

**CHANGE OF USE, EXPANSION
AND IMPACT STUDY FOR A PROPERTY IN
NORTH GRENVILLE MUNICIPALITY
ONTARIO**

Prepared for:
Consilioplanning

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I. EXECUTIVE SUMMARY

The purpose of this report is to identify market-viable uses for a property at 285 County Road in the Town of North Grenville. The property is 24,000 sq. ft. in size (2,220 m²) and fronts on County Road 43 (formerly Highway 43).

The highest and best uses of properties are those which are in demand. As an area's population demand for goods and services change, the use of lands and/or built space also have to change in order to remain viable.

For the Subject Site, we have considered various options, and ultimately identified the best of them for the Subject Site.

A. Subject Site

The Subject Site has numerous excellent qualities. It is clearly visible, its entrance and exit are wide, highly visible, and easy to access. There are ample parking spaces on all sides of the existing building which is approximately 24,000 sq. ft. in size, and vacant at present.

The Subject Site fronts on County Road 43, which is under construction at present, adding one more lane.

In our opinion, the visibility, entrance to and exit from, and circulation within the Subject Site are excellent. These qualities, furthermore, are mostly needed by businesses and residents. With such an excellent entrance, open spaces, parking, and convenient exit, the Subject Site is ideal for a wide variety of retail and other businesses.

B. Highest and Best Use of the Subject Site

The location, visibility and access to the Subject Site make it highly desirable for a variety of commercial, industrial and institutional uses. Since it is privately owned, institutional use would not be its highest and best use.

In our opinion, Industrial use of the Subject Site would also not be its highest and best use even if permitted by municipal authorities.

Retail Commercial use of the Subject Site would be its highest and best use based on our research. Furthermore, while the Subject Site is viable for **several different types of retail commercial businesses**, we recommend a **supermarket** and other retail or service businesses on the Subject Site.

The following provide further support for the above:

1. North Grenville is family dominated and growing rapidly. From 2016 to 2021, its population increased by 1,513 or 92% or an average of 302 persons per year. An average annual population growth of 1.0% is considered by most economists and planners to represent a high growth rate. North Grenville's population growth was 1.84% annually from 2016 to 2021.
2. North Grenville is a highly family dominated area (its average household size was 2.55 in 2021), and is thus expected to continue to grow.
3. North Grenville is family dominated, and its average family size was 2.50 in 2021.
4. The total population of North Grenville is estimated to increase by an average of 734 annually (Table 4) to 27,670 in 2030.

• 2021	22,015 (actual)
• 2025	24,000
• 2027	25,580
• 2030	27,670

5. Owner-occupied housing units represented 87.7% of all units in North Grenville in 2021, and their incomes are higher than renters.

6. In 2020, the average incomes in North Grenville were:

• Single Person	\$59,700
• Two or More Persons	\$137,400

It is thus evident that in terms of population, income and housing ownership, North Grenville is a highly desirable town for retail and service businesses.

C. Reasons For Recommending a Variety of Retail and other businesses: Adequacy Issues

1- The population of the Market Area increased by 1,653 or 8.12% from 2016 to 2021. With an estimated increase of 3,400 the total population of the Market Area is now close to 24,000 and in our estimation, this population is forecast to increase to 27,670 by the year 2030.

2- At an estimated total of 40 sq. ft. per person for various retail and service items, the Market Area is estimated to require an additional 292,000 sq. ft. of retail and service businesses by 2030.

3- Over time, all types of additional retail and service businesses have been required in the Market Area due to its population growth. An additional supermarket, however, has been most in demand in the Market Area.

4- The location, size, visibility, access and other qualities of the Subject Site make it a highly desirable supermarket.

5- In our opinion, the Subject Site is excellent for a variety of retail, service, light industrial, cultural, recreational, and many other uses. A supermarket is needed now, the Subject Site is an excellent parcel for a supermarket, and many other retail and service businesses based on our research.

6- Based on numerous market demand studies in different Canadian provinces, the overall average per capita food store space is 6 sq. ft. At this size, the Market Area should have had 132,090 sq. ft. of supermarket space in 2021.

7- At an estimated 2025 population of 24,000 in the Market Area, the total of all needed supermarkets combined should be 144,000 sq. ft.

8- By the year 2030, the total of all supermarkets combined in the Market Area should thus be a minimum of 166,020 sq. ft.

9- Tourists, other people who go to the Market Area for work, visiting, etc., also purchase supermarket products.

10- Population of the Market Area will, of course, continue to increase after the year 2030, resulting in more demand for a supermarket, and other retail stores.

It is, therefore, evident that the Market Area needs, and can support an additional supermarket, along with several other businesses.

D. Other Relevant Issues:

1. Expansion

As population of the area changes, the needs of its residents and employees change also. Until equilibrium appears there can be imbalances between supply, demand, and services.

The Market Area has been growing significantly in the last 10 years. Similar to any new and growing area, there have probably been shortages of certain goods and services in this area. Based on the existing population, their age, income, lifestyles and the available food stores, **it is evident that there is demand for more food stores.** Furthermore, since the Market Area's population is growing, demand for another supermarket and small specialty food stores (e.g., Italian bakery) will continue to increase further. **If the needed expansion is not provided, the Market Area residents will go to other places for supermarket products.** While there, they are also likely to shop at other stores, resulting in reduced spending within the existing Market Area.

2. Change of Use

Diversity of businesses is an attraction for residential as well as employment growth. Some existing consumer products and services are deeply intertwined with innovation, new items, colours and names for existing products. There are also genuine new products, services, and they are available at different price points. Some of these new products and services become very popular at times, and thus require their own space (store). **In these situations, change of use becomes inevitable.** Rather than resisting "change of use", new businesses, services and other aspects of "new" products or services should be supported and promoted. There are still more reasons to support the "change of use" trends:

- a. If not welcomed in one area, the people behind new products will find suitable/welcoming areas elsewhere.

- b. If/when the Market Area residents go elsewhere for new products or services, it is likely that they would purchase other products or services there which exist in their own area.

As a result, not only would the new products be offered elsewhere, some of the spending of the residents would also be spent in the area which has attracted the new products and services.

3. Permitted Uses

Within the Market Area, there are already several food stores. Supermarkets are typically the main food stores in towns and cities. Areas with small population, villages, incomplete major residential developments either have no food stores or small food stores of up to 3,000 sq. ft.

Within the Market Area, supermarkets are permitted, and there is already one there (YIG). As the population of the Market Area grows, it will require more supermarkets. The recommended supermarket on the Subject Site is already an existing permitted use.

4. Impact

The population of the Market Area has been expanding quite rapidly. As of mid-2025, this population is estimated to be 24,000 and forecast to increase by an average annual of 734 residents (Table 4).

A new supermarket in the Market Area will impact the existing food stores. In view of the fact that there are already 24,000 residents in the Market Area, thousands of employees, and significant population growth, indicates that all existing food stores and the recommended one will do well in terms of sales. An average population growth of 734 would generate demand for (743 x 6 sq. ft.) an estimated 4,404 sq. ft. of food store. The Market Area's employment will also increase as its population increases. There will also be demand for more employees. The tourism facilities, cultural, sports and other such businesses within the Market Area would also increase the demand for eating-drinking facilities, food stores, and numerous other products and services. **Taking into consideration the expected additional population and employment in the Market Area, we believe that the impact of the recommended supermarket on the existing food stores will be insignificant and temporary.**

It is also important to emphasize that the Subject Site is quite attractive for several other businesses in addition to a supermarket. **The need for a supermarket,**

however, is quite strong and time sensitive, based on the facts presented in this study.

II. SUBJECT SITE

The Subject Site is a rectangular building with ample parking spaces at County Road 43. At present the building is vacant.

Access to the Subject Site is from County Road 43. The entrance and exit to the site are wide, visible and convenient to access. The vacant area facing County Road 43 can easily support two rows of parking: one on the building side, and the other on the County Road 43 side.

On the south side of the Subject Site there is a large, MacEwen gasoline station, then forest. On the north side, there is a kindergarten, and Madison Montessori School. Further west, there is another gasoline station (Stinson Gasoline), a Tim Horton's coffee shop, and another business.

County Road 43 is a busy commercial area. It has three lanes, is quite busy, and on the day of our visit (June 7), it was under construction. From east of the Subject Site County Road 43 is a crowded highway commercial area. On the opposite side of the Subject Site, there are numerous commercial and industrial businesses, such as Giant Tiger, Dollar Tree, Starbucks, KFC (and many more). There are also three apartment towers close to the businesses. One is 4-storey, complete, and occupied. The other two seemed to be under construction (mostly completed). **County Road 43 is thus a busy, expanding, highway commercial and industrial roadway with new residential towers nearby.** This expansion, and the future of the Subject Site will have extensive impact on North Grenville.

Based on our experience, the widening and improvement of County Road 43, together with the future of the Subject Site, require addressing the following issues:

1. Building Expansion
2. Permitted Uses
3. Change of Use

These three items, furthermore, involve socio-demographic and economic analyses related to the Town of North Grenville.

III. SUPPORTIVE CHARACTERISTICS OF NORTH GRENVILLE

The latest official population data for the North Grenville Municipality dates back to the years 2016 and 2021. As of the mid-years, the total population of this municipality was:

• 2016	16,451
• 2021	17,964
• Change	1,513 or 9.2% growth in 5 years

The resident population of North Grenville represents the largest source of demand for its retail, various service, and other businesses. There are, however, other factors which impact the supply-demand dynamics of all businesses, such as:

- Population Growth
- Ages of the residents
- Health of the residents
- Tourism facilities and amenities
- Types of jobs
- Growth of employment
- Existence of hospitals, schools, libraries, hotels, gymnasia and other special facilities.

The total population of North Grenville is estimated to be approximately 24,000 in 2025. Due to the availability of details of the 2021 census data, we expect the following population changes to have taken place there since 2021:

1. An average annual population increase of 303 or 1.84% from 2016 to 2021, which is quite high. Economists and planners generally consider an average annual population growth of 1.0% to represent an economically growing area.
2. The average age of the population of North Grenville was 43.8 years in 2021. By selected age groups, the 2021 population consisted of:
 - a. Under 15 years of age 16.3%
 - b. 15 to 64 years of age 62.6%
 - c. 65 & older 21.3%

3. There was a total of 7,035 housing units in North Grenville in 2021. **Single family housing units, which are the most expensive, made up 6,480 of the total units or 92.1%.**

4. **The overall average household size in 2021 was 2.55 persons,** which indicates strong population growth since 2021.

5. Incomes

a. The average employment income in North Grenville in 2020 was \$79,200

b. Income of one-person households (2020): \$59,700

c. Income of two-person and larger households (2020): \$137,400

6. **There was a total of 7,040 housing units in North Grenville in 2021,** consisting of:

a. Owner-occupied 6,175 or 87.7%

b. Rented 865 or 12.3%

7. The educational achievements of the residents in 2020 are (15 years and older):

a. Post-secondary 5,433 or 41.8%

b. College 4,240 or 32.6%

c. Bachelor & higher 3,320 or 25.5%

Total 12,993 or 72.3%

8. Modes of Transportation:

a. Cars, trucks, vans 5,680 or 94.6%

b. All others 325 or 5.4%

9. Knowledge of Languages:

a. English only 13,705 or 76.9%

b. French only 4,085 or 29.8%

c. All others 25 or 0.002%

10. Housing Units:

a. Singles, semis & rows 6,480 or 92.1%

b. All others 555 or 7.8%

The average income of homeowners is typically much higher than the income of renters.

11. Housing Ownership:

- a. Owners 6,175 or 87.7%
- b. Tenants 865 or 12.3%

12. Higher Education:

- a. Post-secondary 5,435
- b. College 4,240
- c. Bachelor & higher 3,320

13. Commuting to Work:

- a. By car, van, truck 5,680 or 94.6%
- b. All other 325 or 5.4%

14. Occupations of the 9,340 workers in North Grenville:

- a. Sales & service 1,960 or 21.0%
- b. Trades 1,945 or 20.8%
- c. Business & finance 1,585 or 17.0%
- d. Education & law 1,325 or 14.2%
- e. All others 2,525 or 27.0%

The information in the above 14 points indicate that North Grenville is a growing, affluent, educated, family-dominated municipality with ample health, education and leisure facilities and programs. These qualities, furthermore, indicate strong population growth in this municipality to the year 2025, and thereafter.

IV. LEVELS OF AFFLUENCE

A. Income

One of the most important information for this study is income data. Based on the census of 2021, the overall average family income in North Grenville was \$59,150 (more up-to-date data are not available).

North Grenville's population was mostly family-oriented in 2021. On average, each family in North Grenville had 2.8 children. In 2020, the key income data were:

- Single person \$59,700
- Two or more persons per family \$137,000

These incomes are considered to be quite high in the year 2020, and they do not normally change significantly in 4 years. Of course, during the pandemic, incomes fluctuated. Furthermore, due to inflation from different causes, and a number of other issues (e.g., wars in other parts of the world), incomes and costs of living have increased across Canada.

For the purpose of income analysis, in addition to field research, we have identified the sales prices of newly built as well as existing homes in North Grenville. As shown in Table 1, there were only 5 newly built homes for sale as follows:

1. The average asking price of these 5 newly built homes in North Grenville was \$958,540 on June 2, 2025. The most expensive of the 5 was \$1,499,999 million, and the least expensive was \$429,000. **All 5 had been offered for sale within the last 3 days.**
2. We also identified 5 resale homes in North Grenville. The asking price for these 5 homes was an average of \$866,579. The least expensive of the 5 resale homes was \$669,900 and the most expensive was \$979,000.
3. These house prices require significantly higher incomes than the average. **The fact that a number of these expensive units have been built reflect the confidence of the builder(s) in the financial ability of the residents of North Grenville and perhaps others from outside as well.**

Based on the prices of new as well as resale homes in Table 1, we conclude that the overall average family income of North Grenville residents is now much higher than in 2021.

B. Tourism and Leisure

For a municipality with a population of less than 25,000, there are numerous tourism, leisure and educational facilities and programs in North Grenville (Table 2).

In addition to the residents of North Grenville, tourists, residents of nearby towns and cities, residents of other cities and likely some American residents come to North Grenville for its natural and other amenities.

Similar to other towns close to North Grenville (e.g., Montreal, Toronto, Ottawa and in the U.S.), people are attracted to the nature, beauty, charm and food products of these areas.¹

In fact, some businesses in small towns on all sides of Ottawa sell more of their products to tourists than to the local residents.

C. Tourism Accommodations

Due to the abundance of tourists in towns and villages such as North Grenville, there are numerous hotels and motels within 45 minutes' drive (Table 3).

The fact that there are at least 11 accommodation facilities within 45 minutes' drive from North Grenville **proves** that there are large numbers of tourists who are attracted to these towns and villages.

¹ We have carried out retail, housing and tourism studies for Carleton Place, Mississippi Mills, Kemptville and Arnprior, and found that many tourists from Montreal to Toronto come to these towns for their nature, people, specialty foods, sports, etc.

V. RETAIL EXPENDITURES AND DEMAND

A. Selected Characteristics of the Retail Industry

The retail industry is dynamic, competitive, and innovative. New retail products and services are quickly adopted and offered to consumers. Often “new products” are the same as before with new colours, sizes, names and prices, and are targeted at wider segments of clients. These and similar characteristics of retail products and services often cause growth, innovation, customer loyalty, and increased profitability. At the same time, lack of change of products, inadequate understanding of customers’ needs, values and preferences cause decline in retail sales.

B. Well Established Retail Trends

Since the late 1970s, we have carried out more than 100 retail studies in Ottawa, cities and towns within 200 km from it, in the rest of Ontario, Quebec, Nova Scotia, Alberta and British Columbia. A number of well-established retail trends and standards for these areas are:

1. Required retail and service floor space per person: 30 to 40 sq. ft.
2. For supermarkets and other food stores: per capita requirement of 5 to 7 sq. ft. (not including restaurants).
3. The remaining floor space was used for all other retail products and services.

With some fluctuations, most retail market analysts relied on these well-established requirements.

In the period between 2010 and 2020, the retail industry was changing. Large food and other stores entered the retail scene, and some small retail businesses could not survive. **The pandemic (2020–2023), however, changed the retail and some other industries dramatically.** Large stores, delivery services, high rental rates, real and not so real discounts, and high retail store taxes have significantly changed the retail industry. These changes are still continuing.

The above-mentioned changes are not well accepted by the entire population of any municipality. Buying healthy foods, local food and non-food items, supporting small retail businesses, establishing relationships with local business owners are now growing trends in many cities.

North Grenville and other similar towns have not appealed to large stores such as Costco and Walmart. The residents of these small areas are increasing shopping at businesses in their own areas. These trends are relatively new, but growing. Businesses which are old, small, and do not offer a large variety of products are having a hard time to survive.

C. Defined Market Area

The Subject Site is practically adjacent to the Town of Kemptville. **The municipal boundaries between North Grenville and Kemptville are not economic.** The residents of the two municipalities shop at businesses in North Grenville as well as in Kemptville. This is not true only for large businesses such as Walmart. Small businesses as well attract customers from both municipalities. These two municipalities have businesses which are conveniently located, are specialized, offer a variety of prices, have lots of parking spaces, easy access and other such real and/or perceived advantages.

Based on our experiences as well as actual drive to many businesses in each of these two municipalities, we consider them to be one economic area for retail shopping purposes.

The actual historical population of these two municipalities is as follows based on Statistics Canada's census of 2016 and 2021:

Area	2016	2021	Change
North Grenville	16,451	17,964	1,513 or 9.19%
Kemptville	3,911	4,151	140 or 3.58%
Both	20,362	22,015	1,653 or 8.12%

Since about 2017, we have carried out several retail and housing demand studies for sites within Kemptville. Based on those studies, as well as field research in North Grenville and Kemptville (early June 2025), we are certain that Kemptville's and North Grenville's total population growth have each been much higher in the period 2021–2025 than in

2016–2021. Based on a conservative average annual population growth of 2.0% per year from 2021 to 2025, we estimate the total population of both area’s combined to be 24,000. For the period 2025 to 2030, we have used an average annual increase of 1.5% (which is low compared to the period 2016–2021). The future population of North Grenville and Kemptville combined is forecast to the year 2030. **At an average population increase of only² 1.5% from 2025 to 2030, the overall population increase in the two municipalities combined would be 734 persons (Table 4).**

D. Selected Businesses In the Market Area

There are many businesses within the Market Area. The large business include the following:

- Food Basics
- Jonsson’s Your Independent Grocer (Kemptville Mall)
- Giant Tiger
- Staples
- Mark’s
- Walmart Supercentre
- Bulk Barn
- Your Independent Grocer (2600 County Road 43)

There are, as well, numerous leisure, entertainment, tourism, cultural, music and nature-based establishments such as:

- Public Library
 - Dance Events
 - Musical Events
 - Spas
 - Unique Businesses
 - Charming Accommodations:
 - Rideau River Cottage
 - Rideau River Retreat
-

² Considering that the actual annual population growth from 2016 to 2021 was 1,653, our estimated annual population increase of 734 is very conservative (i.e., less than half of 1,653).

➤ Pine House Retreat

In addition to serving the population of the Market Area, these establishments also attract tourists, and farmers (for supplies) from long distances.

The existing businesses, residents and farmers need products, machinery, special tools and the like. Such products and services typically require experts from outside. Examples include roof replacements, parts and repairs for home and business heating, plumbing, electrical, mechanical, etc.

The Market Area is constantly growing and changing. Construction of new homes, stores, etc. generate numerous jobs, require many different products and services. Most, if not all, construction workers live outside the Market Area. While working within the Market Area, they spend some money at eating/drinking establishments, go to restaurants or bars, purchase gasoline and other products or services within the Market Area.

Taking into consideration the residents of the Market Area, construction workers, farmers and others who live outside the Market Area but go there for work, leisure, medical, other services, means that the Market Area businesses serve more customers than only the residents of the Market Area.

E. Viable Additional Products

Based on the factual data in this report, it is evident that the Market Area will continue to grow. The growth of this area will, in turn, require numerous additional products and services.

In our estimation, the 2025 population of the Market Area is at least 24,000 and will grow by a minimum of 734 annually to 27,670 by the year 2030. The forecast population increase of 3,670 by 2030 would need the following selected products and services and more, based on numerous similar studies (Table 5):

The estimated 1,990 new housing units by the year 2030 is likely to be too conservative based on the actual units developed in recent years.

Our estimates in Table 5 are strictly related to the growth of 3,670 population by the year 2030. The existing 24,000 residents will also need some of the new products listed in

Table 5. Examples include repair or replacement of refrigerators, cars, heating/cooling systems, roof repairs, and many more products and services.

The needs of the residents and businesses in the Market Area will of course continue after the year 2030. For the next 10 years or longer, many more of the products identified in Table 5 will be needed. Some of the needed products (e.g., furniture) require large stores. Other large stores needed by the residents of the Market Area would be:

- Department store
- Hardware store
- Furniture store
- Refrigerator or other cooling, heating product store
- Warehouse store
- Automotive sale and service centre
- High technology centre
- Supermarket
- Electronics store
- Discount food store

The above suggestions are quite appropriate for the Subject Site due to its excellent visibility, access and size. They are not, however, all the best and highest use of the Subject Site (e.g., department store, high technology centre).

Table 1			
For Sale Houses in North Grenville: Early June 2025			
Newly Built Houses (on the market 1 – 3 days)	Bedrooms	Bathrooms	Price (\$)
21 Karda Terrace	3	2	1,229,999
12 Tilly Lane	3	3	865,000
326 Jack Street	3	1	449,900
590 Latourell Road	3	3	859,900
3758 Mapleshore Drive	5	3	1,388,000
Overall Average (5)	3.4	2.4	958,560
Most expensive: 1671 County Road	3.0	2.0	1,499,999
Least expensive: 827 Maley Street	2.0	2.0	429,000
Midpoint of the above two:			964,499
Existing Houses (i.e., resales)			
304 Oakmont Drive	3	3	814,999
160 Blackhorse Drive	2	2	979,000
207 Bennet Road	2.5	2	669,900
3 Aimee Lane	4	3	839,999
317 County Road	4	3	729,000
Overall Averages (Resales)	3.1	2.6	866,579

Table 2	
Special Tourism and Leisure Facilities	
1.	Limerick Forest Retreat
2.	Sustainable Business Summit at Municipal Centre (June 26, 2025)
3.	Romance on the Road at North Grenville Community Theatre: May 28, 2025
4.	Island Apple Orchard Get Away
5.	Balloon Flying Events
6.	The Double J. Ranch
7.	Various Arts, Cultural, Music and Handcraft Events
8.	Water-based activities, Water Park, Balloon Flying Activities, Romance on the Road
9.	North Grenville's Fund for Arts, Culture and Amusement
10.	North Grenville Community Theatre
11.	Arts and Cultural Activities
12.	Forests within and near North Grenville

Table 3
Hotels and Motels Within 45 Minutes' Drive
from North Grenville

<p>Best Inn Motel</p> <p>Dewar's Inn</p> <p>Roger's Motel</p> <p>Zen's Inn Hostel</p> <p>Best Western</p> <p>Manny's Place</p> <p>Cozy Country Bungalow</p> <p>Merrickville Guest Suites</p> <p>Econ O Lodge</p> <p>Rare Tiny House</p> <p>Quality Inn & Suites</p>

Table 4
Estimated Population Growth for
North Grenville and Kemptville Combined

Year	Population
2021 (actual)	22,015
2025	24,000
2027	25,580
2030	27,670
Average Annual Change (2025–2030):	734
Percent Annual Change (2025–2030):	3.06

Products	2025	2030	Required Additions
Population	24,000	27,670	3,670
Housing Units	10,000	11,990	1,990
Business Area (sq. ft.)	960,000	1,106,800	146,800
Refrigerators	10,000	11,990	1,990
Heating/cooling	11,000	13,189	2,189
Garages	10,000	11,990	1,990
Cars	12,000	14,388	2,388
Retail space (sq. ft.)	960,000	1,106,800	146,800
Restaurants (sq. ft.)	50,000	58,000	8,000
Supermarkets (sq. ft.)	156,000	193,690	37,690

The above are only partial needs of the residents. On a conservative basis, by the year 2030, we estimate that the Market Area would need a total of 347,700 sq. ft. of additional retail and stores and other businesses. Of course, supermarket and other food-businesses are primarily for the residents of the Market Area. Businesses such as garages, heating/cooling services, wooden products and repairs are needed by the residents and rural areas where such businesses may not exist.

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Our principals and most of staff have each been working in the National Capital Region for over 30 years. We have provided consulting services to the municipalities in the capital area, most local developers, many independent businesses, developers in other Ontario and Quebec municipalities, the Federal Government, as well as interprovincial and national organizations, such as **Metro Richelieu, Canadian Wood Council, Canada Lands Company, and Canada Border Services Agency.**

SERVICES PROVIDED BY OUR MARKET RESEARCH DIVISION

Public Consultations
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Executive Interviews
Consumer Surveys
Mystery Shopping
OMB Services

Sales Forecasting
Financial Analysis
Feasibility Analysis
Economic Studies
Strategic Studies
Business Plan Development

SAMPLE OF PRIVATE SECTOR CLIENTS

Business Community

Ottawa Congress Centre (now Shaw)
Metro Richelieu (Montreal)
Panera Bread (U.S.A.)

High Technology Companies

Corel Corporation
JDS Uniphase
Cognos (now IBM)

Developers

GreatWise (Toronto)
DCR Phoenix Homes
Junic Homes (Gatineau)

Retail Sector

Rideau Centre
Glebe BIA
Sparks Street BIA

Legal Firms

Gowlings
Soloway-Wright
GIBSONS LLP

Professional Groups

FoTenn Planning
SamCon Inc. (Montreal)
Colliza Architects

SAMPLE OF PUBLIC SECTOR CLIENTS

Municipalities of Ottawa, Clarence-Rockland, Carleton Place, Arnprior, Gananoque, and Brockville; Infrastructure ON, Salvation Army, University of Ottawa, Carleton University, Royal

Ottawa Hospital; PWGSC, and NCC.

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SECURITY CLEARANCE AUTHORIZATION: RELIABILITY STATUS

SPECIALTY OVERVIEW

Barry Nabatian specializes in consulting regarding demand, feasibility, impact, and financial viability studies; retail, economic, tourism, amusement markets, and business plan developments; consumer research, lifestyle trends and impact of social change on residential, commercial and industrial markets. He is an urban economist and a financial advisor with over 40 years of experience serving a wide variety of private, public and non-profit organizations in Ontario, Quebec, and elsewhere in Canada. He has appeared before the Ontario Municipal Board (OMB), and Assessment Review Board as an expert witness dozens of times regarding various real estate, Official Plans, property taxes and assessment matters. He is frequently interviewed by various media on real estate developments, economics and social trends.

CAREER SUMMARY

July 2010 - present	Director , Shore-Tanner & Associates
1997 - June 2010	General Manager , Market Research Corporation
1985-1997	Vice-President , Corporate Research Group Limited
1974-1985	Senior Market Analyst , Planning Branch, City of Ottawa
1973-1974	Market Analyst , Decision Sciences Corporation, Philadelphia, U.S.A

CAREER PROFILE

July 2010 – Present: Director, Market Research Division

Under Barry's direction and full participation, major studies have been completed regarding the impacts of the City of Ottawa's planned Light Rail Transit (LRT) system on real estate developments; market demand and feasibility of various types of residential, retail, office and industrial development proposals, adaptive re-uses of very large government-owned former health care and industrial properties; business improvement areas, the University of Ottawa's future space needs; and OMB testimony. These studies have involved sites in the Cities of Ottawa, Brockville, Thunder Bay, and Kingston; Towns of Perth, Kemptville, Pembroke, Petawawa and Casselman (Ontario); Gatineau, Lacolle, St. Bernard (Quebec), Aldergrove, and Osoyoos (B.C.). A wide variety of quantitative forecasting as well as qualitative research techniques form the basis of these studies which have dealt with vacant land, as well as brown field developments, demand for built space by type, value, and return-on-investment.

SEPTEMBER 1997 – JUNE 2010: GENERAL MANAGER, MARKET RESEARCH CORPORATION

Barry Nabatian directed and participated in the completion of numerous studies involving market analysis, surveys, economic research, sales forecasting, public consultation, preparation of strategic plans, and policy documentation. These services were provided for a wide variety of private sector, municipal, provincial, federal and crown corporation clients, as well as for educational and health care institutions. As an experienced witness at different court levels, he appeared dozens of times at Ontario Municipal Board hearings, municipal councils, Assessment Review Board, and other public bodies. His approach to problem solving has been based on consensus building, strategic thinking and innovative solutions.

September 1985 – April 1997: Vice-President, Corporate Research Group Limited

Barry directed and contributed to the completion of hundreds of marketing, feasibility, financial and official plan studies related to the office, retail, industrial, and residential markets in Canada and Northeastern USA. Estimation of demand by market segments and time frame, absorption, rental rates, tenant inducements, and pricing strategies were one group of major studies. Another one was site analysis, evaluation and selection, review and/or critique of planning, strategy, and policy documents on behalf of both public and private sector clients. He also developed a number of econometric, simulation, and sales forecasting models for the commercial sector. As well, he appeared as an expert witness before numerous courts, panels of the OMB, the Québec Régie, municipal councils, and other governmental boards and commissions.

Nov. 1974 – Sept. 1985: Senior Market Analyst, Planning Branch, City of Ottawa

Barry was responsible for the design and implementation of a wide variety of commercial studies (e.g., Rideau Centre), research programs, development of property information systems, policy analysis, and positions for Ottawa City Council. He carried out numerous major office, shopping centre, housing studies and development strategies, with emphasis on the downtown core, including the development of a major database for the Ottawa Greater Central Area. Economic analysis and forecasting for the City were also his responsibilities, and he assisted in the creation of the City's Economic Development Department.

April 1973 – November 1974: Market Analyst, Decision Sciences Corp., Philadelphia, USA

Barry carried out market feasibility analyses for proposed new satellite communities for the US Department of Housing and Urban Development (HUD). Another major project was the determination of impacts of specific departmental renovations and expansions on total sales of a major supermarket chain with operations in several Northeastern States.

PERSONAL INFORMATION

Citizenship: Canadian since 1976

Languages: Fluent in English, Persian, plus some French and Russian

Education:

May 1973 **Master's of Science**, Urban Economics and Policy Planning
State University of New York at Stony Brook, U.S.A.
Master's thesis: Truck Routing

May 1971 **Bachelor of Science**, Physics
State University of New York at Stony Brook, U.S.A.

May 1969 **Associate of Applied Sciences**
New York City Community College
Brooklyn, NY, U.S.A.

As well, Barry has completed numerous courses, special training, and attended seminars in the fields of economics and statistics related to real estate markets, lifestyle trends, various consumer products and services, financial and wealth management. He has made numerous presentations and given lectures on these topics to various groups, including at the Real Estate Forum of 2011 in Ottawa with well over 500 attendees.

Interests

Cooking, swimming, hiking, yoga, dancing, and philosophy.