capita Expenditure (\$) *	<u>\$5,641</u>	<u>\$5,899</u>	<u>\$5,958</u>	<u>\$6,048</u>	<u>\$6,048</u>	<u>\$6,048</u>
Expenditure Potential (\$ m's)	<b>\$717.1</b>	<b>\$836.1</b>	<b>\$897.5</b>	<b>\$991.9</b>	<b>\$1,077.0</b>	<b>\$1,143.4</b>
<b>Secondary Zone West - Markham</b>						
Population	4,225	4,930	5,055	5,335	4,925	4,635
Per Capita Expenditure (\$) *	<u>\$4,389</u>	<u>\$4,589</u>	<u>\$4,635</u>	<u>\$4,705</u>	<u>\$4,705</u>	<u>\$4,705</u>
Expenditure Potential (\$ m's)	<b>\$18.5</b>	<b>\$22.6</b>	<b>\$23.4</b>	<b>\$25.1</b>	<b>\$23.2</b>	<b>\$21.8</b>
<b>Secondary Zone East - Markham</b>						
Population	33,425	37,545	41,465	47,340	63,450	72,085
Per Capita Expenditure (\$) *	<u>\$6,416</u>	<u>\$6,709</u>	<u>\$6,776</u>	<u>\$6,878</u>	<u>\$6,878</u>	<u>\$6,878</u>
Expenditure Potential (\$ m's)	<b>\$214.5</b>	<b>\$251.9</b>	<b>\$281.0</b>	<b>\$325.6</b>	<b>\$436.4</b>	<b>\$495.8</b>
<b>Study Area</b>	<b>\$1,342.6</b>	<b>\$1,537.4</b>	<b>\$1,643.9</b>	<b>\$1,807.7</b>	<b>\$2,024.5</b>	<b>\$2,158.5</b>

\* Relative to a combined 2008 Ontario average per capita "NFSR" (Non Food Store Retail = GAFO / DRUG) expenditure of \$5,371 per Appendices A-2 to A-4.

Assume real growth @ 1.5% per annum compounded to the year 2011 and 0.5% to 2016.

**TABLE 3****STUDY AREA "HI" (HOME IMPROVEMENT) EXPENDITURE POTENTIAL**

<u>Study Area</u>	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Primary Zone - Richmond Hill</b>						
Population	55,000	55,600	55,415	55,145	55,700	56,050
Per Capita Expenditure (\$) *	<u>\$665</u>	<u>\$695</u>	<u>\$702</u>	<u>\$713</u>	<u>\$713</u>	<u>\$713</u>
Expenditure Potential (\$ m's)	<b>\$36.6</b>	<b>\$38.7</b>	<b>\$38.9</b>	<b>\$39.3</b>	<b>\$39.7</b>	<b>\$40.0</b>
<b>Primary Zone - Markham</b>						
Population	17,655	19,875	21,860	24,835	28,090	29,330
Per Capita Expenditure (\$) *	<u>\$706</u>	<u>\$738</u>	<u>\$746</u>	<u>\$757</u>	<u>\$757</u>	<u>\$757</u>
Expenditure Potential (\$ m's)	<b>\$12.5</b>	<b>\$14.7</b>	<b>\$16.3</b>	<b>\$18.8</b>	<b>\$21.3</b>	<b>\$22.2</b>
<b>Secondary Zone West - Richmond Hill</b>						
Population	127,125	141,740	150,650	164,010	178,080	189,065
Per Capita Expenditure (\$) *	<u>\$705</u>	<u>\$737</u>	<u>\$745</u>	<u>\$756</u>	<u>\$756</u>	<u>\$756</u>
Expenditure Potential (\$ m's)	<b>\$89.6</b>	<b>\$104.5</b>	<b>\$112.2</b>	<b>\$124.0</b>	<b>\$134.6</b>	<b>\$142.9</b>
<b>Secondary Zone West - Markham</b>						
Population	4,225	4,930	5,055	5,335	4,925	4,635
Per Capita Expenditure (\$) *	<u>\$548</u>	<u>\$573</u>	<u>\$579</u>	<u>\$588</u>	<u>\$588</u>	<u>\$588</u>
Expenditure Potential (\$ m's)	<b>\$2.3</b>	<b>\$2.8</b>	<b>\$2.9</b>	<b>\$3.1</b>	<b>\$2.9</b>	<b>\$2.7</b>
<b>Secondary Zone East - Markham</b>						
Population	33,425	37,545	41,465	47,340	63,450	72,085
Per Capita Expenditure (\$) *	<u>\$802</u>	<u>\$839</u>	<u>\$847</u>	<u>\$860</u>	<u>\$860</u>	<u>\$860</u>
Expenditure Potential (\$ m's)	<b>\$26.8</b>	<b>\$31.5</b>	<b>\$35.1</b>	<b>\$40.7</b>	<b>\$54.6</b>	<b>\$62.0</b>
<b>Study Area</b>	<b>\$167.8</b>	<b>\$192.1</b>	<b>\$205.4</b>	<b>\$225.9</b>	<b>\$253.0</b>	<b>\$269.8</b>

\* Relative to an estimated 2008 Ontario average per capita "HI" (Home Improvement / Hardware / Specialized Building Material & Garden Centre) expenditure of \$671 including contractor/wholesale sales per Appendices A-2 to A-4.

Assume real growth @ 1.5% per annum compounded to the year 2011 and 0% to 2016.

**TABLE 4****STUDY AREA "FSR" (FOOD STORE RETAIL) EXPENDITURE POTENTIAL**

<u>Study Area</u>	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Primary Zone - Richmond Hill</b>						
Population	55,000	55,600	55,415	55,145	55,700	56,050
Per Capita Expenditure (\$) *	<u>\$2,036</u>	<u>\$2,067</u>	<u>\$2,077</u>	<u>\$2,093</u>	<u>\$2,093</u>	<u>\$2,093</u>
Expenditure Potential (\$ m's)	<b>\$112.0</b>	<b>\$114.9</b>	<b>\$115.1</b>	<b>\$115.4</b>	<b>\$116.6</b>	<b>\$117.3</b>
<b>Primary Zone - Markham</b>						
Population	17,655	19,875	21,860	24,835	28,090	29,330
Per Capita Expenditure (\$) *	<u>\$2,058</u>	<u>\$2,089</u>	<u>\$2,099</u>	<u>\$2,115</u>	<u>\$2,115</u>	<u>\$2,115</u>
Expenditure Potential (\$ m's)	<b>\$36.3</b>	<b>\$41.5</b>	<b>\$45.9</b>	<b>\$52.5</b>	<b>\$59.4</b>	<b>\$62.0</b>
<b>Secondary Zone West - Richmond Hill</b>						
Population	127,125	141,740	150,650	164,010	178,080	189,065
Per Capita Expenditure (\$) *	<u>\$2,057</u>	<u>\$2,088</u>	<u>\$2,098</u>	<u>\$2,114</u>	<u>\$2,114</u>	<u>\$2,114</u>
Expenditure Potential (\$ m's)	<b>\$261.5</b>	<b>\$296.0</b>	<b>\$316.1</b>	<b>\$346.8</b>	<b>\$376.5</b>	<b>\$399.7</b>
<b>Secondary Zone West - Markham</b>						
Population	4,225	4,930	5,055	5,335	4,925	4,635
Per Capita Expenditure (\$) *	<u>\$1,973</u>	<u>\$2,003</u>	<u>\$2,013</u>	<u>\$2,028</u>	<u>\$2,028</u>	<u>\$2,028</u>
Expenditure Potential (\$ m's)	<b>\$8.3</b>	<b>\$9.9</b>	<b>\$10.2</b>	<b>\$10.8</b>	<b>\$10.0</b>	<b>\$9.4</b>
<b>Secondary Zone East - Markham</b>						
Population	33,425	37,545	41,465	47,340	63,450	72,085
Per Capita Expenditure (\$) *	<u>\$2,109</u>	<u>\$2,141</u>	<u>\$2,152</u>	<u>\$2,168</u>	<u>\$2,168</u>	<u>\$2,168</u>
Expenditure Potential (\$ m's)	<b>\$70.5</b>	<b>\$80.4</b>	<b>\$89.2</b>	<b>\$102.6</b>	<b>\$137.5</b>	<b>\$156.3</b>
<b>Study Area</b>	<b>\$488.6</b>	<b>\$542.6</b>	<b>\$576.5</b>	<b>\$628.1</b>	<b>\$700.0</b>	<b>\$744.7</b>

\* Relative to estimated 2008 Ontario average per capita FSR expenditure of **\$2,039** per Appendices A-2 to A-4.

Assume real growth @ 0.5% per annum compounded to the year 2011 and 0.25% to 2016.

**TABLE 5****STUDY AREA PERSONAL SERVICE EXPENDITURE POTENTIAL**

<u>Study Area</u>	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Primary Zone - Richmond Hill</b>						
Population	55,000	55,600	55,415	55,145	55,700	56,050
Per Capita Expenditure (\$) *	<u>\$261</u>	<u>\$265</u>	<u>\$266</u>	<u>\$268</u>	<u>\$268</u>	<u>\$268</u>
Expenditure Potential (\$ m's)	<b>\$14.4</b>	<b>\$14.7</b>	<b>\$14.8</b>	<b>\$14.8</b>	<b>\$14.9</b>	<b>\$15.0</b>
<b>Primary Zone - Markham</b>						
Population	17,655	19,875	21,860	24,835	28,090	29,330
Per Capita Expenditure (\$) *	<u>\$273</u>	<u>\$277</u>	<u>\$279</u>	<u>\$281</u>	<u>\$281</u>	<u>\$281</u>
Expenditure Potential (\$ m's)	<b>\$4.8</b>	<b>\$5.5</b>	<b>\$6.1</b>	<b>\$7.0</b>	<b>\$7.9</b>	<b>\$8.2</b>
<b>Secondary Zone West - Richmond Hill</b>						
Population	127,125	141,740	150,650	164,010	178,080	189,065
Per Capita Expenditure (\$) *	<u>\$272</u>	<u>\$276</u>	<u>\$277</u>	<u>\$280</u>	<u>\$280</u>	<u>\$280</u>
Expenditure Potential (\$ m's)	<b>\$34.6</b>	<b>\$39.1</b>	<b>\$41.8</b>	<b>\$45.9</b>	<b>\$49.8</b>	<b>\$52.9</b>
<b>Secondary Zone West - Markham</b>						
Population	4,225	4,930	5,055	5,335	4,925	4,635
Per Capita Expenditure (\$) *	<u>\$228</u>	<u>\$231</u>	<u>\$233</u>	<u>\$234</u>	<u>\$234</u>	<u>\$234</u>
Expenditure Potential (\$ m's)	<b>\$1.0</b>	<b>\$1.1</b>	<b>\$1.2</b>	<b>\$1.3</b>	<b>\$1.2</b>	<b>\$1.1</b>
<b>Secondary Zone East - Markham</b>						
Population	33,425	37,545	41,465	47,340	63,450	72,085
Per Capita Expenditure (\$) *	<u>\$300</u>	<u>\$305</u>	<u>\$306</u>	<u>\$308</u>	<u>\$308</u>	<u>\$308</u>
Expenditure Potential (\$ m's)	<b>\$10.0</b>	<b>\$11.4</b>	<b>\$12.7</b>	<b>\$14.6</b>	<b>\$19.6</b>	<b>\$22.2</b>
<b>Study Area</b>	<b>\$64.7</b>	<b>\$71.9</b>	<b>\$76.5</b>	<b>\$83.5</b>	<b>\$93.3</b>	<b>\$99.4</b>

\* Relative to an estimated 2008 Ontario average per capita Personal Service expenditure of \$259 per Appendix A-4.

Assume real growth @ 0.5% per annum compounded to the year 2011 and 0.25% to 2016.

**TABLE 6****STUDY AREA RESTAURANT EXPENDITURE POTENTIAL**

<u>Study Area</u>	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Primary Zone - Richmond Hill</b>						
Population	55,000	55,600	55,415	55,145	55,700	56,050
Per Capita Expenditure (\$) *	<u>\$787</u>	<u>\$793</u>	<u>\$797</u>	<u>\$803</u>	<u>\$803</u>	<u>\$803</u>
Expenditure Potential (\$ m's)	<b>\$43.3</b>	<b>\$44.1</b>	<b>\$44.2</b>	<b>\$44.3</b>	<b>\$44.7</b>	<b>\$45.0</b>
<b>Primary Zone - Markham</b>						
Population	17,655	19,875	21,860	24,835	28,090	29,330
Per Capita Expenditure (\$) *	<u>\$850</u>	<u>\$856</u>	<u>\$861</u>	<u>\$867</u>	<u>\$867</u>	<u>\$867</u>
Expenditure Potential (\$ m's)	<b>\$15.0</b>	<b>\$17.0</b>	<b>\$18.8</b>	<b>\$21.5</b>	<b>\$24.4</b>	<b>\$25.4</b>
<b>Secondary Zone West - Richmond Hill</b>						
Population	127,125	141,740	150,650	164,010	178,080	189,065
Per Capita Expenditure (\$) *	<u>\$847</u>	<u>\$853</u>	<u>\$858</u>	<u>\$864</u>	<u>\$864</u>	<u>\$864</u>
Expenditure Potential (\$ m's)	<b>\$107.7</b>	<b>\$121.0</b>	<b>\$129.2</b>	<b>\$141.7</b>	<b>\$153.9</b>	<b>\$163.4</b>
<b>Secondary Zone West - Markham</b>						
Population	4,225	4,930	5,055	5,335	4,925	4,635
Per Capita Expenditure (\$) *	<u>\$611</u>	<u>\$616</u>	<u>\$619</u>	<u>\$623</u>	<u>\$623</u>	<u>\$623</u>
Expenditure Potential (\$ m's)	<b>\$2.6</b>	<b>\$3.0</b>	<b>\$3.1</b>	<b>\$3.3</b>	<b>\$3.1</b>	<b>\$2.9</b>
<b>Secondary Zone East - Markham</b>						
Population	33,425	37,545	41,465	47,340	63,450	72,085
Per Capita Expenditure (\$) *	<u>\$994</u>	<u>\$1,001</u>	<u>\$1,006</u>	<u>\$1,014</u>	<u>\$1,014</u>	<u>\$1,014</u>
Expenditure Potential (\$ m's)	<b>\$33.2</b>	<b>\$37.6</b>	<b>\$41.7</b>	<b>\$48.0</b>	<b>\$64.3</b>	<b>\$73.1</b>
<b>Study Area</b>	<b>\$201.8</b>	<b>\$222.7</b>	<b>\$237.0</b>	<b>\$258.9</b>	<b>\$290.4</b>	<b>\$309.8</b>

\* Relative to an estimated 2008 Ontario average per capita Restaurant expenditure of \$798 per Appendix A-4.

Assume real growth @ 0.25% per annum compounded to the year 2016.

**TABLE 7****STUDY AREA LIQUOR/BEER/WINE EXPENDITURE POTENTIAL**

<u>Study Area</u>	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Primary Zone - Richmond Hill</b>						
Population	55,000	55,600	55,415	55,145	55,700	56,050
Per Capita Expenditure (\$) *	<u>\$521</u>	<u>\$525</u>	<u>\$528</u>	<u>\$532</u>	<u>\$532</u>	<u>\$532</u>
Expenditure Potential (\$ m's)	<b>\$28.7</b>	<b>\$29.2</b>	<b>\$29.2</b>	<b>\$29.3</b>	<b>\$29.6</b>	<b>\$29.8</b>
<b>Primary Zone - Markham</b>						
Population	17,655	19,875	21,860	24,835	28,090	29,330
Per Capita Expenditure (\$) *	<u>\$553</u>	<u>\$557</u>	<u>\$560</u>	<u>\$564</u>	<u>\$564</u>	<u>\$564</u>
Expenditure Potential (\$ m's)	<b>\$9.8</b>	<b>\$11.1</b>	<b>\$12.2</b>	<b>\$14.0</b>	<b>\$15.8</b>	<b>\$16.5</b>
<b>Secondary Zone West - Richmond Hill</b>						
Population	127,125	141,740	150,650	164,010	178,080	189,065
Per Capita Expenditure (\$) *	<u>\$552</u>	<u>\$556</u>	<u>\$559</u>	<u>\$563</u>	<u>\$563</u>	<u>\$563</u>
Expenditure Potential (\$ m's)	<b>\$70.2</b>	<b>\$78.8</b>	<b>\$84.2</b>	<b>\$92.4</b>	<b>\$100.3</b>	<b>\$106.5</b>
<b>Secondary Zone West - Markham</b>						
Population	4,225	4,930	5,055	5,335	4,925	4,635
Per Capita Expenditure (\$) *	<u>\$433</u>	<u>\$436</u>	<u>\$438</u>	<u>\$442</u>	<u>\$442</u>	<u>\$442</u>
Expenditure Potential (\$ m's)	<b>\$1.8</b>	<b>\$2.2</b>	<b>\$2.2</b>	<b>\$2.4</b>	<b>\$2.2</b>	<b>\$2.0</b>
<b>Secondary Zone East - Markham</b>						
Population	33,425	37,545	41,465	47,340	63,450	72,085
Per Capita Expenditure (\$) *	<u>\$625</u>	<u>\$630</u>	<u>\$633</u>	<u>\$638</u>	<u>\$638</u>	<u>\$638</u>
Expenditure Potential (\$ m's)	<b>\$20.9</b>	<b>\$23.6</b>	<b>\$26.2</b>	<b>\$30.2</b>	<b>\$40.5</b>	<b>\$46.0</b>
<b>Study Area</b>	<b>\$131.3</b>	<b>\$144.9</b>	<b>\$154.1</b>	<b>\$168.2</b>	<b>\$188.4</b>	<b>\$200.8</b>

\* Relative to an estimated 2008 Ontario average per capita Liquor/Beer/Wine expenditure of \$529 per Appendix A-4.

\*\* Assume real growth @ 0.25% per annum compounded to the year 2016.

**TABLE 8**

**STUDY AREA DEPARTMENT STORE "NFSR" + "HI" DEMANDS & RESIDUAL SPACE**

<u>Study Area</u>	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Primary Zone - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$392.4	\$426.8	\$441.9	\$465.1	\$488.0	\$497.5
Dep't Store NFSR Share *						
@ 11.8%	\$46.2	\$50.2				
@ 12.0%			\$53.0	\$55.8	\$58.6	\$59.7
Richmond Hill Local Capture *						
@ 47.5%	<b>\$21.9</b>	<b>\$23.9</b>				
@ 47.5%			<b>\$25.2</b>	<b>\$26.5</b>	<b>\$27.8</b>	<b>\$28.8</b>
<b>Secondary Zone West - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$735.7	\$858.7	\$921.0	\$1,017.0	\$1,100.1	\$1,165.2
Dep't Store NFSR Share *						
@ 11.4%	\$83.7	\$97.6				
@ 11.5%			\$105.9	\$117.0	\$126.5	\$134.0
Richmond Hill Local Capture *						
@ 67.6%	<b>\$56.6</b>	<b>\$66.0</b>				
@ 67.5%			<b>\$71.5</b>	<b>\$78.9</b>	<b>\$85.4</b>	<b>\$90.4</b>
<b>Secondary Zone East - Markham</b>						
Expenditure Potential (\$ m's)	\$214.5	\$251.9	\$281.0	\$325.6	\$436.4	\$495.8
Dep't Store NFSR Share *						
@ 14.9%	\$32.0	\$37.6				
@ 15.0%			\$42.1	\$48.8	\$65.5	\$74.4
Richmond Hill Local Capture *						
@ 3.4%	<b>\$1.1</b>	<b>\$1.3</b>				
@ 3.5%			<b>\$1.5</b>	<b>\$1.7</b>	<b>\$2.3</b>	<b>\$2.6</b>
<b>Local Share Without Inflow</b>	<b>\$79.6</b>	<b>\$91.2</b>	<b>\$98.2</b>	<b>\$107.2</b>	<b>\$115.5</b>	<b>\$121.4</b>
<b>Plus Inflow **</b>						
@ 25.0%	\$26.5	\$30.4	\$32.7	\$35.7	\$35.7	\$35.7
<b>Total Potential Local Capture</b>	<b>\$106.1</b>	<b>\$121.5</b>	<b>\$130.9</b>	<b>\$142.9</b>	<b>\$151.2</b>	<b>\$157.1</b>
Less Existing Competition						
@ 414,376 sf GLA ***						
@ \$256 /sf GLA	<b>\$106.1</b>	<b>\$106.1</b>	<b>\$106.1</b>	<b>\$106.1</b>	<b>\$106.1</b>	<b>\$106.1</b>
Residual Sales Demand	<b>\$0.0</b>	<b>\$15.4</b>	<b>\$24.8</b>	<b>\$36.8</b>	<b>\$45.1</b>	<b>\$51.0</b>
<b>Warranted sf GLA:</b>						
@ \$400 per sf GLA	0	38,571	61,913	91,932	112,787	127,549
@ \$450 per sf GLA	0	34,286	55,034	81,717	100,255	113,377
@ \$500 per sf GLA	0	30,857	49,531	73,546	90,229	102,039

\* Base year department store shares and local (Richmond Hill) capture rates from consumer telephone survey conducted by urbanMetrics inc., September to October, 2008.

\*\* Assume future inflow @25.0% until 2016 and declining in percentage terms thereafter.

\*\*\* See Appendix B-1.

TABLE 9

**STUDY AREA NON-DEPARTMENT STORE "NFSR" + "HI" DEMANDS & RESIDUAL SPACE**

<u>Study Area</u>	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Primary Zone - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$392.4	\$426.8	\$441.9	\$465.1	\$488.0	\$497.5
Non-Dep't Store NFSR Share						
@ 88.2%	\$346.2	\$376.6				
@ 88.0%			\$388.9	\$409.3	\$429.4	\$437.8
Richmond Hill Local Capture *						
@ 45.9%	<b>\$158.9</b>					
@ 45.0%		<b>\$169.5</b>	<b>\$175.0</b>			
@ 43.5%				<b>\$178.0</b>	<b>\$186.8</b>	<b>\$190.4</b>
<b>Secondary Zone West - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$735.7	\$858.7	\$921.0	\$1,017.0	\$1,100.1	\$1,165.2
Non-Dep't Store NFSR Share						
@ 88.6%	\$652.0	\$761.1				
@ 88.5%			\$815.1	\$900.0	\$973.6	\$1,031.2
Richmond Hill Local Capture *						
@ 63.3%	<b>\$412.7</b>					
@ 63.5%		<b>\$483.3</b>	<b>\$517.6</b>			
@ 60.0%				<b>\$540.0</b>	<b>\$584.2</b>	<b>\$618.7</b>
<b>Secondary Zone East - Markham</b>						
Expenditure Potential (\$ m's)	\$214.5	\$251.9	\$281.0	\$325.6	\$436.4	\$495.8
Non-Dep't Store NFSR Share						
@ 96.6%	\$207.2	\$243.3				
@ 96.5%			\$271.1	\$314.2	\$421.2	\$478.5
Richmond Hill Local Capture *						
@ 7.9%	<b>\$16.4</b>					
@ 8.0%		<b>\$19.5</b>	<b>\$21.7</b>			
@ 7.5%				<b>\$23.6</b>	<b>\$31.6</b>	<b>\$35.9</b>
<b>Local Share Without Inflow</b>	<b>\$588.0</b>	<b>\$672.2</b>	<b>\$714.3</b>	<b>\$741.6</b>	<b>\$802.5</b>	<b>\$845.0</b>
<b>Plus Inflow **</b>						
@ 5.0%	\$30.0	\$35.4				
@ 5.0%			\$37.6	\$39.0	\$39.0	\$39.0
<b>Total Potential Local Capture</b>	<b>\$619.0</b>	<b>\$707.6</b>	<b>\$751.8</b>	<b>\$780.6</b>	<b>\$841.6</b>	<b>\$884.1</b>
Less Existing Competition						
@ 1,980,830 sf GLA ***						
@ \$312 /sf GLA	<b>\$619.0</b>	<b>\$619.0</b>	<b>\$619.0</b>	<b>\$619.0</b>	<b>\$619.0</b>	<b>\$619.0</b>
Residual Sales Demand	<b>\$0.0</b>	<b>\$88.6</b>	<b>\$132.9</b>	<b>\$161.7</b>	<b>\$222.6</b>	<b>\$265.1</b>
<b>Warranted sf GLA:</b>						
@ \$275 per sf GLA	0	<b>322,261</b>	483,234	587,927	809,529	964,040
@ \$300 per sf GLA	0	295,406	<b>442,965</b>	<b>538,933</b>	<b>742,068</b>	883,704
@ \$325 per sf GLA	0	272,682	408,891	497,477	684,986	<b>815,727</b>

\* Base year Local Capture from urbanMetrics' consumer telephone survey.

\*\* Base year inflow = consultant judgment. Assume future inflow @ 5.0% until 2016 & declining in percentage terms thereafter.

\*\*\* See Appendix B-1.

**TABLE 9, CONTINUED**

**STUDY AREA DISTRIBUTION OF "NFSR" (GAFO + DRUG) + "HI" (HOME IMPROVEMENT) RESIDUAL BY STORE TYPE**

<u>Distribution By Store Type **</u>	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Residual Sales Demand</b>	<b>\$0.0</b>	<b>\$88.6</b>	<b>\$132.9</b>	<b>\$161.7</b>	<b>\$222.6</b>	<b>\$265.1</b>
<b>Furniture, Home Furnishings, Computer/Software, Electronics/Appliances</b>						
Ontario Average @ 18.6%	<b>\$0.0</b>					
@ 18.5%		<b>\$16.4</b>	<b>\$24.6</b>	<b>\$29.9</b>	<b>\$41.2</b>	<b>\$49.0</b>
@ \$225 /sf GLA	0	72,867	109,265	132,937	183,043	217,980
@ \$250 /sf GLA	0	65,580	98,338	119,643	164,739	196,182
@ \$275 /sf GLA	0	59,618	89,398	108,766	149,763	178,347
<b>Drugs &amp; Personal Care Stores</b>						
Ontario Average @ 19.6%	<b>\$0.0</b>					
@ 19.5%		<b>\$17.3</b>	<b>\$25.9</b>	<b>\$31.5</b>	<b>\$43.4</b>	<b>\$51.7</b>
@ \$700 /sf GLA	0	24,687	37,019	45,039	62,016	73,852
@ \$725 /sf GLA	0	23,836	35,743	43,486	59,877	71,306
@ \$750 /sf GLA	0	23,042	34,551	42,037	57,881	68,929
<b>Apparel &amp; Accessories</b>						
Ontario Average @ 16.0%	<b>\$0.0</b>					
@ 16.0%		<b>\$14.2</b>	<b>\$21.3</b>	<b>\$25.9</b>	<b>\$35.6</b>	<b>\$42.4</b>
@ \$275 /sf GLA	0	51,562	77,317	94,068	129,525	154,246
@ \$300 /sf GLA	0	47,265	70,874	86,229	118,731	141,393
@ \$325 /sf GLA	0	43,629	65,422	79,596	109,598	130,516
<b>Other General Merchandise (excluding dep't stores)</b>						
Ontario Average @ 16.1%	<b>\$0.0</b>					
@ 16.0%		<b>\$14.2</b>	<b>\$21.3</b>	<b>\$25.9</b>	<b>\$35.6</b>	<b>\$42.4</b>
@ \$220 /sf GLA	0	64,452	96,647	117,585	161,906	192,808
@ \$230 /sf GLA	0	61,650	92,445	112,473	154,866	184,425
@ \$240 /sf GLA	0	59,081	88,593	107,787	148,414	176,741
<b>Sports/Hobby/Music/Books/Miscellaneous /Tires &amp; Auto Parts &amp; Accessories</b>						
Ontario Average @ 15.1%	<b>\$0.0</b>					
@ 15.0%		<b>\$13.3</b>	<b>\$19.9</b>	<b>\$24.3</b>	<b>\$33.4</b>	<b>\$39.8</b>
@ \$225 /sf GLA	0	59,081	88,593	107,787	148,414	176,741
@ \$250 /sf GLA	0	53,173	79,734	97,008	133,572	159,067
@ \$275 /sf GLA	0	48,339	72,485	88,189	121,429	144,606
<b>Home Centres / Hardware / Building Material / Garden Centres</b>						
Ontario Average @ 14.6%	<b>\$0.0</b>					
@ 15.0%		<b>\$12.9</b>	<b>\$19.4</b>	<b>\$23.6</b>	<b>\$32.5</b>	<b>\$38.7</b>
@ \$275 /sf GLA	0	46,998	70,474	85,742	118,060	140,594
@ \$300 /sf GLA	0	43,081	64,601	78,597	108,222	128,877
@ \$325 /sf GLA	0	39,767	59,632	72,551	99,897	118,964

\* The base year Non-Department Store NFSR shares and base year Local Capture rates are based on urbanMetrics inc.'s consumer telephone survey results (September to October, 2008)

\*\* The allocation of the total Non-Department Store NFSR potential among the six store categories is based on Statistics Canada Retail Trade statistics for 2008 (Cat. # 63-005) and consultant judgment.

**TABLE 10**

**STUDY AREA "NFSR" (GAFO + DRUG) + "HI" (HOME IMPROVEMENT) COMBINED IMPACTS**  
**(Unassigned Notional Test Allocation @ 250,000 sf in 2011, 2013, 2016, 2021, and 2031)**

	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Residual Space Demands (Sq. Ft. rounded):</b>						
@ \$275 per sf GLA	0	322,267	483,237	587,925	809,530	964,041
@ \$300 per sf GLA	0	295,405	442,965	538,936	742,068	883,705
@ \$325 per sf GLA	0	272,684	408,890	497,477	684,989	815,725
<u>Less Potential Non-Department Store NFSR Supply (Sq. Ft.):</u>						
<u>Committed Supply</u>						
SE Church / Major MacKenzie proposed 5 storey mixed use with retail		5,000	5,000	5,000	5,000	5,000
NW Bayview / Major MacKenzie proposed Baythorn Plaza		5,000	5,000	5,000	5,000	5,000
NW Yonge / May proposed plaza		5,000	5,000	5,000	5,000	5,000
NW Bayview / 16th proposed plaza		10,000	10,000	10,000	10,000	10,000
Yonge / Lorne Downtown Tridel Renaissance Condo with gr. floor retail		5,000	5,000	5,000	5,000	5,000
NW Yonge / Elgin Mills proposed plaza with Loblaws supermarket		30,000	30,000	30,000	30,000	30,000
<b>Unassigned Notional Test Allocation incl. 90,000 sf Vacancy Uptake</b>		<u>190,000</u>	<u>190,000</u>	<u>190,000</u>	<u>190,000</u>	<u>190,000</u>
Subtotal Committed Supply		250,000	250,000	250,000	250,000	250,000
<b>Total Potential Supply (Sq. Ft.)</b>		<b>250,000</b>	<b>250,000</b>	<b>250,000</b>	<b>250,000</b>	<b>250,000</b>
(Not Committed Test Allocations)						
<b>Surplus (\$) / Shortfall (-) of Supply Over Demand (Sq. Ft.)</b>		<b>-72,267</b>	<b>-192,965</b>	<b>-288,936</b>	<b>-492,068</b>	<b>-565,725</b>
<b>Residual Sales Demand (\$ m's)</b>		<b>\$88.6</b>	<b>\$132.9</b>	<b>\$161.7</b>	<b>\$222.6</b>	<b>\$265.1</b>
<u>Less Potential Non-Department Store NFSR Sales (\$ m's):</u>						
@ Allocated Sq. Ft.		250,000	250,000	250,000	250,000	250,000
@ \$325 per Sq. Ft.		\$81.3				
@ \$350 per Sq. Ft.			\$87.5			
@ \$375 per Sq. Ft.				\$93.8	\$93.8	
@ \$400 per Sq. Ft.						\$100.0
Potential Sales Transfer / Increment (\$ m's)		\$7.4	\$45.4	\$67.9	\$128.9	\$165.1
Resultant Sales Performance of Existing Non-Department Store NFSR Space (\$ per Sq. Ft.)	\$312	\$316	\$335	\$347	\$378	\$396
Resultant Impact on Sales Performance (%)		1.2%	7.3%	11.0%	20.8%	26.7%

**TABLE 11****STUDY AREA HOME IMPROVEMENT DEMANDS & RESIDUAL SPACE**

<u>Study Area</u>	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Primary Zone - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$49.0	\$53.3	\$55.2	\$58.1	\$61.0	\$62.2
Richmond Hill Local Capture *						
@ 58.1%	\$28.5	\$31.0				
@ 60.0%			\$33.1	\$34.9	\$36.6	\$37.3
<b>Secondary Zone West - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$91.9	\$107.3	\$115.1	\$127.1	\$137.5	\$145.6
Richmond Hill Local Capture *						
@ 65.5%	\$60.2	\$70.3				
@ 60.0%			\$69.1	\$76.3	\$82.5	\$87.4
<b>Secondary Zone East - Markham</b>						
Expenditure Potential (\$ m's)	\$26.8	\$31.5	\$35.1	\$40.7	\$54.6	\$62.0
Richmond Hill Local Capture *						
@ 3.1%	\$0.8	\$1.0				
@ 3.0%			\$1.1	\$1.2	\$1.6	\$1.9
<b>Local Share Without Inflow</b>	<b>\$89.5</b>	<b>\$102.3</b>	<b>\$103.2</b>	<b>\$112.3</b>	<b>\$120.7</b>	<b>\$126.5</b>
<b>Plus Inflow</b>						
@ 5.0% **	\$4.7	\$5.4	\$5.4	\$5.9	\$5.9	\$5.9
<b>Total Potential Local Capture</b>	<b>\$94.3</b>	<b>\$107.6</b>	<b>\$108.7</b>	<b>\$118.3</b>	<b>\$126.6</b>	<b>\$132.4</b>
Less Existing Competition						
@ 185,860 sf GLA ***						
@ \$507 /sf GLA	\$94.3	\$94.3	\$94.3	\$94.3	\$94.3	\$94.3
<b>Residual Sales Demand</b>	<b>\$0.0</b>	<b>\$13.4</b>	<b>\$14.4</b>	<b>\$24.0</b>	<b>\$32.4</b>	<b>\$38.2</b>
<b>Warranted sf GLA:</b>						
@ \$275 per sf GLA	0	48,665	52,450	87,286	117,713	138,858
@ \$300 per sf GLA	0	44,609	48,079	80,012	107,903	127,286
@ \$325 per sf GLA	0	41,178	44,381	73,857	99,603	117,495

\* The base year Non-Department Store NFSR shares and base year Local Capture rates are based on urbanMetrics inc.'s consumer telephone survey results (September to October, 2008).

\*\* Assume inflow @ 5.0% until 2016 and declining in percentage terms thereafter.

\*\*\* See Appendix B-1.

**TABLE 12****STUDY AREA SUPERMARKET DEMANDS & RESIDUAL SPACE**

<u>Study Area</u>	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Primary Zone - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$148.3	\$156.4	\$161.0	\$167.9	\$176.0	\$179.3
Supermarket Share						
@ 75.0%	\$111.2	\$117.3				
@ 76.5%			\$123.2	\$128.5	\$134.6	\$137.2
Richmond Hill Local Capture *						
@ 48.5%	\$53.9					
@ 46.5%		\$54.6				
@ 45.0%			\$55.4	\$57.8	\$60.6	\$61.7
<b>Secondary Zone West - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$269.8	\$305.8	\$326.3	\$357.6	\$386.5	\$409.1
Supermarket Share						
@ 76.5%	\$206.4	\$234.0				
@ 76.5%			\$249.6	\$273.5	\$295.7	\$313.0
Richmond Hill Local Capture *						
@ 64.4%	\$132.9					
@ 60.0%		\$140.4	\$149.8	\$164.1	\$177.4	\$187.8
<b>Secondary Zone East - Markham</b>						
Expenditure Potential (\$ m's)	\$70.5	\$80.4	\$89.2	\$102.6	\$137.5	\$156.3
Supermarket Share						
@ 76.5%	\$53.9	\$61.5				
@ 76.5%			\$68.2	\$78.5	\$105.2	\$119.5
Richmond Hill Local Capture *						
@ 6.6%	\$3.6					
@ 6.0%		\$3.7	\$4.1	\$4.7	\$6.3	\$7.2
<b>Local Share Without Inflow</b>	<b>\$190.4</b>	<b>\$198.6</b>	<b>\$209.3</b>	<b>\$226.6</b>	<b>\$244.3</b>	<b>\$256.7</b>
<b>Plus Inflow</b>						
@ 10.0%	\$21.2					
@ 10.0%		\$22.1	\$23.3	\$25.2	\$25.2	\$25.2
<b>Total Potential Local Capture</b>	<b>\$211.6</b>	<b>\$220.7</b>	<b>\$232.5</b>	<b>\$251.8</b>	<b>\$269.5</b>	<b>\$281.9</b>
Less Existing Competition						
@ 600,330 sf GLA ***						
@ \$352 /sf GLA	\$211.6	\$211.6	\$211.6	\$211.6	\$211.6	\$211.6
Residual Sales Demand	\$0.0	\$9.1	\$20.9	\$40.2	\$57.9	\$70.3
<b>Warranted sf GLA:</b>						
@ \$475 per sf GLA	0	19,122	44,090	84,688	121,836	147,951
@ \$500 per sf GLA	0	18,166	41,885	80,454	115,744	140,553
@ \$525 per sf GLA	0	17,301	39,891	76,622	110,233	133,860

\* The base year Supermarket and Grocery shares and base year Local Capture rates are based on urbanMetrics inc.'s consumer telephone survey results (September to October, 2008).

\*\* Assume inflow @ 10.0% until 2016 and declining in percentage terms thereafter.

\*\*\* See Appendix B-1.

**TABLE 13****STUDY AREA SPECIALTY FOOD DEMANDS & RESIDUAL SPACE**

<u>Study Area</u>	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Primary Zone - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$148.3	\$156.4	\$161.0	\$167.9	\$176.0	\$179.3
Specialty Food Share						
@ 25.0%	\$37.1					
@ 23.5%		\$36.8	\$37.8	\$39.5	\$41.4	\$42.1
Richmond Hill Local Capture *						
@ 33.3%	\$12.3					
@ 30.0%		\$11.0	\$11.4	\$11.8	\$12.4	\$12.6
<b>Secondary Zone West - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$269.8	\$305.8	\$326.3	\$357.6	\$386.5	\$409.1
Specialty Food Share						
@ 23.5%	\$63.4					
@ 23.5%		\$71.9	\$76.7	\$84.0	\$90.8	\$96.1
Richmond Hill Local Capture *						
@ 25.0%	\$15.9					
@ 22.5%		\$16.2	\$17.3	\$18.9	\$20.4	\$21.6
<b>Secondary Zone East - Markham</b>						
Expenditure Potential (\$ m's)	\$2,109.0	\$2,140.8	\$2,151.5	\$2,167.7	\$2,167.7	\$2,167.7
Specialty Food Share						
@ 23.5%	\$495.6					
@ 23.5%		\$503.1	\$505.6	\$509.4	\$509.4	\$509.4
Richmond Hill Local Capture *						
@ 2.0%	\$9.9					
@ 2.0%		\$10.1	\$10.1	\$10.2	\$10.2	\$10.2
<b>Local Share Without Inflow</b>	<b>\$38.1</b>	<b>\$37.3</b>	<b>\$38.7</b>	<b>\$40.9</b>	<b>\$43.0</b>	<b>\$44.5</b>
<b>Plus Inflow *</b>						
@ 2.5%	\$1.0					
@ 2.5% **		\$1.0	\$1.0	\$1.0	\$1.0	\$1.0
<b>Total Potential Local Capture</b>	<b>\$39.09</b>	<b>\$38.2</b>	<b>\$39.7</b>	<b>\$41.9</b>	<b>\$44.0</b>	<b>\$45.5</b>
Less Existing Competition						
@ 171,896 sf GLA ***						
@ \$227 /sf GLA	\$39.1	\$39.1	\$39.1	\$39.1	\$39.1	\$39.1
Residual Sales Demand	\$0.0	(\$0.9)	\$0.6	\$2.8	\$4.9	\$6.4
<b>Warranted sf GLA:</b>						
@ \$300 per sf GLA	0	-2,911	2,064	9,459	16,446	21,224
@ \$325 per sf GLA	0	-2,687	1,905	8,731	15,181	19,592
@ \$350 per sf GLA	0	-2,495	1,769	8,107	14,096	18,192
Potential Sales Transfer / Increment (\$ m's)	\$0.0	(\$0.87)	\$0.6	\$2.8	\$4.9	\$6.4
Resultant Sales per Sq. Ft. of Existing Space	\$227	\$222	\$231	\$244	\$256	\$264
Resultant Impact on Sales Performance (%)		-2.2%	1.6%	7.3%	12.6%	16.3%

\* Consultant judgment.

\*\* Assume inflow @ 2.5% until 2016 and declining in percentage terms thereafter.

\*\*\* Appendix B-1

**TABLE 14**

**STUDY AREA PERSONAL SERVICE DEMANDS & RESIDUAL SPACE**

<u>Study Area</u>	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Primary Zone - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$19.2	\$20.2	\$20.8	\$21.8	\$22.8	\$23.3
Richmond Hill Local Capture *						
@ 50.0%	<b>\$9.6</b>					
@ 47.5%		<b>\$9.6</b>	<b>\$9.9</b>	<b>\$10.3</b>	<b>\$10.8</b>	<b>\$11.1</b>
<b>Secondary Zone West - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$35.5	\$40.3	\$43.0	\$47.1	\$50.9	\$53.9
Richmond Hill Local Capture *						
@ 40.0%	<b>\$14.2</b>					
@ 35.0%		<b>\$14.1</b>	<b>\$15.0</b>	<b>\$16.5</b>	<b>\$17.8</b>	<b>\$18.9</b>
<b>Secondary Zone East - Markham</b>						
Expenditure Potential (\$ m's)	\$10.0	\$11.4	\$12.7	\$14.6	\$19.6	\$22.2
Richmond Hill Local Capture *						
@ 5.0%	<b>\$0.5</b>					
@ 2.5%		<b>\$0.3</b>	<b>\$0.3</b>	<b>\$0.4</b>	<b>\$0.5</b>	<b>\$0.6</b>
<b>Local Share Without Inflow</b>	<b>\$24.3</b>	<b>\$24.0</b>	<b>\$25.3</b>	<b>\$27.2</b>	<b>\$29.2</b>	<b>\$30.5</b>
<b>Plus Inflow</b>						
@ 5.0% *	\$1.3					
@ 5.0% **		\$1.3	\$1.3	\$1.4	\$1.4	\$1.4
<b>Total Potential Local Capture</b>	<b>\$25.6</b>	<b>\$25.3</b>	<b>\$26.6</b>	<b>\$28.6</b>	<b>\$30.6</b>	<b>\$31.9</b>
Less Existing Competition						
@ 207,129 sf GLA ***						
@ \$124 /sf GLA	<b>\$25.6</b>	<b>\$25.6</b>	<b>\$25.6</b>	<b>\$25.6</b>	<b>\$25.6</b>	<b>\$25.6</b>
Residual Sales Demand		<b>(\$0)</b>	<b>\$1.0</b>	<b>\$3.0</b>	<b>\$5.0</b>	<b>\$6.3</b>
<b>Warranted sf GLA:</b>						
@ \$250 per sf GLA	0	-1,305	4,020	12,136	20,024	25,334
@ \$275 per sf GLA	0	-1,187	3,655	11,033	18,203	23,031
@ \$300 per sf GLA	0	-1,088	3,350	10,114	16,686	21,112

\* Consultant estimate.

\*\* Assume inflow @ 5.0% until 2016 and declining in percentage terms thereafter.

\*\*\* Appendix B-1

**TABLE 15**

**STUDY AREA RESTAURANT DEMANDS & RESIDUAL SPACE**

<u>Study Area</u>	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Primary Zone - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$58.3	\$61.1	\$63.0	\$65.8	\$69.1	\$70.4
Richmond Hill Local Capture						
@ 41.7% *	<b>\$24.3</b>					
@ 40.0% **		<b>\$24.4</b>	<b>\$25.2</b>	<b>\$26.3</b>	<b>\$27.6</b>	<b>\$28.2</b>
<b>Secondary Zone West - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$110.3	\$124.0	\$132.3	\$145.0	\$156.9	\$166.3
Richmond Hill Local Capture						
@ 44.9% *	<b>\$49.5</b>					
@ 40.0% **		<b>\$49.6</b>	<b>\$52.9</b>	<b>\$58.0</b>	<b>\$62.8</b>	<b>\$66.5</b>
<b>Secondary Zone East - Markham</b>						
Expenditure Potential (\$ m's)	\$33.2	\$37.6	\$41.7	\$48.0	\$64.3	\$73.1
Richmond Hill Local Capture						
@ 13.8% *	<b>\$4.6</b>					
@ 12.5% **		<b>\$4.7</b>	<b>\$5.2</b>	<b>\$6.0</b>	<b>\$8.0</b>	<b>\$9.1</b>
<b>Local Share Without Inflow</b>	<b>\$78.4</b>	<b>\$78.7</b>	<b>\$83.3</b>	<b>\$90.3</b>	<b>\$98.5</b>	<b>\$103.8</b>
<b>Plus Inflow</b>						
@ 20.0% *	\$19.6					
@ 20.0% ***		\$19.7	\$20.8	\$22.6	\$22.6	\$22.6
<b>Total Potential Local Capture</b>	<b>\$98.0</b>	<b>\$98.4</b>	<b>\$104.2</b>	<b>\$112.9</b>	<b>\$121.0</b>	<b>\$126.4</b>
Less Existing Competition						
@ 678,206 sf GLA ****						
@ \$144 /sf GLA	<b>\$98.0</b>	<b>\$98.0</b>	<b>\$98.0</b>	<b>\$98.0</b>	<b>\$98.0</b>	<b>\$98.0</b>
<b>Residual Sales Demand</b>	<b>\$0.0</b>	<b>\$0.4</b>	<b>\$6.2</b>	<b>\$14.9</b>	<b>\$23.0</b>	<b>\$28.4</b>
<b>Warranted sf GLA:</b>						
@ \$300 per sf GLA	0	1,423	20,587	49,771	76,805	94,676
@ \$325 per sf GLA	0	1,314	19,004	45,942	70,897	87,394
@ \$350 per sf GLA	0	1,220	17,646	42,661	65,833	81,151

\* Consumer survey.

\*\* Consultant estimate.

\*\*\* Assume inflow @ 20.0% until 2016 and declining in percentage terms thereafter.

\*\*\*\* Appendix B-1

**TABLE 16**

**STUDY AREA LIQUOR/BEER/WINE DEMANDS & RESIDUAL SPACE**

<u>Study Area</u>	<u>2008</u>	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<b>Primary Zone - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$38.4	\$40.3	\$41.5	\$43.3	\$45.5	\$46.3
Richmond Hill Local Capture *						
@ 40.0%	<b>\$15.4</b>					
@ 40.0%		<b>\$16.1</b>	<b>\$16.6</b>	<b>\$17.3</b>	<b>\$18.2</b>	<b>\$18.5</b>
<b>Secondary Zone West - Richmond Hill + Markham</b>						
Expenditure Potential (\$ m's)	\$72.0	\$81.0	\$86.4	\$94.7	\$102.5	\$108.5
Richmond Hill Local Capture *						
@ 45.0%	<b>\$32.4</b>					
@ 45.0%		<b>\$36.4</b>	<b>\$38.9</b>	<b>\$42.6</b>	<b>\$46.1</b>	<b>\$48.8</b>
<b>Secondary Zone East - Markham</b>						
Expenditure Potential (\$ m's)	\$20.9	\$23.6	\$26.2	\$30.2	\$40.5	\$46.0
Richmond Hill Local Capture *						
@ 2.5%	<b>\$0.5</b>					
@ 2.5%		<b>\$0.6</b>	<b>\$0.7</b>	<b>\$0.8</b>	<b>\$1.0</b>	<b>\$1.1</b>
<b>Local Share Without Inflow</b>	<b>\$48.3</b>	<b>\$53.1</b>	<b>\$56.1</b>	<b>\$60.7</b>	<b>\$65.3</b>	<b>\$68.5</b>
<b>Plus Inflow</b>						
@ 5.0% *						
@ 5.0% **	\$2.5	\$2.8	\$3.0	\$3.2	\$3.2	\$3.2
<b>Total Potential Local Capture</b>	<b>\$50.8</b>	<b>\$55.9</b>	<b>\$59.1</b>	<b>\$63.9</b>	<b>\$68.5</b>	<b>\$71.7</b>
Less Existing Competition						
@ 47,306 sf GLA ***						
@ \$1,075 /sf GLA	<b>\$50.8</b>	<b>\$50.8</b>	<b>\$50.8</b>	<b>\$50.8</b>	<b>\$50.8</b>	<b>\$50.8</b>
<b>Residual Sales Demand</b>	<b>\$0.0</b>	<b>\$5.1</b>	<b>\$8.3</b>	<b>\$13.1</b>	<b>\$17.7</b>	<b>\$20.9</b>
<b>Warranted sf GLA:</b>						
@ \$1,000 per sf GLA	0	5,100	8,257	13,068	17,662	20,880
@ \$1,100 per sf GLA	0	4,636	7,506	11,880	16,056	18,981
@ \$1,200 per sf GLA	0	4,250	6,881	10,890	14,718	17,400

\* Consultant estimate.

\*\* Assume inflow @ 5.0% until 2013 and declining in percentage terms thereafter.

\*\*\* Appendix B-1

**TABLE 17****STUDY AREA SUMMARY DEMANDS & RESIDUAL SPACE**

<u>Study Area</u>	<u>Sq. Ft.</u> <u>2008</u>	<u>Sq. Ft.</u> <u>2011</u>	<u>Sq. Ft.</u> <u>2013</u>	<u>Sq. Ft.</u> <u>2016</u>	<u>Sq. Ft.</u> <u>2021</u>	<u>Sq. Ft.</u> <u>2031</u>
<b>Department Store Space</b>						
@ \$400 /sf GLA	0	38,571	61,913	91,932	112,787	127,549
@ \$450 /sf GLA	0	34,286	55,034	81,717	100,255	113,377
@ \$500 /sf GLA	0	30,857	49,531	73,546	90,229	102,039
<b>Non-department Store NFSR Space</b>						
@ \$275 /sf GLA	0	322,261	483,234	587,927	809,529	964,040
@ \$300 /sf GLA	0	295,406	442,965	538,933	742,068	883,704
@ \$325 /sf GLA	0	272,682	408,891	497,477	684,986	815,727
<b>Furniture, Home Furnishings, Computer/Software, Electronics/Appliances</b>						
@ 18.5%						
@ \$225 /sf GLA	0	72,867	109,265	132,937	183,043	217,980
@ \$250 /sf GLA	0	65,580	98,338	119,643	164,739	196,182
@ \$275 /sf GLA	0	59,618	89,398	108,766	149,763	178,347
<b>Drugs &amp; Personal Care Stores</b>						
@ 19.5%						
@ \$700 /sf GLA	0	24,687	37,019	45,039	62,016	73,852
@ \$725 /sf GLA	0	23,836	35,743	43,486	59,877	71,306
@ \$750 /sf GLA	0	23,042	34,551	42,037	57,881	68,929
<b>Apparel &amp; Accessories</b>						
@ 16.0%						
@ \$275 /sf GLA	0	51,562	77,317	94,068	129,525	154,246
@ \$300 /sf GLA	0	47,265	70,874	86,229	118,731	141,393
@ \$325 /sf GLA	0	43,629	65,422	79,596	109,598	130,516
<b>Other General Merchandise (excluding dep't stores)</b>						
@ 16.0%						
@ \$220 /sf GLA	0	64,452	96,647	117,585	161,906	192,808
@ \$230 /sf GLA	0	61,650	92,445	112,473	154,866	184,425
@ \$240 /sf GLA	0	59,081	88,593	107,787	148,414	176,741
<b>Sports/Hobby/Music/Books/Miscellaneous /Tires &amp; Auto Parts &amp; Accessories</b>						
@ 15.0%						
@ \$225 /sf GLA	0	59,081	88,593	107,787	148,414	176,741
@ \$250 /sf GLA	0	53,173	79,734	97,008	133,572	159,067
@ \$275 /sf GLA	0	48,339	72,485	88,189	121,429	144,606
<b>Home Improvement Centre Space</b>						
@ \$275 /sf GLA	0	48,665	52,450	87,286	117,713	138,858
@ \$300 /sf GLA	0	44,609	48,079	80,012	107,903	127,286
@ \$325 /sf GLA	0	41,178	44,381	73,857	99,603	117,495
<b>Supermarket Space</b>						
@ \$475 /sf GLA	0	19,122	44,090	84,688	121,836	147,951
@ \$500 /sf GLA	0	18,166	41,885	80,454	115,744	140,553
@ \$525 /sf GLA	0	17,301	39,891	76,622	110,233	133,860

**TABLE 17, CONTINUED**

**STUDY AREA SUMMARY DEMANDS & RESIDUAL SPACE**

Study Area	Sq. Ft. 2008	Sq. Ft. 2011	Sq. Ft. 2013	Sq. Ft. 2016	Sq. Ft. 2021	Sq. Ft. 2031
<b>Specialty Food Store Space</b>						
@ \$300 /sf GLA	0	-2,911	2,064	9,459	16,446	21,224
@ \$325 /sf GLA	0	-2,687	1,905	8,731	15,181	19,592
@ \$350 /sf GLA	0	-2,495	1,769	8,107	14,096	18,192
<b>Personal Service Space</b>						
@ \$250 /sf GLA	0	-1,305	4,020	12,136	20,024	25,334
@ \$275 /sf GLA	0	-1,187	3,655	11,033	18,203	23,031
@ \$300 /sf GLA	0	-1,088	3,350	10,114	16,686	21,112
<b>Restaurant Space</b>						
@ \$300 /sf GLA	0	1,423	20,587	49,771	76,805	94,676
@ \$325 /sf GLA	0	1,314	19,004	45,942	70,897	87,394
@ \$350 /sf GLA	0	1,220	17,646	42,661	65,833	81,151
<b>Liquor/Beer/Wine Space</b>						
@ \$1,000 /sf GLA	0	5,100	8,257	13,068	17,662	20,880
@ \$1,100 /sf GLA	0	4,636	7,506	11,880	16,056	18,981
@ \$1,200 /sf GLA	0	4,250	6,881	10,890	14,718	17,400
<b>TOTAL RETAIL &amp; SELECTED COMMERCIAL</b>						
Low Range	0	430,925	676,616	936,267	1,292,800	1,540,512
Mid Range	0	<b>394,542</b>	<b>620,033</b>	<b>858,703</b>	1,186,307	1,413,918
Upper Range	0	363,904	572,339	793,274	<b>1,096,384</b>	<b>1,306,976</b>

**PER CAPITA SPACE RATIOS AND WARRANTED SPACE BASED ON CUMULATIVE POPULATION GROWTH**

	Sq. Ft. 2008	Sq. Ft. 2011	Sq. Ft. 2013	Sq. Ft. 2016	Sq. Ft. 2021	Sq. Ft. 2031
<b>Richmond Hill</b>						
Population Projection	182,125	197,340	206,065	219,155	233,780	245,115
Cumulative Growth		15,215	23,940	37,030	51,655	62,990
<b>Warranted Space Based on Per Capita Space Ratios</b>						
	Sq. Ft. 2008	Sq. Ft. 2011	Sq. Ft. 2013	Sq. Ft. 2016	Sq. Ft. 2021	Sq. Ft. 2031
Assume 25% Average Local Capture of:						
Other Service Space @ 33% Capture      0.9 sf / cap	0	4,519	7,110	10,998	15,342	18,708
Bank Space @ 40% Capture                      1.0 sf / cap	0	6,086	9,576	14,812	20,662	25,196
Local Office Space @ 20% Capture            4.5 sf / cap *	0	13,694	21,546	33,327	46,490	56,691
<b>Total Warranted Space Based on Per Capita Ratios</b>	<b>0</b>	<b>24,298</b>	<b>38,232</b>	<b>59,137</b>	<b>82,493</b>	<b>100,595</b>

**TOTAL RETAIL & SELECTED COMMERCIAL RESIDUALS PLUS WARRANTED OTHER SPACE BASED ON PER CAPITA SPACE RATIOS**

	2008	2011	2013	2016	2021	2031
Low Range	0	455,223	714,848	995,404	1,375,293	1,641,107
<b>Mid Range</b>	<b>0</b>	<b>418,840</b>	<b>658,265</b>	<b>917,840</b>	1,268,800	1,514,513
Upper Range	0	388,203	610,571	852,411	<b>1,178,877</b>	<b>1,407,571</b>

\* Includes Finance/Insurance/Real Estate (FIRE) + Services to Business Management (SBM) + Medical/Dental/Veterinary + Misc. Office.

**TABLE 18**

**COMPARISON OF SQUARE FOOTAGE DEMANDS AND POTENTIAL SUPPLY**

<b>TOTAL RETAIL &amp; SELECTED COMMERCIAL RESIDUAL DEMANDS &amp; OTHER PER CAPITA SPACE RATIOS</b>					
	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
Low Range	455,223	714,848	995,404	1,375,293	1,641,107
Mid Range	<b>418,840</b>	<b>658,265</b>	<b>917,840</b>	1,268,800	1,514,513
Upper Range	388,203	610,571	852,411	<b>1,178,877</b>	<b>1,407,571</b>
Rounded Mid Range Residual Estimates (to nearest 5,000)	<b>420,000</b>	<b>660,000</b>	<b>920,000</b>	<b>1,180,000</b>	<b>1,405,000</b>

<b>POTENTIAL SQUARE FOOTAGE SUPPLY</b>					
	<u>2011</u>	<u>2013</u>	<u>2016</u>	<u>2021</u>	<u>2031</u>
<u>Potential Supply</u>					
NW Vogell / 16th	45,300	45,300	45,300	45,300	45,300
SW Leslie / Elgin Mills	9,000	9,000	9,000	9,000	9,000
9821 Leslie / North of Staples	15,500	15,500	15,500	15,500	15,500
NW Yonge / Elgin Mills	16,600	16,600	16,600	16,600	16,600
SE 16th / Yonge	14,500	14,500	14,500	14,500	14,500
SE Church / Major MacKenzie proposed 5 storey mixed use with retail	31,000	31,000	31,000	31,000	31,000
NW Bayview / Major MacKenzie proposed Baythorn Plaza	12,000	12,000	12,000	12,000	12,000
NW Yonge / May proposed plaza	21,500	21,500	21,500	21,500	21,500
NW Bayview / 16th proposed plaza	20,500	20,500	20,500	20,500	20,500
Yonge / Lorne Downtown Tridel Renaissance Condo with gr. floor retail	7,100	7,100	7,100	7,100	7,100
NW Yonge / Elgin Mills proposed plaza with Loblaws supermarket	<u>73,000</u>	<u>73,000</u>	<u>73,000</u>	<u>73,000</u>	<u>73,000</u>
Subtotal Committed + Not Committed Supply	266,000	266,000	266,000	266,000	266,000
<b>Plus Unassigned Notional Test Allocation @ 62.5% of NFSR</b>	304,000	304,000	304,000	304,000	304,000
<b>Total Potential Supply</b>	<b>570,000</b>	<b>570,000</b>	<b>570,000</b>	<b>570,000</b>	<b>570,000</b>
<b>Surplus (+) / Shortfall (-) of Supply Over Demand (Sq. Ft.)</b>	<b>150,000</b>	<b>-90,000</b>	<b>-350,000</b>	<b>-610,000</b>	<b>-835,000</b>
<b>Additional Land Requirement (acres)</b>	<u>Acres</u>	<u>Acres</u>	<u>Acres</u>	<u>Acres</u>	<u>Acres</u>
@ 25.0% coverage	<b>-13.8</b>	<b>8.3</b>	<b>32.1</b>	<b>56.0</b>	<b>76.7</b>
	<i>Surplus</i>	<i>Equilibrium</i>	<i>Shortfall</i>	<i>Shortfall</i>	<i>Shortfall</i>

# **APPENDIX A**

## **INCOME / EXPENDITURE DATA**

APPENDIX A-1

INCOME/EXPENDITURE INDEXING METHODOLOGY (REGRESSION ANALYSIS)

<u>(n)</u>	Av. Per Capita Income of <u>Income Quintile</u>	Per Capita Indexes		
		(x) <u>Income</u>	(y1) <u>NFSR</u>	(y2) <u>FSR</u>
1	\$10,749	39.4	60.4	94.4
2	\$17,896	65.6	75.1	97.2
3	\$21,019	77.0	81.9	93.0
4	\$27,117	99.4	98.6	100.8
5	\$45,699	167.4	146.3	109.1
All Classes	\$27,291	100	100	100

Source: Statistics Canada Survey of Household Spending, 2004 for NFSR & FSR.

REGRESSION EQUATION

$$y = a + bx$$

where n = number of income classes

where x = independent variable or Income Index

where y = dependent variable or Expenditure Index

$$b = \frac{n(\sum xy) - (\sum x)(\sum y)}{n(\sum x^2) - (\sum x)^2} \quad \text{and} \quad a = \frac{\sum y - b(\sum x)}{n}$$

INCOME/EXPENDITURE REGRESSION EQUATIONS

NFSR Expenditure Index:  $y1 = 32 + .68 (x)$

FSR Expenditure Index:  $y2 = 88 + .12 (x)$

APPENDIX A-2

2008 ESTIMATES OF ONTARIO RETAIL SALES BY TRADE GROUP

	2008 Q.4	2008 Q.3	2008 Q.2	2008 Q.1	TOTAL	2008 Per Capita *	%	%
<b>NAICS FSR (Food Store Retail)</b>								
D 090 Supermarket & Grocery Stores	6,113.1	5,847.5	5,715.2	5,399.7	23,075.5	\$1,785	87.5%	87.5%
D 100 Convenience & Specialty Food Stores	<u>845.6</u>	<u>862.7</u>	<u>840.0</u>	<u>737.8</u>	<u>3,286.1</u>	<u>\$254</u>	12.5%	12.5%
<b>TOTAL FSR</b>	<b>6,958.7</b>	<b>6,710.2</b>	<b>6,555.2</b>	<b>6,137.5</b>	<b>26,361.6</b>			
Per Capita *						= \$2,039	100.0%	100.0%
Add back WMC food sales						= \$130		
Per Capita *						= \$2,169		
<b>NFSR (Non-Food Store Retail)</b>								
<b>"GAFO + DRUGS" (Formerly Department Store Type Merchandise)</b>							%	%
B 030 Furniture Stores	908.1	992.1	882.0	790.6	3,572.8	\$276		
B 040 Home Furnishings Stores	626.2	585.7	572.2	530.9	2,315.0	\$179		
B 050 Computer and software stores	109.4	109.7	104.7	114.9	438.7	\$34		
B 060 Home electronics and appliance stores	<u>1,554.1</u>	<u>1,219.2</u>	<u>994.4</u>	<u>971.0</u>	<u>4,738.7</u>	<u>\$367</u>		
Subtotal	3,197.8	2,906.7	2,553.3	2,407.4	11,065.2	\$856	18.2%	15.9%
E 120 Pharmacies and personal care stores	3,118.0	2,859.5	2,900.1	2,787.1	11,664.7	\$902	19.2%	16.8%
F 140 Clothing stores	2,277.1	1,748.6	1,835.5	1,369.7	7,230.9	\$559		
F 150 Shoe, clothing accessories, and jewellery stores	<u>703.0</u>	<u>566.4</u>	<u>571.6</u>	<u>420.9</u>	<u>2,261.9</u>	<u>\$175</u>		
Subtotal	2,980.1	2,315.0	2,407.1	1,790.6	9,492.8	\$734	15.6%	13.7%
G 170 Department stores (excluding concessions) **	3,325.5	2,344.3	2,387.6	1,893.7	9,951.2	\$770	16.4%	14.3%
G 180 Other general merchandise stores (incl. Can. Tire)	<u>2,637.7</u>	<u>2,471.6</u>	<u>2,562.8</u>	<u>1,905.7</u>	<u>9,577.7</u>	<u>\$741</u>	15.8%	13.8%
Subtotal	5,963.2	4,815.9	4,950.4	3,799.4	19,528.9	\$1,510	32.1%	28.1%
H 160 Sporting goods, hobby, music and book stores	1,160.3	898.0	847.5	798.2	3,704.0	\$286		
H 190 Miscellaneous store retail (90%)	<u>1,044.0</u>	<u>953.5</u>	<u>951.1</u>	<u>804.3</u>	<u>3,752.9</u>	<u>\$290</u>		
Subtotal	2,204.3	1,851.5	1,798.6	1,602.5	7,456.9	\$577	12.3%	10.7%
44132 Tires					839.9	\$65	1.4%	1.2%
44131 Auto Parts & Accessories					<u>714.1</u>	<u>\$55</u>	1.2%	1.0%
Subtotal					1,554.0	\$120	2.6%	2.2%
<b>"HI"</b>								
C 070 Home Centres and hardware stores	1,634.0	1,996.7	2,065.1	1,291.5	6,987.3	\$540		10.1%
C 080 Specialized building materials and garden stores	<u>406.1</u>	<u>515.1</u>	<u>481.1</u>	<u>289.5</u>	<u>1,691.8</u>	<u>\$131</u>		2.4%
Subtotal	2,040.1	2,511.8	2,546.2	1,581.0	8,679.1	\$671		12.5%
<b>TOTAL NFSR = "GAFO + DRUG"</b>					<b>60,762.5</b>	<b>\$4,700</b>	100.0%	
Per Capita (Subtract est'd WMC food sales) **						= \$130		
Per Capita *						\$4,570		
<b>TOTAL NFSR + HI = "GAFO + DRUG" + "HI"</b>					<b>69,441.6</b>	<b>\$5,371</b>		100.0%
Per Capita (Subtract est'd WMC food sales) **						= \$130		
Per Capita *						\$5,241		
Dep't. Store Share of "GAFO + DRUG"						= \$770/\$4700 =	16.4%	
Dep't. Store Share of "GAFO + DRUG" less WMC @ \$130 per capita						= \$770/\$4570 =	16.9%	
Dep't. Store Share of NFSR + HI						= \$770/\$5371 =	14.3%	
Dep't. Store Share of NFSR + HI less WMC @ \$130 per capita						= \$770/\$5241 =	14.7%	

\* Per Capita @ 12,928,996 persons (per July - September 2008 estimate from Statistics Canada Quarterly Demographic Statistics, including net undercoverage of non-permanent residents and returning Canadians (July to September, 2008, Cat. # 91-002-X, Table 1).

Source: Retail Trade, Statistics Canada Cat. # 63-005, Table 3-7, December, 2008, with preliminary 4th quarter estimates.

\*\* Morgan estimate.

**APPENDIX A-3**

**STUDY AREA INCOME AND EXPENDITURE INDEXES**

Study Area	Study Area Pop'n %	Census Pop'n	Number Households	HH Income (\$)	Total HH Income (\$ m's)	Per Cap HH Income (\$)	Per Cap HH Income Index	FSR Index	NFSR GAFO + Drug & HI Index	Per. Serv. Index	Rest. Index	L/B/W Index
<b>Ontario</b>												
2001		11,410,046	4,219,410	\$66,836	282,008	\$24,716	100.0	100.0	100.0	100.0	100.0	100.0
2006		12,160,280	4,554,250	\$77,967	355,081	\$29,200	100.0	100.0	100.0	100.0	100.0	100.0
<b>Primary Zone - Richmond Hill</b>												
2001		46,747	15,450	\$78,739	1,216.5	\$26,023	105.3	100.6	103.6	104.0	104.4	102.9
2006	24.5%	51,465	16,796	\$88,252	1,482.3	\$28,802	98.6	99.8	99.1	100.7	98.7	98.5
<b>Primary Zone - Markham</b>												
2001		9,282	2,453	\$105,259	258.2	\$27,817	112.5	101.5	108.5	107.7	110.7	107.6
2006	7.3%	15,228	4,224	\$113,379	478.9	\$31,449	107.7	100.9	105.2	105.2	106.5	104.5
<b>Secondary Zone West - Richmond Hill</b>												
2001		85,234	25,883	\$93,020	2,407.6	\$28,247	114.3	101.7	109.7	108.5	112.2	108.8
2006	52.7%	110,527	33,967	\$102,036	3,465.9	\$31,358	107.4	100.9	105.0	105.1	106.3	104.3
<b>Secondary Zone West - Markham</b>												
2001		1,506	558	\$84,085	46.9	\$31,155	126.1	103.1	117.7	114.4	122.4	116.4
2006	1.7%	3,530	1,556	\$49,066	75.4	\$21,350	73.1	96.8	81.7	88.0	76.6	81.9
<b>Secondary Zone East - Markham</b>												
2001		27,310	7,837	\$113,152	886.8	\$32,471	131.4	103.8	121.3	117.0	127.0	119.9
2006	13.8%	29,056	8,563	\$127,430	1,091.2	\$37,554	128.6	103.4	119.5	115.7	124.6	118.1
<b>Study Area</b>												
2001		170,079	52,181	\$92,295	4,816.0	\$28,317	114.6	101.7	109.9	108.7	112.5	108.9
2006	100.0%	209,806	65,086	\$101,306	6,593.6	\$31,427	107.6	100.9	105.2	105.2	106.5	104.4

**2008**

NFSR + HI Expenditure Index = 32.0 + .68 (Income Index)  
 FSR Expenditure Index = 88.0 + .12 (Income Index)

Restaurant Expenditure Index = 13.256 + .8661 (Income Index)  
 Liquor/Beer/Wine Expenditure Index = 34.19 + .6524 (Income Index)

Personal Service Expenditure Index = 51.48 + .4991 (Income Index)

**APPENDIX A-4**

**STUDY AREA FSR, GAFO + DRUG, HI, HAAS/TBA, PERSONAL SERVICE, RESTAURANT AND L/B/W EXPENDITURE LEVELS**

Study Area	2005 Per Cap HH Income (\$)	2005 Income Index	2008 FSR		2008 NFSR (GAFO + Drug)		2008 NFSR less HAAS/TBA		2008 HI		2008 HAAS/TBA		2008 Per. Serv.		2008 Restaurant L/B/W	
			Per Cap Exp.	Per Cap Exp.	Per Cap Exp.	Per Cap Exp.	Per Cap Exp.	Per Cap Exp.	Per Cap Exp.	Per Cap Exp.	Per Cap Exp.	Per Cap Exp.	Per Cap Exp.	Per Cap Exp.	Per Cap Exp.	Per Cap Exp.
Ontario	\$29,200	100.0	\$2,039	\$5,371	\$4,700	\$4,378	\$671	\$322	\$259	\$261	\$273	\$798	\$529	\$787	\$850	\$529
Primary Zone - Richmond Hill	\$28,802	98.6	\$2,036	\$5,321	\$4,656	\$4,337	\$665	\$319	\$261	\$273	\$787	\$521	\$521	\$521	\$521	\$521
Primary Zone - Markham	\$31,449	107.7	\$2,058	\$5,652	\$4,946	\$4,607	\$706	\$339	\$273	\$273	\$850	\$553	\$553	\$553	\$553	\$553
Subtotal		100.7														
Secondary Zone West - Richmond Hill	\$31,358	107.4	\$2,057	\$5,641	\$4,936	\$4,598	\$705	\$338	\$272	\$228	\$611	\$433	\$433	\$433	\$433	\$433
Secondary Zone West - Markham	\$21,350	73.1	\$1,973	\$4,389	\$3,841	\$3,577	\$548	\$263	\$228	\$228	\$611	\$433	\$433	\$433	\$433	\$433
Subtotal		106.3														
Secondary Zone East - Markham	\$37,554	128.6	\$2,109	\$6,416	\$5,614	\$5,229	\$802	\$385	\$300	\$300	\$994	\$625	\$625	\$625	\$625	\$625

\* HAAAS/TBA shares of NFSR + HI: Ontario @ 6.0% of \$5,371 per capita

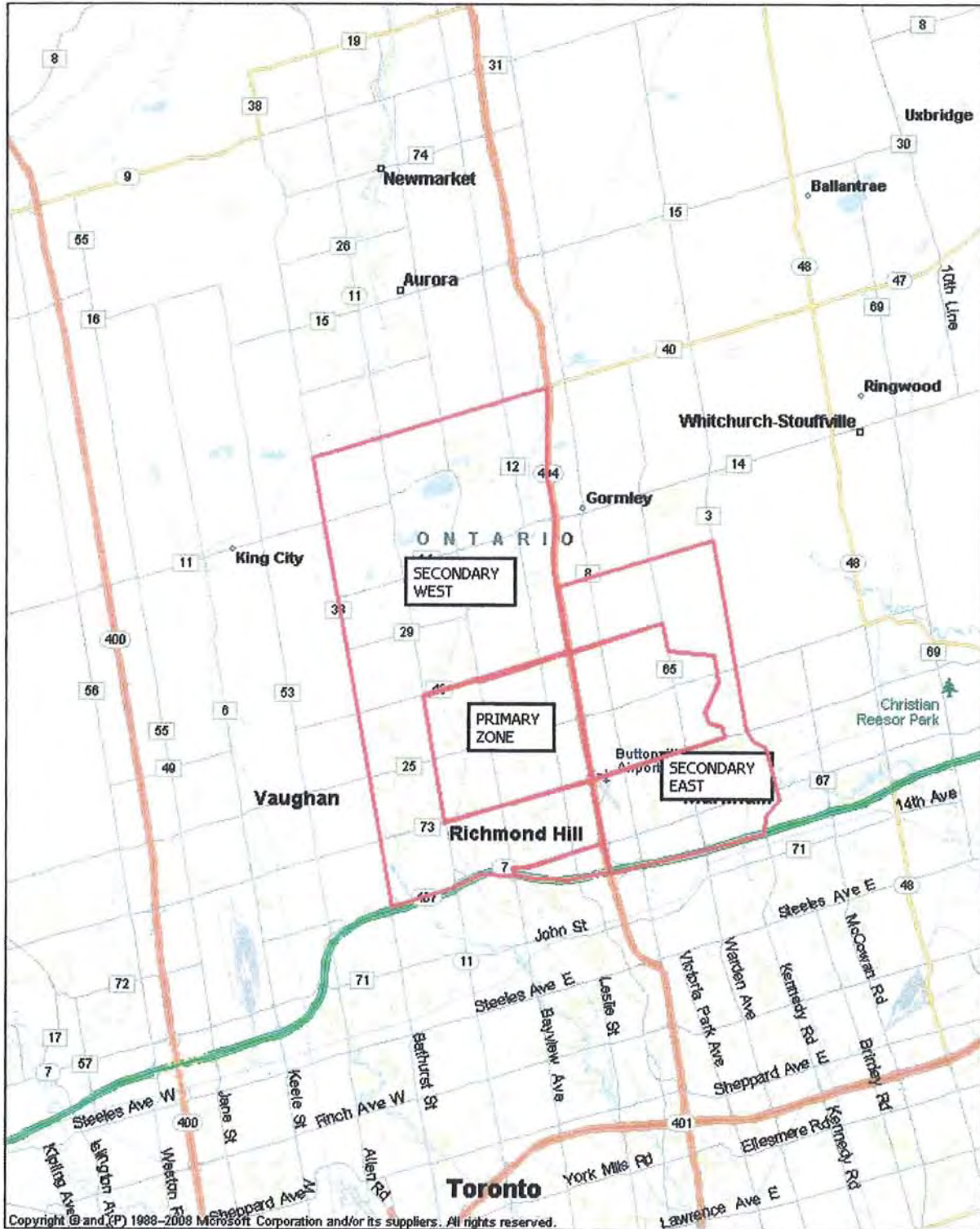
Notes:

The estimated 2008 Ontario per capita Personal Service expenditure assumes 2.0% real and inflationary annual growth from 2004 to 2008 against the 2003 estimate of \$240 per capita.

The estimated 2008 Ontario per capita Restaurant expenditure assumes 10.0% real and inflationary growth from 2004 to 2008 against the 2003 estimate of \$725 per capita.

The estimated 2008 Ontario per capita L/B/W (liquor/beer/wine) expenditure assumes 2.0% real and inflationary annual growth to 2008 against the 2005 estimate of \$499 per capita.

# Scott Morgan & Associates Map Report - Richmond Hill Project PCensus with Microsoft MapPoint





**Scott Morgan & Associates**  
Profile Report - Richmond Hill

2001 Census Census Snapshot	Primary Zone Markham	Primary Zone Richmond Hill	SZ West Markham	SZ West Richmond Hill	SZ East Markham
<b>Total Population</b>					
Males	9,282	46,747	1,505	85,234	27,310
Females	4,469	22,606	733	41,945	13,350
	4,813	24,141	772	43,289	13,960
	% base	% base	% base	% base	% base
	48%	48%	49%	49%	49%
	52%	52%	51%	51%	51%
<b>2001 Population by Age</b>					
0 to 4 years	9,282	46,747	1,505	85,234	27,310
5 to 19 years	561	2,817	50	5,267	1,072
20 to 24 years	2,209	9,536	248	19,192	6,593
25 to 34 years	679	2,963	163	5,517	2,100
35 to 44 years	1,151	6,936	283	11,247	2,453
45 to 54 years	1,738	8,988	252	16,000	4,374
55 to 64 years	1,516	7,021	287	13,566	5,549
65 to 74 years	728	3,638	124	7,136	2,767
75 to 84 years	457	3,024	74	4,305	1,312
85 years and over	174	1,467	16	2,219	736
	39	335	4	633	294
	% base	% base	% base	% base	% base
	6%	6%	3%	6%	4%
	24%	20%	16%	23%	24%
	7%	6%	11%	6%	8%
	12%	15%	19%	13%	9%
	19%	19%	17%	19%	16%
	16%	15%	19%	16%	20%
	8%	8%	8%	8%	10%
	5%	6%	5%	5%	5%
	2%	3%	1%	3%	3%
	0%	1%	0%	1%	1%
<b>Average age of population</b>	33.3	35.4	35.4	34.4	35.8
<b>Median age</b>	35.2	36.2	35.3	35.8	39.0
<b>Dominant age group</b>	5 to 19 years	5 to 19 years	45 to 54 years	5 to 19 years	5 to 19 years
	24%	20%	19%	23%	24%
<b>Families</b>					
Persons per family	2,618	13,173	475	23,735	7,605
	3.4	3.1	2.6	3.3	3.4
	% base	% base	% base	% base	% base
	85%	86%	83%	90%	90%
Two-parent families	2,227	11,391	397	21,382	6,876
With no children at home	539	3,669	173	5,956	1,704
With children at home	1,713	7,694	224	15,410	5,109
Lone-parent families	376	1,764	74	2,321	726
	14%	13%	16%	10%	10%
<b>Total children at home</b>	3,924	16,857	427	33,554	11,122
Children per family	1.5	1.3	0.9	1.4	1.5
<b>Households</b>					
Persons in private households	2,453	15,450	558	25,883	7,837
Persons per household	9,271	46,605	1,493	84,865	27,116
	3.8	3.0	2.9	3.3	3.5
Average 2000 household income	\$ 105,259	\$ 78,739	\$ 84,085	\$ 93,020	\$ 113,152
<b>Occupied Dwellings</b>					
Owned Dwellings	2,448	15,440	558	25,873	7,822
Rented Dwellings	2,107	11,803	471	22,680	7,315
	356	3,660	87	3,160	498
	% base	% base	% base	% base	% base
	86%	76%	84%	88%	94%
	15%	24%	16%	12%	6%



**Scott Morgan & Associates  
Profile Report - Richmond Hill**

2006 Census Census Snapshot	Primary Zone Markham		Primary Zone Richmond Hill		SZ West Markham		SZ West Richmond Hill		SZ East Markham	
		%		%		%		%		%
<b>Total Population</b>	15,228		51,465		3,530		110,527		29,056	
Males	7,414	49%	24,940	48%	1,665	47%	54,164	49%	14,202	49%
Females	7,814	51%	26,525	52%	1,865	53%	56,363	51%	14,854	51%
<b>2006 Population by Age</b>	15,228		51,465		3,530		110,527		29,056	
0 to 4 years	891	6%	2,844	6%	160	5%	6,719	6%	1,170	4%
5 to 19 years	3,189	21%	10,230	20%	369	10%	23,927	22%	6,176	21%
20 to 24 years	1,057	7%	3,387	7%	299	8%	7,158	6%	2,312	8%
25 to 34 years	2,076	14%	6,322	12%	902	26%	13,223	12%	2,646	9%
35 to 44 years	2,596	17%	9,156	18%	578	16%	19,947	18%	3,994	14%
45 to 54 years	2,616	17%	8,448	16%	519	15%	18,075	16%	5,675	20%
55 to 64 years	1,550	10%	5,279	10%	394	11%	11,068	10%	3,849	13%
65 to 74 years	765	5%	3,238	6%	219	6%	6,202	6%	1,867	6%
75 to 84 years	433	3%	2,004	4%	95	3%	3,355	3%	896	3%
85 years and over	85	1%	445	1%	15	0%	1,203	1%	350	1%
<b>Average age of population</b>	36.2		37.5		38.4		36.6		38.6	
<b>Median age</b>	36.8		38.4		35.8		37.4		41.1	
<b>Families</b>	4,415		14,585		1,057		31,188		8,255	
Persons per family	3.3		3.1		2.7		3.3		3.3	
Two-parent families	3,889	88%	12,287	84%	848	80%	27,518	88%	7,423	90%
With no children at home	1,039	24%	3,746	26%	394	37%	7,814	25%	1,885	23%
With children at home	2,832	64%	8,548	59%	454	43%	19,545	63%	5,545	67%
Lone-parent families	507	11%	2,251	15%	209	20%	3,552	11%	753	9%
Children per family	1.4		1.3		0.9		1.4		1.4	
<b>Households</b>	4,224		16,796		1,536		33,967		8,563	
Persons in private households	15,222		51,298		3,530		109,494		28,856	
Persons per household	3.6		3.1		2.3		3.2		3.4	
Average household income	\$ 113,379		\$ 88,252		\$ 49,066		\$ 102,036		\$ 127,430	
<b>Occupied Dwellings</b>	4,226		16,819		1,536		33,989		8,577	
Owned Dwellings	3,863	91%	13,227	79%	1,192	78%	30,485	90%	8,003	93%
Rented Dwellings	354	8%	3,539	21%	344	22%	3,392	10%	575	7%

# **APPENDIX B**

## **FLOORSPACE INVENTORY**

**APPENDIX B-1  
RETAIL AND SERVICE FLOORSPACE INVENTORY**

NAICS Code	Type	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR Dept Store GLA	25-26 Major 25 Dept Store GLA	31-34 Other Genl Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Pers Care 20-21 Access. Used/Misc. GLA	84-113 Sport/Hobby Music/Gift/Art Tires 30 Auto P+A 39 GLA	58-83 Home Furnishings & Electronics GLA	35-57 Fashion & Computers GLA	172-174 Rest. & Fast Food Drinking Services GLA	184-196 Personal Bank Trust Services GLA	124-126 Liquor 24 Wine 23 GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	172-143 FIRE & Prof. Services GLA	131-136 144-159 175-183 Other Vacant Space NEC GLA	160-171 20-2003 Other Space GLA
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**Richmond Hill Retail and Service Inventory**  
Compilation Dated September 14, 2009

Street	Store Name	NAICS Code	Type	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR Dept Store GLA	25-26 Major 25 Dept Store GLA	31-34 Other Genl Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Pers Care 20-21 Access. Used/Misc. GLA	84-113 Sport/Hobby Music/Gift/Art Tires 30 Auto P+A 39 GLA	58-83 Home Furnishings & Electronics GLA	35-57 Fashion & Computers GLA	172-174 Rest. & Fast Food Drinking Services GLA	184-196 Personal Bank Trust Services GLA	124-126 Liquor 24 Wine 23 GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	172-143 FIRE & Prof. Services GLA	131-136 144-159 175-183 Other Vacant Space NEC GLA	160-171 20-2003 Other Space GLA
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**Node 1 - Downtown Richmond Hill**

E.S. Yonge St. North From Major Mackenzie to Centre St.																						
### Yonge St	Doctor's Office	6311	Doctor	151	1,500																	
### Yonge St	Doctor's Office	6211	Doctor	151	2,000																	
### Yonge St	Dentist's Office	6212	Dentist	152	1,800																	
### Yonge St	Vacant	200	Vacant	200	2,000																	
### Yonge St	Dentist's Office	6212	Dentist	152	2,500																	
### Yonge St	Royal Flowers & Gifts	44311	Florists	93	1,260		1,400	1,400														
### Yonge St	Harvest Variety	44412	Convenience Stores	3	1,400																	
### Yonge St	C.B. Dineen Academy	7232	Elementary Education	173	2,100																	
### Yonge St	Cheque & Currency	52239	Cheque Cashing Service	130	1,050																	
### Yonge St	College	61169	Education	150	12,000																	
### Yonge St	Big Box Computer	44312	Computer and Software	73	1,600																	
### Yonge St	Kleiner's Attic	46113	Yarn Store	89	800																	
### Yonge St	Dan's Orthodontics	6212	Dentist	152	8,000																	
### Yonge St	Girls & Guys Salon	812115	Beauty Salon	185	1,800																	
### Yonge St	Beauty Concepts	44231	Floor Coverings Stores	63	1,800																	
### Yonge St	Bike Shop	46111	Sporting Goods Stores	87	1,800																	
### Yonge St	Café de Paris	7231	Restaurant	172	1,800																	
### Yonge St	Dental Office	6212	Dentist	152	1,600																	
### Yonge St	Vacuum Home Depot	44221	Vacuum Cleaners Stores	81	1,600																	
### Yonge St	Freight Postage Bags	46241	Floor Coverings Stores	63	3,200																	
### Yonge St	The Diamond Room	44311	Jewellery Stores	156	1,800																	
### Yonge St	Alate Food	44211	Home Furniture	58	3,450																	
### Yonge St	Richmond Grill	7221	Lic. Restaurant	172	3,800																	
### Yonge St	J. Singer Shoes	44621	Family Shoe Stores	52	2,800																	
### Yonge St	Opium Pharmacy	46011	Pharmacies and Drug S	17	3,400																	
### Yonge St	AMS Driving School	61169	Education	150	1,500																	
### Yonge St	Pain is Pleasure Tattoos	81219	Other Service	189	800																	
### Yonge St	Best Italian Oliva	7222	Fast Food	173	800																	
### Yonge St	Canadian Coin Currency	45399	Miscellaneous	113	2,450																	
### Yonge St	Edward Jones Investments	52393	Brokerage	137	2,400																	
### Yonge St	Psychic	81239	Other Service	196	1,200																	
### Yonge St	Hair Trx	812115	Beauty Salon	185	800																	
### Yonge St	Coldwell Banker Realty	53121	Real Estate	139	1,800																	
### Yonge St	The Make Over Salon	812115	Beauty Salon	185	1,000																	
### Yonge St	Global Computer	44312	Computer and Software	73	1,000																	
### Yonge St	Academy of Learning	61169	Education	150	2,400																	
### Yonge St	Staffing Services	56145	Other Service	145	1,000																	
### Yonge St	Vacant	200	Vacant	200	3,189																	
### Yonge St	Adult Video	53223	Video Rental	134	800																	
### Yonge St	Richmond Hill Variety	44312	Convenience Stores	3	1,400		1,400	1,400														
### Yonge St	Only You Salon	812115	Beauty Salon	185	1,800																	
### Yonge St	Papa Tom's Restaurant	7221	Restaurant	172	3,050																	
### Yonge St	Wing Machine	7221	Lic. Restaurant	172	1,700																	
### Yonge St	Ti Amo Café	7221	Restaurant	172	1,700																	
### Yonge St	Pharmasave	44611	Drugstore	172	2,100																	
### Yonge St	Dental Office	6212	Dentist	152	2,000																	
### Yonge St	The Finest Gold	44311	Jewellery Stores	56	1,000																	
### Yonge St	Vaughan Richmond Hill Vet	54194	Veterinary Clinic	143	5,600																	
### Yonge St	Sun City Gallery	44221	Home Furniture	58	2,200																	
### Yonge St	Lithuan Rug Gallery	44529	Floor Coverings Stores	63	1,800																	
### Yonge St	Praxzo Dried Nuts & Fruits	44221	Floor Coverings Stores	63	1,800																	
### Yonge St	Metro Flooring	44221	Flooring	63	1,800																	
### Yonge St	Honey Bee Discount	45299	General Merchandise S	32	1,400																	
### Yonge St	Bellybumpnabbies	44613	Children's and Infants C	37	700																	
### Yonge St	Jung Soo Ne Restaurant	7221	Lic. Restaurant	172	2,100																	
### Yonge St	Prima Donna Fitness	71394	Fitness Gym	166	5,000																	
### Yonge St	Jeunesse Hair Spa	812115	Beauty Salon	185	1,400																	
### Yonge St	Scotiabank	52211	Bank	124	4,000																	

**Node 2 - North From Major Mackenzie to Bonyo St.**

### Yonge St	Adult Video	53223	Video Rental	134	1,200																	
### Yonge St	Thai Thai Restaurant	7221	Restaurant	172	1,600																	
### Yonge St	Bona Beauty Salon	812115	Beauty Salon	185	800																	
### Yonge St	Super Home Systems	4411	Vacuum Cleaners Stores	81	1,000																	
### Yonge St	Hi & Buck	4612	Accounting	141	1,200																	
### Yonge St	Sign & Book	4411	Printing Service	141	1,200																	
### Yonge St	Manjini Salon	812115	Beauty Salon	185	1,200																	
### Yonge St	Precious Flowers and Things	44311	Florists	93	1,200																	

**APPENDIX B-1  
RETAIL AND SERVICE FLOORSPACE INVENTORY**

Street	Store Name	NAICS Code	Type	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR GLA	25-26 Major 25 Dept Store GLA	31-34 Other Genl Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Pers Care 20-21 Access. GLA	58-83 Home Furnishings & Computers GLA	84-113 Sport/Hobby Music/Book Forst/Gift/Art Used/Misc. GLA	28-30 Can Tire Tires 30 Auto P-A, 29 GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	172-174 Rest. & Fast Food Drinking GLA	184-196 Personal Bank Trust Services GLA	124-126 FIRE & Prof'l Services GLA	137-143 FIRE & Prof'l Services GLA	127-130 131-136 144-159 175-183 Other Vacant Space NEC GLA	160-171 201-203 Other Vacant Space NEC GLA	
Richmond Hill Retail and Service Inventory Compilation Dated September 14, 2009																						
### Yonge St	3C on Restaurant	7221	Restaurant	172	1,650											1,650						
### Yonge St	Vacant	200		200	4,550																	4,550
### Yonge St	M3 Flooring	44221	Floor Coverings Stores	63	950																	
### Yonge St	Luminous Hair Salon	812115	Beauty Salon	185	1,200																	
### Yonge St	Alaina Dry Cleaners	81232	Dry Cleaner	192	800																	
### Yonge St	Chino Med	6213	Other Medical	155	1,000																	
### Yonge St	Medical Spa	6213	Other Medical	155	1,000																	
### Yonge St	Rapsoody Hungarian Cuisine	7221	Lic. Restaurant	172	2,700																	
### Yonge St	Mike's Interiors	44211	Home Furniture	58	1,250																	
### Yonge St	Golden Hoy Chinese Food	7221	Restaurant	172	1,500																	
### Yonge St	Haiam Persian Cuisine	7221	Restaurant	172	1,100																	
### Yonge St	Academy Of Hair Design	81169	Education	150	1,000																	
### Yonge St	Parah Salon & Spa	812115	Beauty Salon	185	1,800																	
### Yonge St	Vacant	200		200	1,200																	
### Yonge St	Your Fired	442298	Petery Stores	70	1,200																	
### Yonge St	Vacant	200		200	4,800																	
### Yonge St	Quinno's	7222	Fast Food	173	2,000																	
### Yonge St	Dental Office	8122	Dentist	152	2,800																	
### Yonge St	Richmond Hill Furriers	44191	Furrier	40	1,300																	
### Yonge St	Used Furniture	45331	Used Goods	98	1,000																	
### Yonge St	Chinese Medical Centre	8111	Doctor	151	500																	
### Yonge St	Air Tech Heating & Air Condit	453999	Home Improvement	113	500																	
### Yonge St	Dick & Jane Komanec Boutiq	453999	Miscellaneous	113	1,750																	
### Yonge St	Schmizer Bistro	7221	Lic. Restaurant	172	1,440																	
### Yonge St	Richmond House Hair Salon	812115	Beauty Salon	185	1,300																	
### Yonge St	Master Reza Takewondo	61169	Education	150	2,400																	
### Yonge St	Employment Resource Centre	5613	Other Service	144	2,400																	
### Yonge St	Basmilla Grocery	44511	Grocery	2	1,200																	
### Yonge St	ICI Paints	44412	Paint and Wallpaper Stk	116	2,750																	
### Yonge St	Color Your World	44412	Paint and Wallpaper Stk	116	8,400																	
### Yonge St	Walking Mobility Clinic	44619	Orthopaedic Aids	21	1,200																	
### Yonge St	Vacant	200		200	2,700																	
### Yonge St	Vacant	200		200	900																	
### Yonge St	Dr. J. D. D. Designer	81232	Dry Cleaner	185	1,600																	
### Yonge St	Relax Sun New Age Boutiq	44312	Gift, Novelty, and Souve	92	600																	
### Yonge St	Gentlemood Optical	44613	Optical Goods Stores	19	600																	
### Yonge St	Sophies Dry Cleaning	81232	Dry Cleaner	192	1,500																	
### Yonge St	Law Office	5411	Legal Service	140	2,000																	
### Yonge St	Young Drivers of Canada	61169	Education	150	1,200																	
### Yonge St	Digital Copy & Print	56143	Printing Service	145	1,500																	
Subtotal Node 1 - Downtown Richmond Hill				0	214,039	0	6,200	6,200	0	1,400	6,700	7,600	22,850	11,460	0	31,740	19,000	4,000	12,050	57,750	16,639	5,000
Node 2 - Yonge Street north of Crosby Ave. to Elgin Mills Rd.																						
ES Yonge St. from Crosby to Elgin Mills																						
### Yonge St	L.C.B.O.	44531	Liquor	24	8,200																	
### Yonge St	The Beer Store	44531	Beer	22	3,350																	
### Yonge St	T-D Canada Trust	52211	Bank	124	3,000																	
Sixth Plaza																						
### Yonge St	Soft Radiance Nail Spa	812115	Nail Salon	185	1,020																	
### Yonge St	Dairy Queen	7222	Fast Food	173	2,640																	
### Yonge St	Richmond Hill Print Centre	44412	Print & Wallpaper	116	2,100																	
### Yonge St	Mt. Shio	7222	Fast Food	173	1,440																	
### Yonge St	Yoshida Bakery	44521	Bakery	173	1,440																	
### Yonge St	Willy's Chinese Restaurant	7221	Lic. Restaurant	172	1,440																	
### Yonge St	Richmond Hill Plaza																					
### Yonge St	Factory Flooring	44221	Flooring	63	2,400																	
### Yonge St	Richmond Hill Pro Bowl	71995	Recreation	169	26,800																	
### Yonge St	Charming Nails	812115	Nail Salon	185	1,500																	
### Yonge St	The Danese Dog	81291	Dog Grooming	194	900																	
### Yonge St	Print Time	56143	Printing Service	145	900																	
### Yonge St	Design 2000 Furniture	44211	Home Furniture	58	5,250																	
### Yonge St	MGM Indian Restaurant	7221	Lic. Restaurant	172	1,800																	
### Yonge St	Shi Ki Sushi	7221	Lic. Restaurant	172	2,400																	
W/S Yonge St. From Elgin Mills to Benson Ave.																						
### Yonge St	Elgin Mills Centre																					
### Yonge St	Allstar Wings & Ribs	7221	Lic. Restaurant	172	3,800																	
### Yonge St	Rogers Wireless	44311	Cell Phones	78	1,920																	
### Yonge St	Dewan To Earth Natural Foods	445999	Health Food	13	1,920																	
### Yonge St	Goldwood Furniture	44211	Home Furniture	58	1,920																	
### Yonge St	Shayan Convenience	44512	Convenience	3	1,920																	
### Yonge St	BSO Beauty Supply	44612	Cosmetics	18	1,920																	
### Yonge St	Kenmark Summerports	45111	Sporting Goods	87	5,720																	
### Yonge St	Vacant	200		200	2,000																	



**APPENDIX B-1  
RETAIL AND SERVICE FLOORSPACE INVENTORY**

Richmond Hill Retail and Service Inventory Compilation Dated September 14, 2009	NAICS Code	Type	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR GLA	25-26 Major 25 Dept Store GLA	31-34 Major 26 Genl Merch. GLA	Drug 17 Cosmetic 18 Optician 19 & Pers Care 20-21 Access. GLA	35-57 Fashion Furnishings & Electronics GLA	58-83 Home Furnishings & Computers GLA	84-113 Sport/Hobby Music/Book + FSC 28 Non-Dept Store GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	124-126 Rest. & Fast Food Drinking Services GLA	131-136 Other Vacant Space NEC GLA	144-159 Other Vacant Space NEC GLA	150-159 Other Vacant Space NEC GLA	160-171 Other Vacant Space NEC GLA						
Shawn's Nails	812115	Nail Salon	185	840																					
Kase Komix	48121	Books & Comics	91	840																					
Royal Deli	445299	Other Food	14	1,000	1,000		1,000																		
Town Variety	44512	Convenience	3	1,000	1,000		1,000																		
Treasures Charity Gift Store	49331	Used Goods	101	1,000																					
Fashion Hair	812115	Beauty Salon	185	1,000																					
Adult Video	53223	Video Rental	134	1,000																					
Pizza Nova	7222	Fast Food	200	1,000																					
Kesters Pastries	445291	Bakery	7	840																					
Bobs Fish & Chips	7222	Fast Food	173	1,000																					
Levendate Convenience	44512	Convenience	3	1,500																					
Nello's Beauty Salon	812115	Beauty Salon	185	780																					
Aldi Kabob	7222	Fast Food	173	780																					
Plus 1 Cleaners	81232	Dry Cleaner	192	840																					
Richmond Flowers	49311	Florist	93	1,800																					
Pizza Printing	56143	Printing Service	145	840																					
J & J Variety	44512	Convenience	3	1,000																					
Hair Fix	812115	Beauty Salon	185	780																					
Laundromat	81231	Laundry	191	780																					
Coffee Time Donuts	7222	Coffee Shop	173	1,600																					
Travel Time	5615	Travel Agent	146	1,200																					
Vacant	200	Vacant	200	840																					
Steps Place Employment	49331	Used Furniture	98	4,800																					
## Young St. Subtotal Node 2 - Yonge St., N. of Crosby Ave. to Elgin Mills Rd.				324,710	22,800	20,940	43,740	0	13,600	22,020	27,392	22,970	44,670	9,000	139,652	4,800	139,652	7,450	12,390	42,720	14,000	6,600	1,600	840	28,000
<b>Node 3 - Yonge Street North of Elgin Mills Rd.</b>																									
<b>E.S. Yonge St. North From Elgin Mills to 197th Ave.</b>																									
## NE Quad, Yonge & Elgin Mills																									
Mac's	44512	Convenience	3	2,784																					
Karibu Restaurant	7221	Lic. Restaurant	172	1,800																					
Khalke Pan Mer. Jan	45122	CD's / Tapes	92	1,800																					
Indian Pakistan Groceries	44511	Grocery	2	2,280																					
Al-Hafiz Halal Meat	44521	Meat Market	4	1,200																					
Pizza Pizza	7222	Fast Food	173	2,400																					
Private Pleasures	448199	Lingerie	43	960																					
Tan 7 Salon	81219	Tanning Salon	189	960																					
Ripley Animal Hospital	54184	Veterinary	143	840																					
Enterprise Car Rental	53211	Car Rental	131	1,200																					
D-Lux Cleaners	81232	Dry Cleaner	192	1,080																					
Europa Deli	445299	Deli/Catessen	14	960																					
Caribbean Jerk Pit	7222	Fast Food	173	840																					
New Galley Bar & Grill	7221	Lic. Restaurant	172	3,000																					
## Rich Point Plaza																									
Mi-Ne Japanese Restaurant	7221	Lic. Restaurant	172	1,200																					
Everyday Cafe	7221	Restaurant	172	2,400																					
Richpoint Pharmacy	44611	Drugstore	17	640																					
Prestige Hair Design	812115	Beauty Salon	185	1,000																					
Richpoint Family Doctors	6211	Doctor	151	1,200																					
New Mega Furniture	44211	Home Furniture	58	2,600																					
Torino Pizza	7222	Fast Food	173	1,500																					
Joe's Hamburgers	7222	Fast Food	173	1,800																					
## Young St. Fr. Leon's																									
## Young St. Loblaws																									
Supermarket	44511	Supermarket	1	58,400																					
General Merchandise	462999	General Merchandise	32	4,800																					
Family Clothing	44814	Family Clothing	38	2,000																					
Ontario MTO	81299	Driver Licensing	150	2,640																					
Dollar Depot	462999	General Merchandise	32	2,700																					
Peppermill's	7222	Fast Food	173	1,200																					
Pet Value	45391	Pet & Pet Supply	102	1,800																					
Magicus	812116	Barber	184	1,000																					
Poppy's	7221	Lic. Restaurant	172	2,400																					
Oregano Pizza	7222	Fast Food	173	1,200																					
Pinacole Optical	44613	Optician	19	1,400																					
TD Canada Trust	52211	Bank	124	4,500																					
Chinese Restaurant	7221	Lic. Restaurant	172	3,000																					
Oleoon Theatre	51213	Theatre	160	15,000																					
Williams Coffee Pub	7222	Coffee Shop	173	3,000																					
York Region Family Service	6241	Social Service	156	1,440																					





**APPENDIX B-1**

**RETAIL AND SERVICE FLOORSPACE INVENTORY**

Street	Start Name	NAICS Code	Type	Study	Total Space	1-2 Super-Market & Grocery	3-16 Spec. Food	Subtotal FSR	25-26 Major Dept Store	31-34 Other Merch	Drug 17 Cosmetic Optician 19	Fashion Access. Pers Care 20-21	58-83 Home Furnishings Electronics	84-113 Sport/Hobby Music/Book	28-30 Can Tire + TSC 28	114-123 Home Ctr. Hardware Bldg. Supply Nursery	172-174 Liquor 24 Beer 22 Wine 23	184-196 Rest. & Fast Food Drinking Services	137-143 FIRE & Prof'l	124-126 Bank Trust	127-130 131-136 144-159 175-183	160-171 201-203 Other Vacant Space NEC	
Richmond Hill	Vacant	200	Vacant	200	4,680																		
Yonge St.	Sporechek	52239	Cheque Cashing	173	240																		
1	New York Pries	7222	Fast Food	173	368																		
2	Mrs Yanelli's	7222	Fast Food	173	368																		
3	A&W	7222	Fast Food	173	368																		
4	Manchu Wok	7222	Fast Food	173	358																		
5	Terraki Experience	7222	Fast Food	173	476																		
6	Bourbon St. Grill	44831	Jewellery	56	1,177																		
B014A	Chaire's Boutique	44832	Luggage	57	1,240																		
B015	Bentley Luggage	44832	Luggage	20	1,362																		
B016	Your Good Health	45112	Health Supplements	88	1,157																		
B017A	E.B Games	81299	Service	196	497																		
B018C	Canadian Viewpoint	44814	Family Clothing	38	10,709																		
B019B	The Gap	44812	Women's Clothing	36	3,972																		
B020B	Melanie Lyne	44813	Children's Clothing	37	4,538																		
B020E	The Children's Place	44813	Children's Clothing	37	2,300																		
B022C	Jacob Connection	44812	Women's Clothing	36	4,604																		
B022A	Jacob	6241	Service	156	3,198																		
C001C	Canadian Blood Services	44814	Unisex Clothing	38	4,123																		
C002B	Boathouse	44811	Women's Shoes	50	1,168																		
C005	Naturalizer	44811	Men's Clothing	35	2,177																		
C006A	Graton & Co.	44812	Soaps/Cosmetics	18	403																		
C008	Fruits & Passion	44814	Family Clothing	38	4,717																		
C009A	American Eagle	44812	Women's Clothing	36	5,855																		
C010C	Esprit	44814	Family Clothing	38	5,855																		
C012B	Mexx	6211	Medical/Dental	151	1,432																		
C017	Dr's Office	45122	Records/Tapes/CD's	92	3,156																		
C013	HMV	44819	Sports Apparel/Shoes	39	2,380																		
C014B	Foot Locker	44811	Home Electronics	75	4,587																		
C015	Sony Style	44611	Drugs	17	7,450																		
C016	Shoppers Drug Mart	44611	Drugs	17	7,450																		
Y001A	Zellers	45211	Discount Department St	26	104,326																		
G001A	Symphony Diamonds	44831	Jewellery	56	1,159																		
G003	Joseph's Coutures	81215	Beauty Salon	185	1,432																		
G004	Marlin Travel	5615	Travel Agent	146	783																		
G002B	Heel Stop	81143	Shoe Repair	182	487																		
F016A	Crate Design	44211	Home Furniture	58	4,527																		
F015B	Lattini Espresso Bar	44211	Home Furniture	58	4,527																		
F014	Ingeborg Shoes	7222	Coffee Shop	173	546																		
F013	R.W. & Co.	44812	Women's Clothing	36	2,129																		
F011A	Zeck's	44811	Mens Clothing	35	4,080																		
F010	Carlton Cards	45322	Cards	96	2,872																		
F009	Northern Reflections	44812	Women's Clothing	36	2,279																		
F008A	Aldo Shoes	44821	Family Shoes	52	2,147																		
F007A	Aldo Accessories	44815	Fashion Accessories	55	748																		
F006	Benix	44298	Housewares	68	1,296																		
F004A	BCBG Max Azria	44812	Women's Clothing	36	3,026																		
F002	Le Chateau	44811	Mens Clothing	35	3,836																		
F001	Kavar Jewellers	44831	Jewellery	56	1,099																		
Y003	The Bay	45211	Department Store	25	98,450																		
E017A	The Source	44311	Home Electronics	75	2,924																		
E015A	Guess By Marciano	44812	Women's Clothing	36	3,037																		
B013	Jean Machine	44612	Cosmetics	18	437																		
B012	La Senza	44814	Casual Clothing	38	900																		
E009A	Guess	44819	Lingerie	43	2,142																		
B008	Stirling Shoes	44821	Casual Clothing	38	4,213																		
E006A	Tan Jay / Alla	44812	Women's Clothing	36	1,856																		
B005	Nine West	44814	Unisex Clothing	38	1,286																		
B003	Black's	44313	Cameras & Accessories	83	1,537																		
B001	Laura Secord	44592	Candy & Nut	8	600																		
E001A	Nature's Health Solutions	446191	Health Supplements	20	440																		
E001C	Delta Optical	44613	Optician	19	500																		
E002A	Hilcrest Florist	45311	Florist	93	770																		
E002B	Gateway News	45121	News Stand	91	548																		
E002E	MM/M Mullins	7222	Fast Food	173	621																		
D007B	Flight Centre	52211	Bank	124	7,506																		
D007	The Hair Spot	81215	Beauty Salon	146	723																		
D005	Telus Mobility	44311	Cell Phones	78	1,117																		
D005B	Peoples Jewellers	44831	Jewellery	56	1,492																		

**APPENDIX E-1  
RETAIL AND SERVICE FLOORSPACE INVENTORY**

Street	Store Name	NAICS Code	Type	Study Code	Total Space G/LA	1-2 Super-Market & Grocery G/LA	3-16 Spec. Food G/LA	25-26 Major 25 Dept. Store G/LA	31-34 Other Genl. Merch. G/LA	Drug 17 Cosmetic 19 Optician 19 Pers Care 20-21 G/LA	35-57 Fashion Access. G/LA	58-83 Home Furnishings & Electronics G/LA	84-113 Sports/Hobby Music/Book + Computers Used/Misc. G/LA	28-30 Can Tire + TSC 28 Tires 30 Auto P-H-A-29 G/LA	114-123 Home Ctr. Hardware Bldg. Supply Nursery G/LA	124-126 FIRE & Prof. Bank Trust Services G/LA	172-174 Rest. & Fast Food Drinking Wine 23 G/LA	184-196 Personal Services G/LA	127-130 131-136 137-143 FIRE & Prof. Services G/LA	144-159 175-183 Other Services G/LA	200 Vacant Space NEC G/LA	160-171 Other Space G/LA						
D004A	Tabi	44812	Womens Clothing	36	2,136						2,136																	
D003	Cassis	44812	Womens Clothing	36	3,570						3,570																	
D001A	Laura / Laura Petites	44812	Womens Clothing	36	7,354						7,354																	
Y004	The Bay Home Store & Kids	45211	Department Store	25	72,950			72,950																				
A016	Goodyear Automotive	178	Auto Service	178	5,088																							
A017	York Regional Police	6242	Other Service	157	8,224																							
A010	Natural Solutions	20	Health Supplements	20	2,843			2,843																				
A014	Japan Camera	44313	Camera & Accessories	83	810																							
A015	Showcase	45399	Miscellaneous	113	1,132																							
A009	Freshly Squeezed	7222	Fast Food	173	844																							
A008	My Gifted Child	45222	Gifts	95	973																							
A005B	Bulk Barn	44529	Bulk Foods	15	4,924																							
A005A	Hallmark	45322	Cards	96	2,646																							
B018D	Pay/less Shoes	44821	Family Shoes	52	1,732																							
A003A	Lenscrafters	44613	Optician	19	4,278																							
A002	Hilbert Dental	6212	Medical/Dental	152	4,254																							
H003A	Mr. Sub	7222	Fast Food	173	412																							
H004A	T Booth	44311	Cell Phones	78	863																							
H005	Sunrise Records	45122	CD/Tapes	92	1,161																							
H006	Baggery	44815	Handbags	55	1,555																							
H007A	West 49	44814	Unisex Clothing	38	1,868																							
H008B	Personal Edge	812115	Beauty Salon	185	502																							
H009	The Body Shop	44612	Cosmetics	18	950																							
H010	The Second Cup	7222	Coffee Shop	173	621																							
H010B	Key Man Engravables	45322	Gifts	95	599																							
H012B	Roots	44814	Unisex Clothing	38	1,630																							
H013A	Freedman Shoes	44821	Family Shoes	52	2,000																							
H014A	Costa Blanca	44812	Womens Clothing	36	1,720																							
H017	Bell World	44311	Cell Phones	78	1,419																							
H018	Kiddie Kobbler	44821	Children's Shoes	51	1,558																							
H019	Trade Secrets	44612	Cosmetics	18	957																							
H020A	Green Earth	45322	Gifts	95	1,012																							
Z008A	Lottery Booth	713291	Other Service	165	70																							
Z010	Bitter Sweet	445292	Candy & Nut	8	195																							
Z002	Rogers Wireless	44311	Cell Phones	78	133																							
Z003	Yogen Fruz	7222	Fast Food	173	200																							
Z011	Fido	44311	Cell Phones	78	150																							
Z001C	Magnolia Jewellery	44831	Jewellery	56	203																							
F017	Bank of Montreal	52211	Bank	124	5,546																							
F/S	Mastermind	45112	Toys	88	6,130																							
F/S	Swiss Chaiot	7221	Lic Restaurant	172	6,370																							
F/S	Pastra Bread	7221	Lic Restaurant	172	5,548																							
Subtotal					534,676	0	5,719	5,719	275,726	0	19,620	115,274	19,363	41,426	0	195,683	471,409	0	0	0	0	16,489	3,191	13,052	0	24,746	0	70

**W/S Yonge St. South From Carville Rd. to Roswell Dr.**

## Yonge St.	Lay's Snacks	812115	Beauty Salon	185	1,000																							
	Country Style Bistro	7221	Restaurant	172	5,000																							
	Mr. Greek	7221	Lic. Restaurant	172	4,000																							
	Optical Oasis	44613	Optician	19	1,600																							
	California Waves Tanning	81219	Tanning Salon	189	2,400																							
	South China Food Take Out	7222	Fast Food	173	840																							
	Vacant	200	Vacant	200	1,560																							
	Adam & Eve Hair Studio	812115	Beauty Salon	185	840																							
	Amami Meats	44521	Meat Market	4	1,200																							
	Admiral Cleaners	81232	Dry Cleaner	192	960																							
	Subtotal				17,840	0	1,200	1,200	0	0	1,600	0	0	0	0	1,600	1,600	0	0	0	0	7,840	5,200	0	0	0	1,560	0
## Yonge St.	Ideal Tile	44221	Flooring	63	3,450																							
## Yonge St.	Dental Office	6212	Dentist	152	2,000																							
## Yonge St.	Richmond Pharmacy	44611	Drugstore	17	2,000																							
## Yonge St.	Active Kids Daycare	6244	Daycare Centre	159	4,000																							
## Yonge St.	Rogers Wireless	44311	Cell Phones	78	960																							
## Yonge	Subtotal Plaza																											
	Tim Horton's	7222	Coffee Shop	173	1,960																							
	Optical Shop of Richmond Hill	44613	Optician	19	1,200																							
	Glamour Gate Graphic	81289	Other Service	196	1,120																							
	Optometrist	6213	Optometrist	153	963																							
	Convenience	44512	Convenience	3	800																							
	Salon G	812115	Beauty Salon	185	905																							
	Chiropractor	6213	Chiropractor	153	1,990																							
	Dentist's Office	6212	Dentist	152	1,150																							
	Classy Flowers	45311	Florist	93	800																							
	Vacant	200	Vacant	200	1,000																							
	State Farm Insurance	52421	Insurance Agent	138	1,200																							
	Zeta Nails	812115	Nail Salon	185	1,200																							
	Subtotal				14,288	0	800	800	0	0	1,200	0	0	800	0	2,000	2,000	0	0	0	1,960	3,225	0	1,200				



**APPENDIX B-1  
RETAIL AND SERVICE FLOORSPACE INVENTORY**

Street	Size	Name	NAICS Code	Type	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR GLA	25-26 Major 25 Dept. Store GLA	31-34 Other Merch. GLA	35-37 Fashion Optician 19 Pers Care 20-21 Access. GLA	58-83 Home Furnishings & Electronics GLA	84-113 Sport/Hobby Music/Book & Games/Art Used/Misc. GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	124-126 Rest. & Fast Food Drinking Services Trust GLA	131-136 FFE & Prof. Services GLA	144-159 Other Vacant Space NEC GLA	160-171 Other Vacant Space NEC GLA
Yonge St. Sofb 999	44211	Home Furniture	58	4,000															
Yonge St. Bristol Car Rental	53211	Car Rental	131	1,200															
Yonge St. Sixth Plaza S/E at 16TH AVE	7222	Fast Food	173	1,000															
Domino's Pizza	44512	Convenience	3	1,600															
Kon Photo	44313	Camera & Film	83	1,064															
Turquoise Medical Supply	44619	Medical Aids	21	1,344															
Palace Hair & Bridal	812115	Beauty Salon	185	1,064															
Mail Boxes Etc	56143	Mail Service	145	1,064															
M & M Meats	445299	Frozen Food	16	1,064															
Fit Mass Nutrition	446191	Health Supplements	20	1,064															
Carer Essentials	5613	Employment Service	144	1,600															
Executive Alternations	81149	Alteration Service	183	1,600															
Play It Again Sports/Langford	45331	Used Sporting Goods	100	4,220															
Subtotal			100	17,184	0	2,664	2,664	0	2,408	0	1,064	4,000	4,000	4,000	4,000	0	0	0	0
E/S Yonge St. North From 16TH AVE. to Palmer Ave.				61,400	61,400														
NE Ooad, Yonge & 16TH AVE				61,400	61,400														
South Hill Shopping Center				32,600	32,600														
No Frills	44511	Supermarket	1	61,400	61,400														
Future Shop	44311	Home Electronics	75	32,600															
Brands Gone Wild Outlet Ctr.	44814	Family Clothing	38	95,400															
Lone Star Texas Grill	7221	Lic Restaurant	172	7,600															
Rochet's Wigs	453999	Misc. Clothing Access.	48	740															
King Henry's Arms	7221	Lic Restaurant	172	2,300															
McDonalds	7222	Fast Food	173	4,000															
Vacant	200	Vacant	200	9,300															
Smart Mart	46111	Sporting Goods	87	7,000															
Royal Bank	52211	Bank	124	5,700															
GNC	446191	Health Supplements	20	1,000															
Dr. Bernstein's Weight Loss	81219	Health Service	187	1,300															
Pet Valu	45391	Pet & Pet Supply	102	2,700															
Oxford Learning	61169	Education Service	150	1,300															
Mega Wraps	7222	Fast Food	173	1,300															
LA Optical	44613	Optician	19	1,300															
Quince Subs	7222	Fast Food	173	1,300															
Expedia Cruise Ship Centre	5615	Travel Agent	146	800															
Magicut	812116	Barber Shop	184	800															
Unison Health Centre	6213	Medical/Dental	153	1,300															
Scottdbank	52211	Bank	124	6,000															
Gramm's Oven Bakery	445291	Bakery	7	900															
London Cleaners	81232	Dry Cleaner	192	600															
Pharma Plus	44611	Drug Store	17	12,500															
CTBC	52211	Bank	124	6,000															
Subtotal			124	265,140	61,400	62,300	0	0	14,800	96,140	32,600	9,700	9,700	0	0	0	0	0	0
Yonge St. F/S Harvey's	7222	Fast Food	173	3,600															
Yonge St. Observations Place Plaza				1,500															
Cash Money	52239	Cheque Cashing	130	1,500															
Choice Of The Orient	7221	Lic. Restaurant	172	6,500															
Fragrant Cleaners	81232	Dry Cleaner	192	2,000															
Jenny Craig	81219	Weight Loss	152	1,200															
Dentist's Office	6212	Dentist	177	2,000															
Health Link Pharmacy	44611	Drugstore	17	2,000															
Physiotherapy Clinic	6213	Other Health Service	153	3,000															
Park Optical	44613	Optician	19	1,300															
Seasons Salon & Spa	812115	Beauty Salon	185	1,400															
Roundhouse Financial & Tax	5412	Accounting	141	1,400															
Reid's Dairy	445299	Other Food	10	1,400															
Video 99 Smoke & Variety	44512	Convenience	3	3,000															
Richmond Hill Beauty Supply	44612	Cosmetics	18	1,500															
Tony Marchese Men's Shop	44811	Mens Clothing	35	1,500															
Home Textile & Fabric	45113	Fabrics	89	1,500															
Bulk Food Store	445299	Other Food	15	1,500															
Subway	7222	Fast Food	173	1,500															
Garni Bakery	445291	Bakery	7	1,500															
Pizza Prizza	7222	Fast Food	173	3,000															
Teryaki Experience	7222	Fast Food	173	1,450															
Shushi Restaurant	7221	Lic. Restaurant	172	1,800															
Apple One Employment	5613	Employment Service	144	1,200															
KFC	7221	Restaurant	172	4,200															
Subtotal			172	47,350	0	7,400	7,400	0	4,800	1,500	0	1,500	0	1,500	0	0	0	0	0
Yonge St. F/S Harvey's				1,500															
Subtotal				2,600															
Yonge St. F/S Harvey's				1,200															
Subtotal				4,000															
Yonge St. F/S Harvey's				1,000															
Subtotal				1,064															
Yonge St. F/S Harvey's				1,600															
Subtotal				1,600															
Yonge St. F/S Harvey's				1,064															
Subtotal				1,600															
Yonge St. F/S Harvey's				1,000															
Subtotal				1,600															
Yonge St. F/S Harvey's				1,064															
Subtotal				1,600															
Yonge St. F/S Harvey's				1,000															
Subtotal				1,600															
Yonge St. F/S Harvey's				1,064															
Subtotal				1,600															
Yonge St. F/S Harvey's				1,000															
Subtotal				1,600															
Yonge St. F/S Harvey's				1,064															
Subtotal				1,600															
Yonge St. F/S Harvey's				1,000															
Subtotal				1															

**APPENDIX B-1  
RETAIL AND SERVICE FLOORSPACE INVENTORY**

Street	Store Name	NAICS Code	Type	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR GLA	25-26 Major 25 Dept Store GLA	31-34 Other Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Pers Care 20-21 GLA	35-37 Fashion Access. GLA	58-83 Home Furnishings & Electronics GLA	84-113 Sport/Hobby Music/Book Periodicals/Used/Misc. GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	124-126 Liquor 24 Beer 22 Wine 23 GLA	172-174 Rest. & Fast Food Drinking GLA	184-196 Personal Services Trust GLA	127-130 FIRE & Prof. Services GLA	131-136 Other Vacant Space NEC GLA	160-171 Other Vacant Space NEC GLA	
###	Yonge St. <b>Vixion Produce Plaza</b>																					
	Wrenos Produce	44511	Supermarket	1	41,800	41,800		41,800														
	Friends Restaurant	7221	Lic. Restaurant	172	3,600																	
	Khameleon Hair Salon	812115	Beauty Salon	185	1,000																	
	Solie Pastry 1,000	445291	Bakery	7	1,500	1,500		1,500														
	Apple Appliances	44211	Home Appliances	59	1,760								1,760									
	A. & W Pharmacy	44611	Drugstore	17	1,760						1,760											
	The Doctor's Office	6211	Doctor	151	1,760																	
	Dental Office	6212	Dentist	152	2,600																	
	Classic Cobbler	81143	Shoe Repair	182	700																	
	Mini Viet	81232	Shoe Repair	172	1,400																	
	Disie Cleaners	81232	Dry Cleaner	192	1,400																	
	Video Panorama	53223	Video Rental	134	1,400																	
	Golden Dollar	452999	General Merchandise	32	2,700					2,700												
	Wallcoverings Plus	44412	Paint & Wallpaper	116	2,100																	
	Puting Edge	71399	Recreation	171	12,000																	
	Party Packagers	453999	Part Supply	135	4,650																	
	Retail Health Centre	44611	Drugstore	17	9,300						9,300											
	Laser Quest	71399	Recreation	171	4,650																	
	Queens Frame Gallery	453999	Art & Frames	113	6,200								6,200									
	Nando's Chicken	7222	Fast Food	173	1,625																	
	Mr. Sub	7222	Fast Food	173	2,100																	
	Hero Burgers	7222	Fast Food	173	2,100																	
	Tomo Sushi	7221	Lic. Restaurant	172	4,800																	
	Korean BBQ	7221	Lic. Restaurant	172	4,800																	
	Meana Lisa Flowers	46311	Florist	93	1,560																	
	Talhan Kabob	7222	Fast Food	173	720																	
	Top Pro Nails	812115	Nail Salon	185	720									1,560								
	The Hair Spa	812115	Beauty Salon	185	720																	
	Hillcrest Smoke & Conventio	44512	Convenience	3	1,080																	
	Roseview Cleaners	81232	Dry Cleaner	192	1,080																	
	Subtotal				123,585	41,800	2,580	44,380	0	2,700	11,060	0	7,960	1,560	2,100	0	21,145	4,920	0	11,110	0	16,650
###	Yonge St. <b>Charles Source</b>																					
	Sylvestr Hair Salon	812115	Beauty Salon	185	600																	
	Shirn Pastry Cafe	7222	Coffee Shop	173	900																	
	Speedy Needle Cleaning & Al	81232	Dry Cleaner	192	900																	
	Vacant	200	Vacant	200	1,080																	
	Johnson Optical	44613	Optician	19	1,080							1,080										
	Dental Office	6212	Dentist	152	1,080																	
	Richmond Hill Deli	445299	Deli	14	3,240																	
	Blinds To Go	442291	Blinds & Drapes	63	2,520																	
	Greek Express	7222	Fast Food	173	1,400																	
	Subtotal				12,800	0	3,240	3,240	0	0	1,080	0	2,520	0	0	0	1,400	1,500	0	1,080	1,080	0
###	Yonge																					
	Shoppers Drug Mart	44611	Drugstore	17	1,600																	
	Pinnacle Health Sciences Cen	6213	Medical / Dental	153	1,600																	
###	Yonge																					
	Richmond Centre																					
	Grande Cheese Factory Outlet	445299	Deli	14	9,526																	
	H-Mart Supermarket	44511	Supermarket	1	34,500	34,500		34,500														
	Living Lighting	442298	Lighting	71	4,187																	
	Much Magazine Plus	45121	News	91	1,200																	
	National Bank	52211	Bank	124	3,462																	
	Jenny Nail Salon	812115	Nail Salon	185	743																	
	Infinity Vision Optical	44613	Optician	19	1,720																	
	Dental Office	6212	Dentist	152	1,500																	
	Nice One Nails	812115	Nail Salon	185	1,019																	
	Network Cleaners	81232	Dry Cleaner	192	1,292																	
	Rogers Wirelase	44311	Cell Phones	78	1,300																	
	Ken's Art & Frames	453999	Art & Frames	113	5,980																	
	Builder King	7221	Lic. Restaurant	172	20,153																	
	Blockbuster Video	53223	Video Rental	134	6,739																	
	Pizzaville	7222	Fast Food	173	535																	
	Toronto Barber	812116	Barber Shop	184	1,852																	
	What A Bagel	445291	Bakery	7	3,739																	
	Home & Home (downstairs)	442298	Bed & Bath	66	10,000																	
	Subtotal				109,437	34,500	13,255	47,755	0	0	1,720	0	21,467	1,200	0	0	20,688	4,906	3,462	0	8,259	0
Subtotal Node 5 - Yonge St. South Of Downtown Richmond Hill					1,333,489	137,700	42,838	180,538	275,726	2,700	77,998	212,914	119,474	65,566	0	477,852	753,578	46,516	40,090	7,234	81,938	28,740

APPENDIX E-1

RETAIL AND SERVICE FLOORSPACE INVENTORY

Street	Store Name	NAICS Code	Type	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR GLA	25-26 Major Dept Store GLA	31-34 Other Merch. GLA	Drug 17 Cosmetic 18 Optician 19 & Access. GLA	35-37 Fashion GLA	58-83 Home Furnishings & Electronics GLA	84-113 Sport/Hobby Music/Book Forst/Gift/Art Used/Misc. GLA	28-30 Can Tire + TSC 28 Tires 30 Auto P-A 29 GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	124-126 Bank Trust Services GLA	184-196 Personal Services GLA	172-174 Rest. & Fast Food Drinking Wine 23 GLA	22-24 Liquor 24 Beer 22 Wine 23 GLA	127-130 131-136 FIRE & Prof. Services GLA	137-143 144-159 175-183 Other Vacant Space NEC GLA	160-171 201-203 Other Vacant Space NEC GLA			
<b>Node 6 - Oak Ridges</b>																										
E/S Yonge St. North from King Rd.																										
<b>Oak Ridges Plaza</b>																										
	Carpet & Hardwood	44221	Flooring	63	1,600								1,600													
	Salon Bloom	812115	Beauty Salon	185	1,000																					
	Information Data Technologies	56143	Other Service	145	4,000																	4,000				
	Subway	7222	Fast Food	173	1,400																					
	TNT Sports Club	71399	Other Service	171	800																					
	Driver Licensing	61169	Other Service	150	1,000																					
	Hydropool Hot Tubs	453999	Hot Tubs	107	4,400																					
F/S	<b>Oak Ridges Market Plaza</b>																									
	Oak Ridges Fish & Chips	7222	Fast Food	173	800																					
	Amazing Nails	812115	Nail Salon	185	800																					
	Oak Ridges Pizza House	7222	Fast Food	173	800																					
	Oak Ridges Flowers	45311	Florist	93	800																					
	King Cigar Plus	44512	Convenience	3	800																					
	Snow White Cleaners	81232	Dry Cleaner	192	800																					
	Mt. Sub	7222	Fast Food	173	1,200																					
	Oregano North Ristorante	7221	Lic. Restaurant	172	4,900																					
	No Frills	44511	Supermarket	1	21,000																					
	3 Vacant Units	200	Vacant	200	3,600																					
	Canadian Dollar Depot	452999	General Merchandise	32	2,100																					
	Shiraz Grill & Caf�	7221	Lic. Restaurant	173	1,100																					
	Phno Jewellery	44831	Jewellery	56	1,100																					
	Global Party Supplies	453999	Party Supply	110	1,100																					
	Vacant	200	Vacant	200	1,100																					
F/S	McDonalds	7222	Fast Food	173	3,600																					
	D.O.T. Patis & Home	44211	Home Furniture	61	6,500																					
	Vacant	200	Vacant	200	1,300																					
	The UPS Store	56143	Postal Service	145	1,000																					
	Ewephoria Yarn Shop	45113	Yarn	89	1,800																					
	T.S. Dental	6212	Dentist	152	2,200																					
	Hair Smart	812115	Beauty Salon	185	1,300																					
	Public Library	71399	Other Service	171	6,000																					
###	Yonge St.	<b>Oak Ridges Medical Office Bldg.</b>																								
	Oak Ridges Pharmacy	44611	Drugstore	17	3,000																					
###	Yonge St.	<b>Scotiabank</b>																								
	Tora Trattoria	52211	Bank	124	3,000																					
	Lic. Restaurant	7221	Lic. Restaurant	172	3,300																					
	Insurance Agent	52421	Insurance Agent	138	1,200																					
	Law Office	4511	Legal Service	140	1,200																					
	Oak Ridges Complete Health	6213	Medical/Dental	153	1,200																					
	Dental Office	6212	Dentist	152	1,200																					
	Canadian Red Cross	6213	Medical/Dental	152	1,200																					
	1 Hr. Cleaner	81232	Dry Cleaner	192	1,200																					
	Mister Moon's Chinese Food	7222	Fast Food	173	1,200																					
	Color Salon & Spa	812115	Beauty Salon	185	1,200																					
	Arthur Murray Dance Studio	61169	Dance Lessons	150	5,000																					
	Anytime Fitness	71294	Fitness Gym	168	3,800																					
###	Yonge St.	<b>Capital North Plaza</b>																								
F/S	T D Canada Trust	52211	Bank	124	6,000																					
	Funny Nails	812115	Nail Salon	185	1,100																					
	Small World Early Learning	61169	Educational	150	1,500																					
	Post Net	56143	Postal Service	145	1,355																					
	Oak Ridges Convenience	44512	Convenience	3	1,355																					
	Dominos Pizza	7222	Fast Food	173	1,355																					
	Sembazuru Sushi	7222	Fast Food	173	1,355																					
	Vacant	200	Vacant	200	1,355																					
###	Yonge St.	<b>Worthington Plaza</b>																								
	The Beer Store	44531	Beer	22	7,000																					
	Pizzaville	7222	Fast Food	173	1,400																					
	Vacant	200	Vacant	200	2,800																					
	Nice One Nails	812115	Nail Salon	185	1,400																					
	Hasty Market	44512	Convenience	3	1,400																					
	Vacant	200	Vacant	200	1,400																					
	Colour Of Maple Paint & Deco	44412	Paint & Wallpaper	116	2,800																					
###	Yonge St.	<b>W&amp;A Yonge St. South From Blackforest Dr.</b>																								
###	Yonge St.	Leatherville Factory Outlet																								
	London Cleaners	44211	Leather Goods/Furniture	57	6,100																					
	Ecokhair	81232	Dry Cleaner	192	450																					
	Tou-Beauty Salon & Boutique	812115	Beauty Salon	185	200																					
F/S	The Art of Framing	812115	Beauty Salon	185	1,800																					
###	Yonge St.	Aurora Party Rentals																								
	Chabad Jewish Centre	44292	Picture Frames	65	2,000																					
	Vacant	53229	Party Rental	135	2,000																					

**APPENDIX E-1**

**RETAIL AND SERVICE FLOORSPACE INVENTORY**

Street	NAICS Code	Code	Type	Study Code	Total Space	1-2 Super-Market & Grocery	3-16 Spec. Food	Subtotal FSR	25-26 Major 25 Dept Store	31-34 Other Genl Merch	Drug 17 Cosmetic Optician 19	35-57 Fashion Access. Auto P-A, 29	58-83 Home Furnishings Computers Electronics Used/Misc.	84-113 Sport/Hobby Music/Book Forest/Gift/Art	28-30 Can Tire Tires 30	Subtotal Non-Dept Store	114-123 Home Ctr. Hardware Bldg. Supply Nursery	124-126 Rest. & Prof. Services	172-174 Rest. & Prof. Services	22-24 Liquor 24 Beer 22 Wine 23	177-183 FR&E & Other	184-196 Personal Services	131-136	160-171			
##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##		
Richmond Hill Retail and Service Inventory Compilation Dated September 14, 2009																											
## Young St. Felini's	7221	Lic. Restaurant		172	2,400	7,800																					
## Young St. Oak Ridges Food Market	44511	Grocery		2	7,800																						
<b>Strip Plaza</b>																											
Persa Grill House	7221	Restaurant		172	1,200																						
Your Choice Cutlery	812116	Barber Shop		184	1,200																						
Peppino's Pizzeria	7221	Lic. Restaurant		172	1,200																						
Dandy Doggy Pet Shop	45391	Pet & Pet Supply		102	1,200																						
Vacant	200	Vacant		200	2,500																						
Oak Hill Discount Travel	5615	Travel Agent		146	900																						
Chocolat Planning	81219	Travel Salon		189	900																						
Sensation Salon & Spa	812115	Beauty Salon		185	900																						
Multigon Security	453999	Locks & Sates		113	900																						
Wild Wing	7221	Lic. Restaurant		172	1,800																						
Upper Canada Glass	44419	Glaze & Mirror		121	3,080																						
Oak Ridges Smoke & Variety	44512	Convenience		3	4,000																						
Esso / Nicholby's	44512	Convenience		3	1,600																						
Shoppers Drug Mart	44611	Drugstore		17	14,400																						
Blockbuster Video	53223	Video Rental		134	5,000																						
## Young St. Craig Security	453999	Locks & Sates		113	1,000																						
Harvey's	7222	Fast Food		173	3,600																						
<b>E/S Yonge Street South from King Rd.</b>																											
Elena's Deli & Cafe	7221	Restaurant		172	1,800																						
Papa's Restaurant	7221	Lic. Restaurant		172	1,800																						
Royal Bank	52211	Bank		124	6,276																						
<b>W/S Yonge Street South from King Rd.</b>																											
Kinark Child & Family Service	6241	Social Service		156	2,400																						
E-Bikes	45111	Electric Bikes		84	1,600																						
Gamma's Oven Bakery Cafe	445291	Bakery		7	2,000																						
Vacant	200	Vacant		200	2,000																						
Value Tire	44132	Tires		30	2,400																						
## Young St. Scoppio's Bar & Grill	7221	Lic. Restaurant		172	1,800																						
Salon Noble	812115	Beauty Salon		185	720																						
Anytime Grocery	44512	Convenience		3	3,600																						
## Young St. Churnasco BBQ Chicken	7222	Fast Food		173	1,600																						
Robust Computers	44312	Computers		73	1,200																						
## Young St. Michel's Hair Studio	61169	Education		150	750																						
## Young St. Pk Kwik Convenience	44512	Convenience		3	1,500																						
<b>King Rd. West of Yonge St.</b>																											
Forté Music School	812115	Beauty Salon		185	750																						
## Young St. Robust Computers	44312	Computers		73	1,200																						
<b>Strip Plaza</b>																											
Ming's Garden	7221	Lic. Restaurant		172	1,730																						
Service Canada Cr. For You!	6243	Other Service		158	1,730																						
Forever Young Hair Studio	812115	Beauty Salon		185	1,920																						
Curves For Women	71394	Fitness Gym		168	1,920																						
National Realty	53121	Real Estate		139	1,920																						
Chiropractic & Wellness Cr.	6213	Medical Service		153	10,800																						
Sushi Cafe	7221	Lic. Restaurant		172	2,160																						
Tax 2000	5412	Accounting		141	1,620																						
Distinct Interiors	44221	Flooring		63	1,730																						
Ontario Tile & Ceramics	44419	Tiles		121	1,730																						
Legacy Taskwon-Do	61162	Education		149	2,880																						
Curtis Coffee & Smoke	44512	Convenience		3	1,800																						
Medical Centre	6214	Medical Service		154	1,920																						
Wind Flowers Floral & Gifts	45311	Florist		93	1,920																						
F/S Home Hardware	44413	Hardware		115	15,000																						
F/S Grand Piano & Organ House	45114	Musical Instruments		90	1,350																						
<b>Subtotal Node 6 - Oak Ridges</b>					<b>296,131</b>	<b>28,800</b>	<b>18,055</b>	<b>46,855</b>	<b>0</b>	<b>2,100</b>	<b>17,400</b>	<b>7,200</b>	<b>13,030</b>	<b>16,070</b>	<b>2,400</b>	<b>88,200</b>	<b>22,610</b>	<b>43,300</b>	<b>15,276</b>	<b>5,940</b>	<b>48,035</b>	<b>16,355</b>	<b>13,520</b>				
<b>Node 7 - N/S Highway 7 From East Beaver Creek Rd. to Bayview</b>																											
650 Hwy. 7 East																											
3 Bl Hair	812115	Beauty Salon		185	450																						
16 Silky Skin	812115	Beauty Salon		185	350																						
19 Shy's Hair	812115	Beauty Salon		185	350																						
38 Nichola's Hair Salon	812115	Beauty Salon		185	1,000																						
41 C Spa	812115	Beauty Salon		185	350																						
42 Nail & Spa	812115	Nail Salon		185	400																						
51 Spa Select	812115	Beauty Salon		185	500																						
72 Koko Spa	812115	Beauty Salon		185	200																						

APPENDIX E-1

RETAIL AND SERVICE FLOORSPACE INVENTORY

Street	Store Name	NAICS Code	Type	Study Code	Total Space G/LA	1-2 Super-Market & Grocery G/LA	3-16 Spec. Food G/LA	Subtotal FSR G/LA	25-26 Major 25 Dept Store G/LA	31-34 Other Merch. G/LA	Drug 17 Cosmetic 18 Optician 19 Pers Care 20,21 G/LA	58-83 Home Furnishings & Computers 84-113 Sports/Hobby Music/Book + TSC 28 + TSC 28 Tires 30 Auto P+A 29 G/LA	114-123 Home Ctr. Hardware Bldg. Supply Nursery G/LA	127-130 131-136 137-143 144-159 FIRE & Prof'l Services G/LA	172-174 Rest. & Fast Food 24 Drinking 25 Wine 23 G/LA	184-196 Personal Services G/LA	124-126 Bank Trust G/LA	160-171 201-203 Other Vacant Space NEC G/LA		
4	Femme Fashions	44812	Women's Clothing	36	350															
6	Ladies Wear	44812	Women's Clothing	36	500															
7	Eng Bridal	44812	Women's Clothing	36	500															
22	Royal Dragon	44812	Women's Clothing	36	200															
43	Christies	44812	Women's Clothing	36	350															
46	Rosy Bridal	44812	Women's Clothing	36	400															
47	Phenix Textiles	45113	Fabrics	89	400															
60	Creative Fashion	44812	Women's Clothing	36	150															
61	Ladies Wear	44812	Women's Clothing	36	300															
66	B & T Trading	44812	Women's Clothing	36	300															
67	Nick & Jade	44812	Women's Clothing	36	350															
73	Zest Design	44812	Women's Clothing	36	150															
1	Vacant	200	Vacant	200	8,500															
8	Vacant	200	Vacant	200	5,000															
10	Vacant	200	Vacant	200	5,000															
11	Fast Food	7222	Fast Food	173	400															
11	Fast Food	7222	Fast Food	173	350															
69	Fast Food	7222	Fast Food	173	350															
70	Fast Food	7222	Fast Food	173	250															
71	Fast Food	7222	Fast Food	173	200															
1a	Doctor	6211	Doctor	151	1,000															
17	Acupuncture	6213	Acupuncture	153	200															
18	Accountant	5412	Accountant	141	200															
20	Law Office	5411	Legal	140	600															
24	Law Office	5411	Legal	140	200															
31 to 35	Financial Group	52393	Broker	137	1,500															
58	Accountant	5412	Accountant	141	200															
63	Art Class	61169	Education	150	300															
65	Wedding Planning	6242	Other Service	157	200															
75	Royal Pearl Jewellery	44831	Jewellery	56	400															
5	Jewellery	44831	Jewellery	56	300															
14	Jewellery	44831	Jewellery	56	300															
30	Jewellery	44831	Jewellery	56	300															
40	Insight Optical	44613	Optician	19	400		400													
50	Parkway Jewellers	44831	Jewellery	56	300															
52	Jewellery	44831	Jewellery	56	350															
54	Swiss Watch Co.	44831	Jewellery	56	200															
57	Jewellery	44831	Jewellery	56	300															
59	Jewellery	44831	Jewellery	56	200															
65	Jewellery	44831	Jewellery	56	200															
82	Jewellery	44831	Jewellery	56	800															
550 Hwy. 7 East Times Square																				
62	Kimfo Restaurant	7221	Lic. Restaurant	172	1,900															
63	Dental Office	6212	Dentist	152	975															
65	The Edge Hair Salon	812115	Beauty Salon	185	910															
66	Natural Wellness	6213	Other Medical	153	895		895													
67	Louis XIV Cakes	445291	Bakery	77	895		895													
68	Goldson Café	7222	Coffee Shop	173	895															
69	PC Power Café	7222	Coffee Shop	173	1,790															
70	Vacant	200	Vacant	200	895															
1	Rogers Wireless	44311	Cell Phones	78	398															
2	Fuji Optical	44613	Optician	19	742		742													
3	Bank Of Montreal	52211	Bank	124	4,760															
5	Ola Optical	44613	Optician	19	1,630															
10	Great Mountain Groeving	445299	Other Food	16	588															
11	Heart & Arrow Jewellery	44831	Jewellery	56	430															
12	Golden Electronics	44311	Home Electronics	75	655															
13	Sephres Cosmetics	44612	Cosmetics	18	658															
18	Bell Mobility	44311	Cell Phones	78	940															
20	Lina Collection	44812	Women's Clothing	36	840															
21	Divi Bridal	44812	Women's Clothing	36	594															
205	V Boutique	44812	Women's Clothing	36	600															
236	Michelle Bludque	44812	Women's Clothing	36	618															
207	Lakobeli	44812	Women's Clothing	36	735															
233	Basique Attitude	44812	Women's Clothing	36	2,000															
222	Focus Café	7222	Coffee Shop	173	1,412															
72	Dental Office	6212	Dentist	152	1,790															
73	Patisserie	445291	Bakery	77	1,790															
74	Mediarh Books	45121	Books	91	895															
76	Kam Moon Fortune Teller	6242	Other Service	157	540															
77	La Difference Watch	44831	Jewellery	56	846															
78	HDTV Electronics	44311	TV / Stereo	75	1,450															
83	Broadcast Books	45121	Books	91	938															
87	Blue Sky Lighting	442298	Lighting	72	1,870															
91	Times Homeaware	442298	Housewares	18	1,800															
92	OT Optical	44613	Optician	153	1,940															
96	Accupuncture Clinic	6213	Other Medical	153	1,080															
97	Fashion Compass	44812	Women's Clothing	36	1,080															
98	Sunlight Hair Design	812115	Beauty Salon	185	1,300															

**APPENDIX B-1  
RETAIL AND SERVICE FLOORSPACE INVENTORY**

Street	NAICS Code	Store Name	Study Code	Total Space	1-2 Super-Market & Grocery	3-16 Spec. Food	Subtotal FSR	Major 25 Dept Store	31-34 Other Genl Merch	Drug 17 Cosmetic 18 Optician 19 Pers Care 20-21	Fashion & Accessories	58-83 Home Furnishings & Computers	84-113 Sport/Hobby Music/Book	28-30 Can Tire + TSC 28 Tires 30 Auto P-A-29	114-123 Home Ctr. Hardware Bldg. Supply Nursery	172-174 Rest. & Liquor 24 Beer 22 Wine 23 Drinking	184-196 Personal Services	124-126 Bank Trust	127-130 FIRE & Prof'l Services	131-136 144-159 175-183 Other Vacant	160-171 204-203 Other Space NEC	
103	45311	Flowers Concerto	93	1,050																		
105	52393	Forex Bankers	137	730																		
107	44511	Tak Chong Food Mart	3	4,040		4,040																
33	812115	Beauty Salon	185	1,440																		
37	812115	Beauty Salon	185	1,360																		
39	45311	Hair Oasis	93	1,400																		
51	52211	TD Canada Trust	124	6,000																		
56	6213	Advanced Health Centre	820																			
57	6213	Medical Wellness	808																			
58	44812	JCY House	36	907						907												
59	812115	Famous Nails	185	1,100																		
60	45392	Century Fine Arts	103	1,100																		
<b>270 st Beaver Ct</b>																						
1	58120	Japanese Restaurant	172	2,700																		
14	7222	Fast Food	173	92																		
15	4511	America Asia Travel	146	541																		
16	812115	Inspire Studio Hair	185	891																		
17	45311	Eastwood Electronics	75	1,295						1,295												
18	7221	Jim Chantice Woodies	172	1,440																		
19	44613	Optical Conn	19	988						988												
21	7221	Golden Court	172	7,200																		
3	812115	Beauty Salon	185	780																		
5	44529	Other Food	16	406																		
6	45111	Sporting Goods	87	406																		
7	812115	Beauty Salon	185	390																		
8	44529	Other Food	16	390																		
9	81232	Dry Cleaner	192	387																		
10	44529	Bakery	7	387																		
11	45322	Gifts	95	1,472																		
12	200	Vacant	200	3,015																		
13	45392	Art Gallery	103	715																		
15	58120	Alaska Restaurant	172	3,308																		
L11	7221	Big Mouth Kce	172	2,088																		
14	200	Vacant	200	7,239																		
19	44529	Dong Dong Pastries	157	838																		
20	6242	Other Food Products	152	838																		
21	7221	Dental Office	172	1,676																		
22	7221	Gourmet Veg Restaurant	172	1,180																		
25	7221	BQ House	172	1,180																		
26	812115	Other Medical	155	1,291																		
28	7221	Urology Therapy	172	872																		
29	7221	Yiet Noodles	172	872																		
30	812115	Beauty Salon	185	872																		
31	7222	Coffee Shop	173	872																		
32	44612	Cosmetics	8	872																		
33	6213	Other Medical	155	894																		
35	8821	Doctor	151	882																		
38	7221	Korean BBQ	172	2,291																		
42	7221	Japanese Restaurant	172	6,200																		
43	6211	Doctor's Office	151	482																		
45	44611	Pharmacy	17	48,594																		
15	52211	Bank	124	10,000																		
	812115	Beauty Salon	185	1,500																		
<b>420 Highway 7</b>																						
	7221	Omni Restaurant	172	4,844																		
	52211	Bank	124	4,827																		
	44512	Convenience	3	1,290																		
	44521	Meat Market	4	3,383																		
	7222	Fast Food	173	1,496																		
	44311	Home Electronics	75	1,155																		
	6213	Other Health Service	155	4,773																		
	7221	Lic. Restaurant	172	2,571																		
	44611	Drugsstore	17	2,367																		
	6213	Other Health Service	155	2,514																		
	5615	Travel Agent	146	919																		
	6211	Medical	151	1,524																		
	44529	Bakery	7	2,167																		
	7221	Lic. Restaurant	172	1,302																		
	44312	Computers	73	971																		
	812115	Beauty Salon	173	1,052																		
	81232	Dry Cleaner	192	528																		
	44819	Furrier	40	726																		
	6212	Dentist	152	1,395																		
	71399	Child Play Area	171	2,078																		
	61169	Education	150	866																		
	200	Vacant	200	3,580																		
	200	Vacant	200	1,044																		
	200	Vacant	200	1,044																		





**APPENDIX B-1**

**RETAIL AND SERVICE FLOORSPACE INVENTORY**

NAICS Code	NAICS Desc	Shady Code	Total Space GLA	1-2 Super-Market & Grocery	3-16 Spec. Food	Subtotal FSR GLA	25-26 Major Dept Store	31-34 Other Merch.	Drug 17 Cosmetics 18 Optician 19 Pers Care 20-21 Access	58-83 Home Furnishings & Computers Electronics Used/Misc.	84-113 Sport/Hobby Music/Book Forst/Gift/Art Wine/23	114-123 Home Ctr. Hardware Bldg. Supply Nursery	124-126 Bank Trust Services	172-174 Rest. & Fast Food Drinking	184-196 Personal Services	127-130 FIRE & Prof'l Services	131-136 Other Vacant Space NEC	166-171 Other Vacant Space NEC		
23	Bombay's Churnery	7221	1,900																	
24	Bayview Spa	812115	1,400																	
25	Tijana Tan	812115	1,400																	
26	Bayhill Education	61169	1,400																	
27	Vic Hong Restaurant	7222	2,100																	
28	Oily Kids	44813	2,300																	
29	HSBC	52211	4,100																	
30	Burger King	7222	4,000																	
31	Tony Petrol's	7221	3,000																	
32	Payless Shoes	44821	2,700																	
33	Canada Computers	44312	2,700																	
	Subtotal		278,262	59,750	1,400	61,150	138,650	0	12,450	3,150	7,500	0	0	18,300	4,400	0	9,800	6,362	0	
	Subtotal Node 8 - Major Mackenzie and Bayview Area		347,302	59,750	6,200	65,950	138,650	10,000	14,450	11,000	7,750	9,100	5,600	29,020	12,200	7,300	0	19,920	13,362	3,000

**Node 9 - Leslie Centre**

**NW Quad, Major Mackenzie Dr. & Leslie St.**

A1	Dr. Safari	6211	1,518																		
A2	Cozy Cleaners	81232	1,454																		
A3	Girl's Hair Salon	812115	1,729																		
A4	Serene de Spa	81219	1,716																		
A5	Vacant	200	3,435																		
A7	PostNet	56143	1,715																		
A8	Forewood IDA	44611	3,859																		
A9	Vacant	200	4,880																		
B2	Price Choppers	44511	45,061																		
D1	LCBO	44531	24																		
E1	Royal Bank of Canada	52211	24																		
F1	Tim Hortons	7222	3,080																		
G1	Sara's Kitchen	7222	1,726																		
G2	Happy Nails	812115	1,673																		
G3/5	Snap Fitness	71294	1,673																		
G6	Cure Chiropractor	6213	1,500																		
G7	Kitchen Food Fair	44512	1,613																		
C1-1	Allstate	52421	2,968																		
C1-2	Vacant	200	3,247																		
C2-1	Bio Fed	446099	21																		
C2-2	B80	44612	18																		
C2-3	Vacant	200	1,543																		
C2-4	Kenny Noodles	7221	3,091																		
C2-6	Vacant	200	1,548																		
C2-7	Vacant	200	1,572																		
C3-1	Romance Flowers	45311	1,250																		
C3-2	Baskin Robbins	7222	1,250																		
C3-3	Northeast Telecom	44311	1,013																		
C3-4	Queen's Patisserie	7222	1,013																		
C3-5	Hero Burger	7222	1,361																		
	Subtotal Node 9 - Leslie Centre		117,740	45,061	1,613	46,674	0	0	6,955	0	1,013	1,250	0	9,625	11,284	6,372	5,511	2,968	4,733	16,225	4,930

**Node 10 - Elgin Mills Crossing**

**### Leslie Street**

B1	Elgin Mills Crossing	44411	120,897																
301	Pizza Pizza	7222	2,256																
302	Dental Office	6212	1,670																
303	Medical Clinic	6215	2,018																
304	Pedi N Nails	812115	1,447																
305	Chocolate Creamery	44532	8																
306	Dove Cleaners	81232	1,447																
30	Your Dollar Store With More	452999	8,301																
401	Marks Work Warehouse	44814	32																
402	Richtman's	44812	38																
403	La Senza	44812	36																
404	Walking On A Cloud	44821	36																
405	Benjamin Moore Paints	44412	2,214																
A51	The Shoe Company	44821	116																
A5	Michael's	45112	21,654																
201	Hero Burger	7222	1,511																
202	Kitchen Food Fair	7222	3																
203	Chinese Restaurant	7222	1,263																
204	Hair Fitness	812115	933																
205	Rogers Wireless	44311	1,217																



**APPENDIX B-1  
RETAIL AND SERVICE FLOORSPACE INVENTORY**

Street	NAICS Code	Type	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR GLA	25-26 Major Discount Dept Store GLA	31-34 Other Genl Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Pers Care 20-21 GLA	58-83 Home Furnishings & Computers GLA	84-113 Sport/Hobby Music/Book Forst/Art Used/Misc. Auto P-A-29 GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	127-130 FIRE & Prof'l Services GLA	131-136 144-159 Other Vacant Space NEC GLA	160-171 201-203 Other Vacant Space NEC GLA	
161 York Blvd. Mr. Greek	7221	Lic. Restaurant	172	4,150	0	0	0	0	0	1,000	0	1,060	0	0	0	0	0
163 York Blvd. Chako	7221	Lic. Restaurant	172	4,150	0	0	0	0	0	1,000	0	1,060	0	0	0	0	0
163 East Pearce	7221	Restaurant	172	1,250													
Asian Cuisine	7221	Restaurant	172	1,050													
Chilli Street	7221	Restaurant	172	700													
My Kitchen	200	Vacant	200	700													
<b>Subtotal Node II - Beaver Creek Area - East &amp; West</b>				<b>133,230</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1,000</b>	<b>0</b>	<b>1,060</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Node 12 - Other Richmond Hill</b>																	
361 Carville Rd.																	
<b>Carville Plaza</b>																	
Mix Variety	44312	Convenience	3	2,100		2,100	2,100										
Melody Nails	812115	Nail Salon	185	640													
Golden Hanger Dry Cleaning	81232	Dry Cleaner	192	640													
Endology	6213	Other Health Service	153	640													
Jazresh Café	7222	Coffee Shop	173	600													
Carville Family Dentistry	6212	Dentist	152	2,100													
Carville Food Centre	44311	Grocery	3	2,320			2,320										
Hair Designs By Minna	812115	Beauty Salon	185	1,120													
Fiori Boutique	45311	Florist	93	1,120													
### Bayview																	
<b>Sidro Plaza</b>																	
Wimpy's Diner	7222	Fast Food	173	2,200													
Vacant	200	Vacant	200	1,100													
Alter Ego Hair Studio	812115	Beauty Salon	185	1,100													
Bayview North Dental	6212	Dentist	152	1,100													
Flower Crez	45311	Florist	93	1,100													
Melle Appliance House	44211	Home Appliances	59	4,000													
Shoppers Drug Mart	44611	Drugstore	17	16,500													
Eggplant Restaurant	7221	Restaurant	172	1,000													
### Bayview Ave.																	
<b>Bayview Mills Shopping Centre</b>																	
Sweet Basil Asian Restaurant	7221	Lic. Restaurant	172	2,940													
Softron Tax Service	5412	Accounting	141	1,000													
Solo Maria Italian Restaurant	7221	Lic. Restaurant	172	1,352													
Little Caesar's Pizza	7222	Fast Food	173	1,431													
Medicine Shop Pharmacy	44611	Drugstore	17	1,404													
Doctor's Office	6211	Medical/Dental	151	988													
YMCA Early Learning Ctr.	61169	Educational	150	1,377													
Azim Hairdresser	812115	Beauty Salon	185	1,055													
YMCA Seneca Employment	5613	Employment Service	144	5,780													
Dental Office	6212	Dentist	152	1,078													
Convenience Store	44312	Convenience	3	1,595													
Aquasub Scuba Diving	6242	Other Service	157	1,050													
Crazy Nails	812115	Nail Salon	185	1,050													
Magic Touch Dry Cleaners	81232	Dry Cleaner	192	1,000													
M & M Meats	44231	Meats	4	1,435													
Family Life Centre	6241	Family Service	156	3,266													
Doctor's Office	6211	Medical/Dental	151	1,690													
### Bayview Ave.																	
<b>T.D. Canada Trust</b>																	
	52211	Bank	124	4,588													
### Bayview Ave.																	
<b>Village Gate Plaza</b>																	
Maxim Restaurant	7221	Lic. Restaurant	172	3,350													
Vacant	200	Vacant	200	1,250													
Bayview Hill Orthodontics	6212	Dentist	152	1,400													
Weldrick Dental	6212	Dentist	152	1,250													
Optometrist	6213	Other Medical	153	1,120													
Comfy Shoe Gallery	44621	Family Shoes	52	1,250													
Village Gate Hair Salon	812115	Beauty Salon	185	1,250													
Village Gate Variety	44312	Convenience	3	1,250													
Eye On Fashion	44812	Women's Clothing	36	1,250													
Senbazaru Sushi Bar	7221	Lic. Restaurant	172	1,250													
Chop Six Chinese Food	7222	Fast Food	173	1,250													
Vacant	200	Vacant	200	1,250													
Vienna Bakery Café	445291	Bakery	7	1,800													
ACT Rehab	6213	Other Medical	153	2,600													
Corso Pro	44612	Cosmetics	18	3,500													
Today's Cleaners	81232	Dry Cleaning	192	1,370													
Medi Trust Pharmacy	44611	Drugstore	17	3,500													

**APPENDIX B-1  
RETAIL AND SERVICE FLOORSPACE INVENTORY**

Sheet	Richmond Hill Retail and Service Inventory Compilation Dated September 14, 2009	Store Name	NAICS Code	Zone	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR Dept Store GLA	25-26 Major 25 Discount GLA	31-34 Other Gen'l Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Pers Care 20-21 GLA	35-57 Fashion Accessories GLA	58-83 Home Furnishings & Electronics GLA	84-113 Sport/Hobby Music/Gift/Art Used/Misc. Auto P+A 29 GLA	28-30 Can Tire Tires 30 GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	22-24 Liquor 24 Beer 22 Wine 23 Drinking Services GLA	172-174 Rest. & Fast Food 175-183 Personal Services Trust Bank GLA	124-126 Bank Trust Services GLA	127-130 FIRE & Prof'l Services GLA	131-136 144-159 Other Vacant Space NFC GLA	160-171 201-203 Other Vacant Space NFC GLA		
		Bono's Fine Foods	44311	Supermarket	1	6,400	6,400																		
		Stonemark	52211	Bank	124	5,000																			
		Blue Sky Jewellery	44831	Jewellery	56	960				960															
		Vacant	200		200	960																			
		Collector's Dreams	45399	Sport Cards	113	800																			
		Majie's Boutique	44812	Women's Clothing	36	1,760				1,760															
		Poppyspa	81291	Dog Grooming	194	800																			
		Yang's Fine Chinese Food	7221	Lic. Restaurant	172	4,000																			
		### Bayview Ave																							
		<b>Stirling Plaza</b>																							
		Shoppers Drug Mart	44611	Drugstore	17	11,000																			
		1678 Avenue Chiropractic	6213	Chiropractor	153	1,000																			
		Pizza Nova	7222	Pizza Food	173	1,000																			
		Yim Hortons	7222	Coffee Shop	173	3,000																			
		Bayview Ave FS																							
		McDonalds	7222	Fast Food	173	3,600																			
		### Bayview Ave																							
		<b>Wendle Village</b>																							
		1 Fast Convenience	44512	Convenience	3	1,479		1,479																	
		2 Louis Cleaners	81232	Dry Cleaners	192	1,200																			
		3 North Bayview Chiropractic	6213	Chiropractor	153	1,170																			
		4 Vacant	200		200	576																			
		5 Vacant	200		200	887																			
		6 Wycliffe Veterinary Clinic	94194	Veterinary	143	1,210																			
		7 Vacant	200		200	1,369																			
		8 Dental Office	6212	Dentist	152	1,107																			
		9 D.A. Pharmacy	44611	Drugstore	17	1,230																			
		10 Queen's Bakery	445291	Bakery	7	1,054																			
		11 Academy of Mathematics	61109	Education Service	150	1,000																			
		12 Emporer's House	7221	Lic. Restaurant	172	8,519																			
		13 P & L Housewares	44298	Housewares	68	1,000																			
		14 Paradise Papillon	445291	Bakery	7	396																			
		15 Waterhouse Restaurant	7221	Lic. Restaurant	172	1,770																			
		16 Opionemak's Office	6213	Medical / Dental	153	1,225																			
		17 M Stylist Hair Salon	812115	Beauty Salon	185	875																			
		18 Canada Hearing Centre	446199	Hearing Aids	21	700																			
		19 Will Feelings	45322	Gifts & Books	95	800																			
		20 Vacant	200		200	833																			
		21 Wintergreen Florist	45311	Florist	95	650																			
		22 Happy Feet	44821	Shoes	52	825																			
		23 L'S Art Gallery	45399	Art & Frames	113	1,160																			
		24 T-D Chandra Trunk	32211	Bank	124	5,305																			
		25 Bayview Food Mart	44511	Supermarket	1	28,035																			
		26 Blackmore Medical Centre	6213	Medical / Dental	153	1,322																			
		27 Contemporary Conservatory	61109	Music Lessons	150	2,566																			
		28 C.A.R.E. Physiotherapy	6213	Physiotherapy	152	1,106																			
		29 Dental Office	32421	Dentist	138	1,068																			
		30 State Farm Insurance	6212	Dentist	152	1,300																			
		31 Dental Office	200		200	2,667																			
		32 Vacant	200		200	2,667																			
		33 Doctors Office	6211	Medical / Dental	151	596																			
		### Bayview Ave																							
		<b>Reverend Hills Plaza</b>																							
		Audio Excellence	44311	Home Electronics	75	2,000																			
		Money 3 Bistro	7221	Lic. Restaurant	172	1,800																			
		Adelphi Cleaners	81232	Dry Cleaner	192	800																			
		Dezaino Salon & Spa	812115	Beauty Salon	185	1,520																			
		Vacant	200		200	855																			
		Monoz Denure Clinic	6212	Dentist	152	855																			
		Vacant	200		200	800																			
		Persia Meat Shop	44521	Meat Market	4	800																			
		Vacant	200		200	2,470																			
		All Seasons Grooming	81291	Dog Grooming	194	680																			
		883 16th. Ave.																							
		<b>Reverend Hills Plaza</b>																							
		Nana Sushi	7221	Lic. Restaurant	172	1,216																			
		Sub-V1 Boutique	44812	Women's Clothing	36	1,216																			
		Vacant	200		200	1,216																			
		Tong's Restaurant	44611	Drugstore	172	1,216																			
		Bayview (OTI), Pharmacy	812115	Beauty Salon	185	1,216																			
		Art Hair Salon	812115	Beauty Salon	185	1,216																			
		Dental Office	6212	Dentist	152	1,216																			
		Merry Life Salon	812115	Beauty Salon	185	1,216																			
		National Bank	32211	Bank	124	2,500																			

APPENDIX B-I

RETAIL AND SERVICE FLOORSpace INVENTORY

NAICS Code	Type	Study Code	Total Space	1-2 Super-Market & Grocery	3-16 Spec. Food	23-26 Major 25 Subtotal	31-34 Other Gen'l	35-57 Fashion Optician 19 & Acces. Per Care 20-21	58-83 Home Furnishings & Computers	84-113 Sport/Hobby Music/Book Post/Gift/Art Used/Misc.	28-30 Can Tire + TSC 28 Tires 30	114-123 Home Cr. Hardware Bldg. Supply Nursery	127-130 FIRE & Prof'l Services	131-136 144-159 175-183 Other Vacant Space	160-171 201-203 Other Vacant Space	
52211	Bank	124	3,300													
446189	Health Aids	21	924													
81232	Dry Cleaners	152	924													
812115	Beauty Salon	185	924													
445899	Art Supply	165	924													
6313	Other Medical	3	924													
44612	Cosmetics	3	924													
812115	Beauty Salon	185	924													
7222	Coffee Shop	173	1,840													
445299	Other Food	16	1,840													
6312	Dentist	152	924													
445299	Other Food	16	780													
445291	Bakery	7	780													
44011	Home Furniture	58	780													
44611	Home Furniture	3	4,000													
7221	Lic. Restaurant	172	2,500													
44631	Meat Market	4	924													
7221	Lic. Restaurant	172	5,460													
44312	Computers	73	1,000													
200	Vacant	200	700													
200	Vacant	200	3,500													
61169	Education	150	2,450													
6313	Chiropractor	152	520													
81232	Dry Cleaners	192	520													
812115	Beauty Salon	185	700													
200	Vacant	200	1,400													
812115	Nail Salon	185	700													
7221	Lic. Restaurant	172	1,400													
445299	Other Food	16	1,500													
7222	Coffee Shop	173	1,500													
445299	Other Food	16	1,500													
7222	Coffee Shop	173	1,500													
81149	Alteration Service	83	1,000													
45321	Office Supply	96	1,000													
61169	Education	150	1,000													
52395	Broker	800	1,000													
6312	Dentist	152	2,500													
7222	Coffee Shop	173	2,160													
44612	Convenience	3	1,950													
52421	Insurance Agent	138	1,950													
202	Office Space	202	1,950													
6312	Dentist	152	1,950													
54164	Veterinary	143	5,225													
81232	Dry Cleaner	192	600													
44611	Grocery Store	2	7,789													
812115	Beauty Salon	185	840													
71394	Floral	168	840													
81232	Dry Cleaner	192	700													
6312	Dentist	152	1,050													
812115	Beauty Salon	185	840													
200	Vacant	200	1,400													
44611	Drugstore	17	2,800													
44612	Convenience	3	1,920													
6311	Medical	151	1,600													
7221	Lic. Restaurant	172	2,000													
812115	Beauty Salon	185	1,000													
44611	Drugstore	17	1,000													
6313	Chiropractor	152	1,000													
81232	Dry Cleaner	192	1,000													
7222	Coffee Shop	173	1,920													
6312	Dentist	152	1,440													

**APPENDIX B-1  
RETAIL AND SERVICE FLOORSPACE INVENTORY**

NAICS Code	NAICS Description	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSK GLA	Major 26 Dept Store GLA	25-26 Major 25 GLA	31-34 Other Gen1 Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Pers Care 20-21 GLA	35-57 Fashion & Accessories GLA	58-83 Home Furnishings & Electronics GLA	84-113 Sport/Hobby Music/Book & Used/Misc. GLA	28-30 Can Tire Tires 30 GLA	Subtotal Non-Dept Store NFSR GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	22-24 Liquor 24 Beer 22 Wine 23 Drinking Services GLA	172-174 Rest. & Fast Food Services GLA	184-196 Personal Services GLA	124-126 Bank Trust Services GLA	137-143 FIRE & Prof'l Services GLA	127-130 131-136 144-159 175-183 200 Other Vacant Space NEC GLA	160-171 201-203 Other Vacant Space NEC GLA	
6342	Other Service	157	2,400																					
202	Office Space	202	1,440																				1440	
202	Office Space	202	1,600																				1600	
52421	Insurance Broker	138	800																			800		
61169	Education	150	2,050																					
7221	Lic. Restaurant	72	2,050																					
44131	Auto Service	29	2,050																					
45999	Appliance Parts	113	2,050																					
44122	Motorcycles	n/a	2,050																					
44159	Plumbing Supply	119	8,200																					
44512	Convenience	3	2,050																					
44131	Auto Parts	29	2,050																					
44832	Leather Goods	57	2,050																					
44419	Ceramic Tile	121	2,050																					
200	Vacant	200	3,337																					
7222	Coffee Shop	173	2,100																					
200	Vacant	200	1,200																					
7221	Lic. Restaurant	172	2,500																					
6313	Chiropractor	153	1,250																					
6312	Dentist	152	1,250																					
81291	Dog Grooming	194	1,250																					
812115	Beauty Salon	185	1,250																					
44813	Children's Clothing	37	2,500																					
44512	Convenience	3	1,250																					
7221	Lic. Restaurant	172	2,500																					
812115	Nail Salon	185	1,250																					
44812	Women's Clothing	36	1,250																					
200	Vacant	200	6,250																					
6241	Social Service	156	2,500																					
7221	Lic. Restaurant	172	1,000																					
81232	Dry Cleaner	200	1,850																					
44812	Women's Clothing	36	1,850																					
81232	Dry Cleaner	192	1,850																					
44591	Bakery	7	3,700																					
7221	Lic. Restaurant	172	1,850																					
6313	Chiropractor	153	1,850																					
7221	Lic. Restaurant	172	2,500																					
44312	Computers	73	1,850																					
71294	Fitness Gym	168	2,400																					
6312	Dentist	152	2,200																					
812115	Beauty Salon	185	3,600																					
44311	Cell Phones	78	1,000																					
7221	Lic. Restaurant	172	2,000																					
7221	Lic. Restaurant	172	1,500																					
81232	Dry Cleaner	192	600																					
6312	Dentist	152	1,600																					
6313	Medical / Dental	153	1,200																					
6313	Chiropractor	153	1,200																					
44591	Bakery	7	1,200																					
44512	Convenience	3	2,460																					
44611	Drugstore	17	1,200																					
81219	Tanning Salon	189	1,200																					
7221	Restaurant	172	2,400																					
52421	Insurance Agent	138	3,600																					
200	Vacant	200	13,000																					
812115	Beauty Salon	185	1,200																					
812115	Beauty Salon	185	1,200																					
71294	Fitness	168	2,000																					
81169	Education	150	1,200																					
71294	Fitness	168	3,200																					
7222	Coffee Shop	173	2,000																					
200	Vacant	200	1,400																					
44211	Home Furniture	58	4,000																					

APPENDIX B-1

RETAIL AND SERVICE FLOORS/SPACE INVENTORY

Street	NAICS Code	Usage	Study Code	Total Space GLA	1-2 Super-Market & Grocery	3-16 Spec. Food	25-26 Major 25 Subtotal FSR	31-34 Other Gen'l Merch.	35-57 Fashion Optician 19 Pers Care 20-21 Access. Electronics	58-83 Home Furnishings & Computers Used/Misc.	84-113 Sport/Hobby Music/Book	28-30 Can Tire + TSC 28 Tires 30 Auto P+A 29	114-123 Home Ctr. Hardware Bldg. Supply Nursery	172-174 Rest. & Fast Food Beer 23 Drinking	22-24 Liquor 24 Wine 23	127-130 FIRE & Prof'l Services	131-136 144-159 175-183 Other Vacant	160-171 201-203 Other Vacant NEC		
10-16-20 Vogelt Rd. @ 16th. Ave. Headford Plaza (New Plaza)		Education	150	4,000															4000	
JCB Dance Studio	61169	Education	150	4,000																
Richmond Hill Retail and Service Inventory Compilation Dated September 14, 2009																				
Tim Horrons	7222	Coffee Shop	173	2,400																
Peryati Experience	7222	Fast Food	173	1,200																
Vacant & Under Const.	200	Vacant	200	31,500															31,500	
<b>Miscellaneous Locations</b>																				
Bridle Dr.																				
Décor Furniture	44211	Home Furniture	58	3,000																
Elegance Restaurant	7221	Lic. Restaurant	172	4,500																
Cosmo Music Superstore	45114	Musical Instruments	90	10,000																
<b>Subtotal Node 12 - Other Richmond Hill</b>				<b>539,265</b>	<b>42,224</b>	<b>39,517</b>	<b>81,741</b>	<b>0</b>	<b>44,974</b>	<b>12,431</b>	<b>21,840</b>	<b>21,260</b>	<b>4,100</b>	<b>104,605</b>	<b>104,605</b>	<b>0</b>	<b>90,824</b>	<b>41,614</b>	<b>20,693</b>	<b>82,753</b>
<b>SUMMARY NODES 1 - 12:</b>																				
<b>Node 1 - Downtown Richmond Hill</b>				<b>214,039</b>	<b>0</b>	<b>6,200</b>	<b>6,200</b>	<b>1,400</b>	<b>6,700</b>	<b>7,600</b>	<b>22,850</b>	<b>11,460</b>	<b>0</b>	<b>50,010</b>	<b>50,010</b>	<b>11,650</b>	<b>31,740</b>	<b>19,000</b>	<b>4,000</b>	<b>12,050</b>
				<b>100.0%</b>	<b>0.0%</b>	<b>2.9%</b>	<b>2.9%</b>	<b>0.6%</b>	<b>3.1%</b>	<b>3.6%</b>	<b>10.7%</b>	<b>5.4%</b>	<b>0.0%</b>	<b>23.4%</b>	<b>23.4%</b>	<b>5.4%</b>	<b>14.8%</b>	<b>8.9%</b>	<b>1.9%</b>	<b>5.6%</b>
<b>Node 2 - Yonge Street north of Crosby Ave. to Elgin Mills Rd.</b>				<b>324,710</b>	<b>22,800</b>	<b>20,940</b>	<b>43,740</b>	<b>13,600</b>	<b>22,020</b>	<b>22,770</b>	<b>22,970</b>	<b>44,670</b>	<b>9,000</b>	<b>139,652</b>	<b>139,652</b>	<b>7,450</b>	<b>12,390</b>	<b>42,720</b>	<b>14,000</b>	<b>6,600</b>
				<b>100.0%</b>	<b>7.0%</b>	<b>6.4%</b>	<b>13.5%</b>	<b>4.2%</b>	<b>8.4%</b>	<b>7.1%</b>	<b>14.6%</b>	<b>2.8%</b>	<b>43.0%</b>	<b>43.0%</b>	<b>2.3%</b>	<b>3.8%</b>	<b>13.2%</b>	<b>4.3%</b>	<b>2.0%</b>	<b>1.6%</b>
<b>Node 3 - Yonge Street North of Elgin Mills Rd.</b>				<b>579,387</b>	<b>118,830</b>	<b>10,562</b>	<b>129,392</b>	<b>7,500</b>	<b>37,505</b>	<b>4,885</b>	<b>72,040</b>	<b>7,203</b>	<b>68,450</b>	<b>197,883</b>	<b>197,883</b>	<b>3,600</b>	<b>0</b>	<b>61,283</b>	<b>9,846</b>	<b>30,316</b>
				<b>100.0%</b>	<b>20.5%</b>	<b>1.8%</b>	<b>22.3%</b>	<b>1.3%</b>	<b>6.5%</b>	<b>0.8%</b>	<b>12.4%</b>	<b>1.2%</b>	<b>11.8%</b>	<b>34.1%</b>	<b>34.1%</b>	<b>0.6%</b>	<b>0.0%</b>	<b>10.6%</b>	<b>1.7%</b>	<b>5.2%</b>
<b>Node 4 - Bayview Glen (excl. Yonge &amp; High Tech)</b>				<b>957,459</b>	<b>139,848</b>	<b>640</b>	<b>140,488</b>	<b>2,560</b>	<b>1,280</b>	<b>37,000</b>	<b>115,480</b>	<b>115,480</b>	<b>94,996</b>	<b>444,316</b>	<b>444,316</b>	<b>120,000</b>	<b>0</b>	<b>25,040</b>	<b>4,480</b>	<b>9,685</b>
				<b>100.0%</b>	<b>14.6%</b>	<b>0.1%</b>	<b>14.7%</b>	<b>0.3%</b>	<b>0.1%</b>	<b>3.9%</b>	<b>20.2%</b>	<b>12.1%</b>	<b>46.4%</b>	<b>46.4%</b>	<b>12.5%</b>	<b>0.0%</b>	<b>2.6%</b>	<b>0.5%</b>	<b>1.0%</b>	<b>0.0%</b>
<b>Node 5 - Yonge St. South Of Downtown Richmond Hill</b>				<b>1,333,489</b>	<b>137,700</b>	<b>42,838</b>	<b>180,538</b>	<b>2,700</b>	<b>77,598</b>	<b>212,914</b>	<b>119,474</b>	<b>65,366</b>	<b>0</b>	<b>477,852</b>	<b>753,578</b>	<b>4,700</b>	<b>18,291</b>	<b>152,824</b>	<b>46,516</b>	<b>40,090</b>
				<b>100.0%</b>	<b>10.3%</b>	<b>3.2%</b>	<b>13.5%</b>	<b>0.2%</b>	<b>5.8%</b>	<b>16.0%</b>	<b>9.0%</b>	<b>4.9%</b>	<b>0.0%</b>	<b>35.8%</b>	<b>56.5%</b>	<b>0.4%</b>	<b>1.4%</b>	<b>11.5%</b>	<b>3.3%</b>	<b>3.0%</b>
<b>Node 6 - Oak Ridges</b>				<b>296,131</b>	<b>28,800</b>	<b>18,055</b>	<b>46,855</b>	<b>2,100</b>	<b>17,400</b>	<b>7,200</b>	<b>13,030</b>	<b>16,070</b>	<b>2,400</b>	<b>58,200</b>	<b>58,200</b>	<b>22,610</b>	<b>7,000</b>	<b>43,500</b>	<b>18,840</b>	<b>15,276</b>
				<b>100.0%</b>	<b>9.7%</b>	<b>6.1%</b>	<b>15.8%</b>	<b>0.7%</b>	<b>5.9%</b>	<b>2.4%</b>	<b>4.4%</b>	<b>5.4%</b>	<b>0.8%</b>	<b>19.7%</b>	<b>19.7%</b>	<b>7.6%</b>	<b>2.4%</b>	<b>14.7%</b>	<b>6.4%</b>	<b>5.2%</b>
<b>Node 7 - N/S Highway 7 From East Beaver Creek Rd. to Bayview</b>				<b>375,714</b>	<b>5,317</b>	<b>25,331</b>	<b>30,648</b>	<b>0</b>	<b>62,331</b>	<b>17,603</b>	<b>13,461</b>	<b>10,837</b>	<b>0</b>	<b>104,232</b>	<b>104,232</b>	<b>0</b>	<b>93,421</b>	<b>27,341</b>	<b>30,165</b>	<b>4,929</b>
				<b>100.0%</b>	<b>1.4%</b>	<b>6.7%</b>	<b>8.2%</b>	<b>0.0%</b>	<b>16.6%</b>	<b>4.7%</b>	<b>2.8%</b>	<b>0.0%</b>	<b>27.7%</b>	<b>27.7%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>24.9%</b>	<b>7.3%</b>	<b>8.0%</b>	<b>1.3%</b>
<b>Node 8 - Major Mackenzie and Bayview Area</b>				<b>347,302</b>	<b>59,750</b>	<b>6,200</b>	<b>65,950</b>	<b>10,000</b>	<b>14,450</b>	<b>11,000</b>	<b>7,750</b>	<b>9,100</b>	<b>0</b>	<b>52,300</b>	<b>190,950</b>	<b>5,600</b>	<b>29,020</b>	<b>12,200</b>	<b>7,300</b>	<b>0</b>
				<b>100.0%</b>	<b>17.2%</b>	<b>1.8%</b>	<b>19.0%</b>	<b>2.9%</b>	<b>4.2%</b>	<b>3.2%</b>	<b>2.2%</b>	<b>2.6%</b>	<b>0.0%</b>	<b>15.1%</b>	<b>55.0%</b>	<b>1.6%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>2.1%</b>	<b>0.0%</b>
<b>Node 9 - Leslie Centre</b>				<b>117,740</b>	<b>45,061</b>	<b>1,613</b>	<b>46,674</b>	<b>0</b>	<b>6,955</b>	<b>0</b>	<b>1,013</b>	<b>1,250</b>	<b>0</b>	<b>9,218</b>	<b>9,218</b>	<b>0</b>	<b>9,625</b>	<b>11,284</b>	<b>6,572</b>	<b>5,511</b>
				<b>100.0%</b>	<b>38.3%</b>	<b>1.4%</b>	<b>39.6%</b>	<b>0.0%</b>	<b>5.9%</b>	<b>0.0%</b>	<b>1.1%</b>	<b>0.0%</b>	<b>7.8%</b>	<b>7.8%</b>	<b>0.0%</b>	<b>8.2%</b>	<b>9.6%</b>	<b>5.6%</b>	<b>4.7%</b>	<b>4.7%</b>
<b>Node 10 - Elgin Mills Crossing</b>				<b>153,032</b>	<b>0</b>	<b>0</b>	<b>153,032</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>153,032</b>	<b>153,032</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
				<b>100.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>100.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Node 11 - Beaver Creek Area - East &amp; West</b>				<b>133,230</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1,000</b>	<b>0</b>	<b>1,910</b>	<b>1,060</b>	<b>0</b>	<b>3,970</b>	<b>3,970</b>	<b>0</b>	<b>96,550</b>	<b>6,720</b>	<b>0</b>	<b>1,200</b>
				<b>100.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.8%</b>	<b>0.0%</b>	<b>1.4%</b>	<b>0.8%</b>	<b>0.0%</b>	<b>3.0%</b>	<b>3.0%</b>	<b>0.0%</b>	<b>72.5%</b>	<b>5.0%</b>	<b>0.0%</b>	<b>0.9%</b>
<b>Node 12 - Other Richmond Hill</b>				<b>539,265</b>	<b>42,224</b>	<b>39,517</b>	<b>81,741</b>	<b>0</b>	<b>44,974</b>	<b>12,431</b>	<b>21,840</b>	<b>21,260</b>	<b>4,100</b>	<b>104,605</b>	<b>104,605</b>	<b>10,250</b>	<b>90,824</b>	<b>41,614</b>	<b>20,693</b>	<b>82,753</b>
				<b>100.0%</b>	<b>7.8%</b>	<b>7.3%</b>	<b>15.2%</b>	<b>0.0%</b>	<b>8.3%</b>	<b>2.3%</b>	<b>4.0%</b>	<b>3.9%</b>	<b>0.8%</b>	<b>19.4%</b>	<b>19.4%</b>	<b>1.9%</b>	<b>16.8%</b>	<b>7.7%</b>	<b>3.8%</b>	<b>1.8%</b>
<b>TOTAL RICHMOND HILL NODES 1-12</b>				<b>5,371,498</b>	<b>600,330</b>	<b>171,856</b>	<b>772,226</b>	<b>414,376</b>	<b>192,892</b>	<b>292,013</b>	<b>338,025</b>	<b>489,338</b>	<b>303,756</b>	<b>178,946</b>	<b>1,794,970</b>	<b>2,209,346</b>	<b>47,306</b>	<b>678,206</b>	<b>207,129</b>	<b>169,636</b>
				<b>100.0%</b>	<b>11.2%</b>	<b>3.2%</b>	<b>14.4%</b>	<b>7.7%</b>	<b>3.6%</b>	<b>5.4%</b>	<b>6.3%</b>	<b>9.1%</b>	<b>3.3%</b>	<b>33.4%</b>	<b>41.1%</b>	<b>0.9%</b>	<b>12.6%</b>	<b>3.9%</b>	<b>3.2%</b>	<b>1.1%</b>