

# Brussels Downtown Market Analysis - Results

April 27, 2005

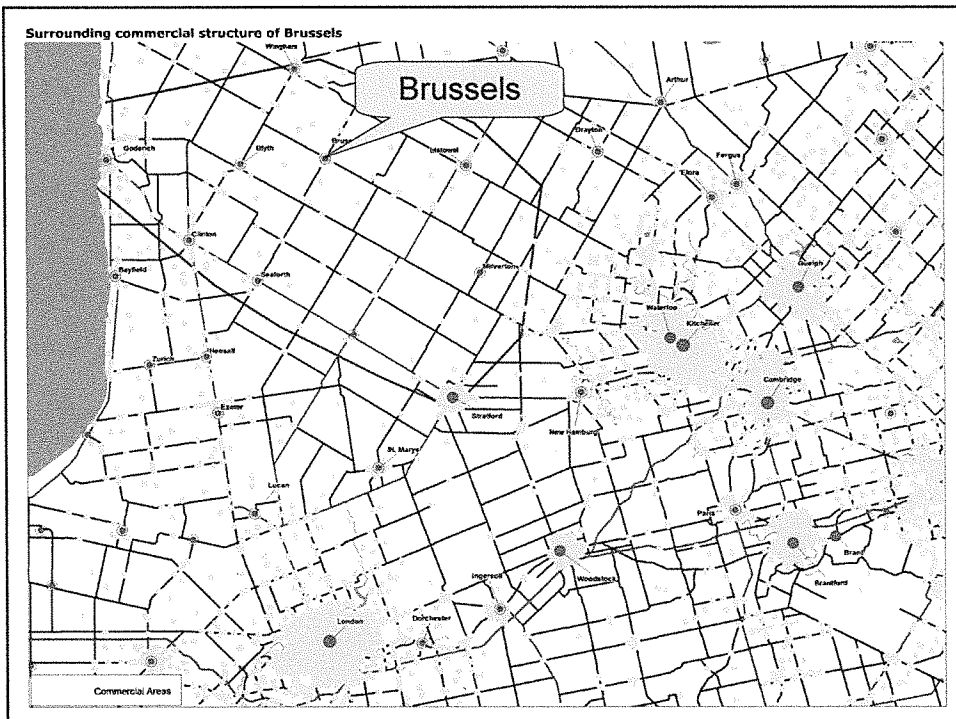


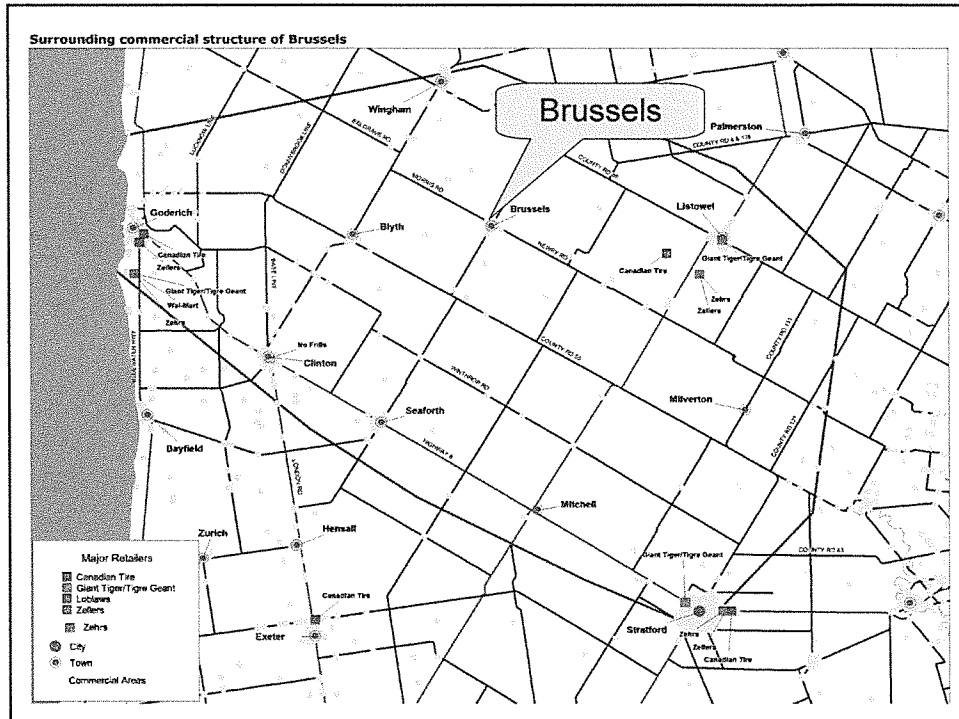
## Outline

- Regional Competition
- Brussels Trade Area
- Demographics of the Trade Area
- Business Mix Analysis



# Regional Commercial Competition





# Brussels Trade Area

## Defining Trade Area

A trade area is the area that generates the majority of consumers (60 – 80%) for a community, business district or downtown.

- A trade area often extends beyond the municipal boundaries of a community.
- Different businesses will have different trade areas depending on their products (e.g. Specialty Product Store – regional, Variety Store – neighbourhood).



## Point of Origin Customer Survey

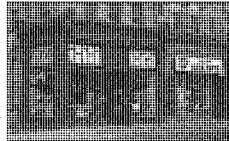
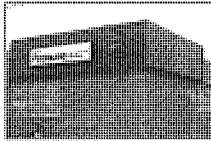
- To determine the size of Brussels trade area
- 6 students collected information by street interviews with customers at 4 selected locations, for 4 hour periods on the Thursday and Saturday during March break.
- Survey participants were asked three simple questions
  - Where are you from? (Address)
  - Why are you shopping in Brussels today?
  - What other stores have or will you visit in Brussels



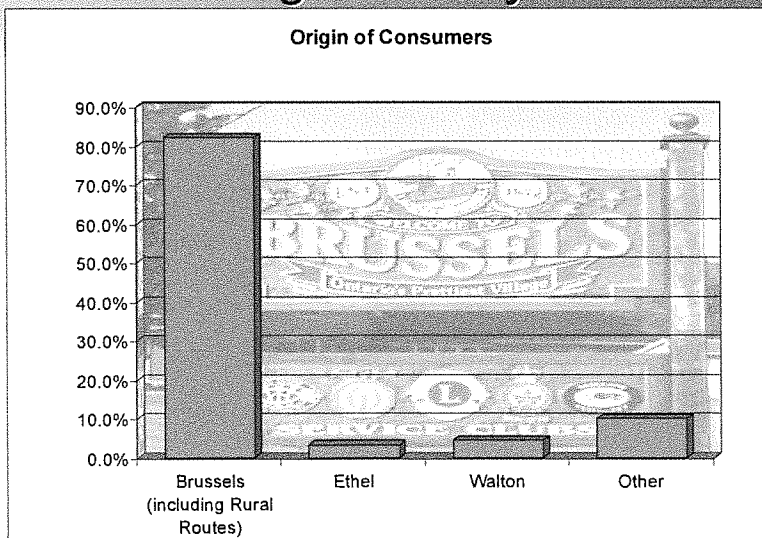
## Customer Point of Origin Survey

- 556 consumers participated in the survey held at four different locations:

– Foodland	322
– Radar's Automotive/Dollar Store	104
– Oldfield's Hardware	84
– Cowboy Loft	46

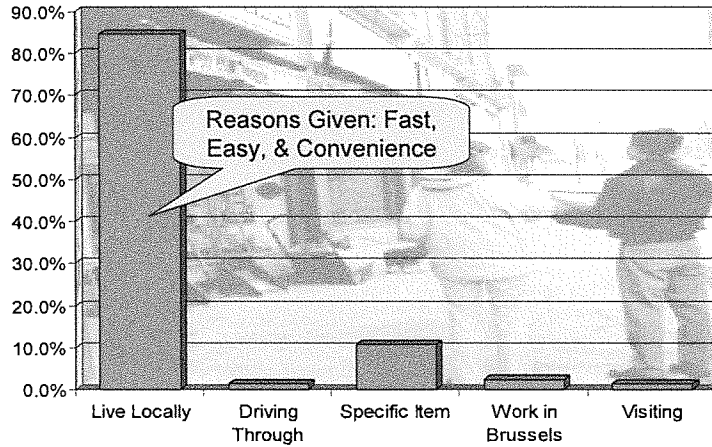


## Point of Origin Survey - Results



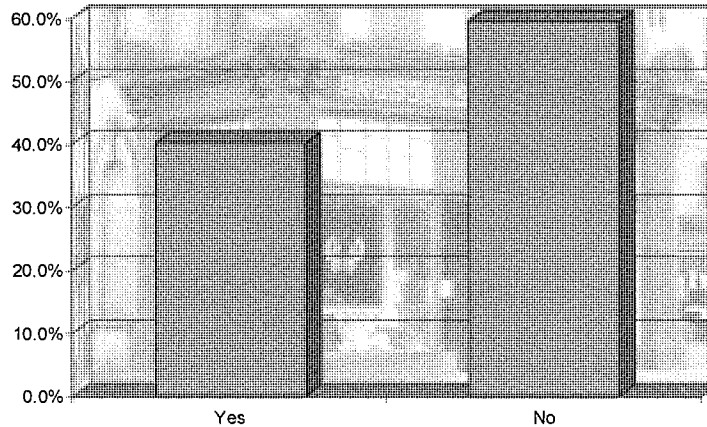
# Point of Origin Survey - Results

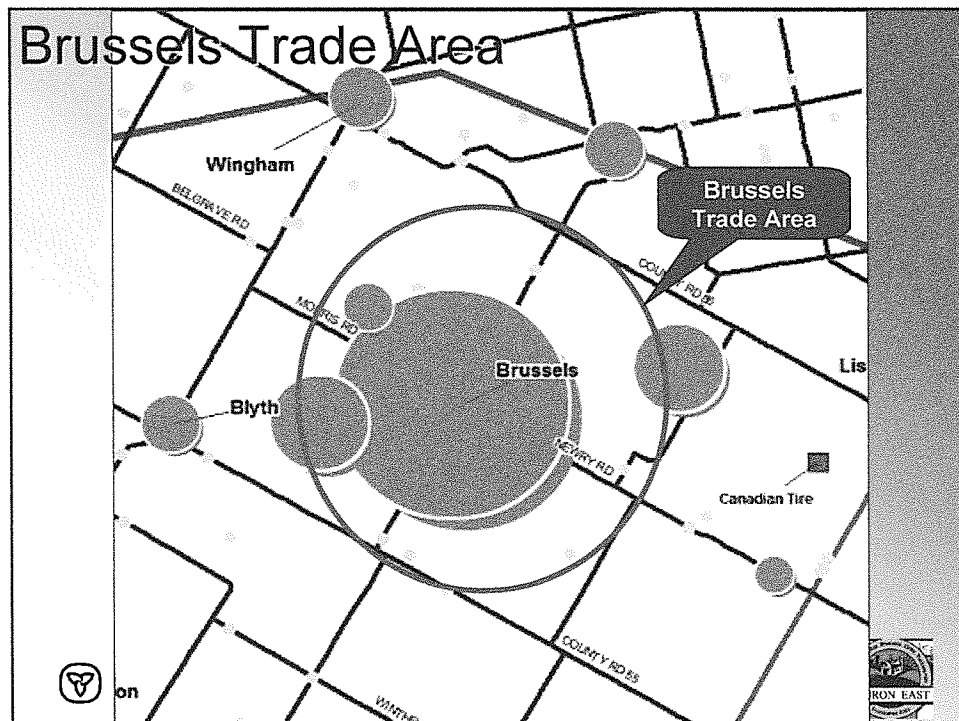
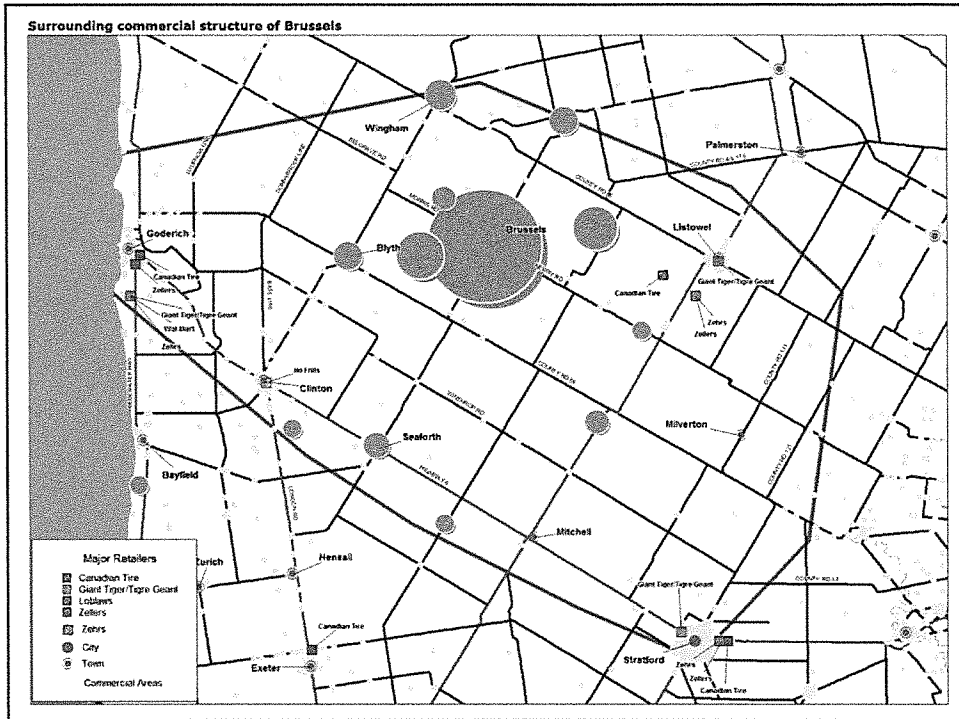
## Why are you shopping in Brussels Today?

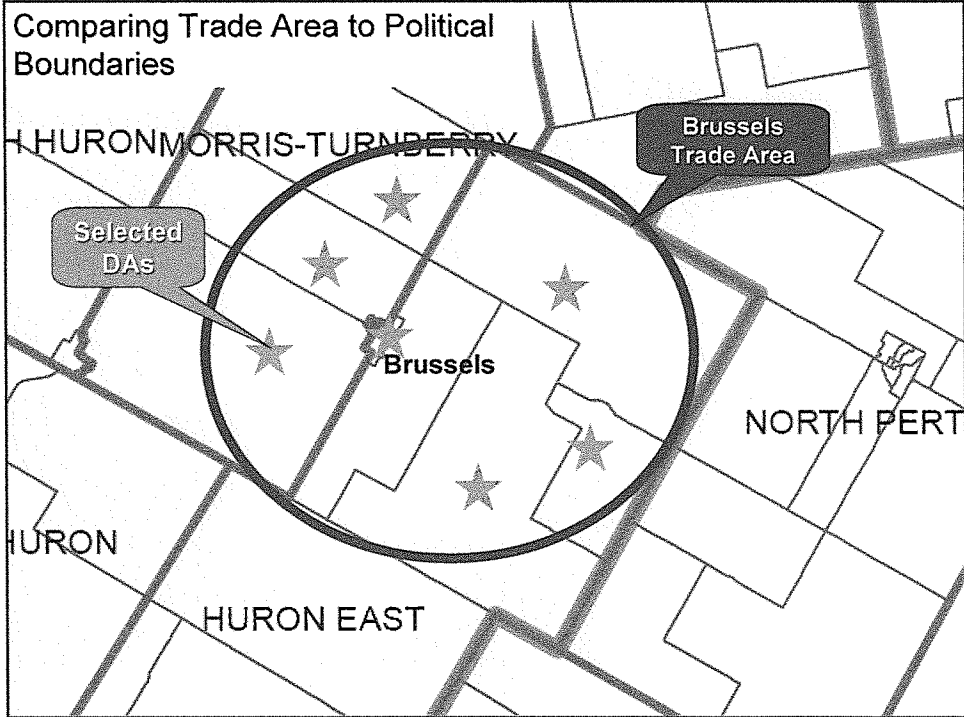
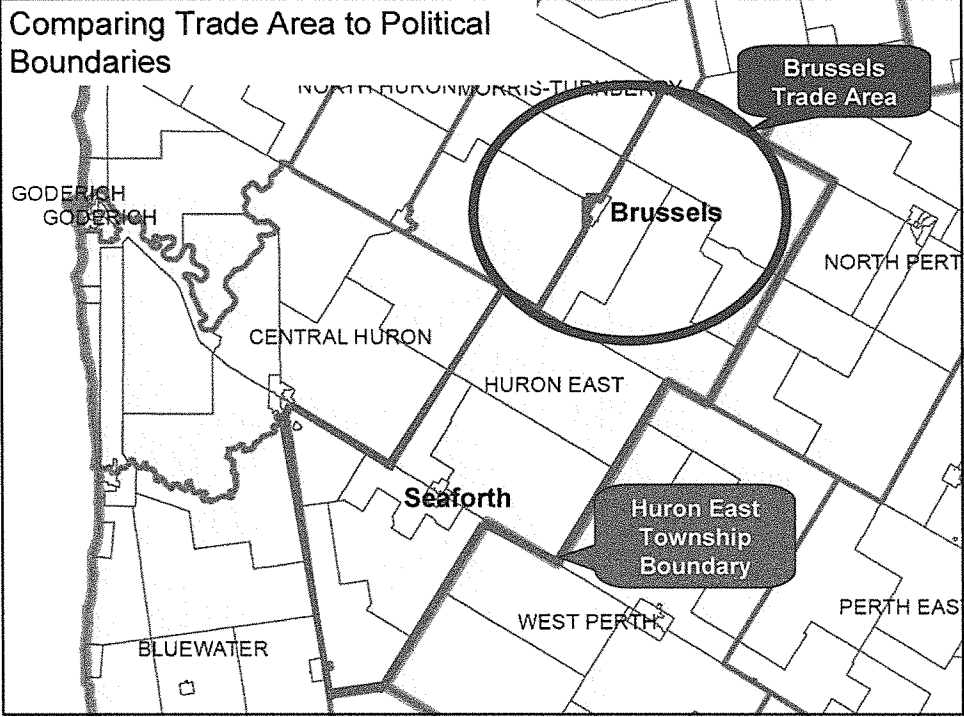


# Point of Origin Survey - Results

## Will you visit other stores while in Brussels?







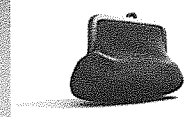


# Demographics of the Brussels Trade Area



## Trade Area Demographic Data

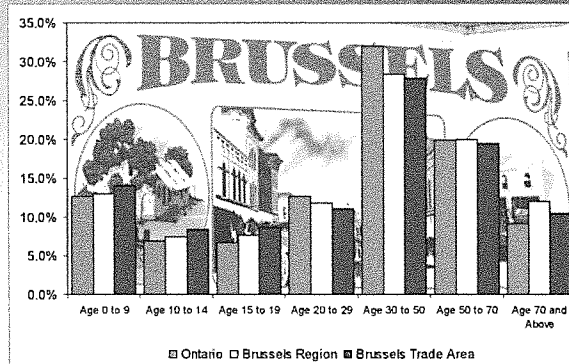
- Population & household
- Income level
- Education
- Occupation
- Ethnicity/Religion
- Housing



## Brussels Trade Area - Population

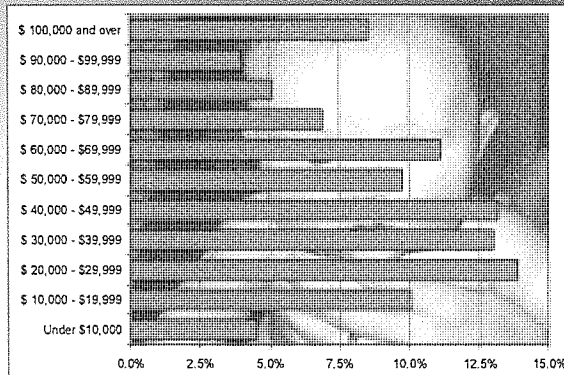
In Brussels Primary Trade Area there are:

- approximately **3775** people
- approximately **1345** households.
- **2.95** persons per family



## Brussels Trade Area – Household Income

	Average Income By Household
Ontario	\$67,015
Brussels Region	\$55,754
Brussels Trade Area	\$50,852



## Brussels Trade Area – Employment & Immigration

Labour Force 15 years +, 2001

	Unemployment Rate
Ontario	6.28%
Brussels Region	4.41%
Brussels Trade Area	4.57%

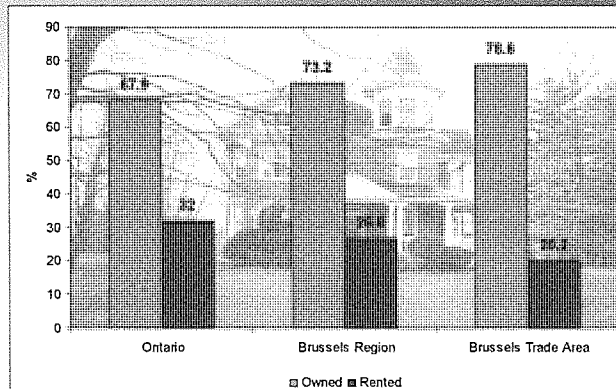
Population by Place of Birth, 2001

	Non-Immigrant Pop	Immigrant Pop
Ontario	72.3%	26.9%
Brussels Region	91.3%	8.7%
Brussels Trade Area	92.3%	7.3%

## Brussels Trade Area – Housing Types

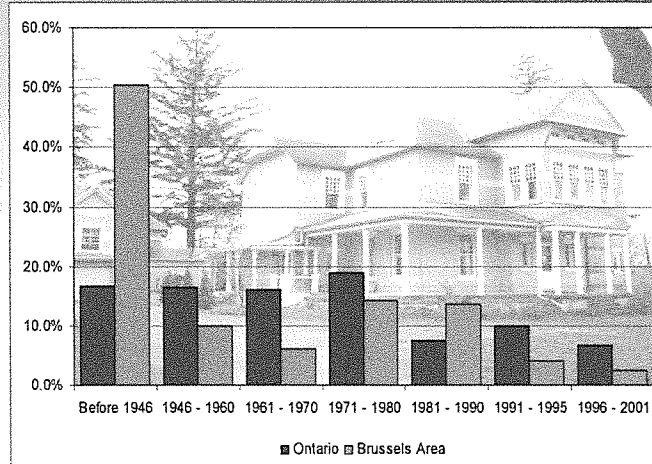
Housing Ownership vs. Rental

88% of people in the trade area live in single detached houses, compared to the Ontario average of 58%



## Brussels Trade Area – Housing

Over 50% of the housing in the Brussels Area was constructed before 1946.



## Consumer Cluster Data For Huron East





Clusters	% of households	# of households
<b>Agrarian Heartland</b>	37.8	1348
<b>Village Blues</b>	34.9	1242
<b>Blue Collar Stride</b>	4.7	759
<b>Middletown Mix</b>	4.7	166
<b>Open Country</b>	1.4	49
<b>Total</b>	100	3564

Source: Financial Post 2004



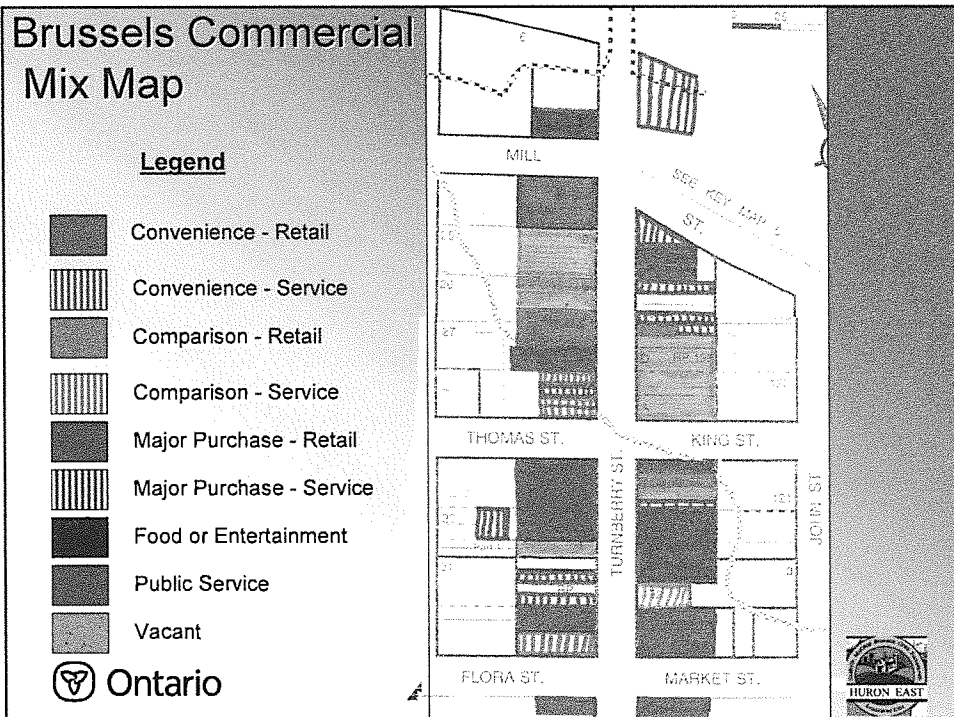
PSYTE Descriptions	
Agrarian Heartland	Successful farmers represent a small and decreasing percent of the Canadian labour force. Still, they define lifestyles of vast areas of the Agrarian Heartland with their steadfast ways and large tractors. Average incomes of \$67,000 -- though perhaps not consistent from year to year -- at least can maintain the family over the long haul. German ancestry, work in agriculture, and older home construction drive high indexes for this cluster.
Village Blues	Blue collar workers negotiating the employment landscape in towns and villages represent Village Blues. These middle-income families (\$61,000 average), some with service sector workers as well as blue collar workers, have the space and resources to raise healthy children and likewise carve out a viable lifestyle. Jobs in utility industries, agricultural services, and manufacturing predominate in this cluster. Most Village Blues still live in their "province of birth" and have a high school education but not always with diploma.
Open Country	RV's and four-wheelers are a practical necessity out here. Bring plenty of gas and an extra tire or two. Average income in this cluster is \$51,000 a year. Jobs in agriculture and the extractive industries predominate. Single, detached housing predominate but mobile homes also index high in Open Country.
Middletown Mix	The centre of a modern society may be the "eye of the storm." Middle-sized towns inhabited by middle-income families, in their middle-aged stage of life often mixed with young couples just starting out. Average household income (\$50,500), however, is about 30 percent below the national average. This cluster lives in the second oldest housing in Canada, indexing high in homes built between 1946 and 1960.
Blue Collar Stride	A city cannot function without a solid core of Blue Collar workers in their stride. Established trades and workers in the service economy provide a base for other sectors. Average annual income in this segment is \$49,500. Workers in manufacturing, construction and the traditional trades predominate.

## Brussels Business Mix Analysis

# Business Mix Types

Type	Description
Convenience purchase	Frequent purchases; impulse purchases; minimum effort required; nearby.
Comparison purchase	Frequent purchases but less on impulse; businesses visited and prices and selection compared
Major purchase	Infrequent purchases, more expensive, require greater thought beforehand; purchase are kept for a long period; destination purchases; comparisons are made with respect to the merchandise, its appearance, quality, price, style and the need; distance is less important.
Restaurant / entertainment purchase	Purchase consumed on-site



## Brussels Business Mix

Type	Downtown		Brussels Other		Total
	Retail	Service	Retail	Service	
Convenience	5	1	-	1	7
Comparison	5	6	2	6	19
Major Purchase	2	9	3	7	21
Food & Ent.	4	-	-	-	4
Public Service	-	2	-	1	3
<b>Total</b>	<b>16</b>	<b>18</b>	<b>5</b>	<b>15</b>	<b>54</b>
Vacant	10				N/A

35% of businesses are located outside of the Downtown

## Brussels Business Mix

Type	Downtown		Total
	Retail	Service	
Convenience	14%	3%	17%
Comparison	14%	17%	31%
Major Purchase	5%	25%	31%
Food & Ent.	11%	-	11%
Public Service	-	5%	5%
Vacant	22%		N/A



Commercial Structure: Comparison to Similar Communities							
Description	Brussels	Blyth	Lucknow	Mildmay	Teeswater	Watford	Average
Building materials, hardware, garden sup	3	5	5	0	5	4	4
General merchandise stores	2	1	1		1	4	2
Food stores	3	2	4	3	3	3	3
Automotive dealers and gasoline service	4	1	5	1	2	6	3
Apparel and accessory stores		1	1	2	1		1
Furniture, home furnishings and equipmen			5	3		3	4
Eating and drinking places	3	3	3	5	2	4	3
Miscellaneous retail	5	10	9	10	2	11	8
Depository institutions	1	1	1	1	1	2	1
Security, commodity brokers, and service	1		1				1
Insurance agents, brokers, and service	2	3	2	1	4	3	3
Real estate	1		1			2	1
Hotels, rooming houses, camps, and other	1		2	3			2
Personal services	4	4	6	4	5	5	5
Business services	3			1	3	5	3
Automotive repair, services, and parking	1	3	2	5	4	8	4
Amusement and recreational services	1		2	4	1		2
Health services	2	1	5	1	3	6	3
Legal services	1	1	3		1	1	1
Social services	1	1	1			1	1
Totals	39	37	59	44	38	68	48


Data Source: CSCA Proprietary Database

## Retail & Service Business Thresholds

POPULATION THRESHOLD FOR RETAIL BUSINESSES	Ontario People per business
NAICS Sectors	
445120 - Convenience Stores	2078
452999 - All Other Miscellaneous General Merchandise Stores	2553
447190 - Other Gasoline Stations	3026
445110 - Supermarkets and Other Grocery (except Convenience) Stores	3187
441120 - Used Car Dealers	3669
443110 - Appliance, Television and Other Electronics Stores	3855
453220 - Gift, Novelty and Souvenir Stores	4006
446110 - Pharmacies and Drug Stores	4109
448120 - Women's Clothing Stores	4352
453999 - All Other Miscellaneous Store Retailers (except Beer and Wine-Making Supplies Stores)	4550
443120 - Computer and Software Stores	4733
451110 - Sporting Goods Stores	5321
448310 - Jewellery Stores	6314
453310 - Used Merchandise Stores	6433
442110 - Furniture Stores	6443
448140 - Family Clothing Stores	6498
453110 - Florists	6919
441110 - New Car Dealers	8564
441310 - Automotive Parts and Accessories Stores	8735
447110 - Gasoline Stations with Convenience Stores	9833
445310 - Beer, Wine and Liquor Stores	10108
454390 - Other Direct Selling Establishments	10192
442298 - All Other Home Furnishings Stores	10633
448210 - Shoe Stores	11004
441120 - Hardware Stores	11044

See Handout







# Making sense of it all

## Understand Market Conditions:

- Business/Building Inventory
- Business Owner Survey
- Business Mix Analysis
- Trade Area Analysis
- Trade Area Demographics
- Consumer Survey

## Identify Market Opportunities

- Retail
- Service
- Restaurant
- Residential
- Entertainment
- Accommodation
- Etc.

## Develop Strategies

- Report to all business owners
- Niche Devt.
- Mixed-Used Devt.
- Business Clustering



# Summary



Population Threshold for Different Types of Businesses		12,281,000	Ontario	3540 - Huron County	3540005 - South Huron	3540010 - Bluewater	3540025 - Central Huron	3540028 - Goderich	3540040 - East Huron	3540046 - Howick	3540050 - Morris-Turnberry	3540055 - North Huron	3540063 - Astfield-Colborne-Wawanosh
Business Counts for Huron County Municipalities, 2004		Population	12,281,000	59,701	10,019	6,919	7,806	7,604	9,680	3,779	3,499	4,984	5,411
NAICS Sectors		People per business	858085	5833	830	1032	286	482	1352	379	299	677	496
541510 - Computer Systems Design and Related Services		376	32824	30	3	1	1	9	9	0	1	1	5
541611 - Administrative Management and General Management Consult		401	30625	58	7	11	4	8	11	1	1	10	5
236110 - Residential Building Construction		443	21706	148	23	32	4	12	29	12	4	16	16
531210 - Offices of Real Estate Agents and Brokers		581	21134	70	7	23	2	13	12	1	3	4	5
722210 - Limited-Service Eating Places		738	16641	61	14	13	3	5	15	3	0	5	3
722110 - Full-Service Restaurants		803	16291	77	7	19	3	15	12	2	3	11	5
621110 - Offices of Physicians		1085	11319	38	3	2	3	11	13	0	3	5	1
238220 - Plumbing, Heating and Air-Conditioning Contractors		1350	9094	49	12	12	3	4	8	0	1	2	7
541110 - Offices of Lawyers		1361	9026	29	4	2	1	9	7	0	0	5	1
541330 - Engineering Services		1427	8609	14	1	2	0	2	3	0	0	2	4
237210 - Land Subdivision		1473	8338	28	7	5	3	2	4	4	0	0	3
811111 - General Automotive Repair		1485	8269	73	9	13	0	8	17	5	4	13	4
238210 - Electrical Contractors		1536	7998	38	10	5	1	2	14	1	1	1	3
238550 - Finish Carpentry Contractors		1678	7317	61	3	4	3	6	14	7	3	8	13
541212 - Offices of Accountants		1976	6215	27	6	5	0	6	5	0	0	4	1
445120 - Convenience Stores		2078	5910	25	3	2	2	6	5	0	2	3	2
812115 - Beauty Salons		2078	5909	20	2	0	1	7	3	1	0	6	0
238320 - Painting and Wall Covering Contractors		2148	5717	33	6	8	1	3	9	0	1	2	3
621210 - Offices of Dentists		2204	5573	15	2	1	0	4	4	0	0	10	1
813110 - Religious Organizations		2216	5443	65	8	10	2	5	20	4	3	1	3
541619 - Other Management Consulting Services		2238	5487	6	1	4	0	0	0	0	0	1	0
452999 - All Other Miscellaneous General Merchandise Stores		2553	4811	43	6	5	3	6	8	3	2	4	6
711510 - Independent Artists, Writers and Performers		2701	4547	3	0	1	0	0	1	1	1	0	0
541215 - Bookkeeping, Payroll and Related Services		2904	4229	14	3	3	0	2	3	0	1	0	2
238310 - Drywall and Insulation Contractors		3018	4069	19	4	4	0	1	6	0	0	6	1
447190 - Other Gasoline Stations		3026	4058	19	5	3	0	3	4	0	2	1	1
236220 - Commercial and Institutional Building Construction		3119	3938	26	4	6	2	0	9	1	1	2	1
541430 - Graphic Design Services		3163	3883	7	0	2	1	2	1	0	0	0	1
445110 - Supermarkets and Other Grocery (except Convenience) Store		3187	3854	32	8	5	1	1	8	1	0	5	3
238910 - Site Preparation Contractors		3357	3658	37	4	9	3	0	9	2	3	5	2
238990 - All Other Specialty Trade Contractors		3544	3465	12	2	4	0	0	3	0	0	2	1
813410 - Civic and Social Organizations		3616	3396	20	3	2	1	6	4	0	0	4	0
441120 - Used Car Dealers		3669	3347	19	4	2	1	2	7	1	0	1	1
811121 - Automotive Body, Paint and Interior Repair and Maintenance		3679	3338	26	4	4	0	2	10	1	0	4	1
238140 - Masonry Contractors		3855	3186	15	1	1	0	0	2	0	3	3	5
443110 - Appliance, Television and Other Electronics Stores		3855	3186	28	6	3	0	5	6	2	1	4	1
453220 - Gift, Novelty and Souvenir Stores		4006	3066	32	2	12	0	3	6	2	0	7	0
446110 - Pharmacies and Drug Stores		4109	2989	15	3	1	1	2	5	0	0	3	0
448120 - Women's Clothing Stores		4352	2822	22	3	4	1	9	2	0	0	3	0
238330 - Flooring Contractors		4381	2803	16	3	5	1	0	2	0	1	1	3
453999 - All Other Miscellaneous Store Retailers (except Beer and Win		4550	2699	12	0	3	1	3	2	0	0	3	0
812190 - Other Personal Care Services		4579	2682	14	3	1	0	6	2	1	0	0	1
443120 - Computer and Software Stores		4733	2695	5	0	0	1	1	2	0	0	1	0
238130 - Framing Contractors		4883	2515	16	2	4	1	1	1	2	3	2	0

Population Threshold for Different Types of Businesses	12,281,000	Ontario	3540 - Huron County	3540005 - South Huron	3540010 - Bluewater	3540025 - Central Huron	3540028 - Goderich	3540040 - Huron East	3540046 - Howick	3540050 - Morris-Turnberry	3540055 - North Huron	3540063 - Ashfield-Colborne-Wawanosh
238160 - Roofing Contractors	5219	2353	16	9	2	0	0	3	0	1	0	1
451110 - Sporting Goods Stores	5321	2308	8	1	0	1	1	4	0	0	0	1
541612 - Human Resource and Executive Search Consulting Services	5394	2277	0	0	0	0	0	0	0	0	0	0
812116 - Unisex Hair Salons	5468	2246	15	5	1	0	2	4	0	0	3	0
624410 - Child Day-Care Services	5490	2237	6	1	2	0	2	2	0	1	0	0
812320 - Dry Cleaning and Laundry Services (except Coin-Operated)	5549	2213	6	1	0	0	2	0	0	0	1	0
541310 - Architectural Services	5758	2133	4	0	0	0	3	0	1	0	0	0
713990 - All Other Amusement and Recreation Industries	5873	2091	10	3	2	1	1	1	0	0	1	1
448310 - Jewellery Stores	6314	1945	3	2	0	0	1	0	0	0	0	0
722410 - Drinking Places (Alcoholic Beverages)	6327	1941	7	2	2	0	1	1	0	0	0	0
453310 - Used Merchandise Stores	6433	1909	6	0	2	0	2	0	0	0	2	0
442110 - Furniture Stores	6443	1906	15	3	1	3	2	3	0	0	1	2
448140 - Family Clothing Stores	6498	1890	14	2	2	0	4	2	0	0	3	1
453110 - Florists	6919	1775	15	4	2	0	1	6	0	0	2	0
541940 - Veterinary Services	7006	1753	17	5	1	1	1	2	0	0	4	3
541410 - Interior Design Services	7403	1659	3	1	0	0	0	0	1	0	1	0
813910 - Business Associations	7439	1651	8	1	1	2	1	1	0	1	1	0
713940 - Fitness and Recreational Sports Centres	7443	1650	9	1	1	0	2	3	0	0	1	2
722320 - Cafeters	7470	1644	8	1	3	1	1	1	0	0	1	0
621310 - Offices of Chiropractors	7475	1643	10	1	0	0	4	4	0	0	1	0
621390 - Offices of All Other Health Practitioners	8016	1532	8	1	0	0	0	3	1	2	0	1
541380 - Testing Laboratories	8435	1456	4	0	4	0	0	0	1	0	0	0
238170 - Siding Contractors	8564	1434	11	1	1	0	1	2	1	1	4	0
441110 - New Car Dealers	8564	1434	19	4	0	1	5	5	0	1	3	0
441310 - Automotive Parts and Accessories Stores	8735	1406	15	4	1	0	2	4	1	0	4	1
522111 - Personal and Commercial Banking Industry	8997	1365	14	3	4	2	2	1	0	0	2	0
447110 - Gasoline Stations with Convenience Stores	9833	1249	9	1	2	0	3	1	2	0	2	0
445310 - Beer, Wine and Liquor Stores	10108	1215	13	2	3	0	2	4	0	0	2	0
454390 - Other Direct Selling Establishments	10192	1205	3	0	0	2	0	1	0	0	0	0
541190 - Other Legal Services	10251	1198	1	0	2	1	3	0	0	0	0	0
811192 - Car Washes	10470	1173	9	1	1	2	3	2	0	0	0	0
721114 - Motels	10569	1162	8	0	1	1	3	1	1	0	2	1
442298 - All Other Home Furnishings Stores	10633	1155	6	1	0	0	1	1	0	0	2	1
448210 - Shoe Stores	11004	1116	2	1	0	0	0	0	0	0	2	0
444130 - Hardware Stores	11044	1112	14	1	2	0	1	6	1	0	2	1
446191 - Food (Health) Supplement Stores	11510	1067	10	2	1	0	2	2	0	1	2	0
442210 - Floor Covering Stores	11564	1062	3	0	1	0	1	0	0	0	0	1
454110 - Electronic Shopping and Mail-Order Houses	11958	1027	5	0	0	0	0	2	2	0	0	0
451210 - Book Stores and News Dealers	12281	1000	7	1	0	0	5	1	0	0	0	0
444190 - Other Building Material Dealers	12330	996	6	0	0	0	2	2	1	0	0	0
721111 - Hotels	12570	977	8	0	4	1	0	1	0	0	2	0
446130 - Optical Goods Stores	12661	970	1	0	0	0	0	1	0	0	0	0
541213 - Tax Preparation Services	12779	961	6	1	0	0	0	5	0	0	0	0
445210 - Meat Markets	12887	953	7	1	2	0	1	2	0	0	1	0
451120 - Hobby, Toy and Game Stores	13422	915	2	0	1	0	1	0	0	0	0	0
441220 - Motorcycle, Boat and Other Motor Vehicle Dealers	13706	896	13	0	5	0	2	4	0	0	2	0
713910 - Golf Courses and Country Clubs	14214	864	15	3	2	1	0	5	0	0	1	3



Commercial Structure	Blyth	Brussels	Clinton	Goderich	Listowel	Milverton	Mitchell	Seaforth	Sebringville	Stratford	Wingham
Building materials, hardware, garden sup	5	3	11	12	7	5	4	8	2	25	4
General merchandise stores	1	2	3	5	8	2	2	3		16	4
Food stores	2	3	4	18	10	3	4	5		29	6
Automotive dealers and gasoline service	1	4	6	16	18	3	13	8	3	40	8
Apparel and accessory stores	1		1	13	10	1	2	3		52	8
Furniture, home furnishings and equipmen			11	20	20	2	8	4	4	48	7
Eating and drinking places	3	3	15	23	20	5	9	8	1	90	15
Miscellaneous retail	10	5	21	49	29	6	16	10	2	121	21
Depository institutions	1	1	3	7	6	3	4	2	1	10	5
Nondepository credit institutions			1		2					6	
Insurance agents, brokers, and service	3	2	8	8	7	4	9	9	1	15	5
Real estate		1	3	15	9		2	5		18	3
Hotels, rooming houses, camps, and other		1	4	12	1			4		43	2
Personal services	4	4	13	29	26	9	13	9		86	16
Business services		3	9	8	6	4	6	3	3	58	7
Automotive repair, services, and parking	3	1	13	18	22	3	15	8	1	51	9
Amusement and recreational services		1	6	18	9	4	7	4	1	23	4
Health services	1	2	26	40	31	6	16	13		129	19
Legal services	1	1	5	14	4	3	3	3		26	4
Social services	1	1	18	10	10	5	2	4		47	9
Museums, art galleries	1			2	1		1			4	1

<b>Population Threshold for Retail Businesses</b>		12,281,000
<b>Business Counts for Huron County Municipalities, 2004</b>		Population
NAICS Sectors		People per business
445120 - Convenience Stores		2078
452999 - All Other Miscellaneous General Merchandise Stores		2553
447190 - Other Gasoline Stations		3026
445110 - Supermarkets and Other Grocery (except Convenience) Stores		3187
441120 - Used Car Dealers		3669
443110 - Appliance, Television and Other Electronics Stores		3855
453220 - Gift, Novelty and Souvenir Stores		4006
446110 - Pharmacies and Drug Stores		4109
448120 - Women's Clothing Stores		4352
453999 - All Other Miscellaneous Store Retailers (except Beer and Wine-Making Supplies Stores)		4550
443120 - Computer and Software Stores		4733
451110 - Sporting Goods Stores		5321
448310 - Jewelry Stores		6314
453310 - Used Merchandise Stores		6433
442110 - Furniture Stores		6443
448140 - Family Clothing Stores		6498
453110 - Florists		6919
441110 - New Car Dealers		8564
441310 - Automotive Parts and Accessories Stores		8735
447110 - Gasoline Stations with Convenience Stores		9833
445310 - Beer, Wine and Liquor Stores		10108
454390 - Other Direct Selling Establishments		10192
442298 - All Other Home Furnishings Stores		10633
448210 - Shoe Stores		11004
444130 - Hardware Stores		11044
446191 - Food (Health) Supplement Stores		11510
442210 - Floor Covering Stores		11564
454110 - Electronic Shopping and Mail-Order Houses		11958
451210 - Book Stores and News Dealers		12281

<b>Population Threshold for Retail Businesses</b>		
444190 - Other Building Material Dealers		12,281,000
446130 - Optical Goods Stores		12330
445210 - Meat Markets		12661
451120 - Hobby, Toy and Game Stores		12887
441220 - Motorcycle, Boat and Other Motor Vehicle Dealers		13422
621320 - Offices of Optometrists		13706
453910 - Pet and Pet Supplies Stores		14796
445299 - All Other Specialty Food Stores		14959
448110 - Men's Clothing Stores		15162
454210 - Vending Machine Operators		15487
448130 - Children's and Infants' Clothing Stores		17569
446120 - Cosmetics, Beauty Supplies and Perfume Stores		17928
444220 - Nursery and Garden Centres		18981
451130 - Sewing, Needlework and Piece Goods Stores		19070
445291 - Baked Goods Stores		20400
444120 - Paint and Wallpaper Stores		21583
453210 - Office Supplies and Stationery Stores		21930
441320 - Tire Dealers		22827
444110 - Home Centres		23893
446199 - All Other Health and Personal Care Stores		25063
445230 - Fruit and Vegetable Markets		26991
451220 - Pre-Recorded Tape, Compact Disc and Record Stores		29881
445292 - Confectionery and Nut Stores		30100
451140 - Musical Instrument and Supplies Stores		30703
453992 - Beer and Wine-Making Supplies Stores		30779
443130 - Camera and Photographic Supplies Stores		31571
441210 - Recreational Vehicle Dealers		38022
452110 - Department Stores		41350
452991 - Home and Auto Supplies Stores		41350
		58481

<b>Population Threshold for Retail Businesses</b>		12,281,000
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