



Carleton Place Downtown Corridor Study
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Prepared for

The Town of Carleton Place



Prepared by

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Executive Summary

The *Carleton Place Downtown Corridor Study* is a project that seeks to re-establish the downtown corridor by first assessing the community needs and wants and developing viable development options for the area. This report outlines strategic development options and implementation plans for re-establishing the Carleton Place downtown corridor as a vibrant and sustainable centre of town life.

Personal interviews with key community stakeholders, the Business Improvement Agency (BIA), developers, and store owners were conducted as was a community workshop on November 15, 2011. Community input was complemented with current situation research on retail trends in Canada, along with a supply-demand analysis on Carleton Place retail space requirements and current inventories.

Retail and service markets are heavily influenced by various economic and demographic trends, including income, employment, and household formation. Doyletech's *Situation Analysis Report* provides further details on these variables; the following is a brief overview:

- FPmarkets estimates that total **2011 retail sales** in Carleton Place are \$189.2 million while its retail sales per household is \$47,700, compared to \$30,800 for Ontario and \$32,500 for Canada. Carleton Place's retail sales per capita in 2011 is \$18,700 compared to \$11,800 for Ontario and \$13,000 for Canada. These statistics paint a healthy comparative picture of Carleton Place's overall retail activity; obviously there is both the ability and opportunity to spend locally. However, Bridge Street (as detailed below) has a high current vacancy rate.
- **Population growth** is a major driver of retail development; typically population growth and housing development is closely followed by retail development; hence the frequent call to increase downtown residential in order to develop a more vibrant core. Between 2001 and 2006, both Carleton Place (the town) and Beckwith (the township) experienced fairly good population growth in comparison to other Eastern Ontario communities; however, both grew slower than Ontario as a whole. Also, the town is growing slower than neighbouring Beckwith Township.
- **Household formation growth** in Carleton Place and Beckwith are reflective of the Ontario average and higher than in most of the other communities under investigation.
- **Income** is likely the single greatest determinant of retail sales and services activity. The level and growth in personal disposable income determines the amount of retail sales and in turn the amount of retail and service floor space that a community requires. The high incomes and population of neighbouring Beckwith Township greatly increases the retail sales activity (and space requirements) of Carleton Place. Also, the significant amount of pass-thru traffic and regional cottagers also contributes greatly.
- Doyletech developed its own **retail demand/supply analysis** (called a trade area residual demand analysis) using a trade area combining Carleton Place with Beckwith Township. Based on this analysis, trade area residents are estimated to have spent \$268.7 million in 2010 at various retail and service stores. Furthermore, this spending is projected to increase by \$47.9 million or 18% to \$316.6 million in 2016. These estimates are derived based on the available population and per capita expenditure data estimates.

- Furthermore, the analysis suggests that spending of trade area residents supported a total of 621,716 to 840,356 sf of retail and service floor space in 2010. By 2013, this space is estimated to increase to a range of 672,019 to 908,462 sf. Two factors shape future retail development: (1) the extent to which there is current over-supply or under-supply, and (2) increases in demand going forward. Our analysis indicates that up to 158,164 sf of additional retail and service floor space would be supportable in this area by 2013 (this assumes however that trade area residents spend 100% of their shopping dollars within the trade area). While this is unlikely to be the case, there is additional spending by vacationers, cottagers, and pass-by traffic. This means that it is entirely possible that 158,164 sf (or more) of additional development may ultimately be needed. The analysis shows that 90,058 sf of retail and service space is needed now with another 68,106 sf needed in the next 3 years, for a total of 158,164 sf.
- Doyletech also developed a [current retail and service space inventory](#) for Carleton Place based on field research and drive-bys. Automotive and Home Improvement (AHIM) represents the largest share of inventory (30%), followed by DSTM (24%), and FCTM (23%). The overall Carleton Place vacancy rate is 2% (which is low by industry standards) but the Bridge Street corridor has the highest vacancy rate of all areas at approximately 11%. This finding further confirms that Carleton Place's downtown needs attention and improvement.
- [Findings from personal and telephone interviews](#) with downtown corridor community stakeholders, shop owners, and others covered a wide range of topics such as the need to improve building facades, create incentives for building owners, improve and enforce standards, improve signage, increase the visibility of current businesses, increase collaborative efforts, increase pedestrian traffic and vibe downtown, deal with parking issues on Bridge Street, promotional activities and materials development, and devise ways to improve the current mix of retail and service enterprises.
- [Findings from the community workshop](#) suggest that:
 - The Town look at Westport, Merrickville, Centrepointe, Westboro, and the Glebe as possible models to replicate over the long-term;
 - Loss of pedestrian traffic in the core needs to be addressed;
 - Anchor attractions/enterprises need to be secured;
 - Chamber of Commerce should consider moving to the Highway 7 Corridor;
 - Landlord engagement on facade improvements be initiated;
 - Situation with Findlay Foundry land should be revisited;
 - Due consideration be given to the Town's residential growth capacity;
 - Large scale renovations to create upscale condominiums maybe difficult; and
 - Open and progressive dialogue around the concept of connecting Bridge Street corridor with Hwy 7 via Coleman Street.
- [A review of current inventory suggests there are some gaps](#) that could be investigated for possible establishment in the core. These include:
 - Men's clothing;
 - Outdoor lifestyle equipment and apparel;
 - Hobby/recreation-oriented shops that serve the retiree / senior community.
 - From a services perspective, the town lacks a common family restaurant and quick luncheon-type eatery as well as current pop-culture entertainment such as

a movie theatre. These local attractions generate regular flows of people which encourage pedestrian traffic bringing a local vibe to the core.

- Based on the interviews, workshop, and comparative research, our [SWOT analysis](#) suggests:
The strengths are:
 - Volume through 'big box' stores;
 - Located on 4-lane highway;
 - Great value-add assets in heritage and historic buildings downtown;
 - Natural waterfront with residential and commercial potential;
 - Opportunities from 'realization' phase of highway construction.But the drawbacks are:
 - Relative decline of downtown against big boxes;
 - Stagnant income growth among main residents;
 - Inadequate current attractions in the downtown corridor to bring traffic.
- To sum up the current situation, **Carleton Place is at a crossroads with strong opportunity, but substantial redevelopment is needed to make the downtown corridor vibrant again.**
- From a **tactical perspective**, the following recommendations and/or findings should be considered to address [current issues](#):
 - During high traffic periods, area parking lots can result in traffic challenges when left handed turns are being made. A tabled recommendation during an interview was the concept of using the back streets parallel to Bridge Street as entry and exit points to help retain traffic flow. An example of such a parking method is the parking lot adjacent to the Thirsty Moose.
 - Implement better signage that leads outside vehicular traffic into the downtown corridor.
 - Carry-on investigations and considerations to extend Bridge Street through Lansdowne to Coleman Street. Improve the flow and commercial space allocations along Coleman Street to integrate with the north end commercial space of the Walmart Smart Centre.
 - Maintain a measure on the local parking demands as the corridor grows. These measures will help serve a longer term comprehensive redesign/planning effort that will serve higher volumes in the future.
 - Improve signage coming off the Trans-Canada bicycle trail. Based on interview feedback, there are documented bicycle trips leading out of Ottawa to Carleton Place. When the cyclists arrive at the end of Coleman Street, they have no guidance on how to get into the downtown corridor.
 - Relocate the Carleton Place Chamber of Commerce office out into the Highway 7 corridor.
 - Work with landlords of vacant locations to fill store-fronts with the merchandise and marketing material associated with local businesses. These businesses could also be local Internet-based enterprises, or other shops not located on Bridge Street.
 - Strongly promote current BIA façade improvement programs in concert with other financial support incentives identified in the *Industrial Strategy Report* (see accompanying Doyletech report "*Review of Assistance Programs*").
 - Remove street signs for closed businesses with vacant shop fronts.

- As momentum is being established in the evolution of the Bridge Street business corridor, consider establishing a plan to create a visible and concentrated real estate business park near the Franktown Road entrance (South Business Park). By supporting a progressive and well planned out relocation of the real estate offices on Bridge Street into a common real estate park more commercial space is made available for new businesses on Bridge Street. This strategic action could possibly start when the planned 'health village' on Hooper Street starts to accommodate the current community health service offices in the South Business Park.
- From a **strategic perspective**, the following recommendations and/or findings should be considered in developing [long-term strategies and plans](#):
 - The downtown corridor needs and deserves to be viewed as an established, distinctive area of Carleton Place with its own common theme and boundary.
 - Build consensus on a long-term development theme or strategy for the downtown corridor. Consider the various development models identified by stakeholders; namely, Westport, Merrickville, Centrepointe, Westboro, and the Glebe as models to replicate (in whole or in some part) over the long-term.
 - No matter what model (or models) is developed, if there is an element of promoting retail and services in the downtown corridor, linking to the current big box development on Highway 7 is a mandatory requirement for success. Establishing a dedicated connection for ease of access, travel time/convenience, and visual integration would be key.
 - Even with the elevated interest of creating smoother, and stronger, linkages between downtown and the Highway 7 area, the downtown is still viewed as needing its own theme and boundary.
 - With the establishment of a more comprehensive retail platform, there would be an inherent vibrancy and broader service offering in the downtown corridor that would support and impress outside visits. Enhanced opportunities in terms of tourism, niche retail, and events and festivals become possible. For example, Carleton Place holds a number of key assets that can be highlighted for tourism purposes. These include the history of Roy Brown, the history of Leigh Instruments (crash indicator innovation), Findlay Stoves, Train Stations, Wool Growers, and more. By mixing a few of these attractions together, outside visitors can be encouraged to come and see the highlights in parallel with making retail purchases. An example provided by a key stakeholder was regular, organized shopping tours from Ottawa into Carleton Place for women's clothing that covers a wide array of age groups. In this tour, there could be guaranteed price reductions at participating stores, a stop at some different eateries mixed with a tour or two of some tourist highlights with bus transportation from start to finish.

1.0 Introduction & Terms of Reference

This document serves as the final deliverable in the **Carleton Place Downtown Corridor Study** in which Doyletech outlines strategic development options and implementation plans for re-establishing the Carleton Place downtown corridor as a vibrant and sustainable centre of town life.

This document will present findings from both the secondary research and field interviews with key community stakeholders, present potential developmental options, and recommended tactics and strategies.

1.1 Project Background and Terms of Reference

The Carleton Place Downtown Corridor Study is a project that seeks to re-establish the downtown corridor by first assessing the community needs and wants and developing viable development options for the area.

While Carleton Place is increasingly serving as a retail mecca for area residents and thru-traffic, its downtown core is not benefitting from this phenomena.

Bridge Street, the main street of Carleton Place, is bisected by the Mississippi River and runs North-South across the entire town. It benefits from solid infrastructure, well-kept historic buildings and broad sidewalks. However, there is low commercial activity currently as reflected in unoccupied store-fronts and reduced pedestrian traffic. The current retail vacancy alone is approximately 11% based on Doyletech research (November 2011).

1.2 Approach and Methodology

In this project, Doyletech worked in partnership with the Town to establish a commercial development plan to reduce store-front vacancies and increase daytime commercial activity. The plan will promote the best mix of retail, eateries/food services, professional and educational services, entertainment and recreational facilities. Our recommendations will complement the needs and wants of both local and neighbouring towns by taking into account the regional retail picture that includes Mississippi Mills, Perth, and other communities.

It will build on our recommended industrial development strategy that includes the evolving demographics of Carleton Place. Our factual base data will include a profile of industry, its tertiary dependencies, by-products and employment analysis. Our understanding of the present and planned industrial base for Carleton Place will inform our recommendations for local businesses/institutions/services aligned with the demographics of the people working in these industries.

The commercial enterprises recommended for the downtown corridor should complement and not compete with those in the neighbouring towns. Our gap analysis of the larger region will identify the best opportunities for enhancing the downtown corridor. These identified gaps will be assessed as contributing elements to a larger economic supply chain as well as simple independent opportunities deemed appropriate.

In summary, our *execution plan* for this project was as follows:

- Step 1: Identify Community Concerns, Needs, and Wants
 - Demographic and industrial analysis using industrial strategy findings and broader information resources.
- Step 2: Identify Gaps in the Larger Municipal Region
 - High-level study of commercial enterprises (retail, professional services, entertainment, education, recreation) in neighbouring communities.
- Step 3: Develop and Present the Plan
 - Matches identified opportunities with the needs and wants of the community.

2.0 Statistical Profile on Retail Trends & Drivers

Retail and service activities are a key aspect of Carleton Place's downtown core, although they are not the only aspect. While these usages dominate the ground floors, higher floors present opportunities for office and residential intensification in the core.

2.1 Retail Trends / Statistics

Retail and service markets are heavily influenced by various economic and demographic trends, including income, employment, and household formation. Doyletech's *Situation Analysis Report* provides further details on these variables; the following is a brief overview.

Strong Canadian retail sales and healthy retail property markets over several years have attracted the attention of foreign retailers/developers. They are impressed with Canada's relatively steady sales growth, higher average sales per square foot, and lower density of shopping space per capita.¹ The influx of American and European retailers into Canada is expected to continue. Going forward, several analysts expect that some established Canadian retailers will disappear as US-based retailers seek easy and quick Canadian market entry through outright acquisition rather than by store-by-store expansion.

Chain stores continue to increase their share of the Canadian market at the expense of non-chain stores (increasing from 39% market share in 1999 to 47% in 2008).² While both chain and non-chain stores are growing their operating revenues, it is the faster growth rate of chain stores that is increasing their market share.³ Chain stores in the area of home electronics, appliances, home furnishings, and clothing had some of the strongest market share growth between 2002 and 2008.⁴ Unfortunately, chain stores often do not locate in town main streets, a phenomenon also reflective on Bridge Street.

While Statistics Canada is the premier source of retail sales data for Canada, they publish national and provincial numbers only (along with some data on Toronto, Montreal, and Vancouver). There are some organizations, using the Statistics Canada data, which develop their own estimates for smaller cities, towns, and regions across Canada (the most prominent being FPmarkets and the Conference Board of Canada).

The following are some relevant statistics published by FPmarkets:

¹ Scotia Capital, Global Real Estate Trends, June 9, 2011.

² State of Retail, The Canadian Report 2010, Retail Council of Canada, Page 6. Industry Canada is identified as the source institution.

³ Ibid.

⁴ Ibid.

- FPmarkets estimates that total 2011 retail sales in Carleton Place are \$189.2 million while its retail sales per household is \$47,700, compared to \$30,800 for Ontario and \$32,500 for Canada. Carleton Place's retail sales per capita in 2011 is \$18,700 compared to \$11,800 for Ontario and \$13,000 for Canada. These statistics paint a healthy comparative picture of Carleton Place's *overall* retail activity; obviously there is both the ability and opportunity to spend locally. However, Bridge Street (as detailed below) has a high current vacancy rate.
- FPmarkets also estimates purchases by retail category, but such data is only available for Lanark County. The largest single expenditure category by far is estimated to be 'new & used cars & recreational vehicles & parts' followed by 'home centres and hardware', and 'supermarkets'. Lanark County's proportions of the Canadian total are fairly similar to that of other Counties such as Prescott & Russell and Renfrew (except for gas stations which appear to be much lower). Again, these are estimates for the County as a whole and not for Carleton Place specifically. FPmarkets estimates for the years 2006 to 2011 suggest that some categories have experienced significant swings in demand over this period (i.e. new and used cars, recreational vehicles, etc.), while others have been fairly consistent (i.e. clothing, computers). A comparison of Lanark County's total retail sales estimates between 2006-2011 with Ontario's suggests both have experienced similar trends (except for between 2006 and 2007 and between 2009 and 2010).

2.2 Population Trends / Statistics

Population growth is a major driver of retail development; typically population growth and housing development is closely followed by retail development; hence the frequent call to increase downtown residential in order to develop a more vibrant core.

Figure 1 provides historical population trends. Between 2001 and 2006, both Carleton Place (the town) and Beckwith (the township) experienced fairly good population growth in comparison to other Eastern Ontario communities; however, both grew slower than Ontario as a whole. Also, Carleton Place is growing slower than neighbouring Beckwith Township. Beckwith's growth rate of 5.6% between 2001 and 2006 compares to 6.7% for Drummond & North Elmsley Township, 8.0% for Lanark Highlands Township, but it is higher than Montague Township (-2.1%).

Figure 1: Population Trends

	Carleton Place, T	Beckwith, TP	Arnprior, T	Casselman, VL	North Grenville, TP	Merrickville-Wolford, VL	Mississippi Mills	Perth, T	Smiths Falls, T	Renfrew, T	Ontario
% Chge., 1996-2001	7.1%	10.7%	1.1%	1.1%	n/a	6.9%	5.2%	1.7%	0.1%	-2.3%	6.1%
Pop., 2001	9,083	6,046	7,192	2,910	13,581	2,812	11,647	6,003	9,140	7,942	11,410,046
Pop., 2006	9,453	6,387	7,158	3,294	14,198	2,867	11,734	5,907	8,777	7,846	12,160,282
% Chge., 2001-2006	4.1%	5.6%	-0.5%	13.2%	4.5%	2.0%	0.7	-1.6%	-4.0%	-1.2%	6.6%
Pop., 2011 Est. FPmarkets	10,102	6,931	7,277	n/a	n/a	n/a	12,132	5,965	8,781	7,915	13,415,750
% Chge., 2006-2011	6.9%	8.5%	1.7%	n/a	n/a	n/a	3.4%	1.0%	0.0%	0.9%	10.3%

If estimates by FPmarkets are correct, population growth during the period 2006 and 2011 appears to be stronger for all communities than in the 2001-2006 period.

2.3 Household Formation Trends / Statistics

Figure 2 provides data on the total number of private households. Household formation growth in Carleton Place and Beckwith are reflective of the Ontario average and higher than in most of the other communities under investigation. Trends in household formation go hand-in-hand with growth in residential construction and dwelling trends; thus the same communities will be strong in both.

Housing starts in Carleton Place typically range between 60 and 80 units a year. The federal government's purchase of the 2.2 million square foot former Nortel campus is expected to result in more housing starts in rural areas surrounding West Ottawa, just as rural areas around Orleans and East Ottawa have historically benefited from a high concentration of federal government jobs (such as from RCMP, DND, NRC, and CMHC in various East Ottawa areas).

Growth in household formation is an important prerequisite for subsequent retail development.

Figure 2: Household Formation Trends

	Carleton Place, T	Beckwith, TP	Arnprior, T	Casselman, VL	North Grenville, TP	Merrickville-Wolford, VL	Mississippi Mills, T	Perth, T	Smiths Falls, T	Renfrew, T	Ontario
Total Number of Private Households, 2001	3,435	2,150	3,030	1,095	4,905	1,060	4,235	2,810	3,895	3,460	4,219,410
Total Number of Private Households, 2006	3,700	2,295	3,160	1,245	5,240	1,115	4,375	2,905	3,815	3,550	4,554,250
% Change, 2001-2006	7.7%	6.7%	4.3%	13.7%	6.8%	5.2%	3.3%	3.4%	-2.1%	2.6%	7.9%
Total Number of Private Households, 2011 Estimate by FPmarkets	3,969	2,483	3,253	n/a	n/a	n/a	4,574	3,001	4,040	3,637	5,130,051
% Change, 2006-2011	7.3%	8.2%	2.9%	n/a	n/a	n/a	4.5%	3.3%	5.9%	2.5%	12.6%

2.4 Income Trends / Statistics

Income is likely the single greatest determinant of retail sales and services activity. The level and growth in personal disposable income determines the amount of retail sales and in turn the amount of retail and service floor space that a community requires. The high incomes and population of neighbouring Beckwith Township greatly increases the retail sales activity (and space requirements) of Carleton Place. Also, the significant amount of pass-thru traffic and regional cottagers also contributes greatly.

Figure 3 provides trends in *average income* based on all population 15 years and over in 2005. Merrickville and Carleton Place experienced the largest percentage growth in average personal income between 2000 and 2005, both significantly higher than the Ontario growth rate. Perhaps, in the case of these two communities they have a significant portion of residents that commute to Ottawa where salaries are higher.

Figure 3: Personal Average Income Trends

	Carleton Place, T	Beckwith, TP	Arnprior, T	Casselman, VL	North Grenville, TP	Merrickville-Wolford, VL	Mississippi Mills, T	Perth, T	Smiths Falls, T	Renfrew, T	Ontario
Avg. Income \$, 2000	29,361	38,757	30,884	34,122	34,301	29,201	35,625	28,064	25,753	26,123	35,185
Avg. Income \$, 2005	35,503	39,680	30,985	38,798	n/a	35,604	39,947	30,263	28,096	28,408	38,099
% Change, 2000-2005	20.9%	2.4%	0.3%	13.7%	n/a	21.9%	12.1%	7.8%	9.1%	8.7%	8.3%

3.0 Trade Area Residual Demand Analysis

This section provides an update to the [2007 Residual Demand Analysis \(RDA\)](#) that was conducted on Carleton Place's retail market. RDA is a technique that uses income, expenditure, and sales statistics to identify the extent to which an area's retail and service needs are being met. The outcome is an estimate of residual (i.e., excess or unmet) demand.

3.1 Per Capita Expenditures

The foundation step of the analysis is to use Ontario annual per capita expenditures to develop a retail demand analysis on Carleton Place. As we stated in the proceeding section, income is considered the most influential factor for the demand of retail products and services. **Figure 4** presents Statistics Canada 2010 data on average per capita expenditures on various retail products and services in Ontario.⁵ As also stated previously, similar information on Carleton Place is not available from Statistics Canada; nevertheless, it is standard practice to estimate local data from the provincial-level data.

3.2 Trade Area

For this analysis, we define the trade area of Carleton Place as consisting of the Town itself as well as neighbouring Beckwith Township. This recognizes the fact that both communities are so closely interrelated that our demand and supply analysis will be based on their aggregation as a whole (rather than just on Carleton Place itself).

Figure 5 shows the population of the retail trade area, along with future estimates.⁶ When Beckwith Township is added to the population of Carleton Place, the trade area becomes significantly larger. Starting in 2009, we applied an annual growth rate of 1.67% per year for both Carleton Place and Beckwith (based on a review of historical population growth rates for these two areas). This provides for estimates of future trade area population based simply on a conservative "steady-state" scenario for future development.

⁵ Source: <http://www40.statcan.ca/l01/cst01/trad38g-eng.htm>.

⁶ Source: http://www.ottawa.ca/city_services/statistics/counts/growth_outside_ottawa/index_en.html.

Figure 4: Total and Per Capita Expenditures for Ontario, 2010

Trade Groups		Total (\$M)	Per Capita	Category
Products:	Supermarkets	\$ 25,009.40	\$1,893.12	FCTM
	All other food stores	\$ 3,770.30	\$285.40	FCTM
	Drugs and patient medicine stores	\$ 12,061.40	\$913.00	FCTM
	Beer, wine, liquor	\$ 7,096.10	\$537.15	FCTM
	Shoes, Accessory & Jewellery	\$ 2,195.30	\$166.18	DSTM
	Clothing stores	\$ 7,662.90	\$580.05	DSTM
	Home Electronics & Appliance Stores	\$ 5,287.10	\$400.21	AHIM
	Home furnishing stores	\$ 2,065.60	\$156.36	AHIM
	Furniture stores	\$ 3,585.50	\$271.41	AHIM
	Computer & Software Stores	\$ -	\$0.00	DSTM
	Home Centres & Hardware Stores	\$ 10,005.70	\$757.40	AHIM
	Building Material & Garden Stores	\$ -	\$0.00	AHIM
	Sporting goods, hobby & music	\$ 4,155.10	\$314.53	DSTM
	Department Stores	\$ -	\$0.00	DSTM
	Motor and recreational vehicles	\$ 30,182.20	\$2,284.68	AHIM
	Gasoline & service stations	\$ 15,882.20	\$1,202.23	AHIM
	General merchandise stores	\$ 20,698.20	\$1,566.78	DSTM
	Oher retail stores	\$ 3,926.90	\$297.25	DSTM
	Services:	Restaurant, bars, other eateries	\$ 17,105.63	\$1,294.83
Personal care		na	\$675.94	Services
Education and culture		na	\$369.31	Services
Sports and recreation		na	\$2,009.92	Services
Reading and entertainment		na	\$434.21	Services
Grand Total All Stores:		na	\$16,409.97	
Ontario's Estimated Population:		13,210,667		

Figure 5: Population of the Retail Trade Area (Past Actuals & Future Estimates)

Year	Carleton Place, Town	Beckwith, Tp.	Total
2001	9,083	6,046	15,129
2006	9,453	6,387	15,840
2009	9,611	6,494	16,105
2010	9,771	6,602	16,373
2011	9,935	6,712	16,647
2012	10,100	6,824	16,925
2013	10,269	6,938	17,208
2014	10,441	7,054	17,495
2015	10,615	7,172	17,787
2016	10,792	7,292	18,084

3.3 Trade Area Per Capita Expenditures

In retail analysis, it is often customary to combine the retail groups appearing in Figure 4 into the four (4) standard store or merchandise types, namely: FCTM (Food & Convenience Merchandise), AHIM (Automotive & Home Improvement Merchandise), DSTM (Department Store Type Merchandise), and Services. How these four groups map to the retail trade groups published by Statistics Canada was shown earlier in Figure 4.

Figure 6 uses the 2010 actuals based on the Ontario average per capita expenditures from Statistics Canada and then forecasts forward six years. As was done in the 2007 RDA, we are making the assumption that there is no meaningful difference between the average per capita expenditures for Ontario and for Carleton Place. Also, like last time, we are applying the same demand growth rates to each of the four merchandise categories as was applied in 2007. Our extensive analysis of various retail datasets indicates that changes (both positive and negative) from one year to the next with many retail categories can be significant, especially in the last five years. However, the long-term change over several years is much more modest and consistent with the modest growth rates used in the 2007 RDA and which will be used here again. Again, like with the population growth rates, they represent conservative “steady state” projections.

In terms of growth rates in demand, FCTM is assumed (like last time) to grow by 1% annually, AHIM is assumed to grow by 1.5% annually, DSTM by 1% annually, and Services by 0.75% annually (as shown in Figure 6). These growth rates exclude inflation.

Figure 6: Per Capita Expenditures By Major Store Type for Trade Area

Consumption Projections

Store Type	2010	2011	2012	2013	2014	2015	2016
FCTM Growth	Actuals	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
FCTM	\$ 3,628.67	\$ 3,664.96	\$ 3,701.61	\$ 3,738.63	\$ 3,776.01	\$ 3,813.77	\$ 3,851.91
AHIM Growth		1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
AHIM	\$ 5,072.29	\$ 5,148.37	\$ 5,225.60	\$ 5,303.98	\$ 5,383.54	\$ 5,464.29	\$ 5,546.26
DSTM Growth		1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
DSTM	\$ 2,924.79	\$ 2,954.04	\$ 2,983.58	\$ 3,013.41	\$ 3,043.55	\$ 3,073.98	\$ 3,104.72
Services Growth		0.75%	0.75%	0.75%	0.75%	0.75%	0.75%
Services	\$ 4,784.22	\$ 4,820.10	\$ 4,856.25	\$ 4,892.67	\$ 4,929.37	\$ 4,966.34	\$ 5,003.59

3.4 Trade Area Estimates for Total Retail and Service Expenditures

As indicated in **Figure 7**, trade area residents are estimated to have spent \$268.7 million in 2010 at various retail and service stores. Furthermore, this spending is projected to increase by \$47.9 million or 18% to \$316.6 million in 2016. These estimates are derived based on the available population and per capita expenditure data estimated in previous figures.

Figure 7: Estimated Total Expenditure Volumes in Trade Area

Estimated Total Expenditure Volumes in Trade Area (\$M)

Store Type	2010	2011	2012	2013	2014	2015	2016
Population	16,373	16,647	16,925	17,208	17,495	17,787	18,084
FCTM	\$ 59.41	\$ 61.01	\$ 62.65	\$ 64.33	\$ 66.06	\$ 67.84	\$ 69.66
AHIM	\$ 83.05	\$ 85.70	\$ 88.44	\$ 91.27	\$ 94.18	\$ 97.19	\$ 100.30
DSTM	\$ 47.89	\$ 49.18	\$ 50.50	\$ 51.85	\$ 53.25	\$ 54.68	\$ 56.15
Services	\$ 78.33	\$ 80.24	\$ 82.19	\$ 84.19	\$ 86.24	\$ 88.34	\$ 90.49
Totals	\$ 268.69	\$ 276.13	\$ 283.78	\$ 291.65	\$ 299.73	\$ 308.04	\$ 316.59

3.5 Total Supportable Retail Space

The next step in the analysis is to determine the amount of retail space trade area residents' expenditures support. Industry productivity rates (that is, annual sales per square foot) are used to assess space requirements. A supermarket is supposed to be economically viable at an average sales per square foot of \$450 to \$500 annually. This is a rough estimate as, obviously, some older stores with low rents and operating costs may well be profitable at a lower average productivity rate. Likewise, a new store in an expensive area/market may not initially be viable at a rate of \$550 (due to high rents, mortgage, and other costs). We will use these average productivity rates to estimate the total supportable floor space by the trade area residents' expenditures in **Figure 8**.

These retail floor space figures are arrived at by dividing the total retail sales volume estimates (Figure 7) by the average productivity rates for FCTM, AHIM, DSTM, and Services. For example, if the high rate of \$550 sales per square foot for FCTM is used it implies 108,025 square feet of total FCTM space is supportable by the trade area in 2010. Obviously, if the lower FCTM productivity rate is used (\$450 psf), then the amount of supportable space is higher (at 132,031 sf). The figures in the constant column in Figure 8 refer to the productivity rates; that is, the average annual sales per square foot (high and low estimates provided for each of the four groupings).

Figure 8: Estimated Total Supportable Retail Floor Space for Trade Area

Estimated Total Supportable Retail Floor Space for Trade Area

Store Type	Floor Space Descriptor	Constant	2010	2011	2012	2013
FCTM	Low	550	108,025	110,928	113,908	116,968
	High	450	132,031	135,578	139,221	142,961
AHIM	Low	1,200	69,209	71,420	73,702	76,057
	High	800	103,814	107,131	110,553	114,086
DSTM	Low	300	159,630	163,919	168,323	172,845
	High	225	212,840	218,558	224,430	230,460
Services	Low	275	284,852	291,781	298,879	306,149
	High	200	391,671	401,199	410,958	420,955
Totals	Low	\$ 432.17	621,716	638,048	654,812	672,019
	High	\$ 319.73	840,356	862,466	885,163	908,462

The analysis indicates that spending of trade area residents supported a total of 621,716 to 840,356 sf of retail and service floor space in 2010. By 2013, this space is estimated to increase to a range of 672,019 to 908,462 sf. It should be noted that technically in an analysis like this, the total figures refer to total supportable space within, as well as outside, the trade area.

Figure 9 presents the estimated increase in demand for total supportable retail floor space between years and over the period 2010-2013. It shows an estimated total increase between 2010-2013 in the range of 50,303 to 68,106 sf, based on current spending trends of trade area residents.

Figure 9: Estimated Increase in Demand for Total Supportable Retail Floor Space**Estimated Increase in Demand for Total Supportable Retail Floor Space**

Store Type	Floor Space Descriptor	2010 - 2011	2011 - 2012	2012 - 2013	2010 - 2013
FCTM	Low	2,902	2,980	3,060	8,943
	High	3,547	3,643	3,740	10,930
AHIM	Low	2,211	2,282	2,355	6,848
	High	3,317	3,423	3,532	10,272
DSTM	Low	4,289	4,404	4,522	13,215
	High	5,718	5,872	6,030	17,620
Services	Low	6,929	7,098	7,270	21,297
	High	9,528	9,759	9,997	29,283
Totals	Low	16,331	16,764	17,208	50,303
	High	22,110	22,697	23,299	68,106

3.6 Estimated Existing Retail and Service Floor Space Inventory and Vacancy Rates

Based on extensive interviews, field research, and drive-bys/visual estimations, **Figure 10** presents estimates for current retail space inventory and vacancy rates.

Figure 10: Summary of Existing Inventory

Summary of Existing Inventory							
Area	FCTM	AHIM	DSTM	Services	Vacant	Total	Vacancy Rate
Hwy 7	73,680	167,949	130,327	42,914	0	414,870	0.0%
Beckwith Mall	7,000	2,000	1,500	6,500	1,500	18,500	8.1%
CP Mews	47,053	7,750	15,430	14,195	1,500	85,928	1.7%
Bridge Street	9,000	4,500	4,500	65,000	10,000	93,000	10.8%
Other	40,500	45,300	32,700	32,500	2,000	153,000	1.3%
Total	177,233	227,499	184,457	161,109	15,000	765,298	2.0%
Total Percentage	23.2%	29.7%	24.1%	21.1%	2.0%		

Automotive and Home Improvement (AHIM) represents the largest share of inventory (30%), followed by DSTM (24%), and FCTM (23%). The overall Carleton Place vacancy rate is 2% (which is low by industry standards) but the Bridge Street corridor has the highest vacancy rate of all areas at approximately 11%. This finding further confirms that Carleton Place's downtown needs attention and improvement.

3.7 Warranted Additional Floor Space

Two factors shape future retail development: (1) the extent to which there is current over-supply or under-supply, and (2) increases in demand going forward. **Figure 11** indicates that up to 158,164 sf of additional retail and service floor space would be supportable in this area by 2013 (this assumes however that trade area residents spend 100% of their shopping dollars within the trade area). While this is unlikely to be the case, there is additional spending by vacationers, cottagers, and pass-by traffic. This means that it is entirely possible that 158,164 sf (or more) of additional development may ultimately be needed. Figure 11 shows that 90,058 sf of retail and service space is needed now with another 68,106 sf needed in the next 3 years, for a total of 158,164 sf.

Figure 11: Total Warranted Floor Space By 2013, Trade Area

Carleton Place Total Warranted Floor Space by 2013

Store Type	Existing Floor Space	Total Supportable (Based on 2010)	Warranted Addition	Increase 2010 - 2013	Total Warranted Addition
FCTM	177,233	132,031	-45,202	10,930	-34,272
AHIM	227,499	103,814	-123,685	10,272	-113,413
DSTM	184,457	212,840	28,383	17,620	46,003
Services	161,109	391,671	230,562	29,283	259,846
Totals	750,298	840,356	90,058	68,106	158,164

4.0 Findings from the Interviews

A series of interviews were held with store owners, the BIA, community stakeholders, local developers, and mall owners/managers. The following is our synthesis of the findings, organized by major topic area.

4.1 Building Façade

Improvements

- Common feedback collected through interviews with various stakeholders indicates that there is a clear need to investigate and promote a face improvement program.
- A common point that was highlighted during interviews and voiced at the collective workshop is the concept of doing a full scale street long image redesign program. The creation of a fully-integrated view provides absolute guidance and clarity for each tenant/landlord to follow-up on.
- The end-to-end view enables the town to create a more distinctive experience that can be promoted.

Standards

- There is a consistent view across all interviewees that the current standard is a start, but requires local authority support. A number of respondents spoke of local enterprises moving forward with façade changes that were misaligned with current documented standards.
- It should be noted the feedback provided indicated these façade compliance guidelines should be by-law enforced with time limits applied to those provided with grace periods through 'grandfather' clauses.

Incentives

- There is a known set of provisions through the BIA that a number of enterprise owners are aware of, but the programs have not been taken advantage of. Reasons provided, their business façade cannot be modified or they were unaware too late.
- Even though incentive programs are available, there is the existing challenge to get current landlords engaged and committed to take advantage of the program. This promotion effort may require local real estate primes to help bolster and articulate the associated real estate value benefits.

4.2 Signage

- Current signage for stores is street facing and car traffic is perpendicular to the focus of presented signs.
- Adjusting the signage regulations, to allow merchants to re-direct signs for traffic visibility is considered a value-add.
- As noted above, current standards are not being enforced and 'grandfather' clauses provided need to have a time limit. Otherwise, there is little possibility of aligning to a common standard for the business corridor.
- Retaining a sign for a closed business is not helpful. The sign draws attention to a building that is not in business.

4.3 Big Box is NOT a Threat

- The current suite of merchants on Bridge Street have services and products that can be sold in concert with those being offered at the Big Box stores near Highway 7.
- Products and services offered in downtown corridor are considered complementary to those.

4.4 Visibility of the Businesses and their Services is required for Continued Growth

- Basic visibility of enterprises and their products was highlighted as a key element for helping local businesses prosper. Two key aspects were highlighted by stakeholders:
 1. The mere presence of pedestrian traffic passing in front of storefronts can play a significant role in selling products and services (leads to both spontaneous sales and return visits).
 2. Instances were noted of current Carleton Place residents not being aware of their business and its products/services. This was cited as supporting evidence for improved local road-side signage.
- Outward promotion into larger catchment area with focus on experience and differentiating merchandise.

4.5 Collaboration

- Retail shops serving common retail sectors with differing product lines have a great opportunity to join forces to create larger scale promotional initiatives.
- Festivals and tourist activities have a greater chance of success with collaborative support.

4.6 Pedestrian Traffic

- Loss of local attractions such as the cinema and the Olympia family restaurant has greatly reduced regular and predictable flows of pedestrian traffic.
- The pedestrian traffic plays a key role in store-front promotion (supporting return visit purchases) and drop-in spontaneous purchases.
- Functionality of parking was cited as a cause for downtown traffic flow problems. It was noted having strategically placed parking lots with coordinated access between Bridge Street and parallel back-streets (Victoria Street and Beckwith Street) would help flow and promote local business activity.

4.7 Street-Side Parking on Bridge Street

- In some locations the redesign of the sidewalk has removed street-side parking spaces that have a follow-on impact to local shops adjacent to location.

4.8 Outward Promotional Material about Carleton Place and the Support of the BIA

- Feedback about the role and fees associated with the BIA were cited. There is a strong perception the BIA has a focus on promoting businesses resident in the downtown corridor bounded by the Mississippi River and Lake Avenue.
- This is contrary to its mandatory fees for businesses located just outside of this boundary.

4.9 Wrong Mix of Enterprises

- With proper marketing and promotion of the downtown corridor, the current mix of downtown enterprises could be influenced into a more ideal blend.
- Currently, the mix of downtown enterprises is considered unbalanced.

4.10 Local Town Interviews

Merchants Sharing on Rent

- o A number of businesses deem rental costs as a deterrent for success, especially during start-up. By partnering with other merchants with complementary merchandise, businesses have found success in having dual occupancy in a single location.

Internet Businesses with Store-fronts

- o The establishment of an Internet business can result in downstream challenges and opportunities. Commonly, an Internet business is only visible on-line and customers are limited to product viewing through picture downloads. This can be a deterrent for some clients. Expansion into a location with a formal store-front serves to promote products in person.

Filling Store-fronts

- o Vacant store-fronts are considered a clear sign of commercial challenges and business attrition. Keeping the shop windows filled with local business products and services serves a dual purpose. It helps local enterprises market and it addresses the larger visual impact of having a vacant store-front.

Making a Change in the Image/Face of the Commercial Buildings

- o Through a set of key champions, a larger image transformation can take place with a well structured and supported project designed to change a single or small set of units.

5.0 Findings from the Community Workshop

On November 15, 2011, a workshop was held at the Carleton Place Library to examine local needs and wants as pertaining to the Carleton Place downtown corridor. The workshop was well attended with business representatives from retail, food services, financial services, career training services, the local BIA, and the Carleton Place Chamber of Commerce. Dialogue throughout the workshop was bi-directional with a number of solid options and points raised for open consideration. Overall, there was consensus that the downtown corridor is on a growth path, but without any insight on a final model and its long-term sustainability. All attendees supplied input and the discussion about making a more formal and fluid connection with the Highway 7 corridor was well received. The discussion about developing a common look and feel was met with general consensus while Westport and The Glebe were highlighted as additional community models to consider as an end goal. Discussions about getting the landlords engaged to help with façade improvements converged on the topic of financial incentives. The overall aspect of incremental real estate value was understood, but getting a design completed was deemed a 'soft cost' that would need to be sponsored externally.

The combination of the findings from the interviews and the workshop collectively create a solid suite of tangible actions that can be leveraged to make long-term sustainable improvements.

The following are the main inputs received / findings provided:

- **The Town looks at Westport and The Glebe as possible models to replicate.**
- **Loss of pedestrian traffic in downtown corridor needs to be addressed.**
 - Loss is attributed to the following:
 - Queen's Hotel closure;
 - Olympia Restaurant closure;
 - CP Cinemas closure;
 - Relocation of Home Hardware up to CP Mews.
- **Anchor attractions/enterprises need to be secured.**
 - Examples of success cited:
 - Franklin TN, USA – General Store;
 - Pakenham – Local General Store with Growing Internet Business.
- **Chamber of Commerce should be in Highway 7 Corridor.**
 - Current location does not promote or help to attract consumer traffic from the Highway 7 corridor.
- **Landlord engagement on facade improvements.**
 - Have the Town absorb 'soft costs';
 - Identify an end-to-end image;
 - Align with initial larger renovation project and document end-to-end process followed by review and re-use for subsequent projects put forth in partnership with landlords.
- **Situation with Findlay Foundry land should be revisited.**
 - Last noted dialogue about developing was at the time the new police station opened.
 - The land is considered of high value supporting shoreline development.

- **Consideration of the Town's residential growth capacity.**
 - Current and future consideration of the Town's residential growth capacity should be included; it was noted that the residential land lot allocations are not extensive.
- **Large scale renovations to create upscale condominiums is considered difficult.**
 - Private Investors:
 - Where and who is going to provide the required finances;
 - The establishment of a group interest requires the vision and engagement of a central champion who promotes a common vision.
 - Remote Landlords:
 - Their interest at present lies in keeping a steady flow of reliable tenants both upstairs in residential apartments and downstairs in the commercial business space.
 - Current Residents and their Displacement:
 - There are projects planned that already serve this purpose on closely neighbouring streets.
- **Open and progressive dialogue around the concept of connecting Bridge Street corridor with Highway 7 via Coleman Street.**
 - The presented option of creating a more contiguous flow between the two business districts was well received and several participants resonated with the benefits associated with the concept.

In sum, the workshop indicated that there is widespread community consensus that the downtown corridor needs and deserves to be viewed as an established, distinctive area of Carleton Place with its own common theme and boundary. Even with the elevated interest of creating smoother, and stronger, linkages between downtown and the Highway 7 area (see bullet immediately above), the downtown is still viewed as needing its own theme and boundary.

6.0 Inventory / Gap Assessment and SWOT Analysis

In this section, a current inventory/gap assessment on the downtown corridor is developed along with a high-level SWOT analysis.

6.1 Inventory and Gap Assessment

The current situation analysis, based on the above research, suggests that Carleton Place has been able to expand its retail and service catchment in recent years with the addition of big box chains on Highway 7. Interviews confirm this finding: the convenience of travel from Almonte into the Carleton Place's Highway 7 business corridor is considered easier and faster than traveling into Kanata/Stittsville.⁷ This development supports the immediate trade area of the town and Beckwith Township as well as significant thru-traffic by tourists to and from Ottawa, travelers to downstream communities such as Perth and Smiths Falls, cottagers to areas such as the Rideau Lakes and Mississippi Lake. There are also more full-time residents on Mississippi Lake.

While the commercial catchment of Carleton Place overall has expanded, the same may not be true for the downtown corridor.

⁷ Based on interviews with John Levi – Mayor, Mississippi Mills.

A review of current inventory suggests there are some gaps that could be investigated for possible establishment in the core. These include:

- Men's clothing;
- Outdoor lifestyle equipment and apparel; and
- Hobby/recreation-oriented shops that serve the retiree / senior community.

From a services perspective, the town lacks a common family restaurant and quick luncheon focused eateries as well as current pop-culture entertainment such as a movie theatre. These local attractions generate regular flows of people which encourage pedestrian traffic bringing a local vibe to the town.

Identified gaps in the current retail and service inventory should be considered growth opportunities.

6.2 SWOT Analysis

A SWOT analysis with respect to retail market development is presented below as **Figure 12**.

Figure 12: SWOT Analysis on Carleton Place Retail Market



In sum, the strengths are:

- Volume through 'big box' stores;
- Located on 4-lane highway;
- Great value-add assets in heritage and historic buildings downtown;
- Natural waterfront with residential and commercial potential;
- Opportunities from 'realization' phase of highway construction.

But the drawbacks are:

- Relative decline of downtown against big boxes;
- Stagnant income growth among main residents;
- Inadequate current attractions in the downtown corridor to bring traffic.

This SWOT analysis suggests that Carleton Place is at a crossroads with strong opportunity, but substantial redevelopment is needed to make the downtown corridor vibrant again.

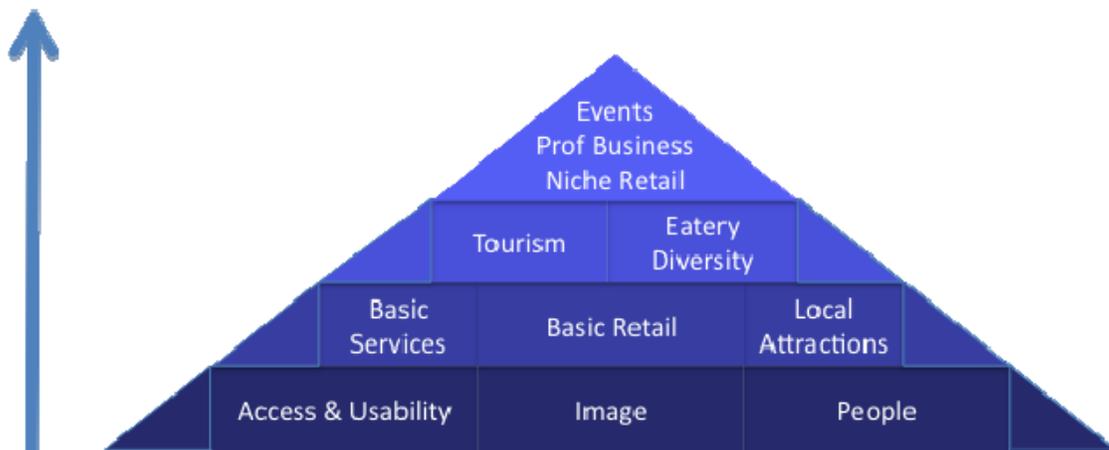
7.0 Recommendations

7.1 High Level Summary of Recommendations

This document is intended to provide the Town of Carleton Place with a specific set of recommendations complemented by a set of longer term options for consideration. The provided set of base recommendations (bottom 2 layers of presented pyramid below) serve as a platform for town growth and evolution. Upon this stable platform that is created, the BIA, Chamber, and Town of Carleton Place can look to initiate activities that are focused on growth and promotion of the downtown corridor (upper 2 layers of presented pyramid below). These actions then serve as catalysts to stimulate inward investment that will in turn extend into adjacent streets elevating the activity and overall commercial/residential value of the downtown corridor.

Through careful and strategic implementation of the recommendations, a solid self-sustaining environment will be created that will support more focused and evolutionary options. **Figure 13** presents a graphical outline of the key ingredients that need to be addressed and how they integrate to create a larger solution that aligns with the identified end-goal/vision.

Figure 13: Implementation Strategy



Base Recommendations (Lower 2 layers of pyramid)

The follow-through on the base recommendations will serve to establish a self-sustaining business corridor that will provide stability for future growth. Stability is obtained through a sound infrastructure that supports steady pedestrian traffic (of all age groups) in concert with local and pass-thru vehicular traffic, visual appeal for businesses interested in re-locating/expanding and proven retail & services productivity.

Access and Usability:

Taking progressive actions to better equip the downtown corridor to smoothly handle higher vehicular and pedestrian traffic will ensure the planned growth is sustained without surprise challenges. Below is a list of tabled recommendations from the community to help improve and prepare the downtown corridor for heightened traffic, etc.

- Currently, the town supports steady traffic flow through the downtown corridor with two well established parking lots that provide reasonable pedestrian reach in the downtown corridor. It was noted that during higher traffic periods these parking lots can result in traffic challenges when left handed turns are being made. A tabled recommendation during an interview was the concept of using the back streets parallel to Bridge Street as entry and exit points to help retain traffic flow. An example of such a parking method is the parking lot adjacent to the Thirsty Moose.
- Proper signage leading outside business traffic into the downtown corridor.
- Carry-on investigations and considerations to extend Bridge Street through Lansdowne to Coleman Street. Improve the flow and commercial space allocations along Coleman Street to integrate with the North end commercial space of the Walmart Smart Centre.
- Employees of the Town of Carleton Place secure a parking location that renders support to all businesses local to the Town Hall. (It was cited during interviews, the Town Hall employee parking does play a factor with local businesses.)
- Maintain a measure on the local parking demands as the business corridor starts to thrive. These measures will help serve a longer term comprehensive re-design/planning effort that will serve higher volumes in the future.
- Improved signage coming off the Trans-Canada bicycle trail. Based on interview feedback, there are documented bicycle trips leading out of Ottawa to Carleton Place. When the cyclists arrive at the end of Coleman Street, they have no guidance on how to get into the downtown corridor.
- Re-locate the Carleton Place Chamber of Commerce office out into the Highway 7 corridor.

Image:

Regardless of larger scale concepts being discussed as models for façade improvements, basic changes can be made to align with the current commercial façade standards. Drawing conformance to a documented standard will help to serve a more uniform and inviting business environment that will grow and render more resources to support a larger scale re-design of the complete business corridor. In addition to the external appearance of active businesses, efforts to improve the look and use of vacant commercial space will help serve to reduce the visual impact of lost businesses. A list of recommendations to help drive immediate improvements is as follows:

- Work with landlords of vacant locations to fill store-fronts with the merchandise and marketing material associated with local businesses. These businesses could be local Internet-based enterprises or other shops not located on Bridge Street.
- Strongly promote current BIA façade improvement programs in concert with other financial support incentives addressed in the Industrial Strategy - "*Review of Assistance Programs*" report.
- Remove street signs for closed businesses with vacant shop fronts.
- Consider a longer term strategy supporting the consolidation of real estate offices into the South Business Park. This activity would provide more commercial space in

the downtown corridor as demand increases and helps situate real estate offices for convenient visitor access.

- With the establishment of a 'health village' near Hooper Street, the community health services in the South Business Park could relocate there.
- The health services move would render the required space for a complete real estate park that would house offices for all town realtors.

Basic Services/Local Attractions:

Securing a solid suite of basic services on the Bridge Street corridor will help to restore pedestrian traffic that in-turn stimulates window shopping and drop-in purchases. Given the current profile of the downtown corridor, recommendations are as follows:

- ➔ Family Restaurant: As outlined in earlier discussions, this restaurant could be a syndicated operation with the predominant ownership coming from within Carleton Place.
- ➔ Small Scale Cinema: The previous CP Cinemas were considered a helpful add for downtown pedestrian traffic.
- ➔ Recreation Activities to complement the Bowling Alley: As an example, a local billiards hall that would cater to the younger population.
- ➔ A small and quaint coffee shop with reading and light snacks would serve as a drop-in centre as well as a draw for locals.
- ➔ The re-establishment of a local tavern (prior existence: Queen's Hotel). This too could be a locally owned facility.

Basic Retail:

The establishment and support of some basic anchor retail businesses helps to draw the local community in for convenience items as well as backfill the gaps associated with the larger retail spectrum in Carleton Place. Below is a list of key areas that are considered basic gaps in the greater landscape of Carleton Place's retail sector:

- ➔ Men's Clothing: There are a number of outlets in Carleton Place that sell clothing for men that range from work-wear to 'neat casual'. The enterprises that provide these products are Giant Tiger, Walmart, Mark's Work Warehouse, and the WoolShop. Locally, the visibility of the WoolShop and its men's clothing line is lacking. This is supported through interviews when people comment that there is no men's clothing shop in town. This is a true fact when one is looking for more precisely tailored business/formal oriented outfits.
- ➔ Sports and Fitness Clothing: Clothing for sports and fitness surrounding outdoor lifestyles. Currently, a well equipped store (McDonald's Sports) resides out on Hooper Street providing a comprehensive line-up of sports equipment for team oriented activities such as hockey and soccer.
- ➔ Household Furnishings: This is a mild stretch as a retail element defined as basic requirement. However, in the case of Carleton Place, a reasonably well located and stocked mid-higher end furnishings shop would be a strong consideration. With the recent and successful establishment of the local Granite and Tile Shop, there is a draw of people seeking to do home improvements. Synergistic activities could be spelled out with good collaboration across a number of different retailers.
- ➔ A centrally located General Store that serves the local community with an older town feel and theme within.

Growth, Diversity, and Visibility Recommendations (Upper 2 layers of pyramid)

With the establishment of a more comprehensive retail platform, there would be an inherent vibrancy and broader service offering in the downtown corridor that would support and impress outside visits. Through proper marketing and strategic activities, the value-add assets within Carleton Place could be leveraged to promote further business activities within the town. The following three focal areas are somewhat inter-laced, but do have independent attributes.

Tourism:

The Town of Carleton Place holds a number of key assets that can be highlighted for tourism purposes. These include the history of Roy Brown, the history of Leigh Instruments (crash indicator innovation), Findlay Stoves, Train Stations, Wool Growers, and more. By mixing a few of these attractions together, outside visitors can be encouraged to come and see the highlights in parallel with making retail purchases. As an example that was highlighted by one of the key stakeholder interviews:

A simple but well defined shopping tour from Ottawa into Carleton Place for women's clothing that covers a wide array of age groups would be worthwhile. In this tour, there could be guaranteed price reductions at participating stores, a stop in at some different eateries mixed with a tour or two of some tourist highlights with bus transportation from start to finish.

Transportation between Carleton Place and West Ottawa was repeatedly cited as a key factor in promoting commuters inward to the town for employment and supporting student programs. This transportation aspect could also play a pivotal role in the marketing and visibility of the downtown corridor outside of the standard work week schedule. In the realm of promoting tourism and helping to increase the size of the catchment area to more disposable income, perhaps the setup and operation of a frequent lower cost shuttle bus service between Kanata and Carleton Place would be helpful.

Eatery Diversity:

The establishment of extended-hours and more diverse eateries helps to support longer 'stay times'.

Events/Professional Business/Niche Retail:

Events:

A cited example of this is the "Puppets Up" festival in Almonte. Events and festivals have a large geographic reach and help draw visitors into the hosting community.

It should be noted that a formal study of hotel/motel accommodations should take place as part of this exercise.

Based on stakeholder feedback, Carleton Place has been approached and has sponsored a number of events, but hotel accommodations continue to be a challenge. As a reasonably central hub to Smiths Falls, Perth, and Almonte, the establishment of a larger hotel would help support events across all smaller metros and would help to retain people in the corridor for extended retail and service activity.

Professional Business:

Outside of the current setup and operations of the Town of Carleton Place in the town hall, the recently announced move of Tiree Facility Solutions Inc. into the Bridge Street corridor is a

strong positive for professional business sector growth. Using the concept of gentrification to remodel a historic riverside house, Tiree is opening a branch office to accommodate its executive management team in the central part of Carleton Place. This new business can serve as a solid anchor in attracting other such corporations into the town corridor. Based on discussions with Tiree President, Duncan McNaughton, who continues to deal with clients all around Ottawa, travel time with the new highway is not cited as an issue. The drive is consistent and predictable with a commute into city limits of approximately 15-20 minutes. And, reaching the city core can be done in 30-40 minutes during day-time traffic.

Niche Retail:

The attraction of niche retail requires a well defined and supported demographic profile that aligns with such businesses. These profiles include population density, employment, education, income, age, interests, and activities. The future industrial strategy adopted by the town will help to define the locally employed demographics and the associated incomes. This combined with the external outside evolutions happening in West Ottawa (outlet discount malls, DND moves to former Nortel campuses) will also influence future demographics. Two examples/recommendations to align the niche retail efforts with the industrial strategy of the town are:

Example 1: Focus on Outdoor Living, Sports, and Recreation Industry

- Trans-Canada bicycle trails connects downtown Ottawa with Carleton Place - a stakeholder indicated he cycled with a group from Westboro directly through to Carleton Place on designated bicycle paths. This connectivity is served predominantly by the Trans-Canada trail which is very flat serving a large demographic. As part of this journey, the group also stops for a lunch along the Mississippi River.
- There are open commercial spaces on Bridge Street in proximity to the river that serve to support active lifestyle retail.
- Perhaps there are opportunities to setup retail twinning between centres given the connectivity through sporting activities.

Example 2: Focus on Gentrification Industry within Town

- With the collaboration and proper marketing of gentrification services and retail in Carleton Place, the downtown corridor could be well equipped with retail components that serve the larger industry and help cater to the overall residential and commercial expansion of Carleton Place.

8.0 Identified Long-Term Options

In this section, we capture existing community models as development options for the Carleton Place downtown corridor. No matter what model (or models) is developed, if there is an element of promoting retail and services in the downtown corridor, linking to the current big box development on Highway 7 is a mandatory requirement for success. Establishing a **dedicated connection** for ease of access, travel time/convenience, and visual integration would be key. This very concept was tabled at the stakeholders' workshop on November 15, 2011 and overall positive dialogue prevailed.

The establishment of a defined end-goal vision is a solid step in creating positive momentum for change. The identified end-goal will resonate with a common theme that all people and businesses can resonate with. This theme encompasses a larger swath of interest that goes beyond a standard façade make-over. A selected theme includes the following elements:

- Façade;
- Streets, parking and pedestrian walkway structure and flow;
- Retail/service mix;
- Activity mix;
- Professional business presence;
- Zoning and building use (second story apartments vs. professional offices);
- Hotels.

This report does not provide any detailed outlines for the costs, suppliers, and timeframes associated with the community concepts presented below. These concepts are presented as templates or considerations to help steer and facilitate larger and longer term initiatives. As noted above in the Base Recommendations section, the direction of retail/services mix can be tightly coupled with an industry strategy adopted by the town. Below is a list of the community frameworks that are tabled as options for Carleton Place. These frameworks have been identified through Doyletech research and stakeholder interviews/workshops.

Option 1: The Centrepointe Model

Centrepointe: The Centrepointe community, in the centre of West Ottawa, is a relatively new community consisting of modern office and residential buildings. A specific throughway corridor of Centrepointe was developed with buildings designed with a specific visual and functional concept. Essentially all buildings are multi-story with a common and pleasant façade. The lower story of the building is designated commercial and houses a variety of professional businesses and the upper floor are more modern apartments/condominiums serving as residence. The main Centrepointe corridor is not established or promoted as a retail corridor but rather serves as a centre for professional services (such as real estate, health, and doctor offices, legal services, etc.). In the context of Carleton Place, this model would create a shift in the overall business landscape of the Bridge Street corridor, that would ultimately bound the Bridge Street region more as a professional business park leaving the retail sector to continue its intensive growth and migration into the Highway 7, CP Mews, and Hooper Street areas.

Figure 14: Centrepointe Model for Development

The Centrepointe Model

Description: identify a focused theme for the corridor that involves securing a pre-determined mix of enterprises combined with development and zoning changes.

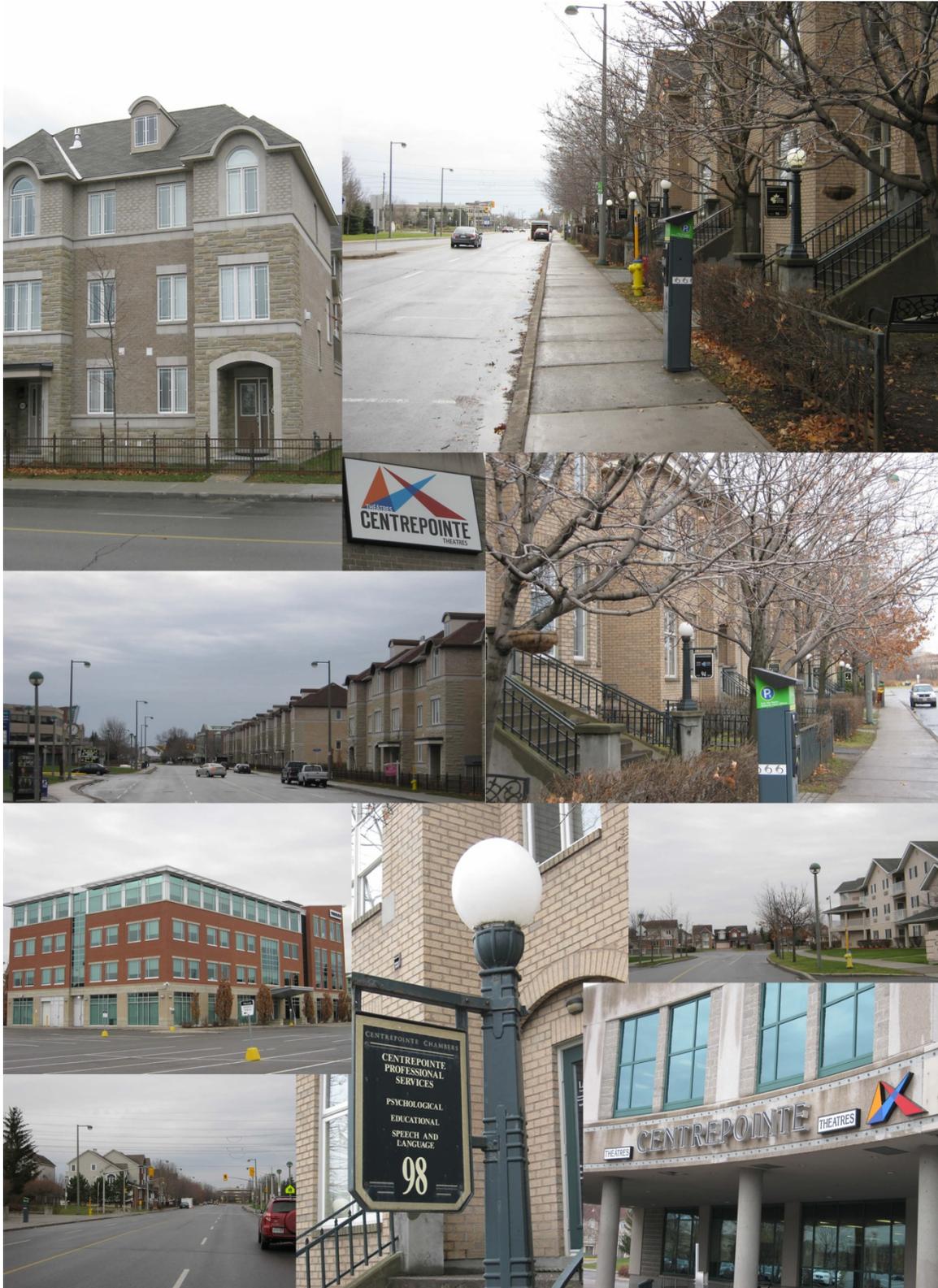
Constraining factors: where to find the capital; who would be the market? - converting the town hall into spiffy condos to anchor the transformation of the corridor + convert existing empty buildings into new offices for the town and rentals to professionals. Why not a community owned pub close to the river (like Prescott has: The Red George). Make the downtown an affordable Westboro for young commuters working in West Ottawa.

Encouraging factors: expanding total population and market, through the industrial strategy; gentrification of nearby residential sectors.

Probability of success: difficult to determine, necessitates gentrification.

Would residents like it? probably yes, because it would make Carleton Place's downtown corridor an interesting and attractive place, without large-scale traffic disruption.

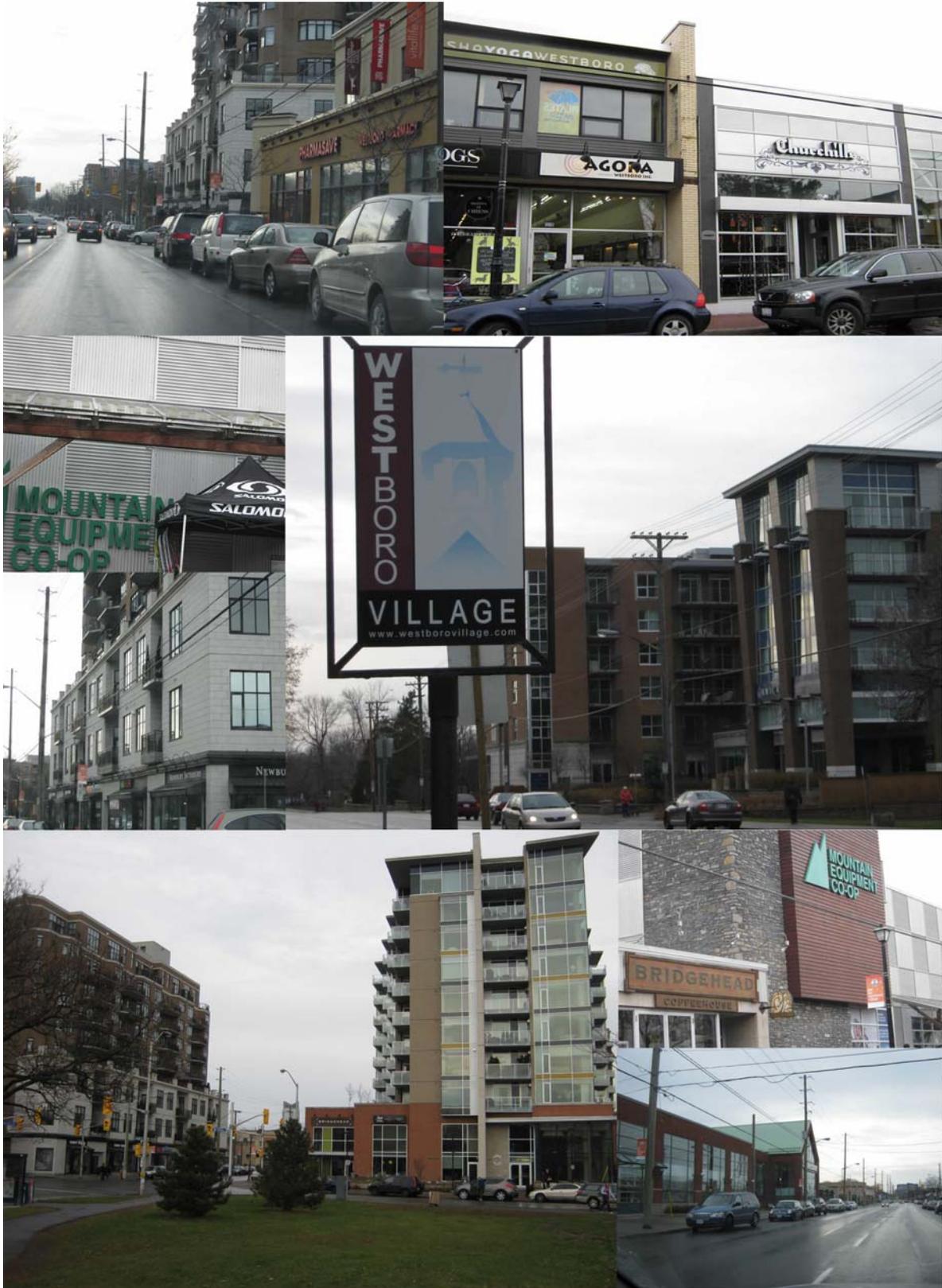
Figure 15: Centrepointe Examples



Option 2: The Westboro Model

Westboro: The Westboro community, centred on and around Richmond Road in West Ottawa, is a blend of residential and commercial businesses with an updated look and feel. With anchor retail providing a theme of outdoor living sports and recreation which is shouldered with active living apparel shops such as Lululemon, Westboro provides a vibrant shopping experience that is extended in time with attractive and diverse street-side eateries/bars. Geographically, the region was noted as pass-through junction into the Gatineau Park and the statistical profiles for Ottawa highlighted the city as being one of the most physically active supporting a solid spectrum of active lifestyle retail. Expensive high-rise and condo development continues to take place on and near Richmond Road.

Figure 16: Westboro Examples



Option 3: The Glebe Model

Glebe: The Glebe is a renowned neighbourhood in the core of the City of Ottawa, with extensive history that traces back to its origin as a locale for a Presbyterian church. As a neighbourhood that surrounds Lansdowne Park, it has undergone significant transformations. The main business corridor straddles Bank Street with significant traffic (both pedestrian and vehicular).

Figure 17: Glebe Examples



Option 4: Continue with Current Trajectory

The downtown corridor in Carleton Place is a business region that is on a path for growth as a result of overall community expansion. This growth will take place without a formal stable platform. Without this platform in place, business start-ups and closures will continue on a steady basis, the overall road-frontage façade will remain in flux and the identity for the core of the town will be hard to articulate.

Figure 18: Carleton Place Examples



Option 5: Extended Options (Westport highlighted during Workshop, Merrickville highlighted during Interviews)

Westport: Westport is a quaint town with a downtown corridor that is adjacent to the Rideau Lakes and waterway. Established in 1904, the community is recognized as a UNESCO Heritage Site. With its origins being associated with the milling industry it has significant historical architecture that can be used as value-add assets for the creation of a distinctive downtown experience. This is very similar to Carleton Place providing a good facsimile for future study and consideration.

Merrickville: Merrickville is a small community on the Rideau System south of Ottawa. The community is also identified as a UNESCO Heritage Site and it works to promote itself as a small quaint community on the water with functional locks, Victorian heritage, beautiful visual appeal (identified as “Canada’s Most Beautiful Village – Communities in Bloom”) and sponsors of quality community events. These events are designed to attract visitors from near and far with the intent of promoting retail and repeat visits. An example of this is the “Merrickville Cruise and Shop Car Show”. This is a large scale event that draws large crowds and it serves to promote retail sales with local merchants. As a community with pride in its visual appeal and services, there is a strong level of promotion for support of weddings and meeting services that are complemented with local hotel and B&B accommodations.

9.0 Associated Roles & Responsibilities Expected From an Economic Development Officer

The appointment of a new Economic Development Officer (EDO) provides the town and the local business community with a new value-add resource. This individual can serve the town by setting out and executing a plan of action that is focused on increasing economic activities across the town.

Working as an outwardly focused and visible resource, the EDO will identify and secure funding for economic development opportunities and programs. More specific to the downtown corridor, the EDO will play a major role in business development and building improvement initiatives.

Using specialized tools, the EDO for the Town of Carleton Place will be able to monitor and report on economic productivity and commercial vacancy rates for the downtown corridor. With the same tool set, the EDO will be able to study and provide advice on the retail/service mix of the downtown core.

The key roles and responsibilities of an EDO, with respect to the support of the downtown corridor, are as follows:

- **Compile and execute a well defined action plan that outlines milestones and measureable outcomes. Elements of the plan being:**
 - Key Performance Indicators and tracking/reporting systems.
 - Town of Carleton Place local business support systems and processes.
 - Partner with local BIA and Chamber of Commerce.
 - Façade programs.
 - Financing programs.
 - Real Estate.
 - Promotional Activities and Signage.
- **Partner with BIA and Chamber of Commerce.**
- **Liaise with neighbouring communities.**
- **Establish functional role as Single Point of Contact for local enterprises.**

10.0 Conclusion

Carleton Place is well situated and equipped to once again be vibrant in the downtown corridor. Energy and activity does not just have to be retail and eateries, it can include professional office work outside of community services. A proper mix will bring success with longevity.



The downtown area can, and should, secure an individual identity that nicely complements neighbouring communities. Identifying a path forward that starts with select actions will create positive momentum which compounds over time. A core group of local advocates can start the ball rolling.

Appendix A: List of Interviewees

Interviewees and Workshop Attendees:

Name	Business / Organization	Role
Jeff Maguire	EMC Newspaper	Senior Editor/Reporter
Tracy Lamb	Chamber of Commerce	Chair
Mike Brydges	Scotiabank	Branch Manager
Erin Pretty	Wool Shop	Store Manager
Paul Dack	Dack's Jewellers	Owner/Operator
Brad & Lisa	Granite and Tile Shop	Owner/Operator
Tony Hopkins	Temptations	Owner/Operator
Peter Laughton	Bushtukah	Former Partner
David Stapley	DRS Technologies	Corporate Executive
Spencer Grabe	Dica Industries	Corporate Executive
Graham Whitelaw	Rose Integration	Corporate Executive
Toni Surko	CP District Memorial Hospital	CEO
Cindy Hobbs	Royal Bank	Branch Manager
Paul Nephin	Neptec	CEO
Duncan McNaughton	Tiree Facility Solutions Inc.	President
Marty White	CP District Memorial Hospital	Chief of Staff
Gordon Baxter	GCL Communications Sol'ns	President
John Levi	Mississippi Mills	Mayor
Stephen Brathwaite	MM - Condo Renovations	Investor/Designer
Walter Renwick	Renwick Realty	Real Estate Broker
Doug Hawkins	Graham's Shoes	Operator
Robby Probert	Canadian Career Academy	Owner/Operator
Ralph Shaw	Century 21	Real Estate Broker

Appendix B: Interview Template

Retail Interview Guide: Carleton Place

Date & Time of Interview _____

Section A: Contact Coordinates

1. Name of Organization _____
2. Mailing Address _____
3. Phone Number _____
4. E-mail/Website _____
5. Contact Person _____

Section B: Business Outline

6. The Carleton Place operation:
 - Single location ___; or one of many ___?
 - Years in business:
 - i. at this location _____
 - ii. overall _____
7. Employee Base:
 - Full-time ___
 - Part-time ___
 - Seasonal ___
8. Business Hours:
 - Weekdays: _____
 - Weekends: _____
9. Business Traffic Patterns (day/time):
 - Heavy _____
 - Medium _____
 - Low _____
10. Size of Operation:
 - Approximate average annual sales over the past three years _____
 - Approximate number of full-time equivalent employees _____
11. Trends since 2009:
 - About the same sales ___; more ___; less ___; approx. Δ % _____
 - About the same employment ___; more ___; less ___ approx. Δ % _____
12. Expected change in size over the coming year:
 - About the same employment ___; more ___; less ___ approx. Δ % _____

Section C: Client-Base Served

- 13. Local vs. beyond: roughly what share of your revenues (nearest 10%) come from
 - Carleton Place _____
 - Ottawa Valley _____
 - Greater Ottawa _____
 - Other Ontario _____
 - Other Canada _____
 - Export Sales _____
- 14. Customer Diversity (demographic – age group, etc): _____
- 15. Common size of purchase (# of items, \$): _____
- 16. Reason for shopping (intentional, walking by, touring downtown): _____
- 17. How do you foresee your organization's sales evolving over the next three years?
 - About the same sales _____; more _____; less _____; approx. Δ % _____

Section D: Business Landscape

18. Local Competition

19. Neighbouring towns with similar business/products

20. Complementary businesses in Carleton Place?

21. Reason for being in Carleton Place?

22. What keeps you in Carleton Place?

23. What do you see as your greatest risk?

24. What would you consider the greatest help you could receive to bolster your business?

Section E: Business Improvement Programs

25. Have you used them?

- Yes – How and Value _____
- No – Why _____

26. The town is conducting this survey in order to develop a plan to sustain and improve businesses in Carleton Place. What would you like to see done as part of it?
