

# RETAIL MARKET & GAP ANALYSIS

Glebe Business Improvement Area



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BUSINESS IMPROVEMENT AREA



## **LAND ACKNOWLEDGEMENT**

**We respectfully acknowledge that the Glebe neighbourhood is within the traditional and unceded territory of the Algonquin Anishinàbeg Nation, who have stewarded, travelled and inhabited these lands since time immemorial. We honour the enduring presence of all First Nations, Métis, and Inuit on this land.**

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# Preface

FBM Architecture Ltd. ("FBM") was commissioned by the Glebe Business Improvement Area (BIA) to conduct a retail market and gap analysis for the BIA. In addition to the core analysis, FBM conducted two online surveys (one for customers, another for BIA business members) as well as interviews with BIA business representatives. The study was carried out over the period of June to September 2025. On-the-ground fieldwork in the study area was carried out in June 2025.

The purpose of this study was to identify the existing gaps and opportunities for retail to support the Glebe BIA as it seeks to maintain its role as a vibrant shopping district in the Ottawa region. This study involved thoroughly documenting the current retail business inventory, defining the realistic Trade Area for which they serve, and analyzing the business inventory and consumers' spending patterns.

For the purposes of identifying the business counts by business category, FBM applied its own business classifications for retail and services to provide additional depth to the overall analysis. In doing so, FBM still recognizes and attempts to adhere to the North American Industry Classification System (NAICS) designations.

Any references to specific suitable retailer prospects do not represent a guarantee that they will locate in the Glebe BIA, but that they have been identified based on an understanding of their typical site and market selection criteria. As with most retailers, there will be a requirement to provide compatible locations and spaces for their respective formats.

This analysis was conducted by FBM as an objective and independent party. As is customary in an assignment of this type, neither our name nor the material submitted may be included in a prospectus, or part of any printed material, or used in offerings or representations in connection with the sale of securities or participation interest to the public, without the expressed expression of the Glebe BIA or FBM.

*FBM, 2025*

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## *Glossary of Terms & Acronyms*

**CanaCode Lifestyle Clusters** - This psychographic/Lifestyle Segmentation tool generated by Manifold Data Mining provides insights into the motivational forces that influence shopping patterns and consumer behaviour for certain segments of the population with shared demographic characteristics.

**Comparison Merchandise** - Comparison Merchandise is an industry term often synonymous with Department Store Type Merchandise (DSTM) and includes categories such as Fashion, Home Decor, Appliances and Electronics, Sporting Goods, etc, or categories that are typically found in more traditional "mall" or shopping centre environments.

**Full Service F&B** - This represents restaurants or pubs that include table service seating or servers for meals and beverages.

**Quick Service/Limited Service F&B** - This represents fast food, grab-and-go, take-out only, or drive through types of restaurants, such as McDonald's, Tim Horton's or other café or coffee shops.

**Specialty Retail** - This merchandise category is typically a "catch-all" for a wide range of retail store types, such as stores selling pets supplies, eye wear, metaphysical products, etc.

**Non-Retail (Other):** Non-retail refers to the Professional & Financial Services as well as Medical & Wellness Services or child care services, which are excluded from the retail-only inventory in this study.

**\$ psf** - dollars per square foot (an industry standard measure of annualized retail sales productivity)

**CMA** - Census Metropolitan Area. A Statistics Canada geographic boundary for a large urban region.

**NAICS** - North American Industry Classification System

# Executive Summary

The Glebe Business Improvement Area (BIA) is recognized as a vibrant, walkable, and distinctively historic shopping district in Ottawa. It is highly valued for its dense concentration of quality, locally-owned businesses. This analysis, commissioned by the Glebe BIA and conducted by FBM, aims to solidify the BIA's role as a resilient retail hub by identifying market-driven opportunities and providing an actionable plan for business retention and attraction.

The study confirms that the Glebe BIA possesses a strong retail ecosystem, supported by an affluent and highly educated local population. Key findings highlight the area's excellent reputation, the unique challenge of balancing local and branded businesses, and opportunities for strategic growth within its three distinct retail nodes.

## Introduction & Context Summary

The Glebe BIA, situated on the Bank St corridor between the Queensway and the Rideau Canal/Dow's Lake, serves effectively as both a neighbourhood shopping node and a regional destination, particularly due to the draw of TD Place/Lansdowne events.

- **Distinctive Character:** The BIA is defined by its historic streetfront shops on Bank St and the modern, large-scale retail and event spaces at Lansdowne. The community consistently values its "local," "walkable," "friendly," and "unique" character.
- **Retail Trends:** The Glebe's strong existing identity aligns well with the national "shop local" movement and the rise of small-format urban retail stores, offering a chance to strategically integrate selective brands without compromising local character.
- **Competitive Landscape:** Primary local competitors, as perceived by members, include the Westboro Village BIA and the Wellington West BIA.
- **Mobility Challenges:** While customers overwhelmingly favour walking to the

BIA (62% of customer respondents), the top two identified customer barriers are the Lack of motor vehicle parking (370 respondents) and Too many motor vehicles (254 respondents). This tension highlights the critical need to balance accessibility for different modes of transport, while prioritizing the pedestrian realm.

## Trade Area(s) Profile Summary

The Glebe's consumer base is exceptionally strong, characterized by affluence, high education levels, and a willingness to support local business.

- **Trade Area Segments:** The core customer base is reflected in the 10-minute Driving Trade Area, which consists of 176,771 people. The much larger 20-minute Lansdowne Trade Area expands the regional reach to 700,030 people for major events.
- **Demographics & Income:** The core Walking Trade Area stands out with average dwelling values considered high relative to the region (\$1.1m versus \$0.7m for the benchmark). This area demonstrates extremely high levels of household income over \$200,000 (29.3% compared to the regional average of 16.1%). This segment is primarily composed of "Elite Professionals" and "Affluents".
- **Market Strength:** Over half of customer respondents (53%) spend more than 20% of their annual retail budget in the Glebe BIA, suggesting a very strong, stable, and resilient local market capture.
- **Local Support:** A striking 88% of customers confirmed they are willing to pay slightly more for a locally-made product or service.
- **Retail Spending Potential:** The major retail spending category across all trade areas is Comparison Merchandise (e.g., fashion, home décor, electronics) followed closely by Grocery & Conveniences.

## Retail Inventory Summary

The total retail-only inventory in the Glebe BIA is 563,127 sf with a healthy overall retail vacancy rate estimated at 4.1%. However, the composition of the retail mix varies by node as summarized below, creating targeted recruitment opportunities.

### Retail Mix by Node (Local vs. Brand)

Node	Primary Character	Local Businesses (count / square footage mix)	Brand Business (count / square footage mix)	Vacancy Rate	Key Retail Gaps / Opportunities
Central	Traditional Heart, Walkable	73% of businesses 62% of square footage	27% of businesses 38% of square footage	7%	Clothing & Footwear, Home Furniture & Décor, Toys & Hobbies, Health & Wellness Stores
Lansdowne	Destination / Large Format	44% of businesses 13% of square footage	56% of businesses 85% of square footage	1%	Local Businesses and smaller retail units are significantly underrepresented
North	Day-to-Day Needs & Services	71% of businesses 46% of square footage	29% of businesses 54% of square footage	7%	Boutique Clothing, Ethnic Fare

- The highest market share capture for the immediate Walking Trade Area is in Arts & Entertainment (562% share) and Full-Service Restaurants (298% share), indicating a massive draw for destination-level dining and leisure.
- The overall market share capture from the core 10-minute Driving Trade Area is 6.7%, a healthy rate given the significant regional competition.

## Market Share Summary

The BIA retail operations are highly productive, suggesting a highly sophisticated and powerful retail engine for both local and regional audiences. Retail sales productivities are estimated to range from the mid \$300 per sf to over \$700 per sf for higher performing retail operations.

- Retail Gaps: Based on low market share capture and customer desire, the greatest gaps are in Boutique Clothing Stores, Home Furniture & Décor, Health & Wellness Stores, Toys & Hobbies, and specialty food/beverage concepts such as a Whisky & Wine Bar and Candy Shops & Specialty Confections.

## Action Plan & Recommendations

The strategy for the Glebe BIA must focus on enhancing the customer experience, fostering local business growth, and making calculated decisions regarding brand presence in the unique Lansdowne node.

### ***BIA-Wide Opportunities***

- **Optimize Parking & Traffic:** Advocate to the City for standardized on-street time limits (e.g. 2 hours on Bank Street) and less punitive enforcement to mitigate the “deterrent” effect of overly zealous ticketing. Promote off-street parking options (parkades/lots) and explore a customer validation/discount program to increase utilization. Continue to also advocate for maintaining on-street parking along Bank St. and adjacent perpendicular streets.
- **Enhance Local Advantage:** Launch a “Support Local” loyalty program to reward spending at independent businesses. Adopt an “Independent First” policy for vacant streetfront retail in the Central and North Nodes to reinforce the Glebe’s core appeal and avoid diluting business productivity.
- **Targeted Recruitment:** Proactively recruit businesses in Boutique Fashions, Toys & Hobbies, and Home Furniture & Décor categories to fill key gaps identified by both the analysis and customer sentiment.

### ***Opportunities by Node***

- **Central Node (The Core):** It is critical to preserve the existing 73%:27% Local to Brand ratio. Focus on attracting high-quality, local independent businesses and complementary food and beverage concepts (e.g. Whisky & Wine Bar or a Chocolate & Fondue Coffee Bar).
- **Lansdowne Node (Destination):** The BIA should decide if it will establish a plan to attract more local businesses by requiring the allocation of smaller incubation retail spaces (500-1,000 sf), or if it will focus a co-marketing strategy that leverages the large branded presence to the benefit of the core BIA. Future retail recruitment should target large-format, affluent-aligned brands like Crate & Barrel or Restoration Hardware to complement the high-end demographic.
- **Retail Redevelopment:** Closely monitor and work with City Planning and developers on any redevelopments to ensure the expansion and maintenance of clear, unobstructed sidewalks that enhance walkability while maintaining the essential historic character and street enclosure.

# Action Plan Summary

Strategy	Action Item	Priority Level	Timeline	Key Actor(s)
<b>1. Optimize Customer Experience &amp; Accessibility</b>				
Parking Enforcement & Access	Advocate to the City for standardized parking time limits and less punitive enforcement.	High	Immediate (0-1 yr)	BIA, City Council, Parking Authority
Parking Validation & Utilization	Promote off-street parking (parkades/lots) and explore a customer validation/discount program to increase utilization.	Moderate	Near-Term (2-5 yrs)	BIA, Business Members, Property Owners
Pedestrian Realm Connectivity	Prioritize expansion and maintenance of clear, unobstructed sidewalks particularly on perpendicular streets to Bank. The BIA should support city plans that prioritize pedestrians and cyclists in areas that do not impact necessary parking for customers and businesses	High	Near-Term (2-5 yrs)	BIA, City Planning/Public Works
Marketing Campaigns	Word of mouth is the most effective information source: Develop marketing campaigns that leverage positive customer experiences and feature the unique owners and stories of local businesses.	High	Immediate (0-1 yr)	BIA, Business Owners
<b>2. Retail Attraction &amp; Filling Gaps</b>				
Local Business Incubation	Work with landlords/property owners to create temporary micro-retail units or pop-up shops to test local concepts and fill vacancies.	High	Immediate (0-1 yr)	BIA, Landlords, Realtors
Targeted Recruitment (BIA-Wide)	Proactively recruit businesses in Toys & Hobbies, Ethnic Fare, Boutique Fashions and Home Furniture & Décor categories. Make sure Invest Ottawa "thinks retail" as well as office and industrial	High	Immediate/Near-Term	BIA, Regional Economic Development (Invest Ottawa)
<b>3. Retail Retention &amp; Positioning</b>				
Expand BIA Boundary	Work with retail business and commercial property owners located along Bank St in Old Ottawa South to become members of the Glebe BIA	Moderate	Near-Term (2-5 yrs)	BIA, Local Businesses, Property Owners, City Administration
Preserve Historic/Local Character	Launch a <b>"Support Local" loyalty program</b> to reward spending at independent businesses.	High	Immediate (0-1 yr)	BIA, Local Businesses
Independents	Implement an <b>"Independent First" policy</b> for vacant streetfront retail in the Central and North Nodes.	High	Immediate (0-1 yr)	BIA, Property Owners
Place a High Value on the Ratio of Locals vs Brands	Ensure the local and independent businesses are prioritized and curated in the North and Central areas of the BIA	High	Immediate (0-1 yr)	BIA, Property Owners
Lansdowne Node Integration	Create a co-marketing strategy for Lansdowne: <b>local integration</b> (e.g., pop-ups for local businesses) or <b>brand exclusivity</b> (focused on regional draw events).	High	Immediate (0-1 yr)	BIA Board
Unwanted Business Control	Monitor and advocate against the clustering of <b>Alcohol, Tobacco, and Cannabis</b> and <b>Fast Food/Grab-and-Go Restaurants</b>	High	Long-Term (5-10 yrs)	BIA, City Planning, Zoning Committee

# 1.0 Introduction

## 1.1 Scope of Study

The Glebe Business Improvement Area (BIA), located in the City of Ottawa, commissioned the FBM consultant team to conduct a **Retail Market and Gap Analysis** that will support the BIA in its work to maintain and enhance the Glebe's role as a vibrant shopping district moving into the future.

The Glebe BIA sits at the heart of the distinctive and highly regarded Glebe neighbourhood. Certain establishments have been doing business in the Glebe for more than a century, such as the Glebe Meat Market which has been operating for 105 years. Historic character defines both the BIA itself - with classic urban retail shops fronting along Bank St and multiple historic event spaces at Lansdowne (e.g., Aberdeen Pavilion) - as well as the beautiful surrounding brick homes. The BIA is also seeing the addition of more modern, large scale developments, with some recent larger format buildings along Bank St and larger, national-brands added to the Lansdowne and TD Place area. Major future developments will soon to be underway with Lansdowne 2.0.

The Glebe BIA has been and continues to be known as a walkable, well-maintained Ottawa shopping area that offers a diverse mix of high quality goods and services provided by locally-owned businesses, with a high level of local support from both businesses and surrounding residents. As the Glebe seeks to maintain its strong local reputation and successful business ecosystem, it will be important to balance preserving the distinctive historic and local characteristics with the needs of the future.

The study provides necessary data and market-driven insights to support the Glebe BIA's programming and marketing, as well as consumer and business retention and attraction strategies, by defining appropriate market opportunities for consumers and businesses, and identifying future growth potential. The approach analyzes the BIA's most up-to-date retail business inventory based on a realistic customer trade area to identify retail sales patterns, quantify gaps, and assess the strengths and refinement opportunities in the streetfront retail mix.



## Study Objectives

The objectives of the study are:

- to identify under-served retail segments;
- to understand consumer expectations;
- to guide recruitment of complementary businesses; and
- to provide actionable recommendations that will foster a balanced and resilient retail ecosystem.

## 1.2 Report Structure

- 1. Introduction:** Here we present the scope of study and report structure.
- 2. Local Context:** This section provides essential background information including competing forces, city planning documents, retail trends, and traffic patterns/parking.
- 3. Trade Area:** This chapter identifies three BIA trade areas based on different modes of travel, plus an additional Lansdowne major events trade area, providing an overview of the demographic characteristics of each, including projections and retail spending patterns.
- 4. Surveys & Interviews:** This section presents the perspectives of both customers and BIA member business representatives as collected through on-line surveys and one-on-one interviews.
- 5. Retail Inventory:** An overview of the total BIA inventory as well as a node-by-node summary are presented in this section.
- 6. Productivity & Market Share Analysis:** In this section we present an estimate of the Glebe's retail productivity and market share penetration relative to the various trade area segments. The purpose is to provide an understanding of the Glebe BIA's opportunities related to productivity and ultimately demand.
- 7. Action Plan:** The final section provides practical steps and recommendations to support the Glebe BIA as it continues to plan for its ideal business mix moving into the future.



# 2.0 Local Context

## 2.1 Introduction

Location factors are an essential foundation to retail success, and an understanding of these factors can help create the necessary conditions for attracting and retaining businesses in a community. This section identifies the distinctive local characteristics of the Glebe BIA with a focus on factors that relate to attraction, retention, and success of retail businesses, including local competitive forces, city planning policies, current Canadian retail trends, and traffic patterns.

## 2.2 Local Context & Competition

The Glebe is a distinctive and historic Ottawa neighbourhood, bordered to the north by the Queensway (Highway 417) and encircled to the south by Dow's Lake and the Rideau Canal. The Glebe BIA is a commercial and mixed use corridor within these bounds that runs along Bank St, which is a major north-south corridor running through central Ottawa. The BIA is a well-established urban shopping district known for its walkability, local offerings, and heritage character. The business composition features a mix of independent boutiques, restaurants, professional services, and recreational attractions, most notably TD Place and Lansdowne Park located at the southernmost end of the BIA boundary.

**Figure 1** shows the Glebe BIA boundary situated in its local context, highlighting the competitive forces in the surrounding area. This analysis takes into account the competitive pressures of the city's other BIAs located to the north of the Glebe as well as the large shopping centres/indoor malls in the surrounding area to determine the Glebe's realistic market share for the defined trade area.

Nine other BIAs are located relatively close to the Glebe BIA, with two of the primary competitors in terms of retail formats and offerings being the Westboro BIA and the Wellington BIA (see the member survey results in **Section 4.0 Surveys & Interviews**). The Glebe BIA's location provides the opportunity for it to act as both a neighbourhood node for the nearby residents and also a regional destination with it being the most western-located of all the central BIAs, access to major corridors such as Highway 417 and Bank St, and the draw of events at TD Place/Lansdowne.



## 2.3 City Planning Documents

Reviewing the City of Ottawa’s planning and policy documents shows that Bank St, the Glebe, and Lansdowne itself are all of special interest among city plans and policies. Policies emphasize the importance of maintaining a mix of land uses in the area as well as prioritizing the pedestrian experience along Bank St.

### *The City of Ottawa’s Official Plan (2022)*

Part of the Glebe BIA is covered by the Lansdowne Special District. Policies for this special district focus on maintaining and enhancing the heritage character of the area,

supporting Lansdowne’s role as a destination for sports and events, and on providing a mix of residential, commercial, entertainment, green space, and public space available to residents year round. Transportation investment will focus on de-emphasizing automobiles and prioritizing the “safety of pedestrians and cyclists on Bank St as well as on connections to the surrounding neighbourhood” by providing more pedestrian and cycling infrastructure (p. 195).

Lansdowne is also considered a Tier 2 Design Priority Area, which means the City considers it to be “of national and regional importance to defining Ottawa’s image” (p. 96). This tier should support a moderate level of pedestrian activity, according to the *Official Plan*.

**Figure 1: The Glebe BIA’s Local Context and Competitive Forces**

(Created by FBM using a Google Earth base map)



## Bank St in the Glebe Secondary Plan (2022)

As part of the latest Official Plan update, the City of Ottawa created an *Urban Secondary Plan for Bank St in the Glebe*. The built form character policies for the area require the following: “New or reconstructed buildings in the study area must contribute to the planned character of Bank St in the Glebe as a pedestrian-oriented mainstreet with a strong heritage context” (p. 2).

There are specific design requirements for future retail spaces on certain properties along Bank St, including requirements to maintain an active street front that is architecturally consistent with existing retail storefronts, and another area in which new retail spaces “are required to have transparent glazing to support the pedestrian-oriented window-shopping experience” (p. 11).

### **Urban Design Guidelines for Development along Traditional Mainstreets (2006)**

The City of Ottawa published the *Urban Design Guidelines for Development along Traditional Mainstreets* in 2006. Bank St is considered a main street, and as such is intended “To accommodate a broad range of uses including retail, services, commercial uses, offices, residential and institutional uses where one can live, shop and access amenities” (p.1).

The urban design guidelines for retail-oriented main streets like Bank St are focused on design principles that will create a pedestrian-friendly environment, including little to no building set backs, wide sidewalks, weather protection for pedestrians, transparent or active façades, human-scale building heights and step-backs, and providing public amenity spaces and seating.

## 2.4 Retail Trends

When considering the ideal programming for the Glebe’s retail offerings, it is important to consider the latest trends affecting local retail markets.

### **2.4.1 The Canadian Retail Market**

Across Canada, retail markets have seen steady growth after fluctuating trends during and after the COVID-19 pandemic. CBRE’s *Canada Real Estate Outlook Report (2025)* described the current the Canadian retail market as “supply-constrained”, with low vacancy rates and an increase in rents. When looking at total square footage of new retail supply across Canada, total new supply has been in decline since 2014. Mixed use retail represents the majority of new supply in Canadian retail markets, with the growth in new Community/Neighbourhood supply remaining relatively steady since 2022.

Current challenges in the Canadian retail market include a potential recession (see next section regarding the Trade War) and the reduced target number for immigrants, which may challenge maintaining retail revenues and the required labour force population. CBRE’s report highlighted that the entertainment and beauty sectors are becoming more successful in Canada, as consumers have begun to see these sectors as more essential.

### **2.4.2 U.S. Relations & Retail**

A looming question is how the ongoing trade negotiations with the United States are going to affect the Canadian economy, including the retail sector. The industries expected to be most affected are oil and gas, potash production, farmers and farming equipment, and the steel and aluminum industries (Bank of Canada, 2025, *Tariffs and trade uncertainty are hurting the Canadian economy*). On a hopeful note for the Glebe, the *Ottawa Retail Insight* report (JLL, 2025) notes that Ottawa tends to be less dependent on U.S. exports than elsewhere in Canada due to its ability to capitalize on an increase in tech companies in nearby Kanata.

Though none of the above industries are retail sector specific, ripple effects like higher prices

resulting from tariffs will affect retail (Bank of Canada, 2025). The uncertainty created by the continuously changing tariff threats are also leading to a decrease in hiring and consumer spending, both of which are likely to affect retail.

Precisely what that effect will be remains to be seen. Based on Statistics Canada's *Labour Force Survey*, during the first quarter of 2025 employment across Canada in wholesale and retail trade declined by 1% (a loss of ~29,000 jobs); however, the change year-over-year was minimal. There were even increases in employment in personal and repair services, both of which are retail merchandise categories.

One clear retail impact is already being seen: a renewed passion for Canadian nationalism and supporting local independent Canadian businesses in response to tariffs and the larger threats to national sovereignty coming from our southern neighbour (Maher, Stephen, 2025, *Canada's New Nationalism*. McLean's). **We are seeing a renaissance in the "shop local" movement, with consumers choosing not to purchase American goods and some stores even removing American products from shelves. The heightened local focus aligns well with the Glebe's strong local business identity.**

### 2.4.3 E-Commerce & the Rise of Omni-Channel Retail

**E-commerce** can be defined as "the buying and selling of goods online, including the digital transmission of payment and data" (Bush, Olivia, 2025, *E-Commerce Statistics in Canada*. Made in CA). **Omni-channel retail** offers an interconnected retail experience between online and in-store shopping through mobile apps, messaging, and home delivery.

The total annual retail sales in Canada from the beginning of May 2024 until the end of May 2025 is \$887.67 billion (Statistics Canada, July 2025, *Monthly retail trade sales by province and territory (x 1,000)*.) E-commerce accounts for 5.71% of this annual total, with \$50.7 billion in retail e-commerce sales. E-commerce sales have been especially successful in sectors such as fashion and electronics (Bush, 2025).

Despite the strength of e-commerce, and of particular importance for the Glebe BIA, the majority of purchases still occur in brick-and-mortar setting. According to a recent survey conducted by KPMG, 66% of respondents indicated that they prefer in-store purchasing (2025, *Connected commerce: A seamless omni-channel experience*). Consumers appreciate opportunities to physically try out new items and pick up items at their own convenience. Past experience with online shopping was also a common factor contributing to the preference for in-store shopping, which included shipping delays, complex returning processes, and the uncertainty of whether the items purchased would meet consumers' expectations.

The KPMG report suggests that as consumers experienced both benefits and challenges with online shopping, they are becoming more conscious with what they value and wish to purchase. It also highlighted that an omni-channel retail experience would continue to be vital in the future. Generative AI is also contributing to the expansion of omni-channel retail by allowing users to ask questions about a product or a service.

### 2.4.4 Small-Format Retail Stores

Retail stores with smaller building footprints are increasingly becoming a preferred option for a range of retailers, even those that have traditionally been large-scale stores such as Best Buy, Walmart, and IKEA (Dutton, Holly,

#### **Figure 2: A small format IKEA store in Sydney, Australia**

(Source: Retail Insider, 2019, *IKEA To Launch Small Urban Format Stores In Canada Beginning In 0*)



2024, More retailers are rolling out small-format stores. Urban Land) (see example in **Figure 2** ). Small-format retail stores usually require smaller operation costs compared to large-format buildings, while allowing more flexible layouts inside the store. The sense of flexibility also allows retailers to be more responsive to the local retail market, allowing business owners to “align with the evolving needs and preferences of cost-sensitive consumers” (Ramesbottom, Lauren, 2024, *Emerging trends in Canada’s retail sector*. Altus Group).

Many small-format retail stores also offer spaces for returning services and in-store pickup for e-commerce orders. Small-format buildings can be strategically located in high-density areas, making these services more accessible for consumers.

Successful neighbourhood shopping areas like the Glebe can benefit from the rise of small-format retail stores, offering opportunities to attract traditionally large-scale retail businesses with that brand name draw that still fit the character of neighbourhood scale retailers.

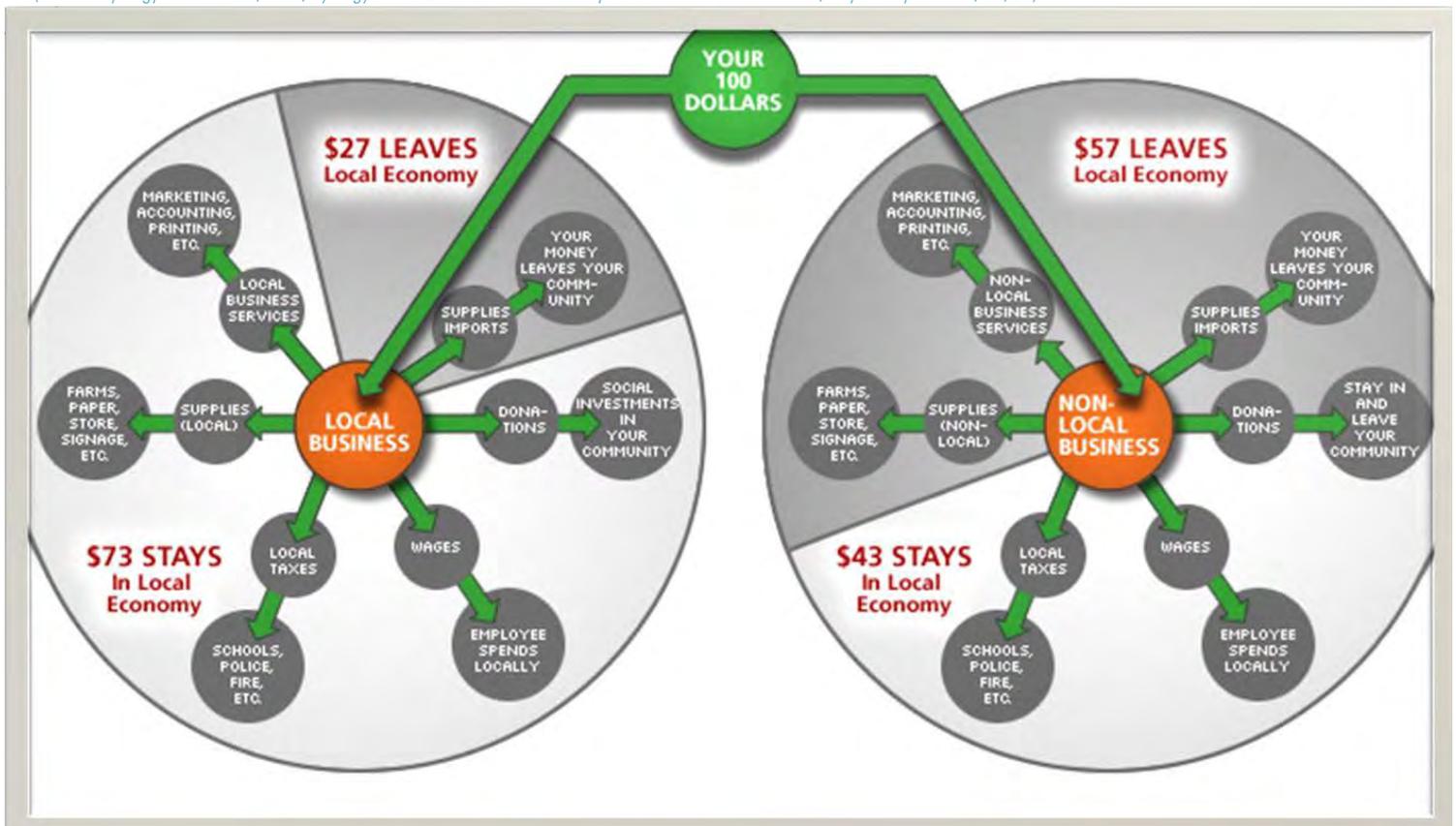
### 2.5.5 The Strength of Local

Synergy Credit Union conducted a study in the City of Lloydminster located in Alberta/Saskatchewan, and found that for every \$100 spent in local businesses, \$73 (73%) stays in the community to support local business services and supplies, and contributes to local taxes, wages, and donations (2022, *Synergy Credit Union Economic Development Breakfast Presentation*). In contrast, \$43 (43%) of every \$100 spent at a non-local business stays in the community and contributes to local taxes, wages, and donations. **Figure 3** illustrates these findings.

While exact dollar figures vary by community, the trend and pattern is consistent in studies like this across North America whereby a higher portion of retail dollars invested in locally-owned and operated businesses tend to stay in the community compared to non-local businesses.

**Figure 3: ‘Supporting Local Builds Communities’ Diagram**

(Source: Synergy Credit Union, 2022, *Synergy Credit Union Economic Development Breakfast Presentation*, City of Lloydminster, AB/SK)



## 2.5.6 A Healthy Retail Hierarchy

**Figure 4** illustrates a healthy retail hierarchy in which retail trade area size is appropriately balanced with housing, travel patterns, and local vs. branded business mix. Main streets are critical for incubating and supporting smaller, independent businesses while larger retail centres accommodate the broader desired and necessary national chains. The unique shops and public spaces of main streets appeal to people looking for a sense of community while larger nodes provide the convenience and variety that businesses and residents seek.

**The Glebe BIA is unique in how it contains two types of retail areas in the hierarchy: the Central and North nodes are a Main Street, while Lansdowne node is Destination Retail.**

This mix, though it does create some disconnect in composition and feel among areas within the BIA, ultimately makes the Glebe an attractive and practical place for people to live and invest, and helps keep local dollars circulating within the community.

Supporting attributes that help strengthen a healthy retail market are events, diverse public spaces, and a diverse mix of retail, dining, and entertainment options, all of which the Glebe provides. All of the above help strengthen community ties, supporting the Glebe in its established role as the “heart” of the community, where people come together for shared experiences.

A thoughtful retail hierarchy has the added benefit of helping prevent urban and suburban sprawl. Main streets like Bank St in the Glebe encourage walkability and reduce car dependency, as shown in the diagram, yet still have a destination component to them that often requires vehicular transport to and from the area with requisite parking needs. Such areas have a symbiotic relationship with diverse housing located nearby in which nearby residents support the shopping area and the shopping area attracts and provides for residents. The ability of these types of retail areas to maintain and even grow the urban population makes them important areas for sustainable and eco-friendly city growth.

**Figure 4: The Hierarchy of Healthy Retail**

(Source: FBM)



## 2.5.7 Food Sector Trends

The following are three major trends related to the food and beverage retail sector:

- **Shifts towards health-conscious options:** Canada has seen a consistent increase in retail sales of more nutritious food products, including products with higher protein content as well as plant-based options to meat and dairy (*Sector trend analysis - packaged food trends in Canada*, Government of Canada).
- **Increase in price-sensitive customers:** Consumers are purchasing more sales items in response to rising food prices and affordable food options have become more critical to attracting customers (Farm Credit Canada, 2024, *Canadian food shopping habits are changing: 2024 FCC Food and Beverage Report*).
- **Use of advanced technology for efficient operation:** Those working in the food sector, particularly restaurant owners, are keen on investing in technology that will help them manage workflow and service capacity on a real-time basis (Square, 2025, *The top restaurant trends in 2025*). Advanced technology can play a vital role in streamlining online orders and delivery processes.

## 2.6 Traffic Patterns & Parking

### 2.6.1 Foot Traffic

The return-to-office trend in Ottawa is being demonstrated by an increase in foot traffic. A CBRE study (*The New Age of Hybrid Work*, 2023) tracking cell phone data found that office buildings in Downtown Ottawa are seeing around 50%-80% of pre-pandemic visitor numbers, which is dramatically higher than the first two Januaries following the start of the COVID-19 pandemic. The increase is due in part to mandates that office workers return to work, such as the Treasury Board of Canada requiring at least two or three days in the office each week for their employees. This pattern has continued into 2025 as more federal workers returned to work from the office three days per week starting in September 2024 (*Ottawa Retail Insight*, 2025, JLL).

A notable difference found between pre-pandemic and more recent foot traffic patterns is a sizable increase in foot traffic on weekends. For instances, on weekends in January 2020 (right before the pandemic started), the same



study counted on average 6000 cellphones per day, whereas on weekends in early 2024 the count of cell phones per day was 21,000 (over 3 times more). This is an enormous leap and reflects a clear shift in foot traffic behaviour, suggesting a new era of pedestrian activity in Downtown Ottawa. Why has there been an increased in foot traffic outside the typical work days? The report suggests the increase is due to an increase in the population living downtown, more multi-residential buildings being built, and a rise in the number of available rental units.

Though the above studies were conducted in Downtown Ottawa, similar patterns are likely affecting surrounding areas like the Glebe which should see an increase in foot traffic as well.

### 2.6.2 Parking

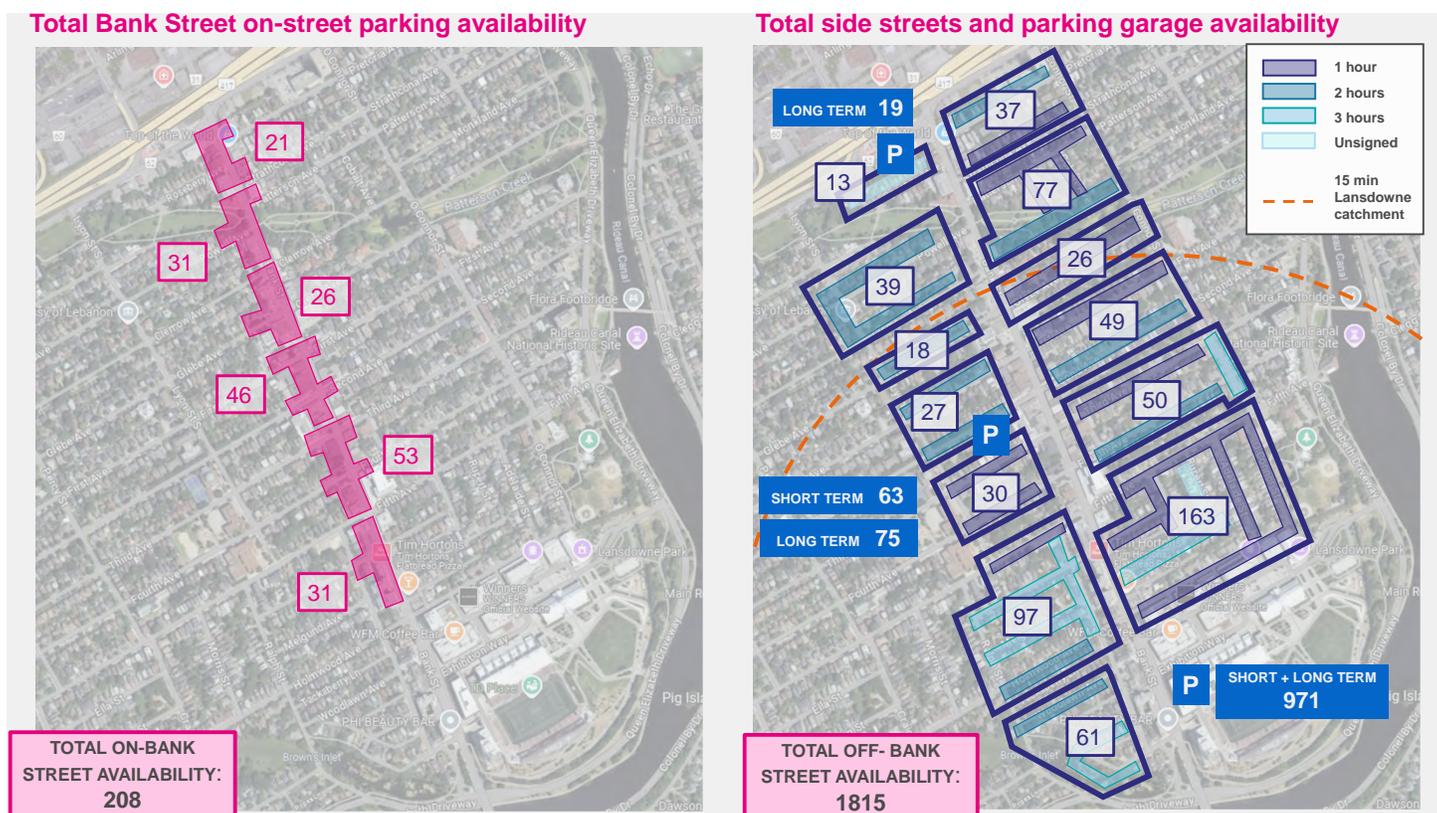
The BIA commissioned a parking study to assess the economic impact of reduced on-street parking on Bank St from proposed active transportation plans (*Glebe BIA Parking Study* (2024, Momentum Transport Consultancy), which included a survey of 62 local businesses. With

a focus on minor events and typical day-to-day parking need, rather than major event days, the study found 208 on-Bank St parking spaces and 1815 off-Bank St spaces (side streets and among the three parkades). **Figure 5** summarizes the locations and total numbers of parking spaces identified in this study.

In conclusion, the study found that the most occupied stretch along Bank St is between Holmwood Avenue and Glebe Avenue, and that the businesses need more accessible parking spaces. The analysis concluded that even if on-street parking were removed along Bank St, there would still be parking available on side streets and in the parkades; however, the businesses who participated in the study perceived there to be an inadequate supply of parking. The study posited that the perceived lack of parking is likely due to the underutilization and lack of awareness about the existing parking garages, which cost the same or less than on-street parking along Bank St. The study suggests educating businesses about this option for their customers, as well as about the potential of how adding bike lanes can reduce traffic.

**Figure 5: Total Number of Parking Spots Available Throughout the Glebe BIA, 2024**

(Source: *Glebe BIA Parking Study*, 2024, Momentum Transport Consultancy, p. 7)



The *Bank St Active Transportation and Transit Priority Feasibility Study* (2024, City of Ottawa) found similar results regarding the importance of on-street parking on Banks Street itself. It found the central parking garage on Second Avenue is not fully utilized, even on Saturdays, with its peak occupancy being ~51% on average. The study found that the parking radius is larger for major events because people are willing to park and walk farther than for typical day-to-day visits.

### 2.6.3 Visitor Behaviour

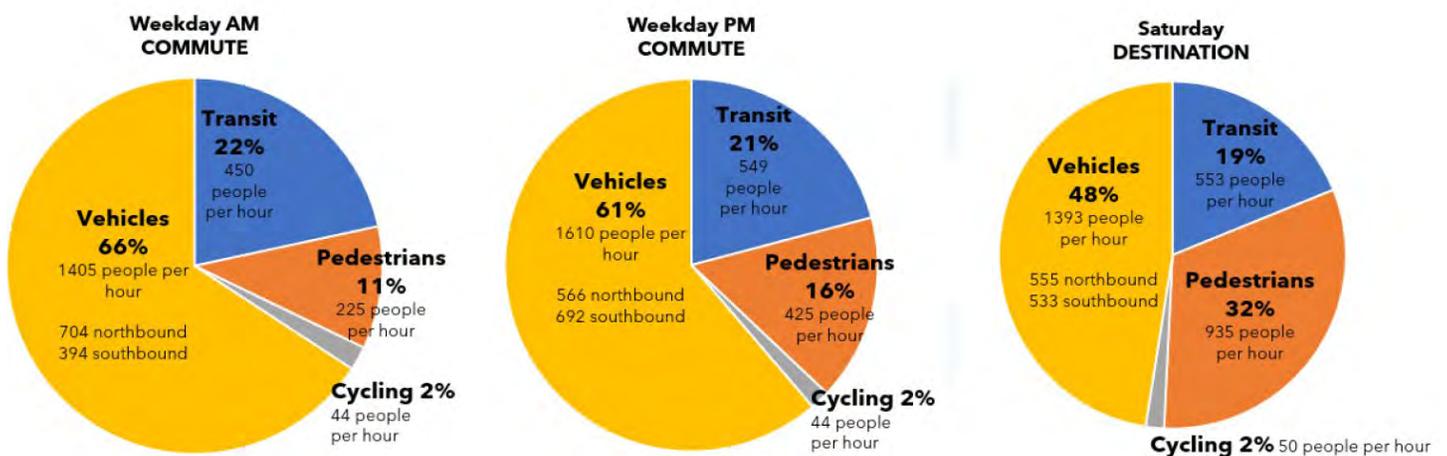
The *Parking Study* (2024, Momentum Transport Consultancy) included questions regarding peak visiting hours. The survey showed that midday around lunch time and the afternoon were most popular, followed by the evening. The weekends were selected by 63% of respondents as the peak time of the week as opposed to 37% who selected week days. The most common duration of visits to Glebe businesses was 15-30 minutes (35% of respondents), followed by 30-60 minutes (21%), and 1-2 hours (19%). The study found that major events, like football games, at Lansdowne TD Place increased foot traffic in the Glebe despite the on-street parking along Bank St being closed on major event days.

### 2.6.4 Traffic Counts & Modes of Travel

The City of Ottawa is conducting an ongoing *Active Transportation and Transit Priority Feasibility Study* (2024, City of Ottawa) for the portion of Bank St that travels through the Glebe BIA, as Bank St is a critical north-south corridor for vehicles moving through the city. **Figure 6**

**Figure 6: Traffic Counts by Mode of Travel on Bank St (within the Glebe only)**

(Source: Bank St Active Transportation and Transit Priority Feasibility Study (Presentation), June 2024, City of Ottawa, p. 8)



shows the traffic counts by mode of travel and time of week/day as presented in June 2024. Vehicles were the primary mode of travel at each time point, though less so on Saturdays (less than 50%). Transit was slightly more important during weekday commutes (21-22% versus 19% on weekend) whereas walking was more important on Saturdays (32% versus 11-16% on weekdays).

**Transit Routes:** The study noted 5,000 average daily bus riders on bus routes 6 and 7, both of which travel straight down Bank St, with six transit stops along this stretch that share the lane with general traffic. Both travel through Downtown straight through the Glebe stretch of Bank St to cross the Rideau Canal, with Route 7 then traveling southwest to Carleton University and Route 6 heading southeast toward South Keys. While a full dedicated rapid bus lane on Bank St. could be detrimental to businesses, it will be important to consider transit improvements that do not result in a significant loss of on-street parking.

**Cycling Infrastructure\*:** Some cycling lanes exist around the area, such as along the Rideau Canal and some lanes in Lansdowne, with additional proposed facilities on several connecting side streets.

*\*An ongoing challenge for Bank St has been if and how to add cycling infrastructure. Creating cycling (and other micromobility) corridors on the side streets parallel to Bank St would be safer routes for cyclists and less disruptive to Bank St traffic and parking.*

## 2.7 Visitor Origins by Mobile Phone Data

Mobile phone tracking data (from Manifold Data Mining) allows us to see more specific visitor patterns by mapping the home postal code locations of visitors to the Glebe.

This mobile phone tracking dataset uses Artificial Intelligence and Machine Learning models to convert location pings into trips, locks the trips onto road networks, and scales the measured trips to trip counts. Processed data can be used to inform tourism planning, estimate traffic counts, and understand visitor volumes and catchment areas. In this study, the data is used to further validate the identified trade areas.

The data indicates how many individuals from a given postal code spent 1 hour or more in the Glebe BIA from the beginning of June through to the end of August in 2025, providing the most recent peak visitor season numbers.

**Figure 7** is a heat map representing visitor origin locations from across Canada. The Glebe saw visitors from coast to coast, though it is clear that the vast majority come from Ottawa area.

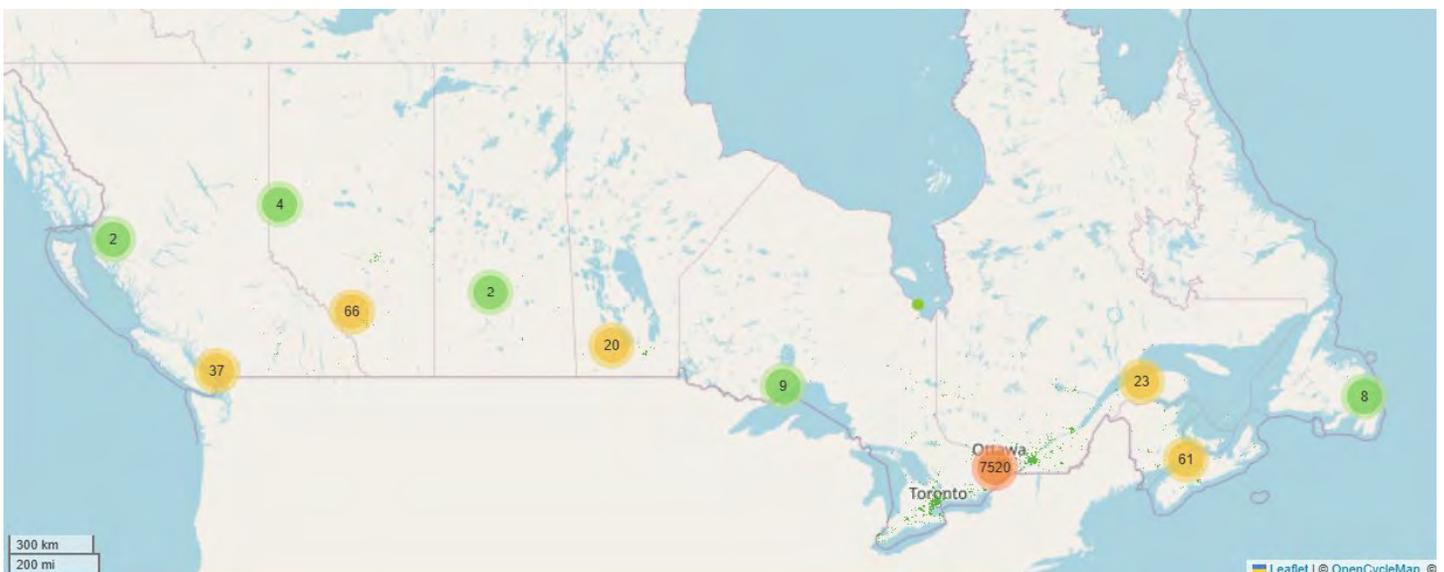
**Figure 8** provides a closer look at the region, in which we see Toronto and Montreal as places of origin for larger clusters of visitors, though the majority are still from Ottawa itself (>5,913).

**Figure 9** shows visitor origins within Ottawa. Most came from within the heart of Ottawa - such as Downtown, Lower Town, and South Ottawa, with the primary visitor origin areas extending out to Vanier/ Rockcliffe Park, Alta Vista, and Hintonburg areas. Other more secondary visitor areas from which a moderate number of visitors came are Kanata (southeast), Napean (south), and Orléans (northeast).

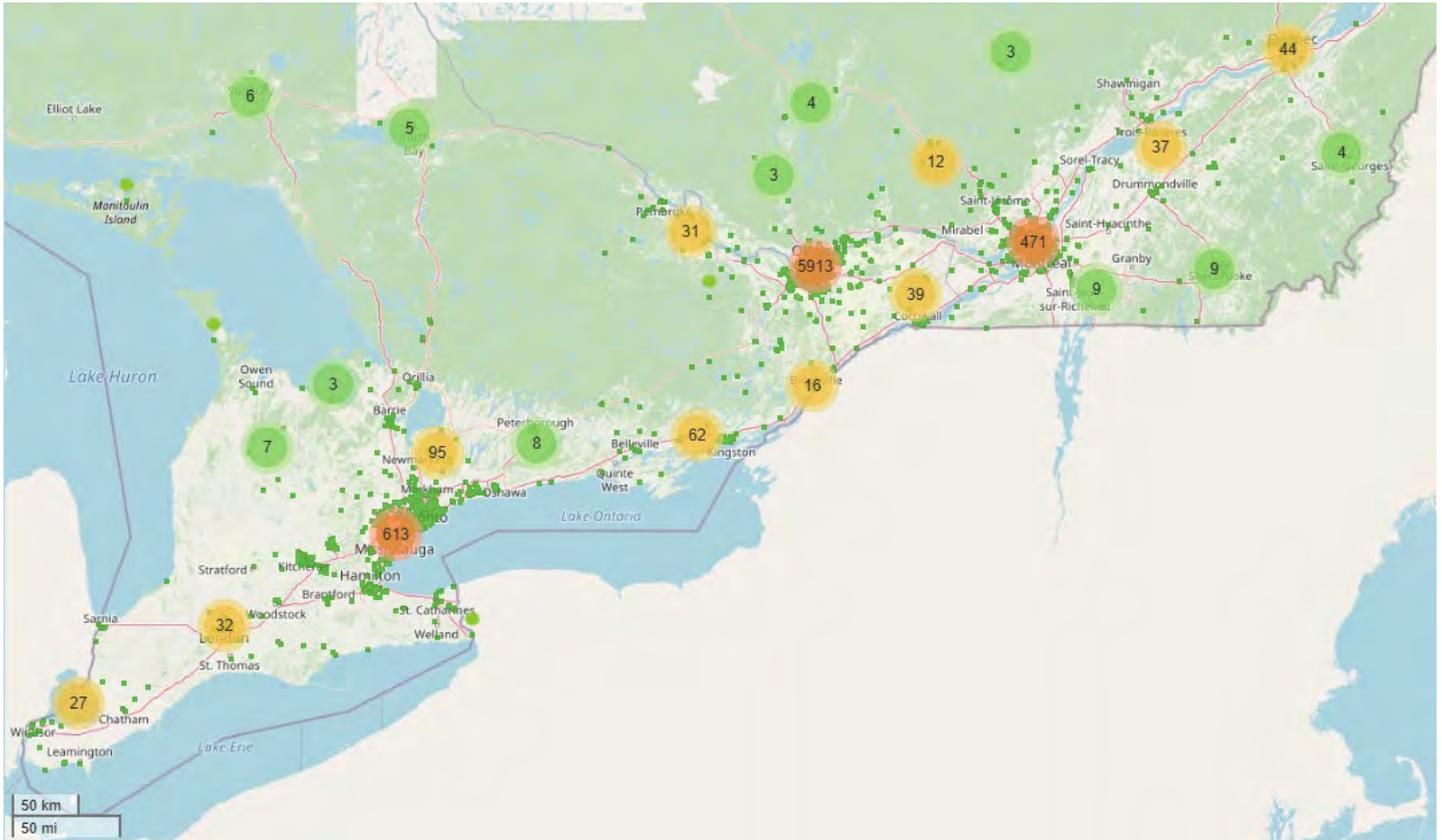
Importantly, the high concentration of mobile phone visitor origins provides valuable insight and support for the delineation of the Glebe's core retail trade area, particularly within a 10-minute drive time.

### Figure 7: Visitor Origins to the Glebe BIA June-August 2025 (Mobile Phones) - National

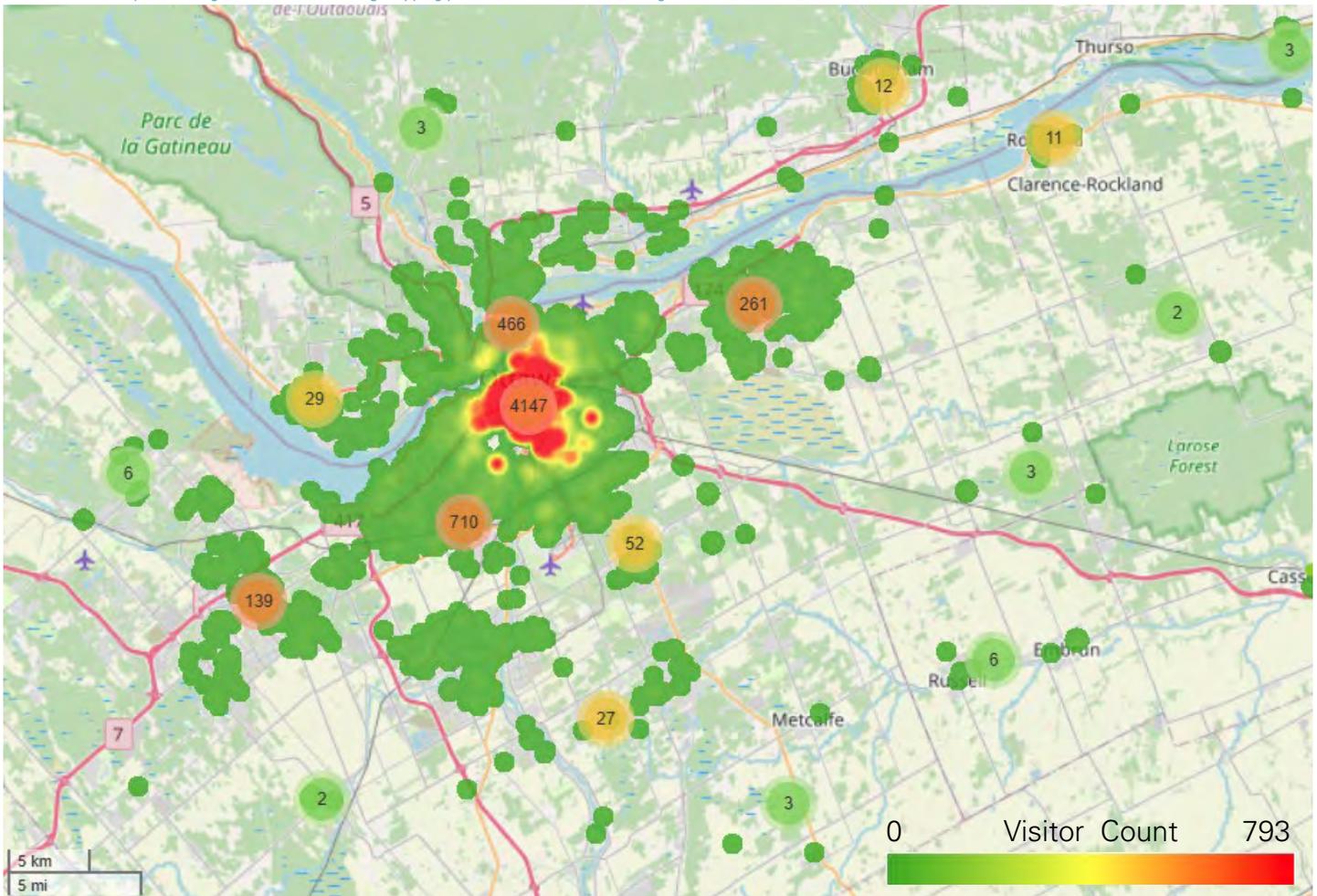
(Source: Created by FBM using Manifold Data Mining mapping platform and data, June to August 2025 (inclusive))



**Figure 8: Visitor Origins to the Glebe BIA June-August 2025 (Mobile Phones) - Regional**  
 (Source: Created by FBM using Manifold Data Mining mapping platform and data, June to August 2025 (inclusive))



**Figure 9: Visitor Origins to the Glebe BIA June-August 2025 (Mobile Phones) - Ottawa**  
 (Source: Created by FBM using Manifold Data Mining mapping platform and data, June to August 2025 (inclusive))





# 3.0 Trade Area

## 3.1 Introducing Trade Areas

The Glebe BIA's **trade area (TA)** is the geographic region from which regular retail patronage could be expected. This section introduces The Glebe BIA's trade area and provides an overview of the area's population and demographic characteristics, including age, gender, income, education levels, and labour force, along with growth projections and estimated retail spending.

The population base in the trade area has demographic characteristics and spending habits that provide insights as to the types of compatible retail tenants, the amount of retail floor space supportable in the market, as well as the current inflow or outflow of retail sales. These are key components of what we call the Retail Demand Analysis, presented in **Section 6.0 Productivity & Market Share**.

### 3.1.1 Data Sources

The two primary data sources for the trade area are the most recent Statistics Canada Census release (2021) as well as Manifold Data Mining (data vintage 2024/2025), a leading supplier of demographic and consumer spending data.

### 3.1.2 Trade Area Determinants

Identification of the trade area is important for understanding the total market potential available to current and future retailers. A retail trade area is defined based on a series of boundary determinants, which can include:

- Transportation networks, including streets and highways, which affect access, drive times, commuting, and employment distribution patterns;
- Major infrastructure projects both planned or under development which could affect future travel patterns;
- Overall community development vision, including an understanding of key nodes' characteristics;
- Local and regional competitive environment, present and future (i.e., nearby communities);
- Proposed generative uses (retail, cultural, civic, institutional etc.) and their relationship within the wider market;
- Significant natural and man-made barriers (e.g. protected green spaces, water features, highways, and industrial areas);
- De facto barriers resulting from notable socioeconomic differentiation; and
- Patterns of existing and future residential and commercial development.

### 3.1.3 Benchmarking

Each table in this report uses the Ottawa-Gatineau CMA (Census Metropolitan Area) as a benchmark. Benchmarking allows the reader to understand how the Glebe BIA's trade area population compares to averages in the wider surrounding context. The index scores and corresponding color codes are shown in **Table 1**. Cells with the darkest blue are considered extremely high compared to the benchmark, while cells with the darkest orange are considered extremely low.

**Table 1: Benchmarking Index Legend**  
(Manifold Data Mining)

Index	Description
>= 180	Extremely High
>=110 and <180	High
>=90 and <110	Similar
>=50 and <90	Low
<50	Extremely Low

## 3.2 The Glebe's Trade Areas

Three trade areas were established for the Glebe BIA based primarily on the time it takes to travel to the Glebe shopping area using the three primary modes of transportation:

- **Walking Trade Area:** Located within a 10 minute walk radius of the Glebe BIA (source: Manifold Data Mining, 2024/2025)
- **Cycling Trade Area:** Located within a 10 minute cycling radius of the Glebe BIA (source: TravelTime API, 2025)
- **Driving Trade Area:** Located within a 10 minute driving time of the Glebe BIA (source: Manifold Data Mining, 2024/2025).

The centrepont for the travel times above is the intersection of Bank St and Third Ave. **Figure 10** shows the three BIA trade areas, noting also the location of TD Place/Lansdowne and Carleton University.

**The analysis presented throughout this report leans most heavily on the numbers from the Driving Trade Area**, as this encompasses the two other BIA trade areas and most accurately reflects the characteristics of typical day-to-day customers.

A fourth trade area was also established to further sensitize this analysis to the regional draw and impact of major events at TD Place/Lansdowne:

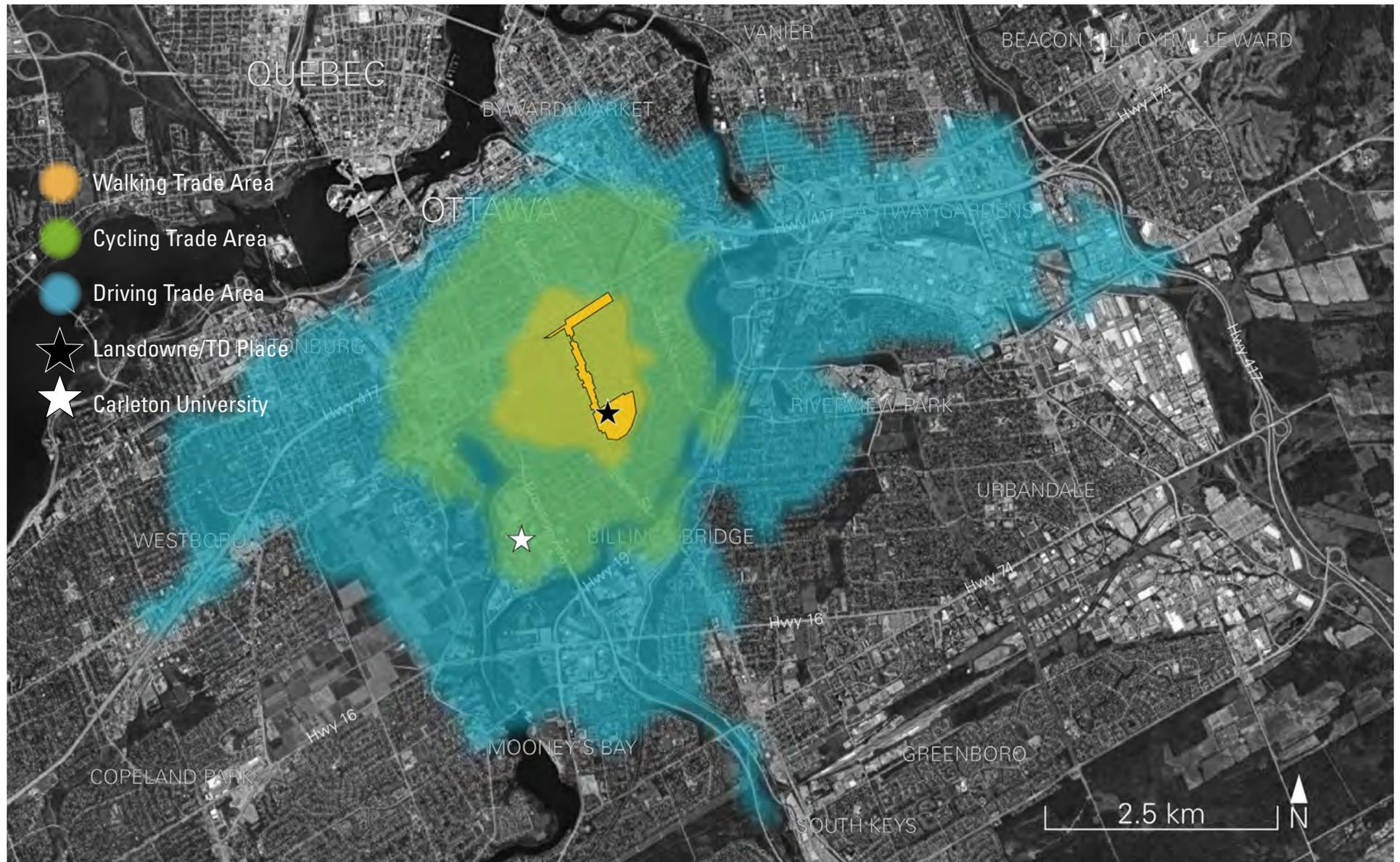
- **Lansdowne Trade Area:** Located within an approximate 20 minute drive time extending out from the intersection of Exhibition Way and Banks Street (near the main entrance to Lansdowne).

The extent of the Lansdowne Trade Area was further validated based on the findings from an Environics Analytics 2023 study (*Visitor Segmentation: The Glebe BIA*) that tracked visitors to the Glebe over the course of one year via mobile device data. Based on the findings, we expanded the Lansdowne Trade Area to extend slightly further south to include the community of Findlay Creek.

All four trade area, including the Lansdowne Trade Area, are shown in **Figure 11**.

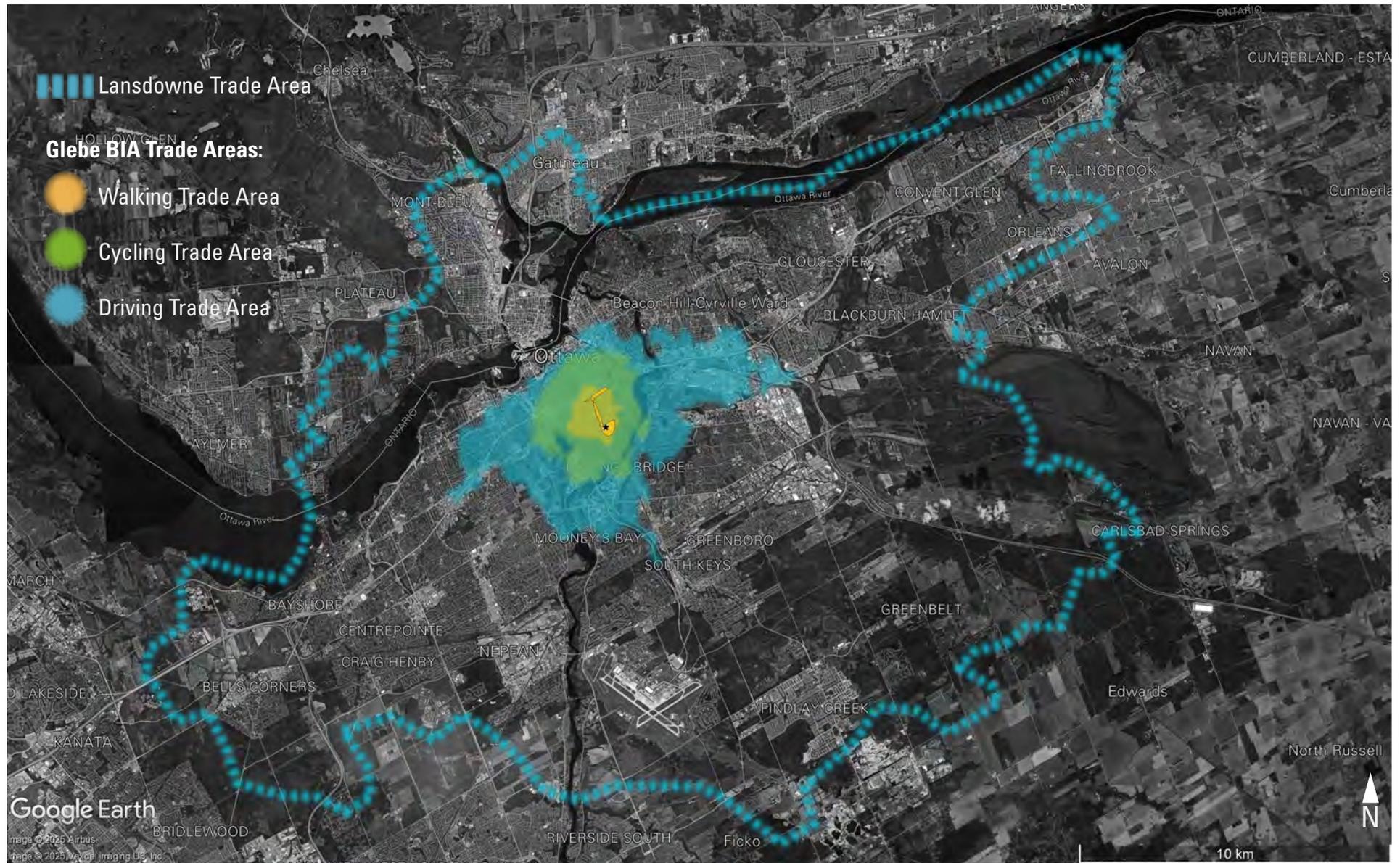
# Figure 10: Glebe BIA Trade Areas - Walking, Cycling, & Driving

(Source: FBM on Google Earth Pro basemap; Manifold Data Mining Inc, 2024/2025; TravelTime API, 2025)



# Figure 11: All Glebe Trade Areas including Lansdowne Event Trade Area

(Source: FBM on Google Earth Pro basemap; Manifold Data Mining Inc, 2024/2025; TravelTime API, 2025)



## 3.3 Trade Area Population Characteristics

### 3.3.1 CanaCode Lifestyle Clusters

The CanaCode Lifestyle Clusters are a demographic analysis resource created by Manifold Data Mining that provides insight into a population's shared consumer lifestyle profile. As defined by Manifold Data Mining, "Each cluster consists of households who share key characteristics in geography, demographics, psychographics, household spending, product, and media usage as well as shopping behaviour." The top four lifestyle clusters in the Glebe's trade areas are shown in **Figure 12** along with their rank by percentage of trade area population.

A complete breakdown of how the 17 CanaCode Lifestyle Clusters are distributing amongst the four trade areas is provided in **Appendix A: Trade Area Demographic Tables**.

To understand the significance of a lifestyle cluster, it is helpful to compare the percentage of the population in the trade area that falls into that category to the average percentage of Canadian households (shown below the lifestyle cluster title for each).

A clear trend among the most prominent lifestyle clusters surrounding the Glebe BIA is a strong presence of both well-established and up-and-coming professionals, with the population becoming increasingly wealthy the closer to the Glebe BIA they are located.

The Walking TA is the closest area to the study site, and we can see that 14.1% of the population fall into *Cluster A - Affluents*, a cluster in which only 3.4% of Canadian households typically find themselves. This cluster is characterized as mature adults (ages 50-54) who have very high average household incomes and an interest in spending money on fine foods/butchers; more expensive recreational activities like golf, skiing, and fitness classes; and products from stores like Lululemon and MEC.

The #1 cluster in the Walking TA is *Cluster B - Elite Professionals*, which make up 7.1% of Canadian households but an enormous 36.7% of Walking TA households.

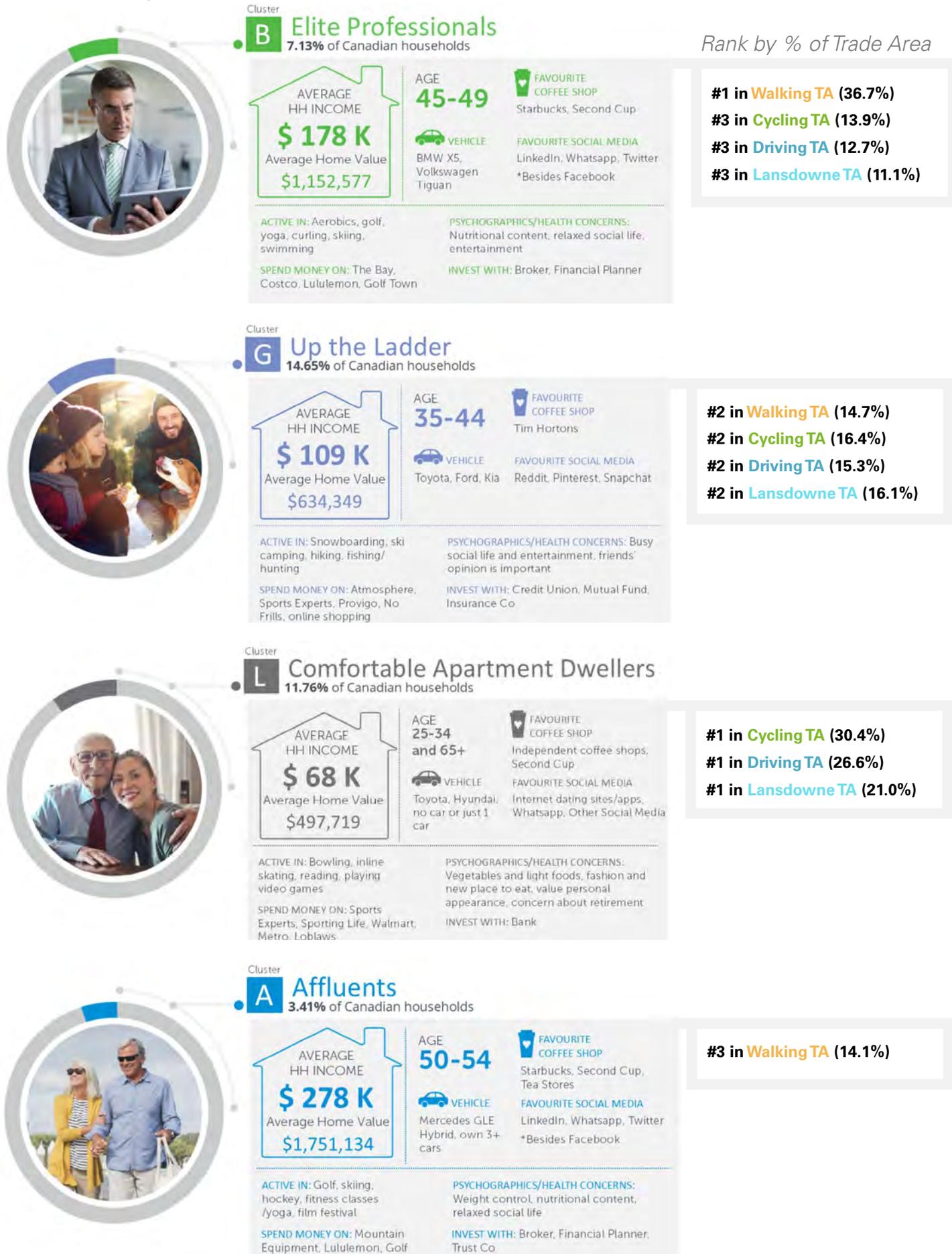
The share amongst the other three trades is also high, ranging from 11% to 14%. This cluster also has a high average household income and tend to be well-established adults who are advanced in their careers. They value nutrition, a relaxed social life, entertainment, and spending money at large grocery/department stores and recreational stores like Lululemon and Golf Town.

The #1 cluster for the remaining three trade areas is *Cluster L - Comfortable Apartment Dwellers*. The percentage of the population in this category is significantly higher than the national average of 11.8%, with the Cycling, Driving, and Lansdowne trade areas being more in the range of 21%-30%. This group represents a split amongst young adults and retirees (ages 25-34 and 65+) with more modest household incomes and an interest in spending money are grocery, department, and sports stores, and valuing trying new places to eat and personal appearance.

The final top cluster - *Cluster G - Up the Ladder* - ranks #2 for all four of the Glebe's trade areas. Percentage-wise it is more on par if just slightly higher than what is typically seen in an average Canadian household. This is a group is characterized by being 33- to 44-years-old; a high average household income (109K) and home value (\$634,349); spending money at stores that support their interest in active outdoor adventures (e.g., snowboarding, skiing, camping, hiking, fishing, & hunting); and busy social lives in which friends' opinions matter.

**Figure 12: Top CanaCode Lifestyle Clusters for the Glebe BIA Trade Areas**

(Source: Manifold Data Mining Inc, 2024/2025)



### 3.3.2 Demographics Statistics

The tables and figures over the next several pages provide an overview of the Glebe's trade area demographic characteristics. Each table presents statistics for the BIA's 10-minute Walking, Cycling, and Driving trade areas, along with the 20-minute drivetime Lansdowne event trade area. Each table uses the Ottawa-Gatineau area as a benchmark for regional comparison.

#### *Population, Households, & Dwelling Patterns*

**Table 2** provides an overview of population characteristics by trade area for the Glebe. The total population for the Glebe BIA's 10-minute Driving TA is 176,771 people. For larger Lansdowne Events, the defined trade area is 700,030 people.

The Walking, Cycling, and Driving Trade Areas are characterized by slightly smaller family sizes than the regional average seen in the average number of persons in private households and the very low share of multiple-family households.

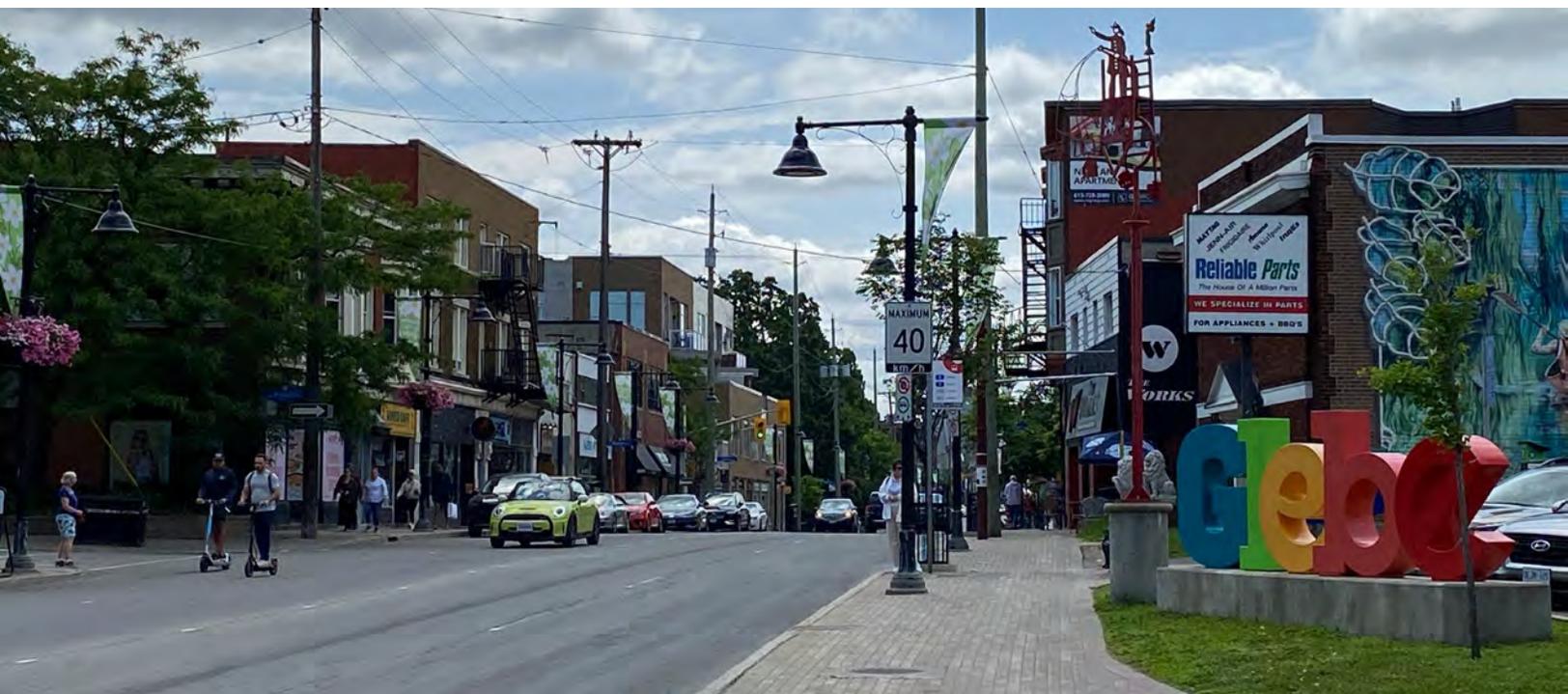
The average dwelling value increases the closer the trade area is to the Glebe BIA, with values considered high relative to the rest of the region in the Walking TA (\$1.09M versus \$0.7M for the benchmark). Home values in the Cycling and Driving TAs are more on par with the larger Ottawa-Gatineau region, and the Lansdowne TA is considered low.

There are low levels of home ownership in all four of the trade areas relative to the region, in the range of 41%-54% versus 65% for the larger region. Renting or home tenant levels are comparatively quite high, in the range of 46% to 58% compared to the typical 35% home tenants for the benchmark.

#### *Education*

Education statistics for the Glebe trade area paint a picture of a population with a high to very high share of population with university level education, with 67% of the Walking TA achieving a university level certification or high compared to 37% of the Ottawa-Gatineau region, and the Cycling, Driving, and Lansdowne trade area in the range of 43%-58%. The share of the population with certifications from apprenticeships, trades, colleges, and other non-university sources are low compared to the rest of the region, becoming 'extremely low' as one moves closer to the Glebe BIA to the Cycling and Walking TAs.

The high levels of university education and low share in non-university levels is consistent with the highly professional and career-oriented nature of the top lifestyle clusters presented earlier.



**Table 2: Population, Households, Dwelling Patterns, & Education Levels in the Glebe Trade Areas**

(Source: Manifold Data Mining Inc, 2024/2025)

	Benchmark		Walking TA			Cycling TA			Driving TA			Lansdowne		
	Ottawa-Gatineau (CMA)		10 Minutes - walking time			10 Minutes - cycling time			10 Minutes - driving time			20 Minutes - driving time		
	value	percent	value	percent	index									
<b>SUMMARY</b>														
Total population	1,668,821		13,578			97,616			176,771			700,030		
Total population age 15 and over	1,406,932		12,140			89,083			159,733			609,276		
Total number of private households	674,251		6,311			49,531			88,582			310,822		
Average number of persons in private households	2.43		2.09		86	1.93		79	1.95		80	2.20		91
Total population in families	1,329,567		9,637			58,038			107,029			491,061		
Total number of labour force age 15 and over	964,995		8,759			62,570			110,405			393,951		
Land area (square km)	8,046.99		1.62			8.26			22.73			256.41		
Inhabited area (square km)	4,580.36		1.62			8.26			22.73			255.61		
<b>DWELLING</b>														
Total number of occupied private dwellings	674,251		6,311			49,531			88,582			310,822		
Average dwelling value \$	\$724,072		\$1,088,661		150	\$755,964		104	\$711,977		98	\$646,740		89
Home owners	438,236	65.00%	3,406	53.96%	83	20,638	41.67%	64	37,224	42.02%	65	154,788	49.80%	77
Home tenants	236,014	35.00%	2,905	46.04%	132	28,893	58.33%	167	51,358	57.98%	166	156,035	50.20%	143
Band housing	0	0.00%	0	0.00%		0	0.00%		0	0.00%		0	0.00%	
<b>HOUSEHOLDS</b>														
One-family households	426,993	63.33%	3,442	54.54%	86	21,129	42.66%	67	38,737	43.73%	69	162,911	52.41%	83
Multiple-family households	17,798	2.64%	53	0.84%	32	518	1.05%	40	918	1.04%	39	5,632	1.81%	69
<b>EDUCATION</b>														
Total population by highest certificate, diploma, or degree	1,406,611		12,140			89,022			159,677			609,259		
No certificate, diploma, or degree	178,772	12.71%	601	4.95%	39	6,197	6.96%	55	12,283	7.69%	61	73,019	11.98%	94
High school diploma or equivalent	327,805	23.31%	1,840	15.15%	65	17,224	19.35%	83	31,862	19.95%	86	138,008	22.65%	97
Post-secondary certificate, diploma, or degree	900,034	63.99%	9,699	79.90%	125	65,600	73.69%	115	115,533	72.35%	113	398,231	65.36%	102
Postsecondary certificate or diploma below bachelor level	384,328	27.32%	1,510	12.43%	45	13,710	15.40%	56	26,586	16.65%	61	134,700	22.11%	81
Apprenticeship or trades certificate or diploma	80,158	5.70%	164	1.35%	24	1,745	1.96%	34	3,687	2.31%	41	23,340	3.83%	67
College, CEGEP or other non-university certificate or diploma	270,908	19.26%	1,214	10.00%	52	10,988	12.34%	64	20,606	12.90%	67	98,670	16.20%	84
University certificate or diploma below bachelor level	33,262	2.37%	131	1.08%	46	977	1.10%	46	2,293	1.44%	61	12,690	2.08%	88
University certificate, diploma, or degree at bachelor level or above	515,706	36.66%	8,190	67.46%	184	51,890	58.29%	159	88,947	55.70%	152	263,533	43.25%	118
Bachelor's degree	311,055	22.11%	4,058	33.43%	151	27,955	31.40%	142	47,828	29.95%	135	149,201	24.49%	111

Index	Description
>= 180	Extremely High
>=110 and <180	High
>=90 and <110	Similar
>=50 and <90	Low
<50	Extremely Low

**Table 3: Age Breakdown in the Glebe Trade Areas**

(Source: Manifold Data Mining Inc, 2024/2025)

	Benchmark		Walking TA			Cycling TA			Driving TA			Lansdowne		
	Ottawa-Gatineau (CMA)		10 Minutes - walking time			10 Minutes - cycling time			10 Minutes - driving time			20 Minutes - driving time		
	value	percent	value	percent	index									
Total population by age groups	1,668,821		13,578			97,616			176,771			700,034		
0-14	261,889	15.69%	1,439	10.60%	68	8,533	8.74%	56	17,038	9.64%	61	90,757	12.96%	83
0-4	80,184	4.81%	405	2.98%	62	2,696	2.76%	57	5,513	3.12%	65	28,982	4.14%	86
5-9	87,720	5.26%	470	3.46%	66	2,900	2.97%	56	5,817	3.29%	63	30,792	4.40%	84
10-14	93,985	5.63%	564	4.15%	74	2,937	3.01%	53	5,709	3.23%	57	30,982	4.43%	79
15-64	1,108,378	66.42%	9,311	68.57%	103	73,716	75.52%	114	130,565	73.86%	111	476,373	68.05%	102
15-19	100,332	6.01%	717	5.28%	88	4,221	4.32%	72	7,486	4.24%	71	34,699	4.96%	83
20-24	112,134	6.72%	1,167	8.60%	128	12,133	12.43%	185	20,472	11.58%	172	60,473	8.64%	129
25-29	117,340	7.03%	1,275	9.39%	134	11,925	12.22%	174	20,728	11.73%	167	63,159	9.02%	128
30-34	123,327	7.39%	1,212	8.93%	121	11,051	11.32%	153	19,428	10.99%	149	62,194	8.88%	120
35-39	117,691	7.05%	931	6.85%	97	8,032	8.23%	117	14,558	8.24%	117	52,199	7.46%	106
40-44	113,309	6.79%	773	5.69%	84	6,168	6.32%	93	11,408	6.45%	95	45,053	6.44%	95
45-49	105,851	6.34%	755	5.56%	88	5,226	5.35%	84	9,421	5.33%	84	38,967	5.57%	88
50-54	103,459	6.20%	834	6.14%	99	5,232	5.36%	86	9,090	5.14%	83	38,089	5.44%	88
55-59	105,123	6.30%	838	6.17%	98	4,902	5.02%	80	8,852	5.01%	80	39,391	5.63%	89
60-64	109,812	6.58%	809	5.96%	91	4,825	4.94%	75	9,122	5.16%	78	42,148	6.02%	91
65 and over	298,554	17.89%	2,829	20.83%	116	15,367	15.74%	88	29,168	16.50%	92	132,904	18.99%	106
65-69	93,551	5.61%	684	5.04%	90	4,362	4.47%	80	8,255	4.67%	83	37,750	5.39%	96
70-74	74,276	4.45%	652	4.80%	108	3,859	3.95%	89	7,159	4.05%	91	31,679	4.53%	102
75-79	58,393	3.50%	625	4.60%	131	3,196	3.27%	93	5,908	3.34%	95	26,161	3.74%	107
80-84	36,423	2.18%	418	3.08%	141	1,924	1.97%	90	3,736	2.11%	97	17,433	2.49%	114
85 and over	35,911	2.15%	450	3.31%	154	2,025	2.07%	96	4,109	2.32%	108	19,881	2.84%	132
85-89	22,976	1.38%	247	1.82%	132	1,375	1.41%	102	2,619	1.48%	107	12,350	1.76%	128
90-94	10,223	0.61%	167	1.23%	202	393	0.40%	66	1,007	0.57%	93	5,749	0.82%	134
95-99	2,478	0.15%	32	0.24%	160	252	0.26%	173	452	0.26%	173	1,618	0.23%	153
100 and over	233	0.01%	4	0.03%	300	5	0.01%	100	31	0.02%	200	164	0.02%	200
Average age of total population	41.10		43.30		105	40.30		98	40.60		99	41.60		101

**Age Distribution**

A population age breakdown is provided in **Table 3**. The benchmarking colours are particularly useful for demonstrating the general pattern of being slightly older in both the Walking TA closest to the Glebe BIA and also much larger Lansdowne event TA, particularly high for over the age of 90. The average age is highest in the Walk TA at 43,3, with Lansdowne TA being almost on par with the Ottawa

region at 41.6 and the Cycling and Driving TAs being slightly younger at around 40 years.

All four trade areas also see a higher representation of university and working-age adults ages 20-39. The Cycling TA in particular sees an ‘extremely high’ share of 20- to 25-year-olds (12.4% versus 6.7% for the region), which makes sense considering this Trade Area reaches Carleton University.

Index	Description
>= 180	Extremely High
>=110 and <180	High
>=90 and <110	Similar
>=50 and <90	Low
<50	Extremely Low

**Table 4: Household Income in the Glebe Trade Areas**

(Source: Manifold Data Mining Inc, 2024/2025)

	Benchmark		Walking TA			Cycling TA			Driving TA			Lansdowne		
	Ottawa-Gatineau (CMA)		10 Minutes - walking time			10 Minutes - cycling time			10 Minutes - driving time			20 Minutes - driving time		
	value	percent	value	percent	index									
<b>HOUSEHOLD INCOME</b>														
Total number of households	674,251		6,311			49,531			88,582			310,823		
Average household income \$	\$131,499.00		\$189,674.00		144	\$131,531.00		100	\$125,131.00		95	\$118,549.00		90
Median household income \$	\$110,956.00		\$140,834.00		127	\$93,671.00		84	\$92,868.00		84	\$96,412.00		87
Household with income under \$5,000	5,369	0.80%	42	0.66%	83	1,423	2.87%	359	2,619	2.96%	370	6,320	2.03%	254
Household with income \$5,000 to \$9,999	4,604	0.68%	35	0.55%	81	772	1.56%	229	1,511	1.71%	251	4,461	1.44%	212
Household with income \$10,000 to \$14,999	7,091	1.05%	33	0.52%	50	1,230	2.48%	236	2,196	2.48%	236	6,096	1.96%	187
Household with income \$15,000 to \$19,999	10,540	1.56%	53	0.84%	54	1,324	2.67%	171	2,506	2.83%	181	7,639	2.46%	158
Household with income \$20,000 to \$24,999	17,004	2.52%	94	1.49%	59	1,685	3.40%	135	3,062	3.46%	137	9,729	3.13%	124
Household with income \$25,000 to \$29,999	16,010	2.37%	118	1.86%	78	1,667	3.37%	142	2,940	3.32%	140	9,658	3.11%	131
Household with income \$30,000 to \$34,999	16,335	2.42%	131	2.07%	86	1,631	3.29%	136	2,871	3.24%	134	9,671	3.11%	129
Household with income \$35,000 to \$39,999	17,865	2.65%	135	2.14%	81	1,670	3.37%	127	2,963	3.35%	126	10,560	3.40%	128
Household with income \$40,000 to \$44,999	19,416	2.88%	107	1.70%	59	1,645	3.32%	115	3,086	3.48%	121	11,449	3.68%	128
Household with income \$45,000 to \$49,999	20,564	3.05%	166	2.62%	86	1,858	3.75%	123	3,577	4.04%	132	12,807	4.12%	135
Household with income \$50,000 to \$59,999	37,296	5.53%	271	4.30%	78	2,961	5.98%	108	5,296	5.98%	108	18,937	6.09%	110
Household with income \$60,000 to \$69,999	41,968	6.22%	336	5.33%	86	2,994	6.05%	97	5,405	6.10%	98	19,591	6.30%	101
Household with income \$70,000 to \$79,999	42,086	6.24%	342	5.41%	87	2,962	5.98%	96	5,336	6.02%	96	19,177	6.17%	99
Household with income \$80,000 to \$89,999	41,135	6.10%	368	5.83%	96	2,929	5.91%	97	5,189	5.86%	96	18,876	6.07%	100
Household with income \$90,000 to \$99,999	40,332	5.98%	337	5.34%	89	2,691	5.43%	91	5,003	5.65%	94	18,934	6.09%	102
Household with income \$100,000 and over	336,635	49.93%	3,744	59.33%	119	20,088	40.56%	81	35,023	39.54%	79	126,918	40.83%	82
Household with income \$100,000 to \$124,999	75,407	11.18%	558	8.83%	79	4,233	8.55%	76	7,790	8.79%	79	30,372	9.77%	87
Household with income \$125,000 to \$149,999	69,355	10.29%	589	9.33%	91	4,012	8.10%	79	7,113	8.03%	78	26,819	8.63%	84
Household with income \$150,000 to \$199,999	83,191	12.34%	748	11.86%	96	4,600	9.29%	75	7,959	8.99%	73	29,500	9.49%	77
Household with income \$200,000 and over	108,682	16.12%	1,849	29.30%	182	7,243	14.62%	91	12,160	13.73%	85	40,228	12.94%	80
Household with income \$200,000 to \$249,999	60,509	8.97%	932	14.77%	165	3,650	7.37%	82	6,127	6.92%	77	20,258	6.52%	73
Household with income \$250,000 to \$299,999	25,226	3.74%	374	5.92%	158	1,463	2.95%	79	2,456	2.77%	74	8,120	2.61%	70
Household with income \$300,000 and over	22,944	3.40%	543	8.60%	253	2,125	4.29%	126	3,567	4.03%	119	11,793	3.79%	111

**Household Income**

Household income is a valuable indicator of the financial reality of families in an area. The provincial benchmarking colors are particularly helpful to put into perspective how families are doing financially compared to others in their region.

The average household income for the Driving TA is \$125,131. We can see that incomes become higher the closer we get to the Glebe BIA, with the Walking TA have 'extremely high' level of \$200,000 or more household incomes. We can see also that all incomes in the range of under \$5000 up to \$100,000 are

relatively low in the Walking TA compared to the Ottawa region.

Meanwhile, the income breakdown among the Cycling, Driving, and Lansdowne TAs look more similar to one another, with an 'extremely high' share of the lowest income brackets (under \$15,000) and a 'high' share in the range of \$15,000 to \$50,000. The middle-income brackets are fairly on par with the larger region, and the share of households with incomes of \$100,000 or greater is relatively low. The high \$300K+ bracket is likely because these latter three trade areas contain the affluent Walking TA.

Index	Description
>= 180	Extremely High
>=110 and <180	High
>=90 and <110	Similar
>=50 and <90	Low
<50	Extremely Low

**Table 5: Employment Patterns in the Glebe Trade Areas**

(Source: Manifold Data Mining Inc, 2024/2025)

	Benchmark		Walking TA			Cycling TA			Driving TA			Lansdowne		
	Ottawa-Gatineau (CMA)		10 Minutes - walking time			10 Minutes - cycling time			10 Minutes - driving time			20 Minutes - driving time		
	value	percent	value	percent	index									
<b>LABOUR FORCE ACTIVITY - TOTAL</b>														
Total population 15+ years	1,406,611		12,140			89,022			159,677			609,257		
In the labour force	964,995	68.60%	8,759	72.15%	105	62,570	70.29%	102	110,405	69.14%	101	393,950	64.66%	94
Employed	918,203	65.28%	8,395	69.15%	106	59,210	66.51%	102	104,111	65.20%	100	370,069	60.74%	93
Unemployed	46,792	3.33%	364	3.00%	90	3,360	3.77%	113	6,294	3.94%	118	23,880	3.92%	118
Not in the labour force	441,616	31.40%	3,381	27.85%	89	26,452	29.71%	95	49,272	30.86%	98	215,309	35.34%	113
Participation rate (%)		68.60%		72.15%	105		70.29%	102		69.14%	101		64.66%	94
Employment rate (%)		65.28%		69.15%	106		66.51%	102		65.20%	100		60.74%	93
Unemployment rate (%)		4.85%		4.16%	86		5.37%	111		5.70%	118		6.06%	125
<b>LABOUR FORCE INDUSTRY</b>														
Total labour force population aged 15+ years by NAICS Category	964,995		8,759			62,570			110,405			393,950		
Industry - not applicable	21,847	2.26%	179	2.04%	90	1,571	2.51%	111	2,851	2.58%	114	11,227	2.85%	126
All industries	943,148	97.74%	8,580	97.96%	100	60,998	97.49%	100	107,554	97.42%	100	382,723	97.15%	99
11 Agriculture, forestry, fishing, and hunting	5,332	0.55%	0	0.00%	0	92	0.15%	27	208	0.19%	35	897	0.23%	42
21 Mining, quarrying, and oil and gas extraction	1,005	0.10%	0	0.00%	0	20	0.03%	30	20	0.02%	20	392	0.10%	100
22 Utilities	3,259	0.34%	18	0.20%	59	43	0.07%	21	77	0.07%	21	716	0.18%	53
23 Construction	62,346	6.46%	210	2.40%	37	1,327	2.12%	33	2,921	2.65%	41	16,705	4.24%	66
31-33 Manufacturing	29,662	3.07%	190	2.17%	71	1,369	2.19%	71	2,424	2.20%	72	9,160	2.33%	76
41 Wholesale trade	17,213	1.78%	94	1.07%	60	666	1.06%	60	1,288	1.17%	66	5,340	1.36%	76
44-45 Retail trade	95,756	9.92%	575	6.57%	66	4,410	7.05%	71	8,446	7.65%	77	37,598	9.54%	96
48-49 Transportation and warehousing	32,014	3.32%	83	0.95%	29	1,039	1.66%	50	2,343	2.12%	64	12,700	3.22%	97
51 Information and cultural industries	19,001	1.97%	226	2.58%	131	2,355	3.76%	191	3,742	3.39%	172	9,527	2.42%	123
52 Finance and insurance	29,050	3.01%	249	2.84%	94	2,588	4.14%	138	4,188	3.79%	126	12,615	3.20%	106
53 Real estate and rental and leasing	13,875	1.44%	179	2.05%	142	1,038	1.66%	115	1,674	1.52%	106	6,156	1.56%	108
54 Professional, scientific, and technical services	93,186	9.66%	1,407	16.06%	166	8,101	12.95%	134	13,797	12.50%	129	40,594	10.30%	107
55 Management of companies and enterprises	1,043	0.11%	31	0.35%	318	40	0.06%	55	101	0.09%	82	428	0.11%	100
56 Administrative/support, waste management, & remediation services	39,727	4.12%	147	1.67%	41	2,212	3.53%	86	3,971	3.60%	87	18,528	4.70%	114
61 Educational services	74,146	7.68%	917	10.47%	136	6,032	9.64%	126	10,264	9.30%	121	32,423	8.23%	107
62 Health care and social assistance	113,888	11.80%	1,110	12.68%	107	6,768	10.82%	92	12,177	11.03%	93	46,819	11.88%	101
71 Arts, entertainment, and recreation	16,310	1.69%	289	3.30%	195	1,891	3.02%	179	2,805	2.54%	150	7,997	2.03%	120
72 Accommodation and food services	47,546	4.93%	375	4.28%	87	3,366	5.38%	109	6,097	5.52%	112	22,441	5.70%	116
81 Other services (except public administration)	36,531	3.79%	308	3.51%	93	2,321	3.71%	98	4,248	3.85%	102	15,106	3.83%	101
91 Public administration	212,258	22.00%	2,174	24.82%	113	15,321	24.49%	111	26,761	24.24%	110	86,582	21.98%	100

**Employment Patterns**

Employment patterns based on labour force statistics are shown in **Table 5** along with employment by industry using the North American Industry Classification System (NAICS). These categories help us further understand the Glebe’s consumer base.

Unemployment in the Walking TA is low compared to the Ottawa-Gatineau region, while it is relatively high in the Cycling, Driving, and Lansdowne TAs.

Looking at employment by industry, we see a higher-than-typical share of professional and office-based employment in the three BIA trade areas, particularly in Information and cultural industries, real estate, and professional/scientific/technical services. The Walking TA has a very high share of management and arts/entertainment/ recreation employment. There is a low share of employment in extraction and construction type industries in all trade areas.

Index	Description
>= 180	Extremely High
>=110 and <180	High
>=90 and <110	Similar
>=50 and <90	Low
<50	Extremely Low

**Table 6: Commuting Patterns in the Glebe Trade Areas**

(Source: Manifold Data Mining Inc., 2024/2025)

	Benchmark		Walking TA			Cycling TA			Driving TA			Lansdowne		
	Ottawa-Gatineau (CMA)		10 Minutes - walking time			10 Minutes - cycling time			10 Minutes - driving time			20 Minutes - driving time		
	value	percent	value	percent	index									
<b>PLACE OF WORK</b>														
Total employed labour force 15 years and over by place of work status	918,203		8,395			59,210			104,111			370,069		
At home	164,897	17.09%	2,131	24.33%	142	14,597	23.33%	137	24,417	22.12%	129	72,262	18.34%	107
Outside Canada	3,155	0.33%	22	0.25%	76	273	0.44%	133	511	0.46%	139	1,528	0.39%	118
No fixed workplace address	123,823	12.83%	722	8.24%	64	6,121	9.78%	76	11,228	10.17%	79	46,836	11.89%	93
Usual place of work	626,326	64.91%	5,520	63.02%	97	38,218	61.08%	94	67,955	61.55%	95	249,443	63.32%	98
Employed Males	465,865	48.28%	4,019	45.88%	95	29,836	47.68%	99	52,233	47.31%	98	187,838	47.68%	99
Employed Females	452,338	46.88%	4,376	49.96%	107	29,374	46.95%	100	51,878	46.99%	100	182,233	46.26%	99
<b>COMMUTING DESTINATION</b>														
Total employed labour force 15 years and over with a usual place of work	626,326		5,520			38,218			67,955			249,443		
Commute within area of residence (with same census subdivision)	510,415	52.89%	5,199	59.36%	112	35,913	57.40%	109	64,261	58.20%	110	229,691	58.30%	110
Commute to a different area within province or territory of residence	56,554	5.86%	19	0.22%	4	884	1.41%	24	1,307	1.18%	20	4,853	1.23%	21
Commute to a different province or territory	50,734	5.26%	301	3.43%	65	1,416	2.26%	43	2,382	2.16%	41	14,890	3.78%	72
<b>MODE OF TRANSPORTATION</b>														
Total employed labour force 15 years and over who commute to work by mode	750,150		6,242			44,340			79,183			296,279		
Car, truck or van	600,822	62.26%	3,507	40.04%	64	24,876	39.76%	64	44,261	40.09%	64	200,526	50.90%	82
Public transit	71,606	7.42%	367	4.19%	56	5,766	9.22%	124	11,915	10.79%	145	44,751	11.36%	153
Walked	46,523	4.82%	1,754	20.03%	416	10,658	17.03%	353	17,374	15.74%	327	34,546	8.77%	182
Bicycle	9,842	1.02%	482	5.51%	540	2,050	3.28%	322	3,276	2.97%	291	6,971	1.77%	174
Other method	21,356	2.21%	131	1.49%	67	990	1.58%	71	2,357	2.13%	96	9,485	2.41%	109
<b>COMMUTING DURATION</b>														
Total employed population aged 15 years and over with a usual place of work	750,150		6,242			44,340			79,183			296,279		
Less than 15 minutes	202,314	20.97%	2,729	31.15%	149	16,148	25.81%	123	27,198	24.63%	117	89,885	22.82%	109
15 to 29 minutes	297,598	30.84%	2,615	29.85%	97	19,745	31.56%	102	35,319	31.99%	104	131,574	33.40%	108
30 to 44 minutes	161,070	16.69%	567	6.47%	39	5,288	8.45%	51	10,900	9.87%	59	48,320	12.27%	74
45 to 59 minutes	50,449	5.23%	213	2.43%	46	1,735	2.77%	53	3,050	2.76%	53	13,374	3.39%	65
60 minutes and over	38,719	4.01%	119	1.36%	34	1,423	2.28%	57	2,717	2.46%	61	13,125	3.33%	83
<b>TIME LEAVING FOR WORK</b>														
Total employed population aged 15 years and over who commute to work	750,150		6,242			44,340			79,183			296,279		
Leave for work between 5 am and 5:59 am	46,329	4.80%	238	2.72%	57	2,374	3.79%	79	3,833	3.47%	72	13,930	3.54%	74
Leave for work between 6 am and 6:59 am	143,011	14.82%	510	5.82%	39	4,910	7.85%	53	9,616	8.71%	59	44,735	11.36%	77
Leave for work between 7 am and 7:59 am	203,783	21.12%	1,578	18.01%	85	11,582	18.51%	88	20,234	18.33%	87	76,265	19.36%	92
Leave for work between 8 am and 8:59 am	156,582	16.23%	2,213	25.27%	156	11,795	18.85%	116	21,059	19.07%	117	69,902	17.74%	109
Leave for work between 9 am and 11:59 am	92,296	9.56%	1,161	13.25%	139	8,076	12.91%	135	13,864	12.56%	131	44,798	11.37%	119
Leave for work between 12 pm and 4:59 am	108,148	11.21%	542	6.19%	55	5,603	8.95%	80	10,578	9.58%	85	46,651	11.84%	106

**Commuting Patterns**

**Table 6** shows commuting patterns among the Glebe trade areas. Commuting patterns provide an idea of how much of the resident population’s time is spent in or near the study area, which contributes to potential market capture.

A higher proportion of people in the three main BIA trade areas work at home (18%-24%) compared to the region (17%). Most trade areas mirror the benchmark

in that more males are employed than females, except for the Walking TA which sees more employed females than males. Most workers commute within the City of Ottawa (~58% among all trade areas).

The top mode of transportation for commuting among all trade areas is motor vehicles, though notably to a lesser extent than the regional average (around 40% among BIA trade areas and 50% for Lansdowne, compared to 62% for the larger region).

Index	Description
>= 180	Extremely High
>=110 and <180	High
>=90 and <110	Similar
>=50 and <90	Low
<50	Extremely Low

**Table 7: Household Income Growth Projections**

(Source: FBM & Manifold Data Mining Inc.)

	Benchmark		Walking TA			Cycling TA			Driving TA			Lansdowne		
	Ottawa-Gatineau (CMA)		10 Minutes - walking time			10 Minutes - cycling time			10 Minutes - driving time			20 Minutes - driving time		
	value	percent	value	percent	index									
<b>PROJECTIONS</b>														
Annual population growth in the period: Next 5 years		1.63%		1.45%	89		1.86%	114		1.82%	112		1.56%	96
Annual household growth in the period: Next 5 years		1.74%		1.87%	107		2.02%	116		1.97%	113		1.60%	92
Annual population growth in the period: 5 to 10 years from 2025		1.45%		1.27%	88		1.64%	113		1.61%	111		1.38%	95
Annual household growth in the period: 5 to 10 years from 2025		1.55%		1.66%	107		1.80%	116		1.75%	113		1.43%	92
<b>POPULATION GROWTH</b>														
Current year total population	1,668,821		13,578			97,616			176,771			700,030		
5-Year Projections - Total population	1,809,656		14,601			107,130			193,605			756,893		
10-Year Projections - Total population	1,944,364		15,560			116,314			209,829			810,998		
<b>HOUSEHOLD GROWTH</b>														
Current year total number of households	674,251		6,311			49,531			88,582			310,822		
5-Year Projections - Total number of households	734,878		6,928			54,804			97,736			336,787		
10-Year Projections - Total number of households	793,501		7,525			59,976			106,690			361,714		
<b>HOUSEHOLD INCOME GROWTH</b>														
Current year average household income	\$131,499		\$189,674		144	\$131,531		100	\$125,131		95	\$118,550		90
5-Year Projections - Average household income	\$158,451		\$221,716		140	\$159,036		100	\$152,744		96	\$143,769		91
10-Year Projections - Average household income	\$187,593		\$250,140		133	\$186,462		99	\$180,898		96	\$169,229		90

The proportion of the population who commute via walking or cycling is ‘extremely high’ across all four trade areas (except for just ‘high’ for cycling in the Lansdowne TA), with the share of primarily choose to walk up to between 15%-30% in the three primary trade areas compared to 4.8% in the Ottawa region. Public transit usage is low in the Walking TA but high for the other three trade areas.

The most popular times to start the morning commute for the three BIA trade areas is between 8am and 9am while between 7am and 8am is the top time for the Lansdowne TA. The majority of workers across the four trade areas commute for under 30 minutes (commuting the under 15-minute figure with the 15- to 29-minute figure gives a range of 56%-62%), and the Walking TA sees 31% of workers commuting less than 15 minutes.

**Population & Income Projections**

Manifold Data Mining calculates growth projections based on historic data trends, shown in **Table 7**. Modest growth is expected across all categories and trade areas, with some differences between trade areas. The Walking Trade Area’s population growth is expected to be slower than the regional average, with the household growth being relatively on par.

Meanwhile, the Cycling and Driving TAs are expected to grow more quickly in terms of both population and household growth. Despite slower population and household growth projections, average household incomes are expected to grow faster in the Walking TA than the other three TAs.

Looking at the Driving BIA as the key trade area for the Glebe BIA’s regular customer base, the population is projected to grow to 193,605 people by 2030 and 209,829 people by 2035.

Index	Description
>= 180	Extremely High
>=110 and <180	High
>=90 and <110	Similar
>=50 and <90	Low
<50	Extremely Low

## 3.4 Additional Audience Segments

This analysis has taken into account the influence of several additional audience segments that have an effect on retail spending in the Glebe BIA.

### **Carleton University Staff and Students**

The total number of staff and students at Carleton University is **34,234** (carleton.ca, 2025).

### **Visitors**

The total number of unique visitors to the Glebe BIA over the span of a recent year (September 2022 to 2023) was **767,414 visitors** (EnviroNics Analytics, 2023, *Visitor Segmentation: The Glebe BIA*).

### **TD Place Events**

TD Place sees **~4 million guests** annually (Tdplace.com, 2025).

### **Office Workforce**

CBRE provided the consultant team with the total number of occupied office floor space for Q1 of 2025 for buildings located within the Glebe (256,000 SF occupied out of a total office inventory of 314,000 SF). Based on ranges provided by Studio Forma Interior Design (2024, *Typical Office Size: How Much Office Space Do You Need*), we have estimated about 150 SF per office employee, which assumes a mix of open concept and traditional private office layouts.

When divided the total occupied office space in the Glebe by the required square footage per employee results in an estimated **1707 office workers** in the Glebe.

## 3.5 Retail Spending Profile

Having established the respective Trade Area boundaries, demographic profile, and population projections, anticipated growth was projected using retail spending data, also from Manifold Data Mining (2024/2025 data vintage).

Retail spending data within each Trade Area was consolidated into the 22 retail merchandise categories applied in this study to build a spending profile each trade area. These categories are as follows:

- Grocery & Convenience
- Pharmacy
- Alcohol, Tobacco & Cannabis
- Personal Services
- Health Care & Medical Services\*
- Fashion & Footwear
- Jewelry
- Beauty & Personal Care
- Home Furniture & Décor
- Appliances & Electronics
- Home Improvement & Gardening
- Books & Media
- Sporting Goods
- Toys & Hobbies
- Specialty Retail (see **Glossary of Terms & Acronyms**)
- Quick Service Restaurants
- Full Service Restaurants
- Arts & Entertainment
- Fitness & Leisure
- Auto Parts & Accessories
- Auto-RV/Motorsports Dealership
- Auto Fuel\*.

The retail spending profile provides an understanding of how Trade Area residents spend their shopping and leisure dollars on a household basis for each of the 22 categories, presented by trade area.

*\*While these two categories have an associated household expenditure, they are only included in the spending profile and not quantified in the upcoming demand analysis. 'Health Care & Medical Services' does not have a typical associated productivity for forecasting floorspace since a large component of the business model is not a fee-for-service or fee-for-product model but rather involves direct insurance payment. 'Auto Fuel' is highly volatile in terms of pricing (which is a common component of quantifying demand and productivity), number of pumps, vehicles, and litres sold as well as the fact that taxes vary from region to region.*

### 3.5.1 Spending Profile by Trade Area

**Table 8** shows the current trade area spending by details merchandise category, shown for each trade area. The total spending is shown as both Total Categories and Total Retail, which excludes 'Health care & Medical Services' and all three of the Automotive Goods categories. **Figure 13** provides a higher level summary of overall trade area spending by further consolidating the merchandise categories with a shared focus into four broad retail categories.

**Table 9** shows the retail spending potential by category for ten-year spending projections, respectively. We have applied a conservative annualized household spending growth estimate of 1% to account for inflation or consumer price indices.

Looking first at the current retail spending, as is particularly clear in **Figure 13** that the total amount of retail spending corresponds to the size of the trade area, with the much larger Lansdowne event trade area generating far more spending than the three smaller BIA trade areas. Businesses in the broad 'Comparison Merchandise' (includes fashion, home furnishings, hobbies, etc) category generate the most spending in all four trade areas followed by closely by 'Grocery & Conveniences' (includes pharmacy, alcohol, and personal services).

#### 10-Minute Walking Trade Area

The **10-minute Walking Trade Area** has a population of 13,578 people with a Total Retail aggregate spending of \$233.7 million (excluding health care and auto). The top retail-only categories with the most spending are:

1. Grocery & Convenience (\$63.5 m)
2. Home Improvement & Gardening (\$38.3 m)
3. Quick Service Restaurants (\$23.3 m)

Looking at the broad merchandise categories, Comparison Merchandise saw the highest combined spending at \$105.0 million, dominated by Home Improvement & Gardening, and followed by spending in Fashion & Footwear and Appliances & Electronics.

Looking at conservative spending growth potential, Total Retail aggregate spending is projected to grow to \$269.7 million in five years and to \$307.8 million in 10 years.

#### 10-minute Cycling Trade Area

The **10-minute Cycling Trade Area** has a population of 97,616 people with an aggregate Total Retail spending of \$ 1.4 billion (excluding health care and auto). The top retail-only categories that saw the most spending are:

1. Grocery & Convenience (\$391.6 m)
2. Home Improvement & Gardening (\$212.5 m)
3. Quick Service Restaurants (\$143.4 m)

Looking at the broad merchandise categories, Comparison Merchandise also saw the highest combined spending at \$637.2 million, dominated again by Home Improvement & Gardening, with the next closest Fashion & Footwear, seeing half the amount of spending.

For retail spending growth potential, Total Retail aggregate spending is projected to grow to \$1.7 billion by the year 2030 and \$1.9 billion by 2035.

#### 10-minute Driving Trade Area

The **10-minute Driving Trade Area** has a population of 176,771 people with an aggregate Total Retail spending of \$ 2.5 billion (excluding health care and auto). The top retail-only categories that saw the most spending are:

1. Grocery & Convenience (\$678.3 m)
2. Home Improvement & Gardening (\$365.7 m)
3. Quick Service Restaurants (\$247.5 m)

Among the broad merchandise categories, Comparison Merchandise remains highest with \$1.1 billion in this combined category, dominated again by Home Improvement & Gardening, followed by Fashion & Footwear and Appliances & Electronics, as in the Walking Trade Area.

For future retail spending projections, Total Retail aggregate spending is projected to grow to \$2.9 billion by the year 2030 and \$3.3 billion by 2035.

### Lansdowne Trade Area (20-minute driving)

The **Lansdowne Trade Area**, covering a much larger land area, reaches a minimum population of 700,030 people with an aggregate Total Retail spending of **\$8.5 billion** (excluding health care and auto). The top retail-only categories that saw the most spending are:

1. Grocery & Convenience (\$2.4 billion)
2. Home Improvement & Gardening (\$1.2 billion)
3. Full Service Restaurants (\$858 million)
4. Fashion & Footwear (\$661 million)
5. Quick Service Restaurants (\$556 million)

The aggregated Comparison Merchandise categories is the highest spending cluster among the broad spending categories at **\$3.8 billion**, led still by Home Improvement & Gardening, with Fashion & Footwear and Appliances & Electronics following far behind.

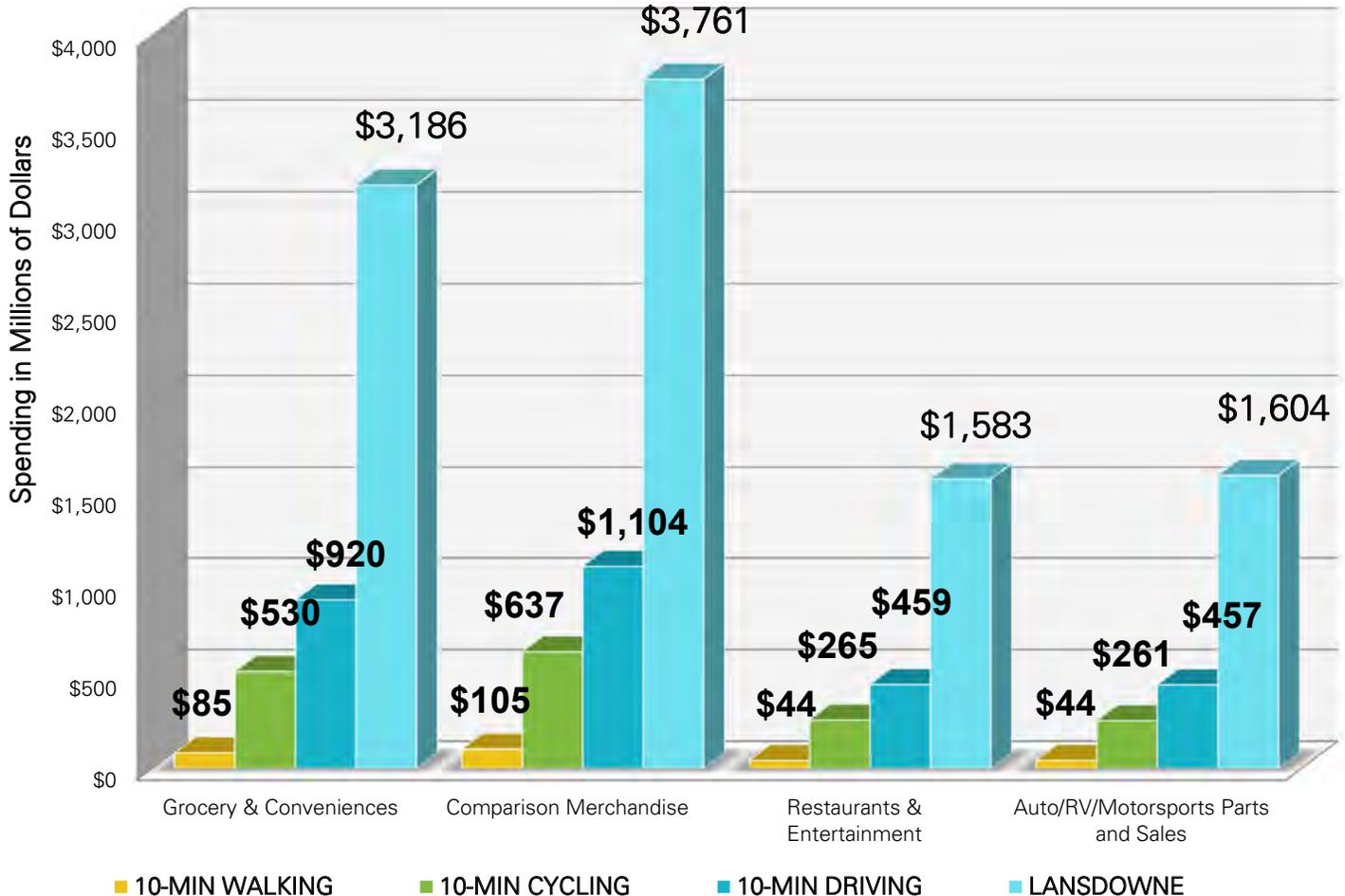
As for future retail spending potential, the Total Retail aggregate spending is projected to grow to just under \$11.0 billion in ten years by 2035.

The retail spending profile for the Glebe suggests that the highest productivity is in the Grocery & Convenience category as well as Quick Service Restaurants (including fast food restaurants). This high productivity suggests a very stable market for such businesses.

While these categories were identified as less desirable to online survey respondents, they nonetheless represent a strong opportunity to maximize productivity based on the total spending numbers and yet there are still niche formats that could fit within the Glebe demographic and spending profile.

**Figure 13: Trade Area Spending Summary by Broad Merchandise Category 2025**

(Source: FBM & Manifold Data Mining Inc.)



**Table 8: Current Trade Area Spending by Detailed Merchandise Category 2025**

(Source: FBM & Manifold Data Mining Inc.)

Retail Spending by Merchandise Category		2025		2025		2025		2025	
		GLEBE 10-Minute Walking Trade Area Household Retail Spending	GLEBE 10-Minute Walking Trade Area Aggregate Retail Spending	GLEBE 10-Minute Cycling Trade Area Household Retail Spending	GLEBE 10-Minute Cycling Trade Area Aggregate Retail Spending	GLEBE 10-Minute Driving Trade Area Household Retail Spending	GLEBE 10-Minute Driving Trade Area Aggregate Retail Spending	LANSDOWNE 20-Minute Driving Trade Area Household Retail Spending	LANSDOWNE 20-Minute Driving Trade Area Aggregate Retail Spending
Convenience & Day-to-Day Goods/Services	Grocery & Convenience	\$10,059	\$63,484,405	\$7,907	\$391,636,763	\$7,657	\$678,287,654	\$7,584	\$2,357,303,962
	Pharmacy	\$1,027	\$6,483,980	\$780	\$38,643,535	\$775	\$68,651,623	\$775	\$240,887,812
	Alcohol, Tobacco & Cannabis	\$1,758	\$11,095,981	\$1,543	\$76,428,985	\$1,498	\$132,672,439	\$1,427	\$443,503,229
	Personal Services	\$631	\$3,980,400	\$469	\$23,223,677	\$461	\$40,859,646	\$464	\$144,151,877
	Health Care & Medical Services	\$1,071	\$6,760,764	\$777	\$38,483,957	\$769	\$68,161,169	\$796	\$247,534,850
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$2,772	\$17,491,720	\$2,187	\$108,343,944	\$2,142	\$189,784,135	\$2,126	\$660,842,525
	Jewelry	\$237	\$1,494,324	\$190	\$9,419,491	\$186	\$16,433,272	\$173	\$53,730,943
	Beauty & Personal Care	\$1,275	\$8,048,942	\$1,091	\$54,040,183	\$1,039	\$92,026,644	\$956	\$297,284,909
	Home Furniture & Décor	\$1,429	\$9,018,532	\$1,117	\$55,348,315	\$1,092	\$96,737,540	\$1,072	\$333,192,741
	Appliances & Electronics	\$1,984	\$12,519,895	\$1,517	\$75,159,889	\$1,482	\$131,301,538	\$1,463	\$454,803,402
	Home Improvement & Gardening	\$6,065	\$38,278,413	\$4,290	\$212,499,608	\$4,128	\$365,654,161	\$3,970	\$1,233,928,645
	Books & Media	\$829	\$5,233,752	\$790	\$39,150,143	\$766	\$67,885,253	\$746	\$231,821,398
	Sporting Goods	\$441	\$2,782,318	\$393	\$19,485,172	\$372	\$32,918,506	\$363	\$112,864,341
Toys & Hobbies	\$319	\$2,015,132	\$230	\$11,393,708	\$233	\$20,663,673	\$252	\$78,471,246	
Specialty Retail	\$1,293	\$8,162,318	\$1,057	\$52,373,663	\$1,025	\$90,817,458	\$979	\$304,343,067	
Leisure, Recreation & Entertainment Goods/Services	Quick Service Restaurants	\$3,687	\$23,267,646	\$2,895	\$143,382,394	\$2,794	\$247,538,744	\$2,760	\$857,772,045
	Full Service Restaurants	\$2,399	\$15,142,420	\$1,861	\$92,166,970	\$1,813	\$160,635,164	\$1,790	\$556,422,858
	Arts & Entertainment	\$333	\$2,101,008	\$249	\$12,335,097	\$226	\$19,992,396	\$205	\$63,690,047
	Fitness & Leisure	\$496	\$3,128,656	\$355	\$17,591,999	\$345	\$30,596,712	\$339	\$105,381,293
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$2,430	\$15,333,179	\$1,836	\$90,933,774	\$1,792	\$158,747,804	\$1,777	\$552,423,027
	Auto/RV/Motorsports Dealership	\$4,608	\$29,082,385	\$3,438	\$170,278,939	\$3,362	\$297,796,128	\$3,384	\$1,051,712,155
	Auto Fuel	\$2,586	\$16,319,650	\$2,068	\$102,406,492	\$1,994	\$176,635,546	\$1,973	\$613,348,472
<b>TOTAL CATEGORIES</b>		<b>\$47,730</b>	<b>\$301,225,817</b>	<b>\$37,042</b>	<b>\$1,834,726,697</b>	<b>\$35,953</b>	<b>\$3,184,797,207</b>	<b>\$35,375</b>	<b>\$10,995,414,845</b>
<b>TOTAL RETAIL (excluding Health Care &amp; Auto)</b>		<b>\$37,035</b>	<b>\$233,729,840</b>	<b>\$28,924</b>	<b>\$1,432,623,536</b>	<b>\$28,036</b>	<b>\$2,483,456,559</b>	<b>\$27,445</b>	<b>\$8,530,396,341</b>

**Table 9: Ten-year Trade Area Retail Spending Potential 2035**

(Source: FBM & Manifold Data Mining Inc.)

Retail Spending by Merchandise Category		2035		2035		2035		2035	
		GLEBE 10-Minute Walking Trade Area Household Retail Spending	GLEBE 10-Minute Walking Trade AreaAggregate Retail Spending	GLEBE 10-Minute Cycling Trade Area Household Retail Spending	GLEBE 10-Minute Cycling Trade Area Aggregate Retail Spending	GLEBE 10-Minute Driving Trade Area Household Retail Spending	GLEBE 10-Minute Driving Trade Area Aggregate Retail Spending	LANSDOWNNE 20-Minute Driving Trade Area Household Retail Spending	LANSDOWNNE 20-Minute Driving Trade Area Aggregate Retail Spending
Convenience & Day- to-Day Goods/Services	Grocery & Convenience	\$11,112	\$83,615,947	\$8,734	\$523,838,715	\$8,458	\$902,414,124	\$8,378	\$3,030,280,922
	Pharmacy	\$1,135	\$8,540,116	\$862	\$51,688,149	\$856	\$91,336,167	\$856	\$309,657,877
	Alcohol, Tobacco & Cannabis	\$1,942	\$14,614,629	\$1,704	\$102,228,557	\$1,654	\$176,511,370	\$1,576	\$570,117,132
	Personal Services	\$697	\$5,242,624	\$518	\$31,063,124	\$510	\$54,360,891	\$512	\$185,305,200
	Health Care & Medical Services	\$1,183	\$8,904,670	\$858	\$51,474,704	\$850	\$90,683,652	\$880	\$318,202,550
		\$0							
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$3,062	\$23,038,520	\$2,416	\$144,916,815	\$2,367	\$252,494,474	\$2,349	\$849,503,724
	Jewelry	\$262	\$1,968,189	\$210	\$12,599,159	\$205	\$21,863,316	\$191	\$69,070,368
	Beauty & Personal Care	\$1,409	\$10,601,343	\$1,205	\$72,282,132	\$1,148	\$122,434,992	\$1,057	\$382,155,549
	Home Furniture & Décor	\$1,579	\$11,878,399	\$1,234	\$74,031,840	\$1,206	\$128,702,509	\$1,184	\$428,314,559
	Appliances & Electronics	\$2,191	\$16,490,079	\$1,676	\$100,531,062	\$1,637	\$174,687,482	\$1,616	\$584,643,345
	Home Improvement & Gardening	\$6,700	\$50,416,882	\$4,739	\$284,231,543	\$4,560	\$486,477,201	\$4,385	\$1,586,197,832
	Books & Media	\$916	\$6,893,427	\$873	\$52,365,770	\$847	\$90,316,565	\$824	\$298,003,130
	Sporting Goods	\$487	\$3,664,619	\$435	\$26,062,638	\$410	\$43,795,762	\$401	\$145,085,515
	Toys & Hobbies	\$353	\$2,654,151	\$254	\$15,239,799	\$258	\$27,491,567	\$279	\$100,873,678
Specialty Retail	\$1,429	\$10,750,671	\$1,168	\$70,053,056	\$1,132	\$120,826,254	\$1,082	\$391,228,711	
Leisure, Recreation & Entertainment Goods/Services	Quick Service Restaurants	\$4,073	\$30,646,051	\$3,198	\$191,782,937	\$3,087	\$329,332,927	\$3,048	\$1,102,653,839
	Full Service Restaurants	\$2,650	\$19,944,233	\$2,055	\$123,279,099	\$2,003	\$213,713,813	\$1,977	\$715,273,719
	Arts & Entertainment	\$368	\$2,767,259	\$275	\$16,498,965	\$249	\$26,598,480	\$226	\$81,872,656
	Fitness & Leisure	\$548	\$4,120,784	\$392	\$23,530,401	\$382	\$40,706,778	\$375	\$135,466,162
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$2,684	\$20,195,484	\$2,028	\$121,629,621	\$1,980	\$211,202,813	\$1,963	\$710,131,993
	Auto/RV/Motorsports Dealership	\$5,090	\$38,304,701	\$3,797	\$227,758,752	\$3,714	\$396,196,850	\$3,738	\$1,351,961,109
	Auto Fuel	\$2,856	\$21,494,774	\$2,284	\$136,975,100	\$2,203	\$235,001,199	\$2,180	\$788,450,790
<b>TOTAL CATEGORIES</b>		<b>\$52,724</b>	<b>\$396,747,550</b>	<b>\$40,917</b>	<b>\$2,454,061,939</b>	<b>\$39,715</b>	<b>\$4,237,149,183</b>	<b>\$39,076</b>	<b>\$14,134,450,360</b>
<b>TOTAL RETAIL</b> (excluding Health Care & Auto)		<b>\$40,910</b>	<b>\$307,847,921</b>	<b>\$31,950</b>	<b>\$1,916,223,762</b>	<b>\$30,969</b>	<b>\$3,304,064,670</b>	<b>\$30,316</b>	<b>\$10,965,703,918</b>

### 3.5.2 Miscellaneous Inflow Spending

In broad terms, miscellaneous inflow is derived from a variety of audience segments that represent additions to the typical trade area population. For the Glebe, these additional audience segments are the staff and students at Carleton University, visitors to both the Glebe and to Lansdowne events specifically, and the office workforce.

Conservative estimates for Miscellaneous inflow spending accounts for a range of 1% to 10% of the Glebe’s respective trade area retail spending. This approach is used as there is no direct spending profile available for the Lansdowne Park annual events attendance.

Therefore, in lieu of this, generalized percentages were applied to give a high level value to the significance of miscellaneous inflow spending.

Accordingly, and using the Lansdowne 20-minute drive time as the basis upon which miscellaneous inflow would augment reveals a conservative figure of \$185.3 million in additional retail-specific spending attracted to the Glebe area for a wide range of retail goods and services.

**Table 10: Miscellaneous Inflow Retail Spending 2025**

(Source: FBM & Manifold Data Mining Inc.)

Miscellaneous Inflow Factor	Retail Spending by Merchandise Category	2025	2025	2025	2025
		GLEBE 10-Minute Walking Trade Area Misc Inflow	GLEBE 10-Minute Cycling Trade Area Misc Inflow	GLEBE 10-Minute Driving Trade Area Misc Inflow	GLEBE 20-Minute Driving Trade Area Misc Inflow
Convenience & Day-to-Day Goods/Services	1.0% Grocery & Convenience	\$634,844	\$3,916,368	\$6,782,877	\$23,573,040
	1.0% Pharmacy	\$64,840	\$386,435	\$686,516	\$2,408,878
	1.0% Alcohol, Tobacco & Cannabis	\$110,960	\$764,290	\$1,326,724	\$4,435,032
	1.0% Personal Services	\$39,804	\$232,237	\$408,596	\$1,441,519
	<i>Health Care &amp; Medical Services</i>	\$0	\$0	\$0	\$0
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	5.0% Fashion & Footwear	\$874,586	\$5,417,197	\$9,489,207	\$33,042,126
	5.0% Jewelry	\$74,716	\$470,975	\$821,664	\$2,686,547
	1.0% Beauty & Personal Care	\$80,489	\$540,402	\$920,266	\$2,972,849
	1.0% Home Furniture & Décor	\$90,185	\$553,483	\$967,375	\$3,331,927
	1.0% Appliances & Electronics	\$125,199	\$751,599	\$1,313,015	\$4,548,034
	0.0% Home Improvement & Gardening	\$0	\$0	\$0	\$0
	1.0% Books & Media	\$52,338	\$391,501	\$678,853	\$2,318,214
	5.0% Sporting Goods	\$139,116	\$974,259	\$1,645,925	\$5,643,217
	5.0% Toys & Hobbies	\$100,757	\$569,685	\$1,033,184	\$3,923,562
	5.0% Specialty Retail	\$408,116	\$2,618,683	\$4,540,873	\$15,217,153
Leisure, Recreation & Entertainment Goods/Services	5.0% Quick Service Restaurants	\$1,163,382	\$7,169,120	\$12,376,937	\$42,888,602
	5.0% Full Service Restaurants	\$757,121	\$4,608,349	\$8,031,758	\$27,821,143
	10.0% Arts & Entertainment	\$210,101	\$1,233,510	\$1,999,240	\$6,369,005
	2.5% Fitness & Leisure	\$78,216	\$439,800	\$764,918	\$2,634,532
Automotive Goods (excluding repair)	0.0% Auto Parts & Accessories	\$0	\$0	\$0	\$0
	0.0% Auto/RV/Motorsports Dealership	\$0	\$0	\$0	\$0
	0.0% Auto Fuel	\$0	\$0	\$0	\$0
<b>TOTAL RETAIL CATEGORIES ONLY</b>		<b>\$5,004,770</b>	<b>\$31,037,892</b>	<b>\$53,787,928</b>	<b>\$185,255,382</b>

# 4.0 Surveys & Interviews

## 4.1 Online Surveys

This study included two online surveys to gain a broad understanding of local perspectives regarding the Glebe BIA's retail offerings. In this section we present an overview of the results from both surveys.

### 4.1.1 Methodology

Two online surveys ran concurrently with one another from June 23, 2025 to July 13, 2025: a customer survey and a business member survey, both of which were shared via Glebe BIA communication channels. Both surveys focused on understanding perspectives on the Glebe retail shopping area using a mix of opened- and closed-ended questions.

All survey questions are provided in **Appendix B: Customer Survey Questions** and **Appendix D: BIA Member Survey Questions**, with the complete set of survey results included in **Appendix C: Customer Survey Results** and **Appendix E: BIA Member Survey Results**.

### 4.1.2 Survey Respondents

#### *Customer Survey*

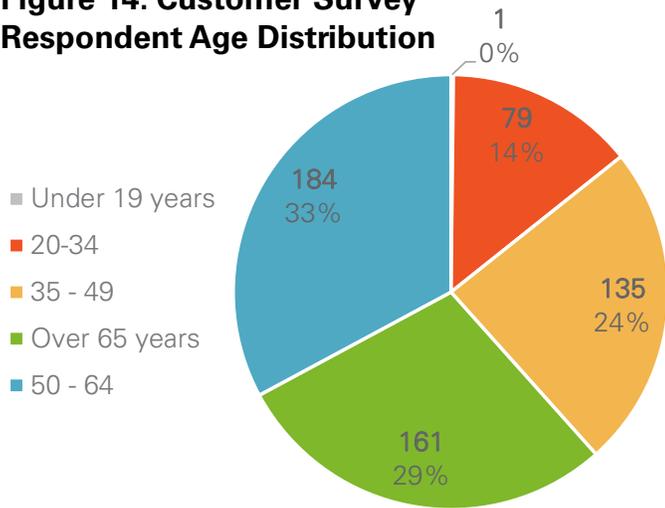
The Customer Survey received 589 responses. Females were most strongly represented (67% of respondents), followed by males (30%). As seen in **Figure 14**, the age distribution of respondents shows there is a strong and balanced representation among adult age groups in this survey, from young adults up to retirees. Respondents mostly live within a 15-30 minute travel time (via their primary mode of transport), with nearly half (257 respondents) saying that they live in the Glebe already.

#### *Member Survey*

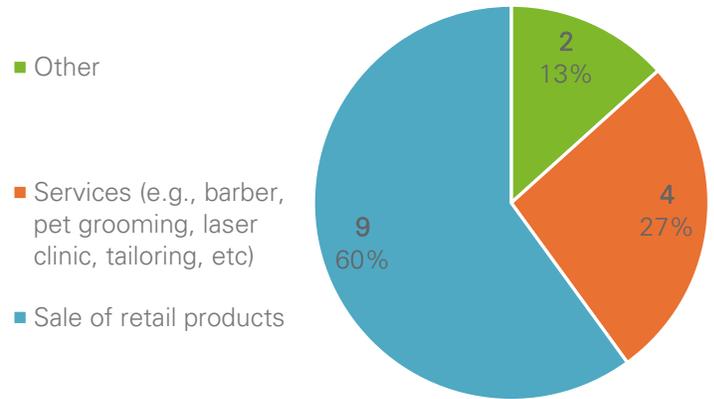
The Member survey was targeted received a total of 18 responses from Glebe BIA business representatives. Eleven were located in the Central park of the Glebe BIA, four in Lansdowne area, and two in North Glebe BIA. Nine of the businesses are in the sale of retail products, four consider themselves services, and two placed themselves as 'Other'.



**Figure 14: Customer Survey Respondent Age Distribution**



**Figure 15: Member Survey Respondent Business Type**



### 4.1.2 Survey Results

Most close-ended questions are presented throughout this section in the form of charts and graphs, along with supporting sample quotes from responses to open-ended questions.

#### Local vs. Brand Offerings

Both surveys asked how respondents felt about the Glebe shopping area's offering of local versus brand businesses. Sentiments were similar among Customers and Business Members. **Figure 16** shows the responses from the customer survey, which show that 346 respondents felt that there were too few Local businesses while 272 felt there were too many Branded businesses. When asked whether they would be willing to pay slightly more for a local product or service, 88% of respondents in the customer survey said 'Yes' (**Figure 17**).

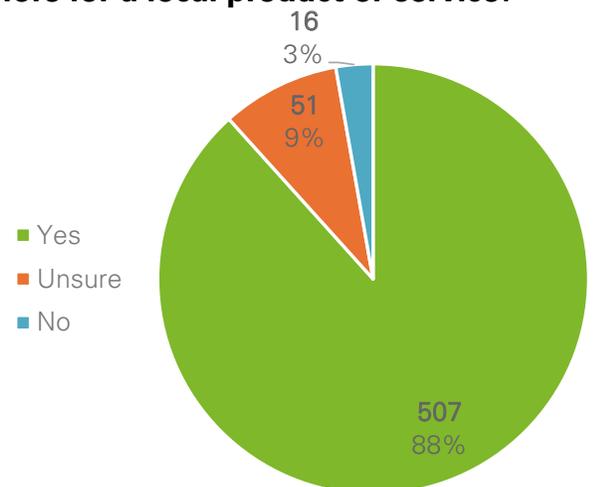
*"Some branded discount shops such as Dollarama or Giant Tiger could be very helpful for local residents, while other branded shops (big box-types) would probably take away from the cachet of the area."*

*"Too many fast food, cannabis and brand chains in Bank St crowding out local unique retailers and take away from the distinct community retail appeal of the Glebe."*

**Figure 16: Customer Perception regarding Local vs. Brand Offerings**



**Figure 17: Are Customers willing to pay slightly more for a local product or service?**



### Primary Reason to Visit the Glebe

As shown in **Figure 18**, the main reason customers identified, by far, for visiting the Glebe shopping area is that they live there (50%). The subsequent top reasons were shopping for non-essentials (13%) and then shopping for groceries or other day-to-day essentials (12%).

### The Glebe's Retail Offerings by Category

A core question on both surveys - and for this retail study as a whole - sought to understand how customers viewed the Glebe based on retail merchandise category. Customer's perspectives are shown on **Figure 19** and Member business perspectives on **Figure 20**.

When interpreting the charts, green bars show how many indicated that they would go to the Glebe if they were looking for that product or service (or that the Glebe is known for that product or service, in the case of the Member survey). The yellow bars are those categories respondents felt are underrepresented and the red those that are overrepresented.

We will look primarily at the results of the Customer Survey, as this study is most concerned with customer demand, using the Member survey results for comparison. Looking first at **the categories for which the Glebe is known**, we can see the following are the top categories in the Customer Survey:

1. Groceries & Specialty Foods
2. Pharmacy
3. Full-Service Restaurants
4. Home Improvements & Gardening
5. Personal Services

The Member Survey identified similar categories, and placed more emphasis on Jewellery & Accessories as well Sporting Goods.

As for the retail categories for which respondents selected "**I wish there were more in the Glebe**"; the customer survey highlighted the following:

1. Clothing & Footwear
2. Arts & Entertainment
3. Home Furniture & Décor
4. Books, Video Games, & Other Media
5. Groceries & Specialty Goods

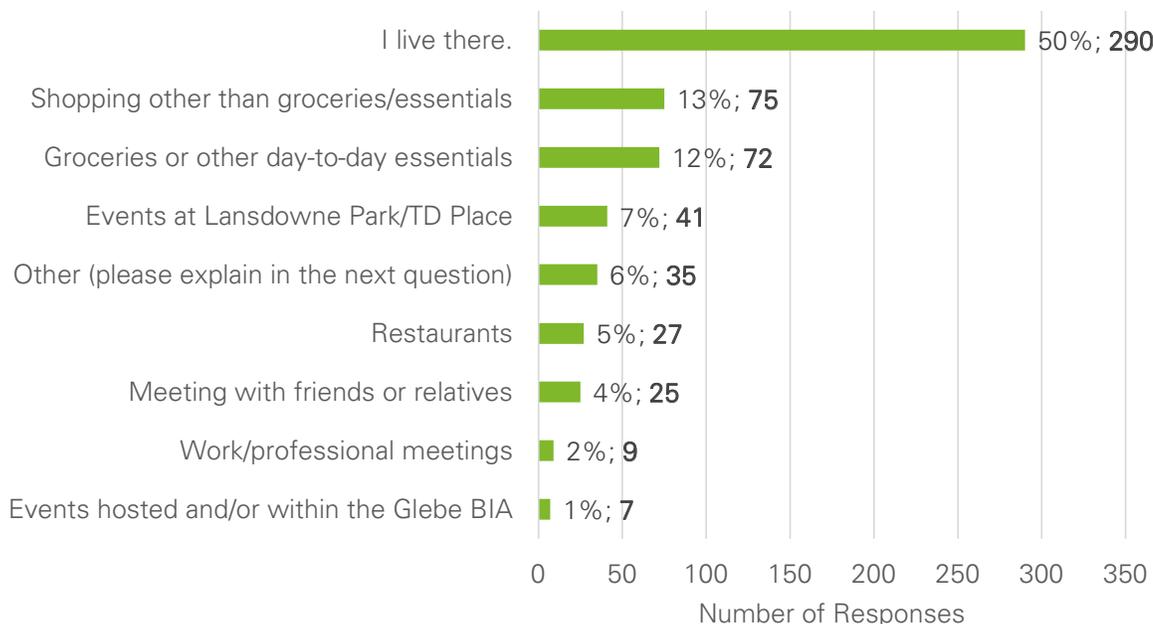
The Member Survey also identified a need for more Home Furniture & Décor and Clothing & Footwear, but also for more Toys & Hobbies.

In general, Customer respondents indicated that most categories were not **overrepresented** in the Glebe, which the clear exception of:

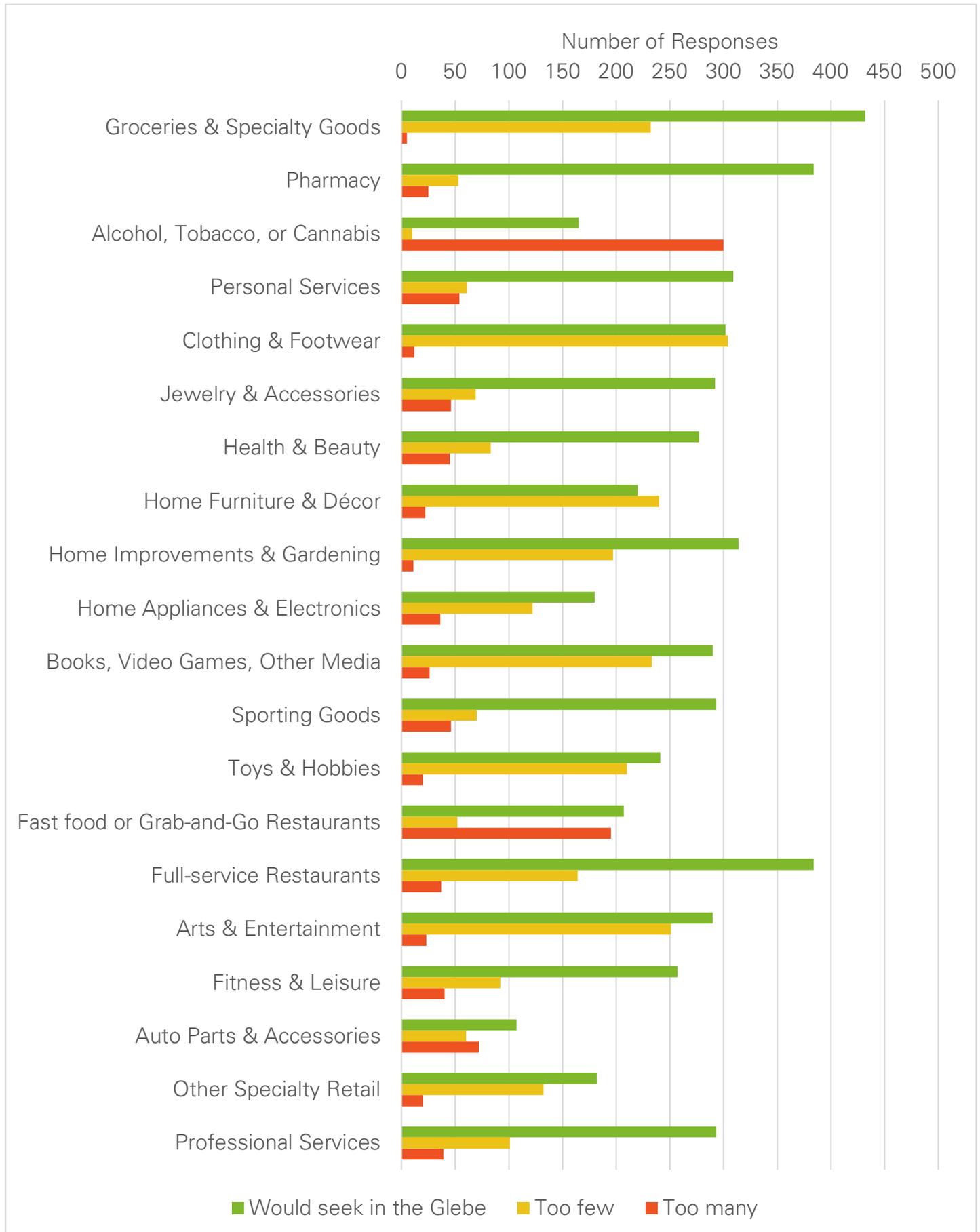
1. Alcohol, Tobacco, or Cannabis; and
2. Fast Food or Grab-and-Go Restaurants.

The Member responses echoed the oversupply of the above two categories, and added Auto Parts & Accessories to the list.

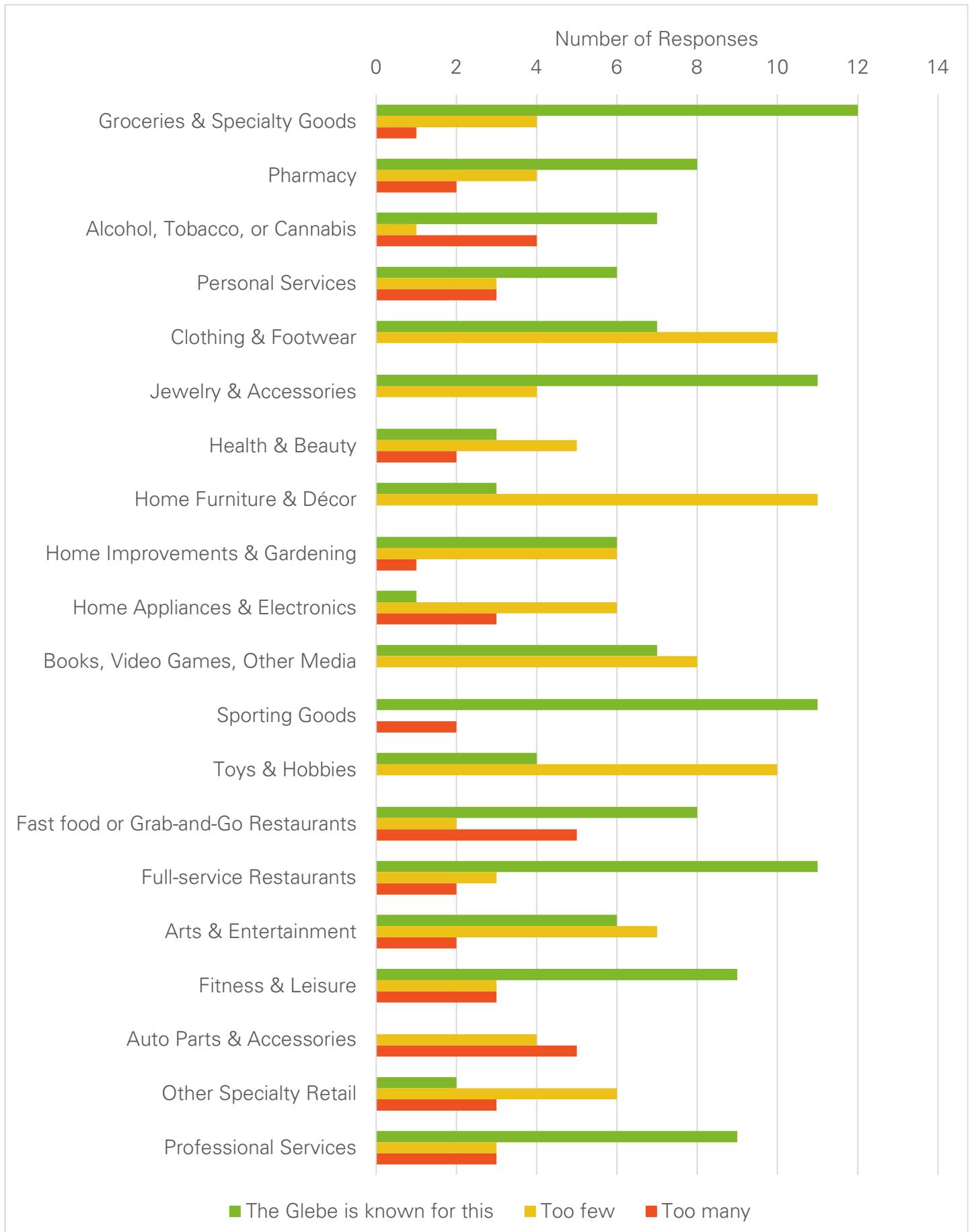
**Figure 18: Why do customers visit the Glebe shopping area?**



**Figure 19: Customer Perspectives on Retail Categories in the Glebe**



**Figure 20: Business Member Perspectives on Retail Categories in the Glebe**



Respondents were provided the opportunity to share **additional comments about shops and services offered within the Glebe BIA**. Though there were multiple positive comments regarding the mix, the following key themes emerged from an analysis of customer survey responses regarding the retail mix in the Glebe (including sample direct quotes from the survey):

*"It's a good mix."*

*"Love all the coffee shops and thrift stores that have been opening up"*

*"Most of the local shops available are great (coffee, food, clothing, footwear)"*

**Local vs. Branded Businesses:** The strongest theme was preserving the Glebe's "village feel" by ensuring there are many local shops. Some respondents expressed a desire for certain large brands (Lululemon, Indigo, Sephora, Anthropologie, Crate & Barrel) but others saw too many brands as diluting the Glebe character.

*"Local businesses are what make the Glebe special and worth walking/bussing to!"*

*"We need to keep the variety and village feel of the neighbourhood"*

**Lansdowne:** Several respondents expressed that Lansdowne feels like a different type of shopping area than the rest of Glebe, identifying the need for more local businesses in that area, and at least two respondents noting how music played on speakers in the area is out of place.

*"Lansdowne feels like a strip mall and very different from the local feel of the rest."*

*"I would like to see more variety in local businesses especially at Lansdowne."*

### Top Identified Gaps:

- **Retail:** more affordable and natural/health grocery options; convenience stores; discount/dollar stores; clothing (women & children, lingerie, second-hand); footwear; boardgames; toy store; new and used bookstores; hobby stores; gardening; fish market; home décor, outdoor gear.
- **Food & Beverage:** outdoor patios; bakeries; more gluten-free options; sit-down cafés; more Asian restaurants (specifically Chinese, Thai, Vietnamese, Japanese); high-end restaurants; family-friendly; street food
- **Services:** medical services (family doctor, walk-in clinic, seniors' health, diagnostics services); shoe repairs; dry cleaning
- **Public & Cultural Amenities:** public washrooms; community spaces; galleries; improved sidewalks; more parking
- **Activities:** family-friendly activities (e.g., play café, escape room; mini-put); climbing gym; swimming; bowling; music/dancing venues

*"More book shops and second hand clothing/items"*

*"More kids stuff."*

*"More affordable grocery options as well as more affordable retail options would be nice."*

*"Need better patios for bars, and more bars in general that offer music and dancing"*

*"Vietnamese restaurant. Medical clinic. A shuttle bus that goes from lansdowne park to rideau centre. Public rest room."*

*"I think we have enough pubs, restos and coffee shops! Those are nice for visitors, and for the occasional splurge, but as a local resident, but as a local, grocers of all types, hardware, clothes, sports, hobbies etc. are more useful."*

**Top Identified Oversupply:** restaurants, coffee shops, cannabis, fast-food chains; sex store.

*"There are too many cannabis shops."*

*"The Stag Shop is out of place."*

### Restaurant and Food Service Preferences

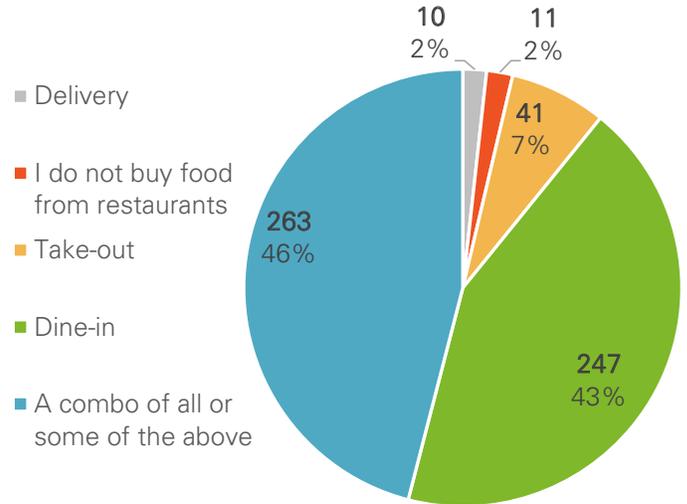
The Customer Survey asked what kinds of restaurants were of most interest to respondents **Figure 22**. The highest level of interest was in visiting a Café or Coffee Shop - which resonates with how so many cafés have been able to operating successfully in the Glebe. International Foods received the next highest level of interest, with Pubs & Bars and Family-style sit-down restaurants voted for next and receiving a similar level of interest.

When asked whether they most often purchase food from restaurants via take-out, delivery, or dine-in, the vast majority was split almost evenly between 'A combo of all or some of the above' (46%) and 'Dine-in' (43%) (**Figure 21**).

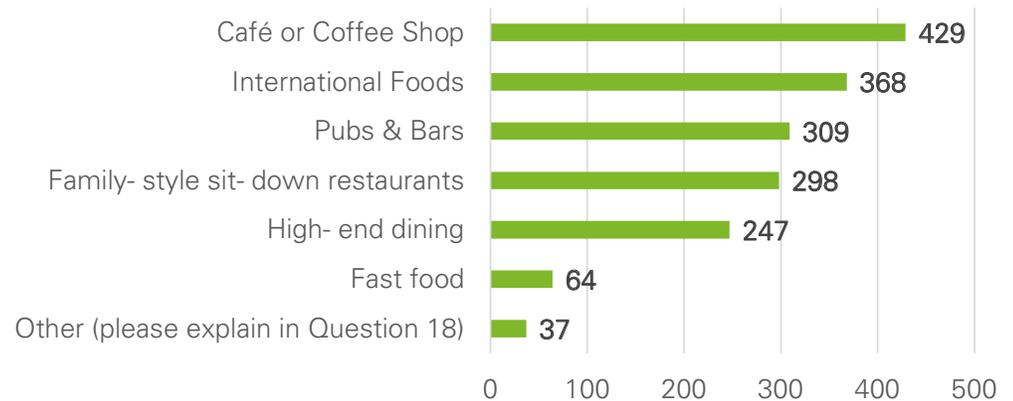
### Purchasing & Pick-Up Options

Member survey respondents identified all of the purchasing, pick-up, and delivery options provided by their business (**Figure 23**), which provides an idea of the Glebe BIA businesses engagement in omni-channel retail trends. The question was relevant to 11 of the 18 member respondents. Most provide a combination of options, particularly a mix of in-store purchases, in-store pick ups of online orders, and delivery via a third party delivery service.

**Figure 21: Customer preferences between dine-in, take-out, and delivery for restaurants**



**Figure 22: Restaurant type preferences from Customer Survey**



**Figure 23: Purchasing, delivery, & pick-up options from Business Member Survey respondents**



## Traveling to the Glebe

Customers were asked which mode of transportation they primarily use to travel to the Glebe shopping area, with their responses shown in **Figure 24**. Members were asked which mode they perceive to be the most important for their customers (**Figure 25**).

Member respondents perceive motor vehicles to be much more important than reflected in the customer survey responses (94% versus 14%), with customers favoring walking. Customers' preference among public transit (11%), cycling (13%), and motor vehicles (14%) is evenly distributed.

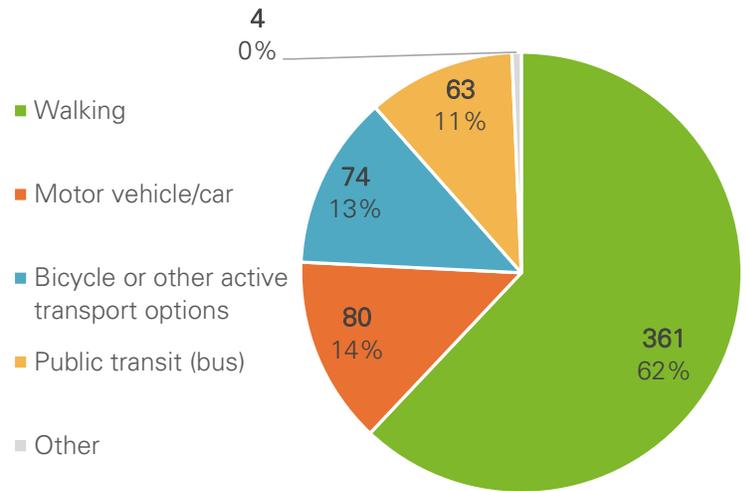
The discrepancy between the two could simply be that member respondents happen to represent businesses with a more auto-dependent clientele, but it also could suggest that member businesses overestimate the importance of motor vehicles to their customers.

Members were also asked to rank the modes of transportation in what they perceived to be their order of importance for their customer base (see figure in the Appendices). Motor vehicles were ranked #1 by 12 respondents, walking as #1 by 4, and public transit as #1 for 2. Walking was ranked as #2 by 8 respondents, and public transit ranked as #3 by 7 respondents. Cycling, E-bikes/e-scooters and motorcycles were seen as much less important, mostly ranked as #4, #5, and #6.

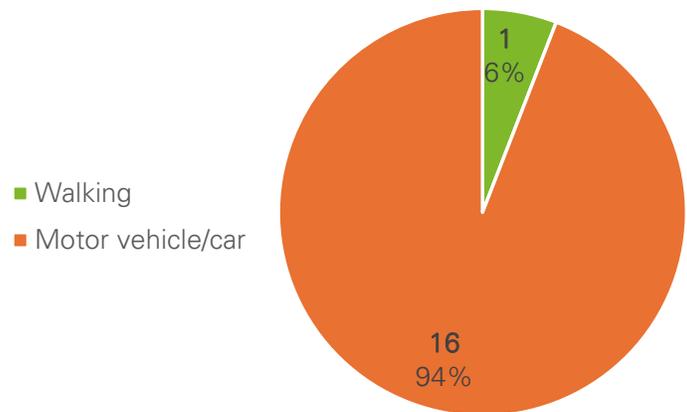
**Figure 26** shows the length of time it takes customers to travel to the Glebe using their identified primary mode of transportation. The responses shows that about half already live in the area (which includes those who take 5 minutes or less to get to the BIA), which is consistent with the previous finding that about half of respondents visit the Glebe because they live there. Most non-Glebe residents are able to travel to the Glebe in 15 to 30 minutes or less.

The customer responses support that the Glebe is a well established walkable shopping district for which motor vehicles, public transit, and cycling play a role as supporting or secondary modes of customer transportation.

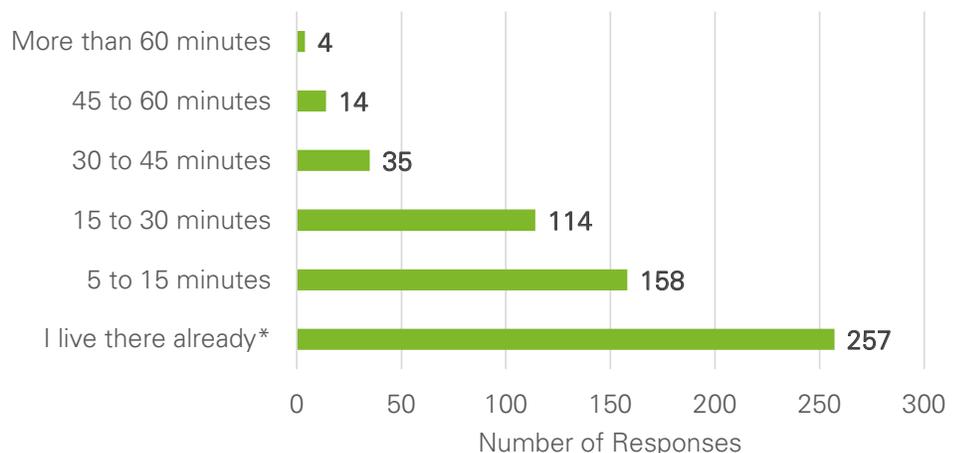
**Figure 24: Primary mode of travel to the Glebe from the customer survey**



**Figure 25: Primary customer mode of travel to the Glebe from the member survey**



**Figure 26: Customer survey travel time to the Glebe via preferred transport mode**



## The Glebe's Greatest Strengths

**Figure 27** and **Figure 28** show what the customer and member respondents, respectively, perceive to be the Glebe shopping area's greatest strengths.

The top strengths identified were as follows:

1. Centrally located (#1 for both)
2. Historic aesthetic (#2 for Customers; #3 for Members)
3. Wide variety of shops & services (#3 for Customers; #4 for Members)
4. Lots of people and activity along the main streets (#4 for Customers, #2 for Members)
5. A wide variety of restaurants and Events at Lansdowne (#5 or #6 depending respondent group).



*"The Glebe has a nice community feel."*

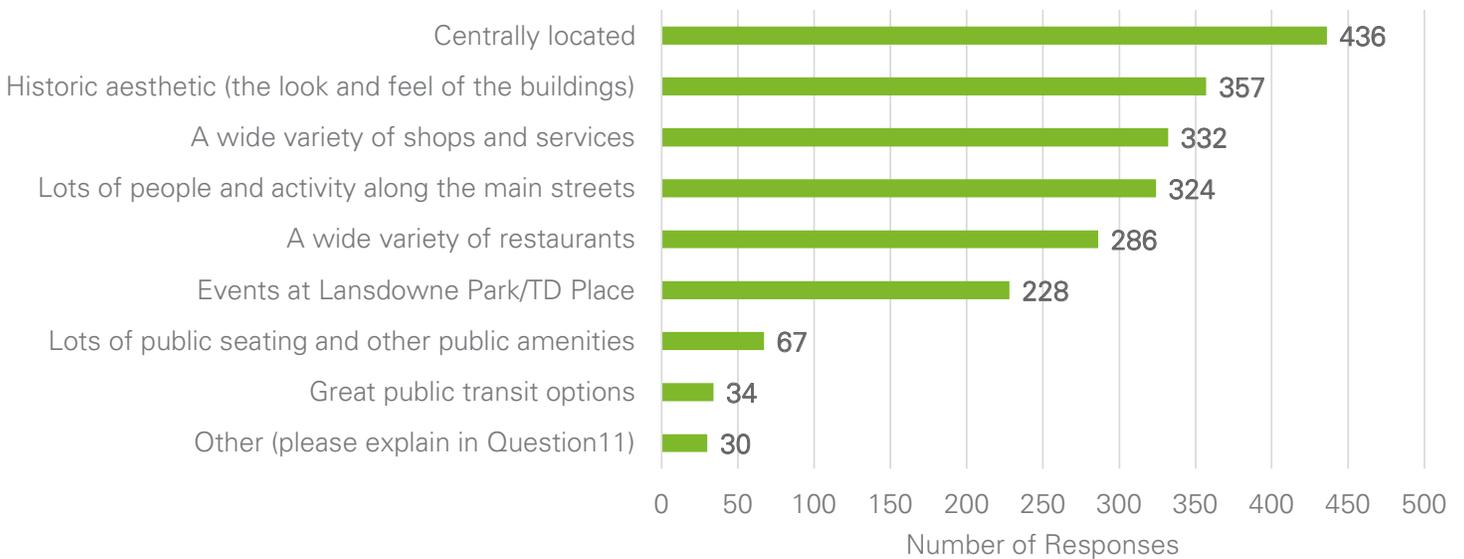
*"The Glebe has a great atmosphere, the historic buildings on Bank St and elsewhere in the neighbourhood give a kind of European experience."*

*"I appreciate the unique businesses and aspects of the area and not the generic parts"*

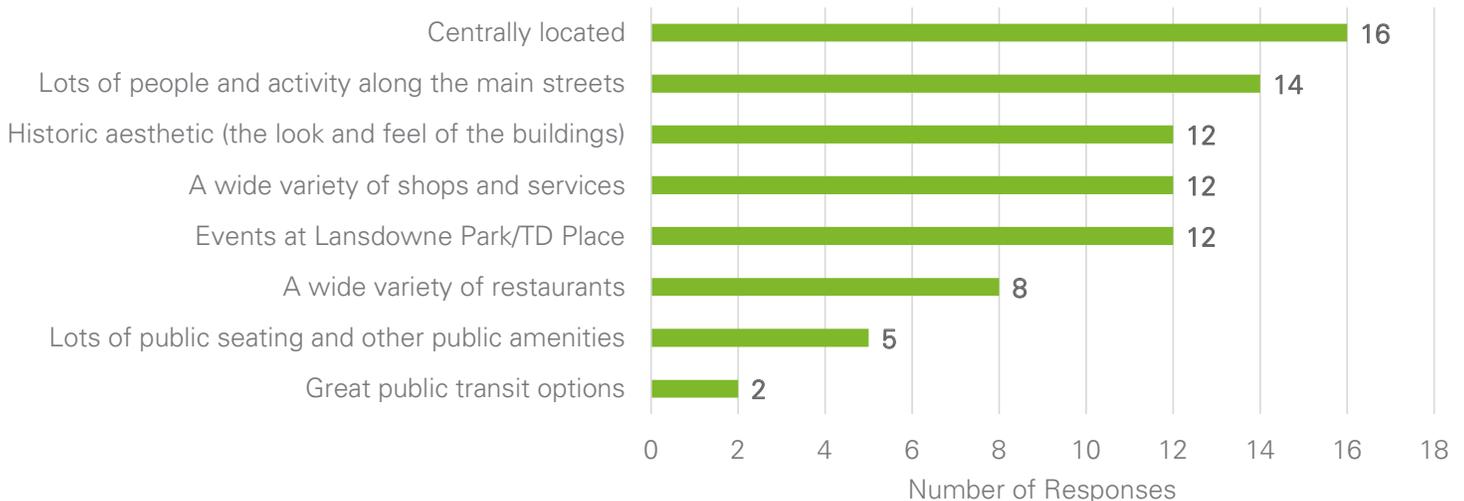
*"Unique Glebe shops with longtime employees who I know by name"*

*"Most shops in the glebe, you buy things you can carry home without big cars. I'd focus on that! keep things local, walkable, and inviting."*

**Figure 27: The Glebe's greatest strengths from the Customer Survey**



**Figure 28: The Glebe's greatest strengths from the Member Survey**



## The Glebe's Greatest Customer Barriers

Customer and Member perspectives on the main barriers to customers visiting the Glebe are shown in **Figure 29** and **Figure 30**.

The top barriers identified were as follows:

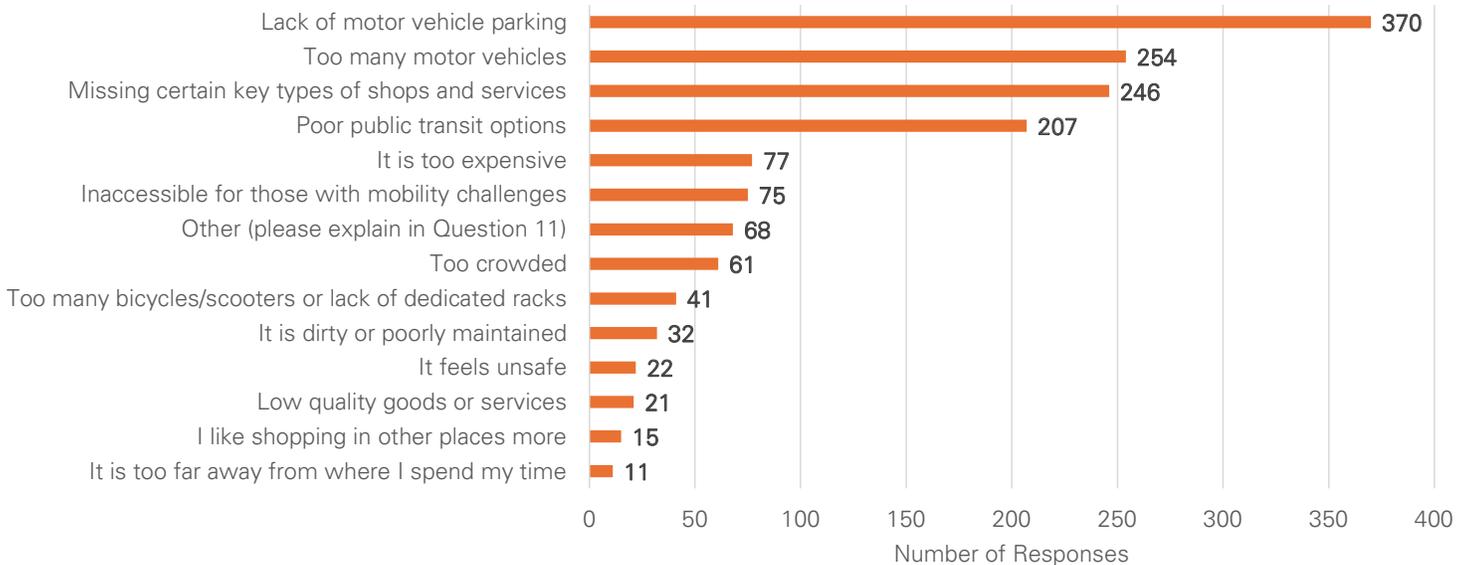
1. Lack of motor vehicle parking (#1 for both)
2. Too many motor vehicles (#2 for Customers; #4 for Members)
3. Missing key types of shops & services (#3 for Customers; #2 for Members)
4. Poor public transit options (#4 for Customers, #3 for Members)

The remaining potential barriers received far fewer votes than the above four reasons.

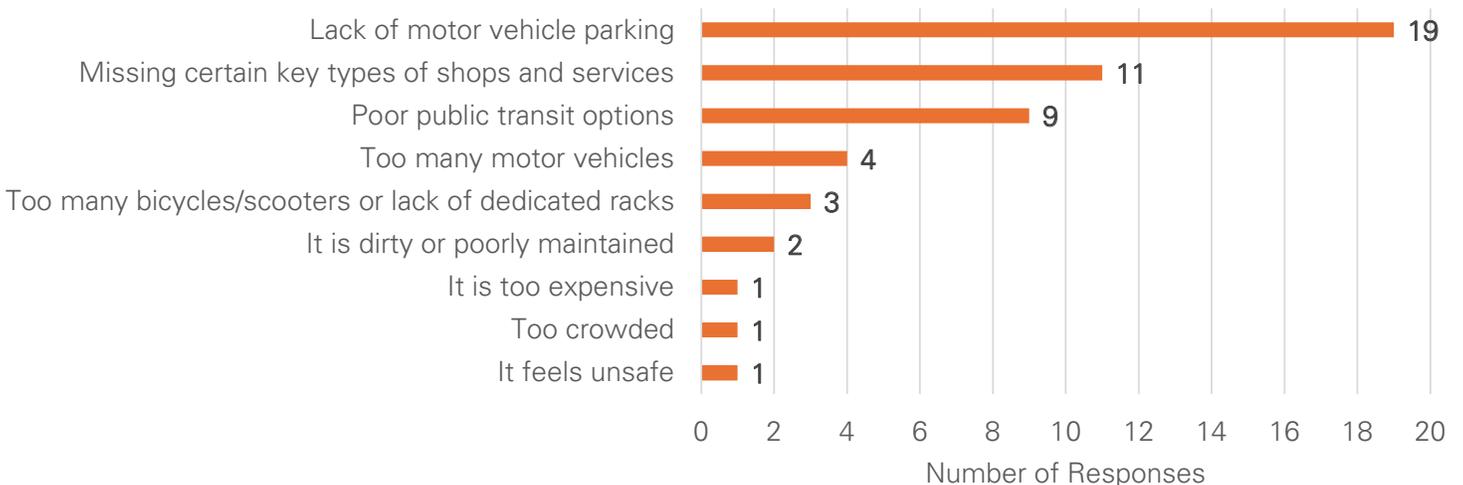
An additional insight from the open-ended question responses is the need for wider, less obstructed, and better-maintained sidewalks. Improving the pedestrian experience in general was repeated frequently and opinions are divided over the whether there is a need for on-street parking on Bank St.

Looking at responses to the **open-ended questions** (see sample quotes on next page), there was both support and opposition to on-street parking, cycling lanes, and bus lanes; however, improving pedestrian experiences by ensuring clearer and wider sidewalks was widely agreed upon.

**Figure 29: The Glebe's greatest customer barriers from the Customer Survey**



**Figure 30: The Glebe's greatest customer barriers from the Member Survey**



“Street parking should be banned, businesses use it more than actual customers. More space for pedestrians. Better transit options needed with access to park and rides.”

“It needs to make driving and parking plentiful and easy.”

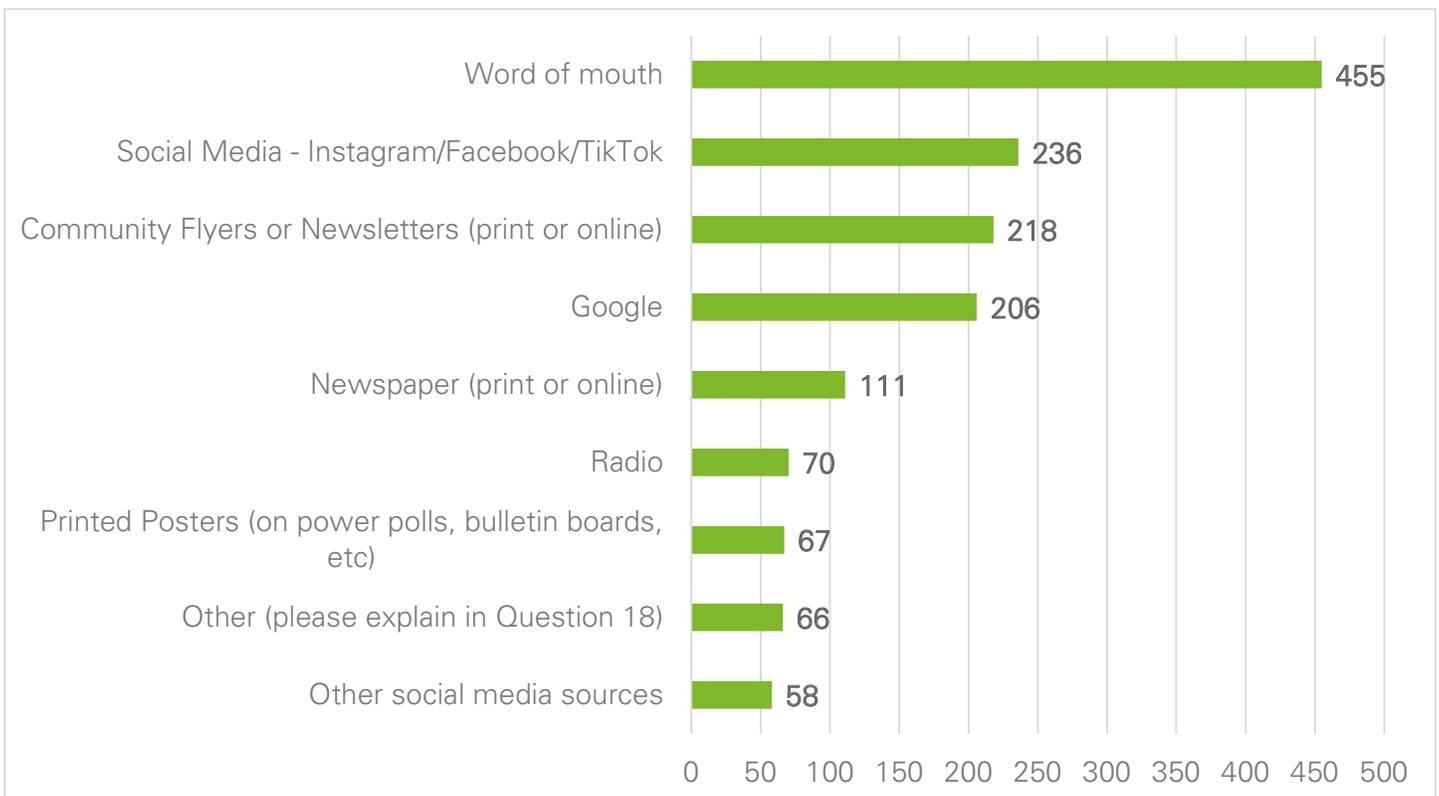
“the sidewalks aren’t wide enough for how many people walk (and the sidewalks are taken up by power lines, bike racks, etc)”

“Too many cars and parking make it an unpleasant experience”

### Top Information Sources for Customers

**Figure 32** shows the top ways Glebe customers find information about where they shop or dine. Word of mouth is clearly most important, identified by 455 of the 589 respondents. The next three top ways customers get their retail and restaurant information is via social media, print or online community flyers/newsletters, and Google. The importance of the community news letter makes sense considering that this is one of the main ways this survey was shared.

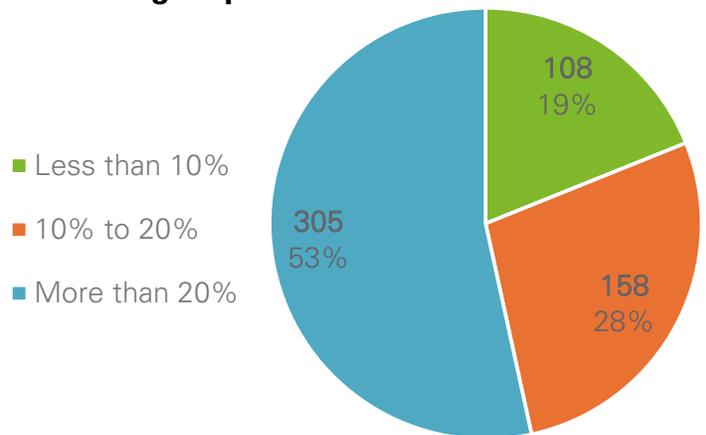
**Figure 32: How customers find information about where the shop or dine**



### Customer Spending in the Glebe

The customer survey asked what percentage of the respondent’s average annual retail and food/ beverage spending they thought they spent in the Glebe BIA (**Figure 31**). Over half responded that they spend more than 20% of their budget in the Glebe, with just over a quarter spending between 10% and 20%, and the rest spending less than 10% of their annual retail spending. This suggests that the Glebe has a strong and stable share of trade area spending relative to the broader competitive market.

**Figure 31: Percent of Customer’s annual retail budget spent in the Glebe BIA**





## 4.2 Interviews

To add further depth to the survey findings, we interviewed several business representatives.

### 4.2.1 Methodology

Interviews were conducted via phone call from August to September 2025 with representatives of six businesses from across the BIA, from different types of business. The five questions focused on the Glebe's reputation, retail mix, strengths, weakness, and threats/opportunities moving into the future. To protect respondent anonymity, key themes from the interviews are summarized at a high level presented one question at a time.

### 4.2.2 Key Take-Aways from Interviews

#### *Question 1: Reputation*

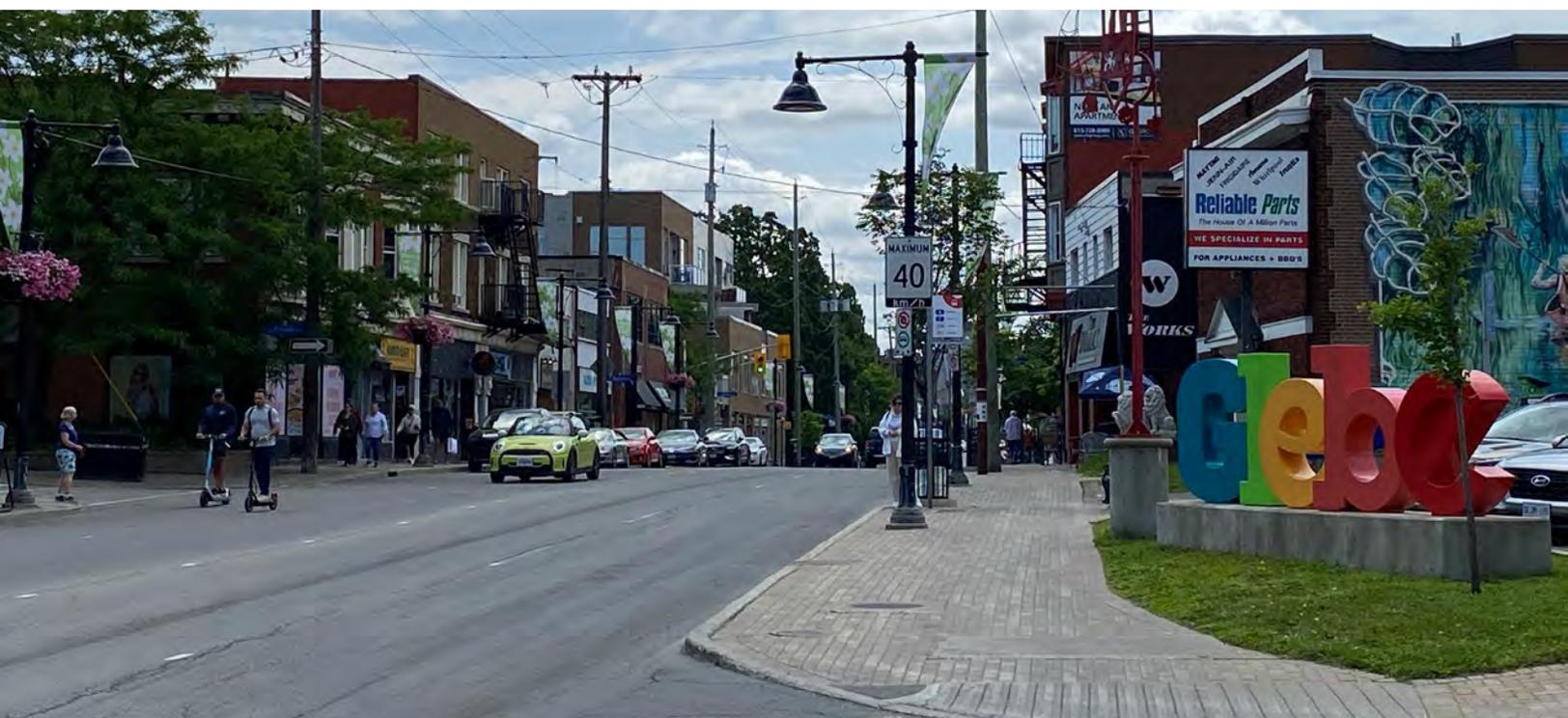
*What are the main reasons most people come to the Glebe shopping area, as opposed to visiting one of the many other shopping districts around central Ottawa?*

A strong **reputation** was a - if not the - main reason interviewees identified that lead people to choose the Glebe. Most pointed to how the neighbourhood is known for being able to effectively serve both purpose-driven customers - those visiting with a specific goal - and also

visitors looking to enjoy a leisurely walking and window-shopping experience in a pretty, well-maintained, and distinctively historic neighbourhood. Compared to other shopping areas in Ottawa, the Glebe has a unique feel.

The **physical built-form of the Glebe was identified as key to its reputation**: the historic, upscale, and well-maintained storefronts and street beautification in particular. The compact nature of the area, enclosed by the Queensway and water features, and the diverse shops and services make it highly walkable, which was also frequently mentioned. One noted the area is appealing to **"European" style shoppers**: those seeking to pick up only what they intend to eat within the same day or so. The walkable form was noted as beneficial to both locals walking from their nearby homes as well as for out-of-area visitors looking to park-and-walk.

Most interviews also identified the Glebe's **diverse and unique retail offering** as a major draw to customers. Multiple well-established businesses have been operating on this stretch of Bank St for decades. It is well-known that one can accomplish multiple tasks with the many goods and services available in one small area. The Glebe businesses are known to be locally owned and operated, offering high-quality, varied, and unique goods that cannot easily be found in other major shopping areas in Ottawa.



The Glebe is also known for **events**, which draw more customers to the area. Major events at Lansdowne and TD Place were noted by most as a primary avenue through which new clients or customers discover their establishment. A special market event in the Kunstadt parking lot was also noted, as well as the regular Farmers' Market that takes place in Lansdowne's Aberdeen Pavilion.

### **Question 2: Retail Offerings**

*Thinking about all the different types of shops, restaurants, and services offered within the Glebe BIA, are there are specific categories you feel are underrepresented or overrepresented?*

Most of the individuals interviewed expressed that the retail mix at the Glebe is **well-balanced**, with two noting that local demand seems to naturally weed out businesses that are in oversupply (e.g. both were referring to multiple cannabis shops that closed recently).

Types of stores interviewees said would be valuable and fitting additions to the Glebe were a **fresh fish store (or a fish monger), boutique butcher, Bulk Barn-type store, organic and natural food store, an herb and spice store, and shoe store**. One noted that they would like to see **more local** stores added, noting that these would be most suitable along main streets and side streets, rather than in Lansdowne. For food and beverage options, a **steak house** and **Chinese restaurant** were noted as gaps.

The main two business types in oversupply in the Glebe as noted by multiple interviewees were the **cannabis shop** (though most noted now that only one remains they are less concerned) and **sex shop**. Several interviewees commented that these are out of character for the Glebe, one saying the sex shop was "a shock" to the neighbourhood.

Several said that there *maybe* too many **coffee shops and restaurants**, but two of said interviewees noted that if they are able to stay in business than the high number may be fine.

### **Question 3: Strengths**

*What are the Glebe shopping area's greatest strengths?*

Two top strengths mentioned by all interviewees were the Glebe's **central location** and **walkability**. One noted how it is easy to access the Glebe via multiple transportation corridors. Walkability was noted in connection to the small geographic extent containing a wide selection of businesses.

Most interviewees also noted that the Glebe is **an authentic and supportive community**. This is a strength for retail because those living and working in the Glebe are proud to be part of the community and intentionally choose to support the businesses. Several interviewees said the businesses are great at promoting one another, which also helps new independent businesses.

Several expressed that customers appreciate the access to **excellent in-person expertise**, in how they are served directly by owner-operators who can share insights on the given good or service being sought (rather than asking Google).

### **Question 4: Barriers**

*What are the main factors that prevent or discourage customers or clients from visiting the Glebe shopping area?*

A remarkably strong theme in the responses was that **enforcement of on-street parking time limits is excessively strict**, with interviewees using strong language including "predatory", "aggressive", and "ruthless". Almost all shared that customers are receiving parking tickets for being just a few minutes late to their vehicle, and this is negatively impacting their experience in the Glebe. Several noted that varied parking time limits among different streets is a challenge.

Perspectives on parking otherwise varied. Some said there is enough, others said there is not. Two interviewees said parking is a "perceived" problem in the Glebe. One noted it is important because the niche shops are destinations for those living farther out of the immediate area.

Perspectives on transit, cycling, and traffic in general were negative: too many cars, buses, and bicycles travel down Bank St during peak hours, delayed in particular by a lack of advanced left turn signals. There was also fear of the potential impact of removing on-street parking on Bank St and adding dedicated bus lanes and/or cycling lanes. Two respondents mentioned that the transit system used to be more effective as a whole, but the recent light rail addition has negatively impacted the entire transit system, including buses.

Almost all interviewees observed an increased presence of individuals who find themselves unhoused and/or are experiencing mental health/substance abuse challenges in the Glebe since the COVID-19 pandemic. Two suggested that recent law enforcement efforts in the ByWard Market have pushed such individuals southward.

### **Question 5: Opportunities & Threats**

*What do you see as one of the greatest opportunities or challenges for the Glebe shopping area moving forward?*

Lansdowne was mentioned in response to this question by all interviewees. Most noted Lansdowne as a current major benefit in attracting more customers and several mentioned the upcoming Lansdowne 2.0 project as a change in the Glebe they anticipate to be a great opportunity for their business.

As for concerns about Lansdowne, three mentioned that music plays over speakers in the area, which feels out of character with the rest of the Glebe. One expressed that Lansdowne really only has major brands rather than the local businesses that were initially part of the vision, and another was concerned that several national brands have chosen to close their Lansdowne

locations (i.e. Lindt; Rinaldo's; Teavana). Two did also note the possible temporary disruptions expected from the Lansdowne 2.0 construction. One suggested increasing driveway access directly to Lansdowne could mitigate traffic during events.

Another identified opportunity is for the retail along Bank in Old Ottawa South to join the BIA. This collaboration would benefit the businesses in this area along Bank as well as the BIA.

Another opportunity is to improve the parking situation by providing free parking of some form. Two mentioned how Westboro BIA provides free on-street parking, and one mentioned how Lansdowne validates parking for their customers. Another suggestion was making the time limits for on-street parking consistent across all on-street parking in and around the Glebe, including on side streets.

Another potential threat anticipated by several interviewees is if the observed trend of an increased presence of people experiencing homelessness, mental health and substance abuse challenges continues in the Glebe. One respondent linked the need to consider how adding seating as a placemaking initiative should consider how these areas will be used by such individuals. Overall, they said the Glebe continues to generally be considered safe and "nice," but this possibility is a concern.

Several interviews shared concerns about the loss of historic character caused by more modern style and larger new developments along Bank St and also because of Lansdowne. One mentioned that the pro-build city council and city planners allowing many variances is a threat to maintaining the defining historic aspect of the Glebe.





# 5.0 Retail Inventory

## 5.1 Introduction

This section provides an overview of the current retail business mix that comprise the Glebe BIA's retail inventory.

The inventory provides a foundation for the demand analysis and the assessment of the current retail performance (also known as retail sales productivity). The inventory and resulting analyses will also be used to identify the potential types of tenants and/or merchandise categories that would be compatible and desirable as future additions to the Glebe retail portfolio.

### 5.1.1 Approach and Methodology

In mid June 2025, FBM conducted on-the-ground fieldwork to document the **current ground-floor retail inventory** within the Glebe BIA boundary (along with 2nd floor retail in Lansdowne, as this node's retail format differs from the other two nodes). The inventory was then compiled and further refined through desktop research, cross-referenced with the BIA's Business Member Directory, and business floor areas (SF) were estimated using geographic information system (GIS) software. The inventory primarily reflects the ground floor business square footage with the exception of Lansdowne, for which the second floor retail is included.

The inventory businesses were categorized in terms of the store name/vacancies, location, local versus branded businesses, and two and six digit North American Industry Classification System (NAICS) code, as well as by the same merchandise categories profiled in the previous retail spending section to allow for direct comparison.

For the purposes of this analysis, we have divided the study area into three nodes, as shown in **Figure 344**. Following the inventory overview, each is then profiled one at a time.

## 5.2 Total Retail Inventory Overview

As shown in **Table 111** and **Figure 355**, the total inventory for the Glebe BIA is 852,981 SF. When excluding "non-retail" categories such as Professional & Financial Services and Medical & Wellness Services, the **total retail-only inventory is 563,127 SF**.

### 5.2.1 Brand vs Local Total Retail Mix

When looking at the mix of brand versus local businesses in

Figure 34: The Glebe BIA's Retail Nodes



**Table 11: Total Glebe BIA Retail Inventory by Merchandise Category**

<b>RETAIL MERCHANDISE or BUSINESS CATEGORY</b>	<b>ALL NODES FLOORSPACE (SF)</b>	<b>ALL NODES FLOORSPACE MIX (%)</b>
NON-RETAIL (OTHER)	148,285	17.4%
FULL SERVICE F&B	112,150	13.1%
GROCERY, CONVENIENCE & SPECIALTY FOODS	91,103	10.7%
FASHION & FOOTWEAR	80,136	9.4%
PROFESSIONAL & FINANCIAL SERVICES	71,944	8.4%
ARTS & ENTERTAINMENT	64,936	7.6%
LIMITED SERVICE F&B	56,618	6.6%
FITNESS & LEISURE	40,974	4.8%
<b>VACANT</b>	34,566	4.1%
PERSONAL SERVICE	32,190	3.8%
MEDICAL & WELLNESS SERVICE	27,119	3.2%
ALCOHOL, TOBACCO & CANNABIS	26,386	3.1%
SPECIALTY RETAIL	13,943	1.6%
PHARMACY	11,993	1.4%
HOME IMPROVEMENT & GARDENING	9,007	1.1%
HOME ELECTRONICS & APPLIANCES	5,724	0.7%
SPORTING GOODS & OUTDOOR RECREATION	5,473	0.6%
AUTO/RV/MOTORSPORTS DEALERSHIP	4,859	0.6%
JEWELRY	4,829	0.6%
AUTO SERVICE	3,082	0.4%
HOME FURNISHINGS & DÉCOR	2,402	0.3%
BEAUTY & PERSONAL CARE	2,296	0.3%
BOOKS, MEDIA & VIDEO GAMES	1,725	0.2%
TOYS & HOBBIES	1,241	0.1%
AUTO PARTS & ACCESSORIES	0	0.0%

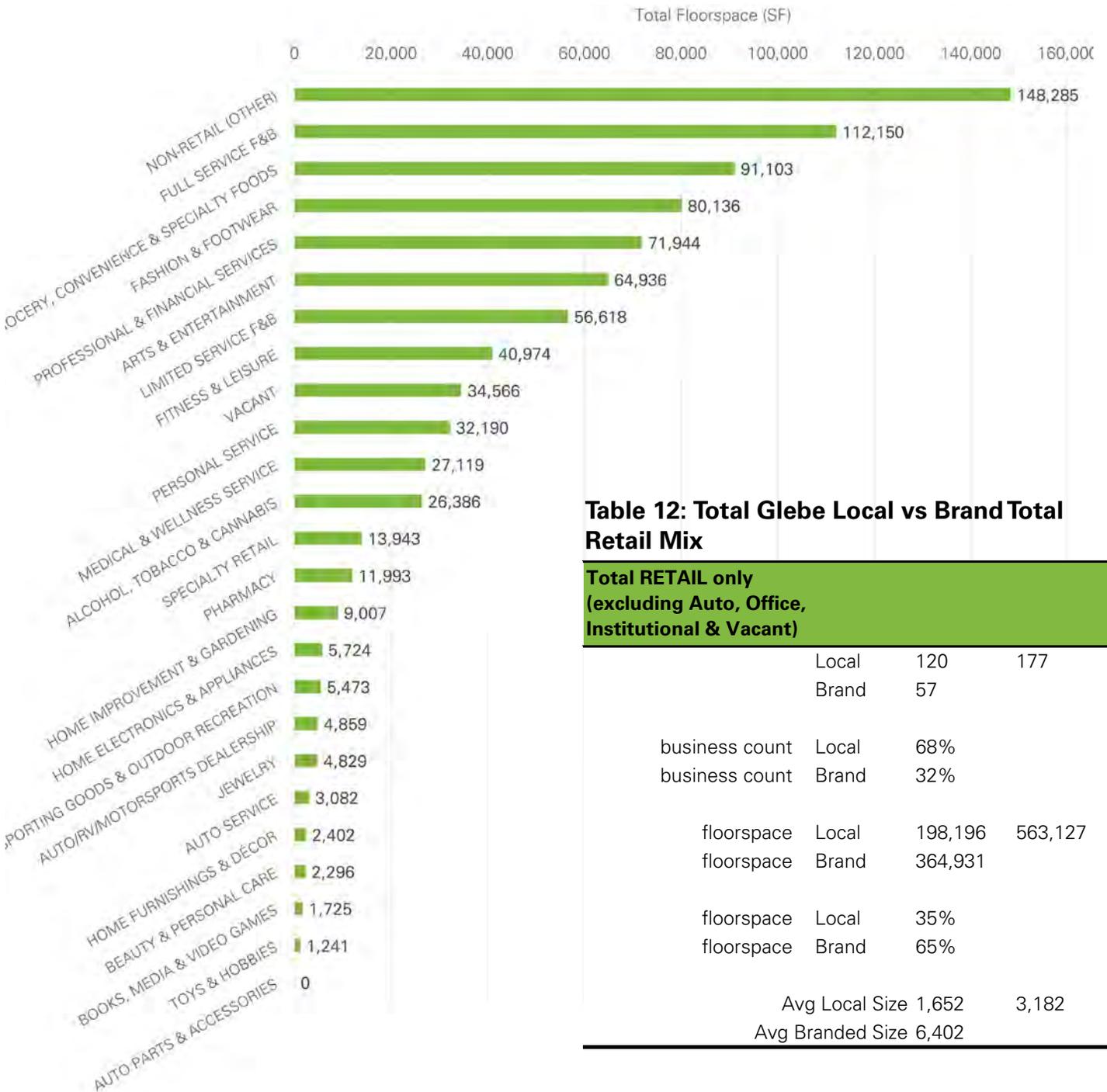
**TOTAL - streetfront plus Lansdowne floor 2**

**852,981**

Retail ONLY Floorspace (excluding Medical & Wellness,  
Professional, Non-Retail/Other, Auto & Vacant)

**563,127**

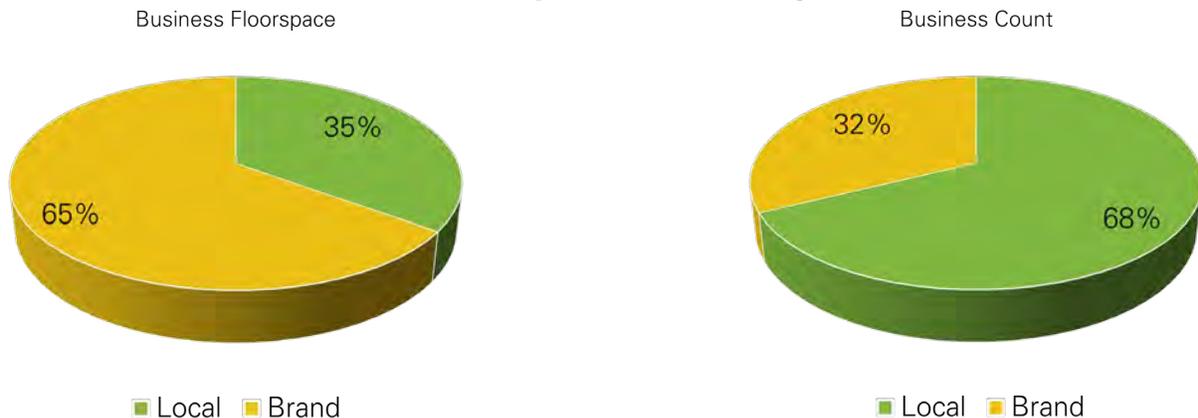
**Figure 35: Total Glebe BIA Retail Inventory by Merchandise Category**



**Table 12: Total Glebe Local vs Brand Total Retail Mix**

Total RETAIL only (excluding Auto, Office, Institutional & Vacant)			
	Local	120	177
	Brand	57	
business count	Local	68%	
business count	Brand	32%	
floorpace	Local	198,196	563,127
floorpace	Brand	364,931	
floorpace	Local	35%	
floorpace	Brand	65%	
	Avg Local Size	1,652	3,182
	Avg Branded Size	6,402	

**Figure 36: Local vs Brand Total Retail Mix by Business Floorspace & Count**



the inventory, shown in **Table 122** and **Figure 366**, we see the percentage differs notably depending on if considering business count as opposed to total floorspace.

For business count, 68% of businesses are local (121 businesses), while 32% are brands (58 business). Meanwhile for total floorspace by business, 65% is occupied by a branded business while 35% is occupied by local.

The differences is due in large part to how many and how large the branded businesses comprise the main offering within the Lansdowne Node, which also has the greatest and most notable impact on retailer-specific floor areas in the Glebe BIA.

### 5.2.2 Old Ottawa South Retail

Although not quantified as part of the BIA's retail inventory in this study (as it is currently not part of the BIA boundary), the retail offered directly to the south of the BIA - where Bank St continues through Old Ottawa South between the Rideau Canal and the Rideau River - should be considered when developing a business retention and attraction strategy.

Old Ottawa South currently contains some brands of note (e.g., Starbucks, Dairy Queen, Shoppers) but also many unique local businesses. Several financial and professional services can be found in the area (e.g. Scotiabank, physiotherapy; massage; an animal hospital), as well as the Sunnyside Ottawa Public Library, and several auto services.

Restaurant offerings include:

- Many ethnic options (Korean, Thai, Fusion, Lebanese, Japanese);
- Coffee shops (Bridgehead, Black Squirrel Books); and
- a pub, bar, and burger shop.

Retail offerings include:

- Personal services (e.g., A-One Hair Salon; Lilac Nails & Spa);
- Specialty retail (e.g., Doyon Després; two antique stores; Alta Vista Flowers; Black Squirrel Books & Espresso);
- Groceries and convenience (Cedars & Co. Food Market; Life of Pie; Quickie

Convenience Store);

- Fitness & leisure (Giant Ottawa Bicycle Store; Douvris Martial Arts); and
- Arts and entertainment (Mayfair Theatre; First Class Auctions; The Mud Studio).

An opportunity for the Glebe BIA would be to expand the BIA boundary to include the businesses along this stretch of Bank St.

## 5.3 Retail Property Metrics

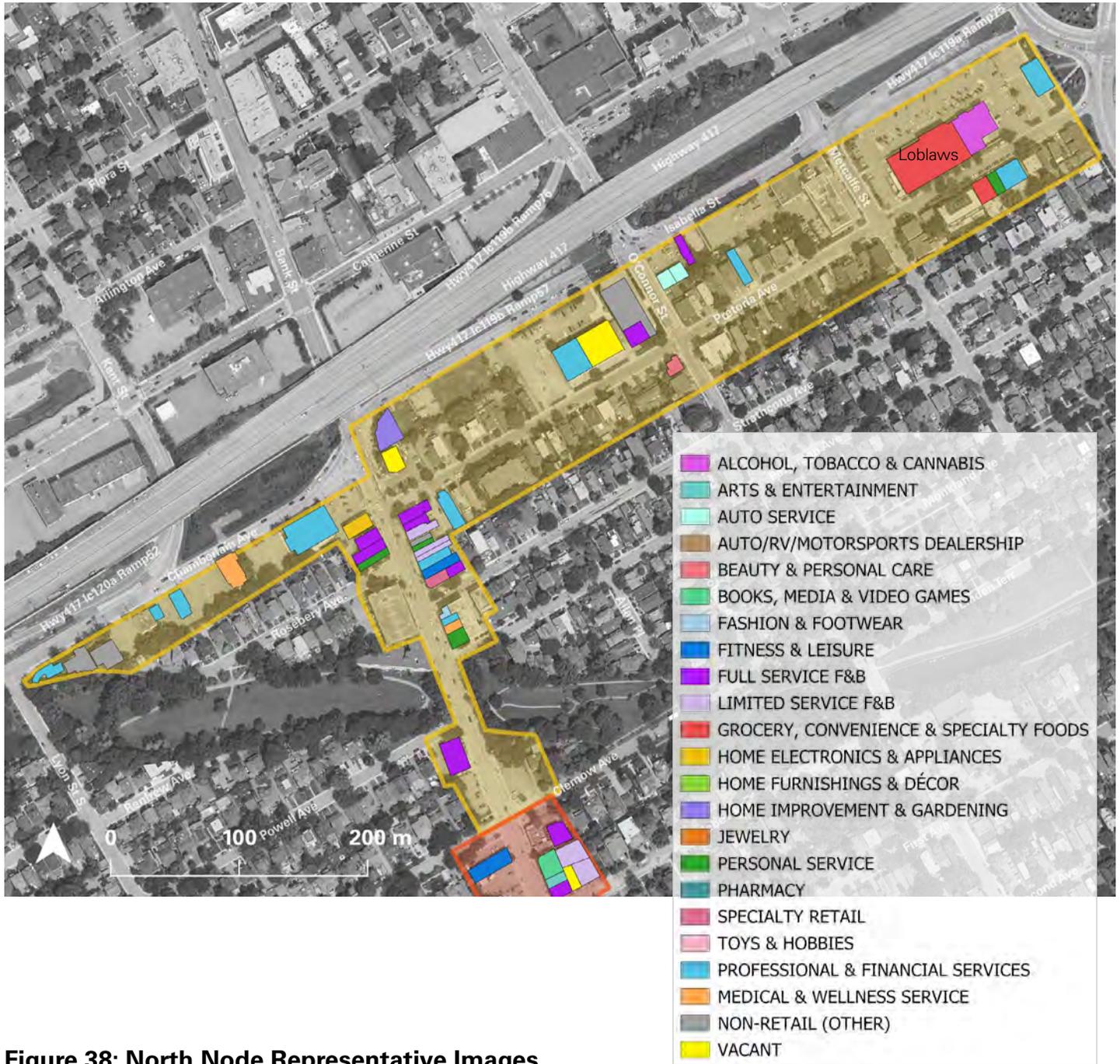
The Glebe Business Improvement Area (BIA) represents one of Ottawa's most premium and resilient retail corridors, justifying occupancy costs significantly above the city-wide average. Retail property metrics within the Glebe BIA, however, exhibit considerable polarization based on asset type and location, specifically distinguishing the traditional Bank St corridor from the institutional development at Lansdowne Park.

Current market data indicates a dual-tier pricing structure within the Glebe BIA:

- **North & Central Nodes (Core Retail):** Net rental rates (excluding CAM + taxes) ranging from lows of \$26 per sf in off-street locations to \$40 per sf in core Bank St frontages in spaces averaging 1,000 to 1,500 sf.
- **Lansdowne Park Node (Destination Retail):** Net rental rates (excluding CAM + taxes) ranging from lows of \$55 per sf to >\$65 per sf for equivalent stores at 1,500 sf or larger.

The decision between the two sub-nodes hinges on a retailer's operational model and tolerance for fixed costs. The Bank St corridor offers relative pricing stability, integration within an affluent residential neighbourhood, and a diverse building stock. In contrast, Lansdowne Park presents access to high-volume destination traffic generated by major sports and entertainment events 1, but demands a significant cost premium and necessitates a financial model robust enough to support top-tier urban rents.

**Figure 37: North Node Retail Inventory Map**



**Figure 38: North Node Representative Images**

Photos taken by FBM, June 2025



**Table 13: North Node Retail Inventory by Merchandise Category**

MERCHANDISE CATEGORY	NORTH ZONE FLOORSPACE (SF)	NORTH ZONE MIX (%)
PROFESSIONAL & FINANCIAL SERVICES	35,689	23.7%
GROCERY, CONVENIENCE & SPECIALTY FOODS	23,101	15.4%
NON-RETAIL (OTHER)	20,135	13.4%
FULL SERVICE F&B	15,599	10.4%
VACANT	10,632	7.1%
ALCOHOL, TOBACCO & CANNABIS	8,591	5.7%
MEDICAL & WELLNESS SERVICE	7,348	4.9%
PERSONAL SERVICE	5,864	3.9%
LIMITED SERVICE F&B	5,859	3.9%
HOME IMPROVEMENT & GARDENING	4,559	3.0%
AUTO SERVICE	3,082	2.0%
HOME ELECTRONICS & APPLIANCES	2,648	1.8%
FITNESS & LEISURE	2,424	1.6%
FASHION & FOOTWEAR	1,885	1.3%
SPECIALTY RETAIL	1,613	1.1%
BEAUTY & PERSONAL CARE	1,460	1.0%
ARTS & ENTERTAINMENT	0	0.0%
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%
SPORTING GOODS & OUTDOOR RECREATION	0	0.0%
PHARMACY	0	0.0%
JEWELRY	0	0.0%
BOOKS, MEDIA & VIDEO GAMES	0	0.0%
HOME FURNISHINGS & DÉCOR	0	0.0%
TOYS & HOBBIES	0	0.0%
AUTO PARTS & ACCESSORIES	0	0.0%
COMMUNITY SERVICES	0	0.0%
<b>TOTAL</b>	<b>150,488</b>	

**Retail ONLY Floorspace (excl Medical & Wellness,  
Professional, Auto Service & Vacant)**

**73,602**

**49%**



## 5.4 Retail Inventory by Node

### 5.4.1 North Node

The North Node, as shown in **Figure 374 & 37**, occupies the area to the north of Clemow Ave within the Glebe BIA boundary. **Figure 399** and **Table 133** present the North Node's total inventory by retail merchandise category. The top 3 retail categories are as follows:

1. Grocery, Convenience, & Specialty Food (23,101 SF)
2. Full-Service F&B (15,599 SF)
3. Alcohol, Tobacco, & Cannabis (8,591 SF).

Vacant space is 10,632 SF or 7.1% in the Node.

It is worth noting that the non-retail categories of Professional & Financial Services, Non-Retail (Other), and Vacant are in the top five categories by square footage in the North Node, suggesting the North Node is currently less retail-focused.

Along Bank St this node sees streetfront retail similar in format to the Central Node - densely packed, smaller businesses with little-to-no setbacks - while businesses along Chamberlain Ave, Pretoria Ave, and Isabella St see larger formats and setbacks, with more surface parking. Central Park and its multi-use trail run through the centre of this node.

The overall mix is characterized by larger multi-tenant office buildings, residential homes, and the larger format grocery anchor: Loblaws on Isabella St. The retail mix shows a trend toward non-retail and products for day-to-day needs.

**Figure 388** shows a selection of representative images for the North Node inventory.

### 5.4.2 Central Node

The Central Node, as shown in **Figure 4141**, runs along Bank St between Clemow Ave to the north and Holmwood Ave to the south. **Figure 433** and **Table 15** present the Central Node's total inventory by retail merchandise category. The top 3 retail categories are as follows:

4. Limited Service F&B (37,456 SF)
5. Full Service F&B (36,354 SF)
6. Personal Service (21,143 SF).

The Central Node represents the traditional heart of the Glebe shopping area, reflecting its trademark historic, densely-packed streetfront businesses operated largely by independent local owners, offering an eclectic mix of products and services. Unlike the North Node, the Central Node is almost entirely retail and other commercial uses, located mainly along Bank St with some businesses tapering onto certain side streets, such as Third Ave and Fourth Ave. The retail mix shows a strong trend toward food and beverage businesses.

The Central Node also contains a transition area starting around Thornton Ave and moving southward toward Holmwood Ave (i.e., where the Lansdowne Node begins), in which the feel of the traditional Glebe begins to shift from the lower rise, historic architecture and narrow sidewalks to a more Lansdowne-like feel, with taller, larger, and more modern building designs and much wider sidewalks, particularly on the western side of Bank St.

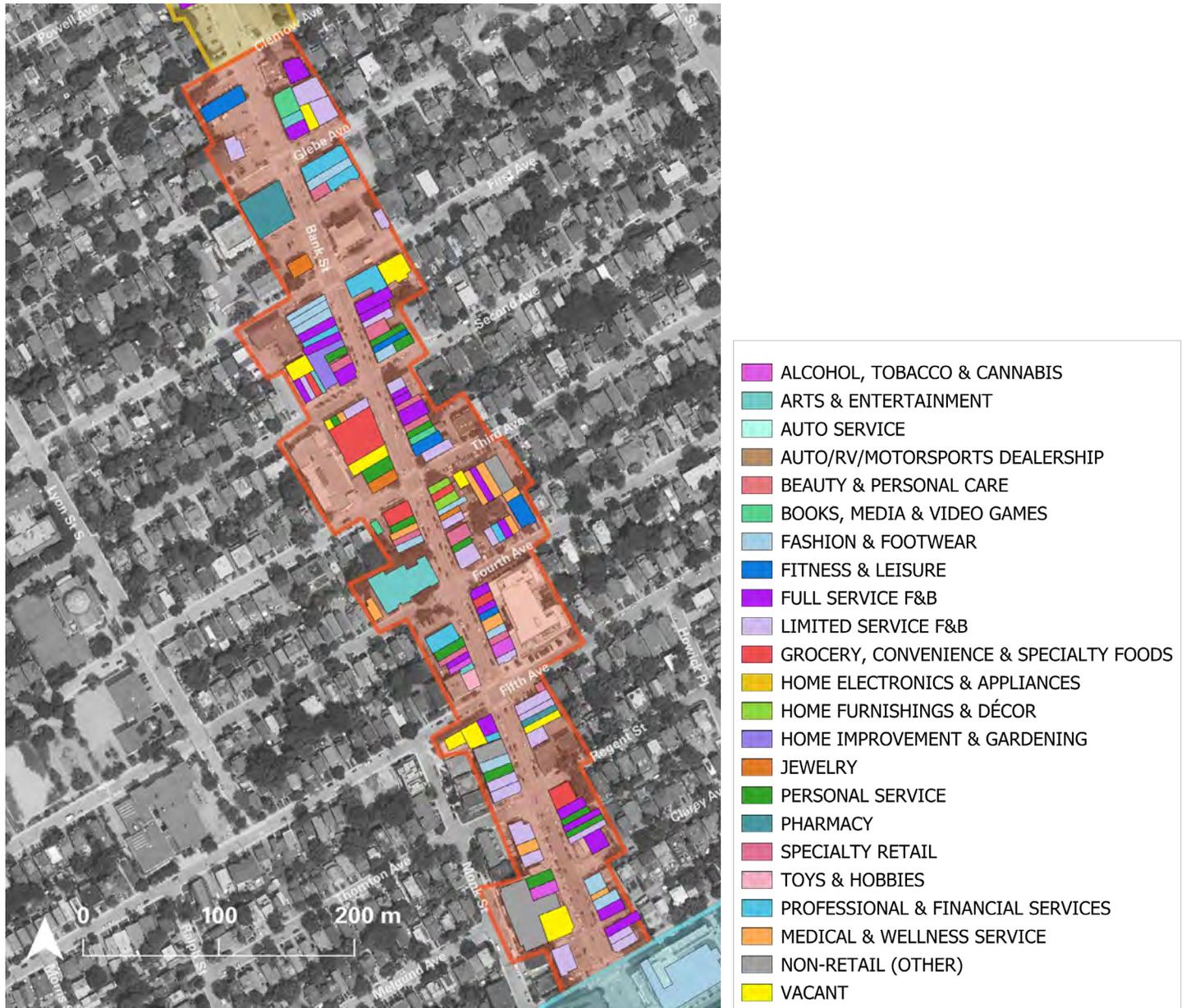
**Figure 4242** shows a selection of representative images for the Central Node inventory, in which the difference between the Glebe's traditional character and the more modern transition area buildings can be seen.

The retail ratio of local/independent to branded or franchised retail businesses in the Central as summarized in **Table 16 and Figure 44** shows how essential local businesses are to the fabric and character of the central 'heart' of the Glebe. Local/independent businesses account for an estimated 73% of the businesses and 62% of the overall leasable floorspace.

Small business lies at the core of Glebe's positioning, support and resulting high market penetration of retail spending. The organic and curated collection of retail shops and services is essential to the success of the area and is a major reason why it is one of the strongest and most resilient, yet under-appreciated urban retail shopping districts in Canada.

The mix of businesses in the central node of the Glebe acts as a catalyst for and a benefactor of adjacent nodes such as the north and Lansdowne.

**Figure 41: Central Node Retail Inventory Map**



**Figure 42: Central Node Representative Images**

Photos taken by FBM, June 2025



↑ Transition Area ↓

**Table 15: Central Node Retail Inventory by Merchandise Category**

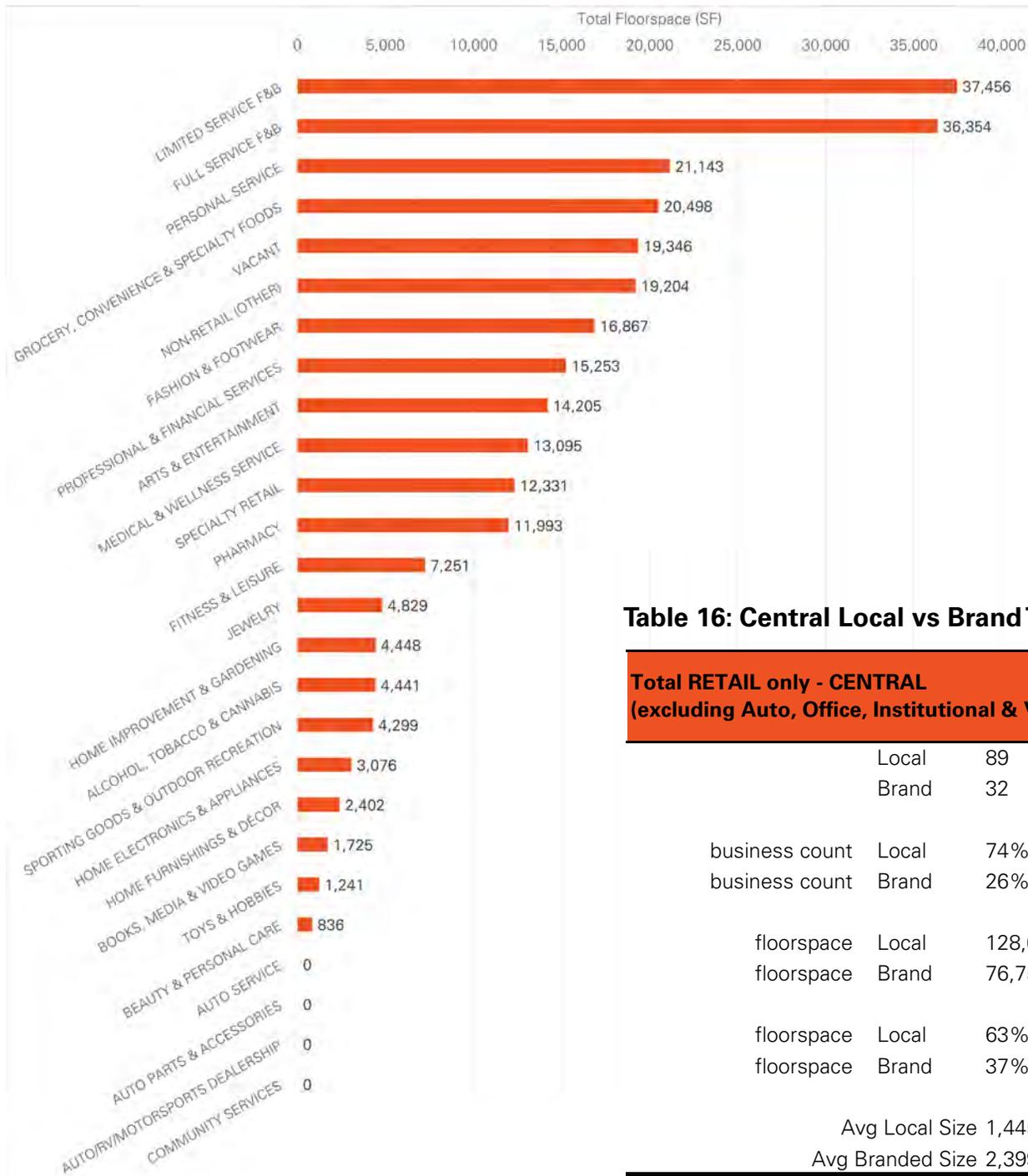
MERCHANTISE CATEGORY	CENTRAL ZONE FLOORSPACE (SF)	CENTRAL ZONE MIX (%)
LIMITED SERVICE F&B	37,456	13.8%
FULL SERVICE F&B	36,354	13.4%
PERSONAL SERVICE	21,143	7.8%
GROCERY, CONVENIENCE & SPECIALTY FOODS	20,498	7.5%
VACANT	19,346	7.1%
NON-RETAIL (OTHER)	19,204	7.1%
FASHION & FOOTWEAR	16,867	6.2%
PROFESSIONAL & FINANCIAL SERVICES	15,253	5.6%
ARTS & ENTERTAINMENT	14,205	5.2%
MEDICAL & WELLNESS SERVICE	13,095	4.8%
SPECIALTY RETAIL	12,331	4.5%
PHARMACY	11,993	4.4%
FITNESS & LEISURE	7,251	2.7%
JEWELRY	4,829	1.8%
HOME IMPROVEMENT & GARDENING	4,448	1.6%
ALCOHOL, TOBACCO & CANNABIS	4,441	1.6%
SPORTING GOODS & OUTDOOR RECREATION	4,299	1.6%
HOME ELECTRONICS & APPLIANCES	3,076	1.1%
HOME FURNISHINGS & DÉCOR	2,402	0.9%
BOOKS, MEDIA & VIDEO GAMES	1,725	0.6%
TOYS & HOBBIES	1,241	0.5%
BEAUTY & PERSONAL CARE	836	0.3%
AUTO SERVICE	0	0.0%
AUTO PARTS & ACCESSORIES	0	0.0%
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%
COMMUNITY SERVICES	0	0.0%
<b>TOTAL</b>	<b>272,293</b>	

**Retail ONLY Floorspace (excl Medical & Wellness, Professional, Auto Service & Vacant)**

**205,395**

**75%**

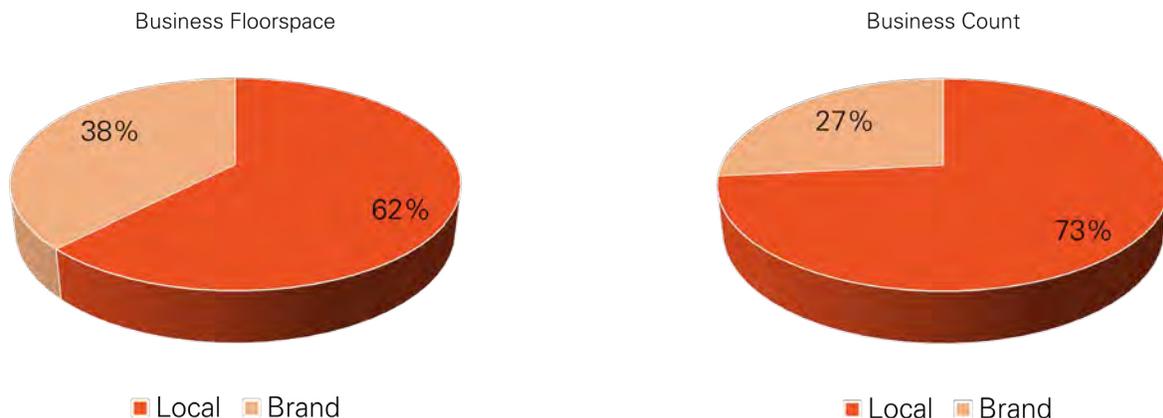
**Figure 43: Central Node Retail Inventory by Merchandise Category**



**Table 16: Central Local vs Brand Total Retail Mix**

Total RETAIL only - CENTRAL (excluding Auto, Office, Institutional & Vacant)			
	Local	89	121
	Brand	32	
business count	Local	74%	
business count	Brand	26%	
floorspace	Local	128,640	205,395
floorspace	Brand	76,755	
floorspace	Local	63%	
floorspace	Brand	37%	
	Avg Local Size	1,445	1,697
	Avg Branded Size	2,399	

**Figure 44: Local vs Brand Total Retail Mix by Business Floorspace & Count**



### 5.4.3 Lansdowne Node

The Lansdowne Node, as shown in **Figure 466**, occupies the southernmost extent of the BIA and encompasses the Lansdowne shopping area and the area-defining Lansdowne Park/TD Place.

**Figure 467** and **Table 177** present the Lansdowne Node’s total inventory by retail merchandise category. Given the distinctive format and nature of retail in Lansdowne Node compared to the other two Glebe retail nodes, Floors 1 and 2 are included in the inventory (whereas only ground floor retail was accounted for in the other nodes).

The top 3 retail categories are as follows:

- Arts & Entertainment (117,270 SF)
- Fashion & Footwear (61,384 SF)
- Full Service F&B (60,197 SF).

Vacant space is only 4,587 SF or 0.9% of the Lansdowne Node total inventory.

Non-Retail (Other) occupies the second largest share of floorspace (108,946 or 21.9%), which includes the large indoor event spaces of Aberdeen Pavilion and the Horticultural Building.

The Lansdowne Node is characterized by larger format retailers hosting national brands as well as by the major regional draw of events at TD Place. The central plaza (Aberdeen Square) within Lansdowne also hosts the seasonal Farmers’ Market that takes place on Sundays from May through October annually.

The built form is more modern, with larger sidewalks and wide streets. Several storefronts mimic the narrow storefronts that define the Central Node while other stores are much larger such as the Sporting Life, Winners, and Cineplex.

**Figure 455** shows a selection of representative images for the Lansdowne Node inventory.

The retail ratio of local/independent to branded or franchised retail businesses in the Lansdowne Node as summarized in **Table 18** and **Figure 48** shows an inverse relationship than that which was revealed for the Central Node. In Lansdowne, local/independent businesses only account for an estimated 44% of the businesses and only 13% of the overall leasable floorspace.

Lansdowne is an economic engine for the province but also a powerful compatible economic engine for the Glebe. The more pronounced ratio of high quality branded retailers, occupying larger floor area represents a significant destination draw that bolsters the opportunity for local Glebe businesses to benefit through marketing and exposure.

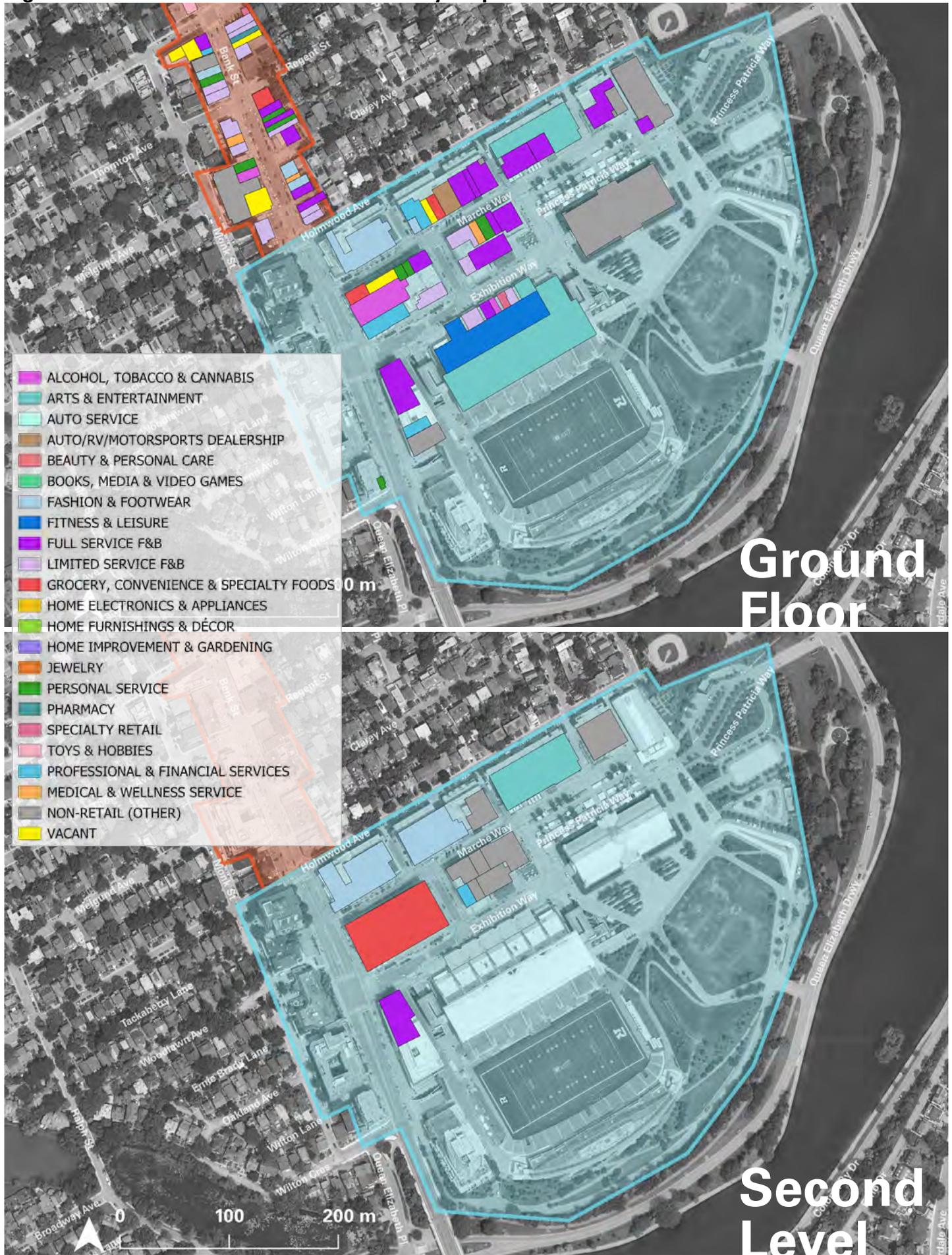
The most urban successful entertainment districts across North America, such as LA Live, all have the ability to harness their location for the benefit of surrounding smaller businesses located within a walkable distance.

### Figure 45: Lansdowne Node Representative Images

Photos taken by FBM, June 2025



**Figure 46: Lansdowne Node Retail Inventory Map - Floors 1 & 2**



**Table 17: Lansdowne Node Retail Inventory by Merchandise Category**

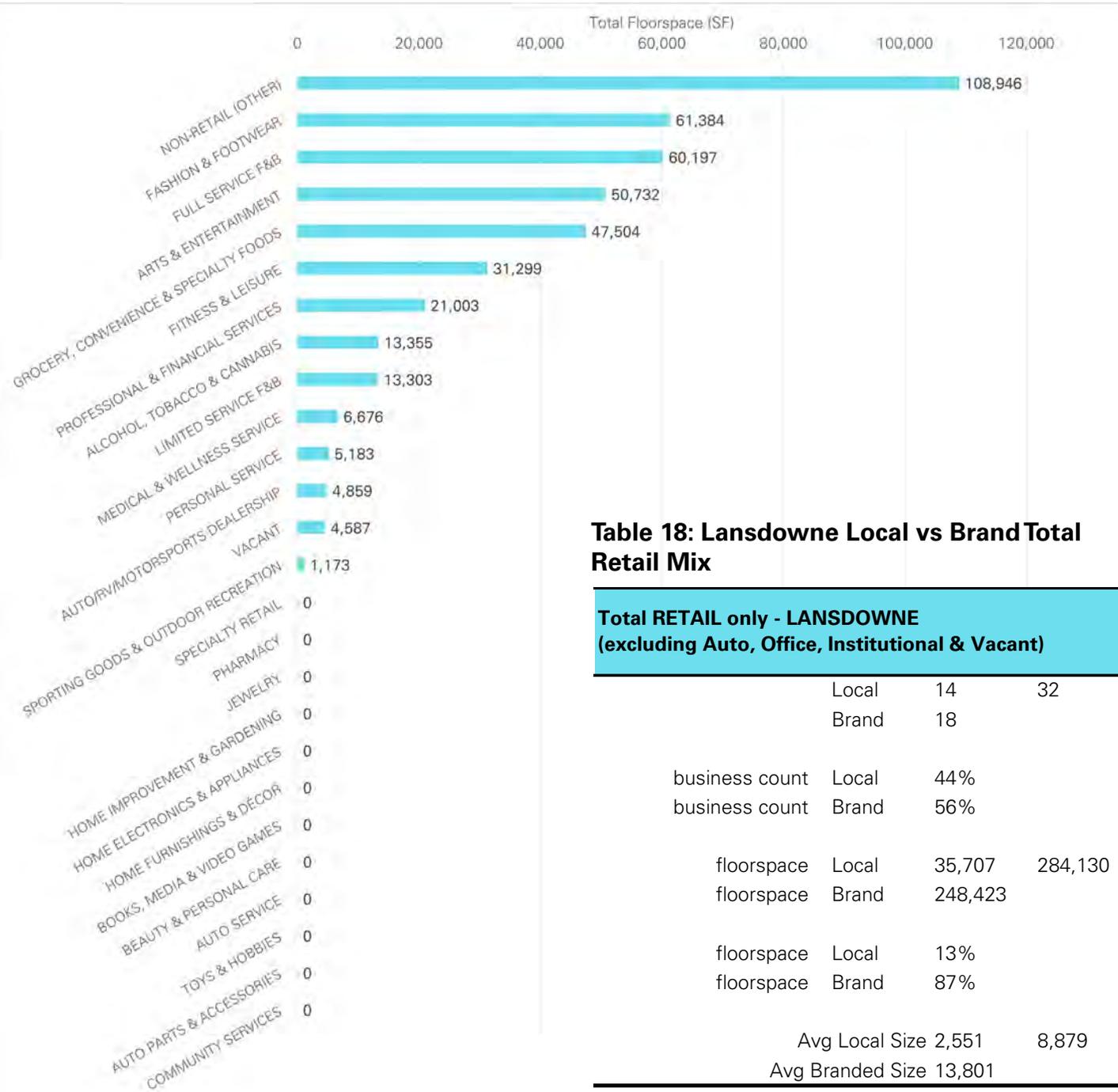
MERCHANDISE CATEGORY	LANSDOWNE PARK ZONE FLOORSPACE (SF)	LANSDOWNE PARK ZONE MIX (%)
NON-RETAIL (OTHER)	108,946	25.3%
FASHION & FOOTWEAR	61,384	14.3%
FULL SERVICE F&B	60,197	14.0%
ARTS & ENTERTAINMENT	50,732	11.8%
GROCERY, CONVENIENCE & SPECIALTY FOODS	47,504	11.0%
FITNESS & LEISURE	31,299	7.3%
PROFESSIONAL & FINANCIAL SERVICES	21,003	4.9%
ALCOHOL, TOBACCO & CANNABIS	13,355	3.1%
LIMITED SERVICE F&B	13,303	3.1%
MEDICAL & WELLNESS SERVICE	6,676	1.6%
PERSONAL SERVICE	5,183	1.2%
AUTO/RV/MOTORSPORTS DEALERSHIP	4,859	1.1%
VACANT	4,587	1.1%
SPORTING GOODS & OUTDOOR RECREATION	1,173	0.3%
HOME IMPROVEMENT & GARDENING	0	0.0%
AUTO SERVICE	0	0.0%
HOME ELECTRONICS & APPLIANCES	0	0.0%
SPECIALTY RETAIL	0	0.0%
BEAUTY & PERSONAL CARE	0	0.0%
PHARMACY	0	0.0%
JEWELRY	0	0.0%
BOOKS, MEDIA & VIDEO GAMES	0	0.0%
HOME FURNISHINGS & DÉCOR	0	0.0%
TOYS & HOBBIES	0	0.0%
AUTO PARTS & ACCESSORIES	0	0.0%
COMMUNITY SERVICES	0	0.0%
<b>TOTAL</b>	<b>430,201</b>	

**Retail ONLY Floorspace (excl Medical & Wellness,  
Professional, Auto Service & Vacant)**

**284,130**

**66%**

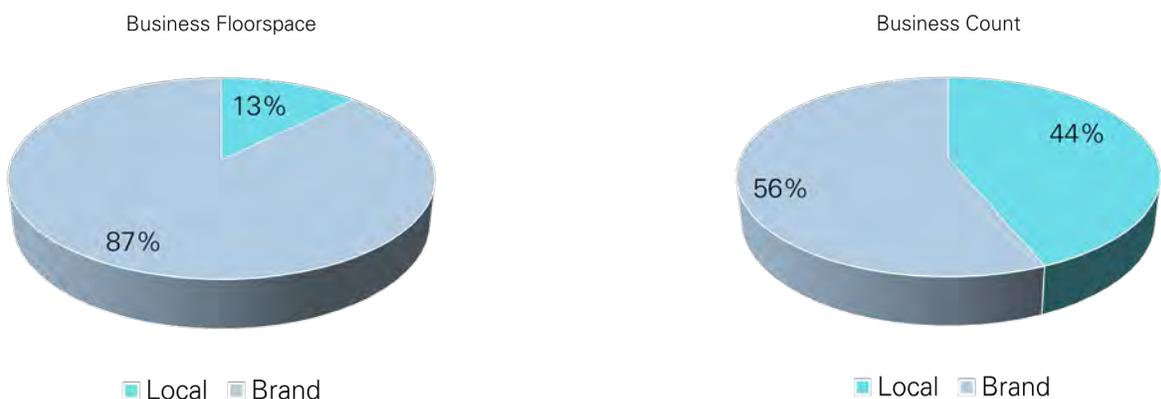
**Figure 47: Lansdowne Node Retail Inventory by Merchandise Category**



**Table 18: Lansdowne Local vs Brand Total Retail Mix**

Total RETAIL only - LANSLOWNE (excluding Auto, Office, Institutional & Vacant)			
	Local	14	32
	Brand	18	
business count	Local	44%	
business count	Brand	56%	
floorspace	Local	35,707	284,130
floorspace	Brand	248,423	
floorspace	Local	13%	
floorspace	Brand	87%	
	Avg Local Size	2,551	8,879
	Avg Branded Size	13,801	

**Figure 48: Local vs Brand Total Retail Mix by Business Floorspace & Count**



## 5.5 Vacancy Overview

A review of the current vacancy provides additional cues for prospective business interests in the Glebe.

The current **overall retail vacancy is estimated at 4.1%**. Given that 4-5% is considered a healthy vacancy rate in a retail market, the Glebe BIA's vacancy rate suggests a healthy and vibrant environment that is balanced for retailers and landlords.

Vacancy rates by node vary:

- **North: 7.1%**
- **Central: 7.1%**
- **Lansdowne: 1.1%**

The low vacancy rate in Lansdowne would be skewed by the unusually high number of businesses with very large floorspaces taken into account in this study (e.g., TD Place, Aberdeen Pavilion, Cineplex, CRAFT Beer Market & Restaurant).

Vacancy in the North & Central Nodes are higher than the average for all the BIA, suggesting space for new retail tenants is available.

Vacant space occupies 19,346 SF or 7.1% of the Central Node. This is the highest vacancy rate among the three Glebe BIA retail nodes. Typically, this might be a cause for some concern, however the nature of the current vacancies does not indicate a concern as it does include some spaces that are soon-to-be occupied as part of an ongoing building renovation.

The largest vacancy at 4,754 is accounted for by the recent closure of the Beer Store, which closed during the course of this study.

Overall vacancy in the Central Node is represented by 10 units averaging 2,238 sf. With many of the spaces being around 2,000 sf these are ideal for ongoing retail attraction of local independent businesses, but there could be discussion about some re-demising of some of these spaces, if possible, to smaller 750 sf units which could be more rent-friendly for local independent retailers.

A selection of representative images of retail spaces that were vacant at the time of this inventory are shown in **Figure 499**.

### Figure 49: Vacancy Representative Images

Photos taken by FBM, June 2025



# 6.0 Productivity & Market Share

## 6.1 Introduction

This section presents a picture of the overall estimated retail productivity of retail businesses in the Glebe BIA overall as well as for each of the identified nodes (North, Central and Lansdowne). The productivity is further highlighted by illustrating the estimated current market share of total available retail spending from within the identified walking, cycling and driving trade areas. The purpose of this approach is to highlight the strength of the retail composition in the GLEBE BIA and validate its important position as a business hub for local, independent businesses as well as for franchise or branded retailers.

### 6.1.1 Approach and Methodology

With our understanding of the retail market dynamic, population growth, and the results of both the surveys and interviews, the key to forecasting new floorspace demand looks at firstly quantifying how much market share the Glebe BIA retail businesses garner from the Driving Trade Area + Miscellaneous Inflow spending.

These market share calculations are derived from FBM's extensive analysis of the current BIA retail inventory, against which retail sales productivity estimates were sensitized and applied to each of the respective categories, store types, business sizes and locations to provide an indication of the current estimated retail sales that the Glebe BIA businesses are generating.

A reasonable sounding board for retail productivities are the net lease rates (excluding CAM + taxes), which in the Glebe BIA are estimated to be in the range of +/- \$26 to \$40 per sf along and surrounding Bank St to +/- \$55 to \$65. On this basis, it is estimated that retail sales productivities in the various nodes would average in the mid \$300 per sf range to over \$700 per sf for higher performing retail operations.

The Glebe BIA, alongside other urban BIA corridors such as Westboro, maintains a strong and steady positioning and market share. The lease rates stability suggests that the Glebe BIA is highly resistant to the general market softness observed in regional malls and other suburban areas. The neighbourhood's high residential affluence cements its status as a robust urban destination (supported by Lansdowne



Park). Meanwhile, the market fundamentals of the Glebe effectively insulate it, allowing it to command sales productivities that reflects its prime demographic profile and continuous local and destination foot traffic.

## 6.2 Market Share

By dividing the total Driving Trade Area + Miscellaneous Inflow retail spending potential into the category-specific retail sales productivity estimates (measured in \$/SF), the estimated market share percentages could be calculated from which a measure of supportable floorspace can be determined (see **Tables 19, 20, 21 & 22**).

The purpose of this approach is to see how well the full Glebe BIA performs in terms of garnering market share from the respective trade area segments.

In **Table 19**, the analysis clearly illustrates that there are a number of categories that far exceed the local nature of the trade area whereby market shares, particularly in the Leisure, Recreation & Entertainment Categories well exceed 100%. This simply means the trade area while strong on the local penetration within a 10-minute walk is obviously a much bigger draw by garnering an overall market share of 71.2%.

Nonetheless, the 10-minute walking trade area market share shows how well the area penetrates and dominates this smaller catchment for almost all shops and services, at least for those categories that have a presence in the Glebe. Notably absences include Toys & Hobbies while lower market share segments include Home Improvement & Gardening, Home Furniture and Decor and Beauty & Personal Care.

*By way of a caveat to some categories like Beauty and Personal Care, it is commonplace for many Personal Services businesses to carry an inventory of Beauty & Personal Care goods, so there would be some overlap therein. Furthermore, a retailer like Loblaws or Metro will also carry Beauty & Personal Care product lines in their merchandise offering.*

In **Table 20**, the same approach as above is used, but applied against the 10-minute cycling trade area which is slightly larger in catchment that garners just under 12% total retail spending market share. In this trade area, the size of the population catchment is much more pronounced and consequently the market shares given the increased competition relative to the size of the trade area do drop more noticeably, but still illustrate high productivity and healthy, realistic category specific market shares.

Similarly, **Table 21** documents the market share penetration against the 10-minute drive time. In this analysis, the Glebe faces more competition across multiple streetfront and traditional shopping locations. Therefore the market shares will decline further but still paint a picture of healthy and reasonable market penetration.

There is a noticeable drop in Convenience & Day-to-Day Goods/Services Market Shares in the cycling and 10-minute drive time trade areas. This is more attributable to the fact that the trade areas used in this study reflect a single centrepiece of the Glebe BIA and as a result a grocery anchor like Loblaws likely would have a slightly different trade area because of its location at the northeast side of the Glebe.

Lastly, **Table 22** reflects the 20-minute drive time for which more specifically, the Lansdowne Park node would compete for attracting customers and resulting market share. Overall, the market share within the 20-minute drive time is realistic at 2% given the wide range of competitive retail destinations across the city.

Since annualized visitor volumes to Lansdowne are not specifically available, it reasonable to assume that overall retail spending potential attracted to the Glebe is higher than that used in this study and therefore the figures are likely conservative in illustrating the full magnitude of opportunity. Nonetheless, the Glebe retail performance metrics suggest a highly sophisticated and powerful retail engine for the local and regional audiences.

**Table 19: 10-Minute Walking Trade Area Market Share Summary**

Retail Spending by Merchandise Category		2025 10-Minute Walking Trade Area		
		GLEBE BIA Sales Productivity (\$psf)	GLEBE BIA Estimated Market Share	Market Share Sales \$
Convenience & Day- to-Day Goods/Services	Grocery & Specialty Foods	\$595	85%	\$54,194,249
	Pharmacy	\$625	114%	\$7,495,832
	Alcohol, Tobacco & Cannabis	\$494	116%	\$13,040,903
	Personal Services	\$198	158%	\$6,368,095
	<i>Health Care &amp; Medical (not applicable)</i>			
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$345	150%	\$27,639,227
	Jewelry	\$527	162%	\$2,543,904
	Beauty & Personal Care	\$250	7%	\$573,922
	Home Furniture & Décor	\$304	8%	\$730,323
	Appliances & Electronics	\$450	20%	\$2,575,691
	Home Improvement & Gardening	\$197	5%	\$1,770,095
	Books & Media	\$183	6%	\$314,894
	Sporting Goods	\$263	49%	\$1,441,514
	Toys & Hobbies		0%	\$0
	Specialty Retail	\$225	37%	\$3,139,462
Leisure, Recreation & Entertainment Goods/Services	Quick Service Restaurants	\$461	107%	\$26,074,355
	Full Service Restaurants	\$423	298%	\$47,429,491
	Arts & Entertainment	\$200	562%	\$12,989,436
	Fitness & Leisure	\$239	305%	\$9,783,830
Automotive Goods (excluding repair)	Auto Parts & Accessories	N/A	0%	\$0
	Auto/RV/Motorsports Dealerships	N/A	0%	\$0
	<i>Auto Fuel (not applicable)</i>			
<b>TOTAL RETAIL CATEGORIES ONLY</b>		<b>\$387</b>	<b>71.2%</b>	<b>\$218,105,223</b>

**Table 20: 10-Minute Cycling Trade Area Market Share Summary**

Retail Spending by Merchandise Category		2025 10-Minute Cycling Trade Area		
		GLEBE BIA Sales Productivity (\$psf)	GLEBE BIA Estimated Market Share	Market Share Sales \$
Convenience & Day- to-Day Goods/Services	Grocery & Specialty Foods	\$595	14%	\$54,194,249
	Pharmacy	\$625	19%	\$7,495,832
	Alcohol, Tobacco & Cannabis	\$494	17%	\$13,040,903
	Personal Services	\$198	27%	\$6,368,095
	<i>Health Care &amp; Medical (not applicable)</i>			
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$345	24%	\$27,639,227
	Jewelry	\$527	26%	\$2,543,904
	Beauty & Personal Care	\$250	1%	\$573,922
	Home Furniture & Décor	\$304	1%	\$730,323
	Appliances & Electronics	\$450	3%	\$2,575,691
	Home Improvement & Gardening	\$197	1%	\$1,770,095
	Books & Media	\$183	1%	\$314,894
	Sporting Goods	\$263	7%	\$1,441,514
	Toys & Hobbies	\$0	0%	\$0
	Specialty Retail	\$225	6%	\$3,139,462
Leisure, Recreation & Entertainment Goods/Services	Quick Service Restaurants	\$461	17%	\$26,074,355
	Full Service Restaurants	\$423	49%	\$47,429,491
	Arts & Entertainment	\$200	96%	\$12,989,436
	Fitness & Leisure	\$239	54%	\$9,783,830
Automotive Goods (excluding repair)	Auto Parts & Accessories	N/A	0%	\$0
	Auto/RV/Motorsports Dealerships	N/A	0%	\$0
	<i>Auto Fuel (not applicable)</i>			
<b>TOTAL RETAIL CATEGORIES ONLY</b>		<b>\$387</b>	<b>11.7%</b>	<b>\$218,105,223</b>

**Table 21: 10-Minute Drive Time Trade Area Market Share Summary**

Retail Spending by Merchandise Category		2025 10-Minute Drive Time Trade Area		
		GLEBE BIA Sales Productivity (\$psf)	GLEBE BIA Estimated Market Share	Market Share Sales \$
Convenience & Day- to-Day Goods/Services	Grocery & Specialty Foods	\$595	8%	\$54,194,249
	Pharmacy	\$625	11%	\$7,495,832
	Alcohol, Tobacco & Cannabis	\$494	10%	\$13,040,903
	Personal Services	\$198	15%	\$6,368,095
	<i>Health Care &amp; Medical (not applicable)</i>			
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$345	14%	\$27,639,227
	Jewelry	\$527	15%	\$2,543,904
	Beauty & Personal Care	\$250	1%	\$573,922
	Home Furniture & Décor	\$304	1%	\$730,323
	Appliances & Electronics	\$450	2%	\$2,575,691
	Home Improvement & Gardening	\$197	0%	\$1,770,095
	Books & Media	\$183	0%	\$314,894
	Sporting Goods	\$263	4%	\$1,441,514
	Toys & Hobbies	\$0	0%	\$0
	Specialty Retail	\$225	3%	\$3,139,462
Leisure, Recreation & Entertainment Goods/Services	Quick Service Restaurants	\$461	10%	\$26,074,355
	Full Service Restaurants	\$423	28%	\$47,429,491
	Arts & Entertainment	\$200	59%	\$12,989,436
	Fitness & Leisure	\$239	31%	\$9,783,830
Automotive Goods (excluding repair)	Auto Parts & Accessories	N/A	0%	\$0
	Auto/RV/Motorsports Dealerships	N/A	0%	\$0
	<i>Auto Fuel (not applicable)</i>			
<b>TOTAL RETAIL CATEGORIES ONLY</b>		<b>\$387</b>	<b>6.7%</b>	<b>\$218,105,223</b>

**Table 22: 20-Minute Drive Time Trade Area Market Share Summary**

Retail Spending by Merchandise Category		2025 20-Minute Drive Time Trade Area		
		GLEBE BIA Sales Productivity (\$psf)	GLEBE BIA Estimated Market Share	Market Share Sales \$
Convenience & Day- to-Day Goods/Services	Grocery & Specialty Foods	\$595	2%	\$54,194,249
	Pharmacy	\$625	3%	\$7,495,832
	Alcohol, Tobacco & Cannabis	\$494	3%	\$13,040,903
	Personal Services	\$198	4%	\$6,368,095
	<i>Health Care &amp; Medical (not applicable)</i>			
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$345	4%	\$27,639,227
	Jewelry	\$527	5%	\$2,543,904
	Beauty & Personal Care	\$250	0%	\$573,922
	Home Furniture & Décor	\$304	0%	\$730,323
	Appliances & Electronics	\$450	1%	\$2,575,691
	Home Improvement & Gardening	\$197	0%	\$1,770,095
	Books & Media	\$183	0%	\$314,894
	Sporting Goods	\$263	1%	\$1,441,514
	Toys & Hobbies	\$0	0%	\$0
	Specialty Retail	\$225	1%	\$3,139,462
Leisure, Recreation & Entertainment Goods/Services	Quick Service Restaurants	\$461	3%	\$26,074,355
	Full Service Restaurants	\$423	8%	\$47,429,491
	Arts & Entertainment	\$200	19%	\$12,989,436
	Fitness & Leisure	\$239	9%	\$9,783,830
Automotive Goods (excluding repair)	Auto Parts & Accessories	N/A	0%	\$0
	Auto/RV/Motorsports Dealerships	N/A	0%	\$0
	<i>Auto Fuel (not applicable)</i>			
<b>TOTAL RETAIL CATEGORIES ONLY</b>		<b>\$387</b>	<b>2.0%</b>	<b>\$218,105,223</b>

# 7.0 Action Plan

## 7.1 Introduction

This final section provides opportunities and strategies to support the BIA as it works to ensure the Glebe shopping area remains a vibrant and healthy community retail hub. It includes recommendations to improve identified travel challenges for customers as well as for the an actionable strategy for retention and attraction tailored to the Glebe BIA as a whole and by node, as summarized in **Table 24**.

## 7.2 BIA-Wide Opportunities

### 7.2.1 Opportunities to Improve Travel Challenges

**Parking:** Interview respondents strongly noted that overly zealous parking enforcement is a deterrent to customers, noting that inconsistent on-street parking time limits contribute to this challenge. The Glebe BIA should consider advocating for standardized on-street time limits. A consistent 2-hour time limit would be suitable for Bank St, because this allows for higher visible turnover of spaces, while a 3-hour limit along side streets within a certain distance from Bank St would allow for longer visits that could include both shopping and dining as well as salons and personal services.

**Cycling:** As noted in City Planning Documents and by online survey and interview respondents, Bank St in the Glebe is a primary north-south corridor for the City of Ottawa, a well-established main street shopping area, and an identified area to ensure walkability for pedestrians is prioritized. Bank St already struggles to accommodate the competing demands of private motor vehicle, public transit, and pedestrians during peak traffic hours, with dedicated bus lanes and on-street parking both hotly debated topics. If and how to add cycling infrastructure to Bank St is an ongoing challenge. The BIA can consider advocating for well-designed cycling (and other micromobility) corridors along side streets parallel to Bank St (e.g., O'Connor St or Lyon St S) may be safer routes for cyclists and less disruptive to existing Bank St traffic and parking challenges. Bank St is not considered ideal for any dedicated cycling network, nor a permanent rapid bus land as the retail businesses are too dependent on on-street parking. Moreover, it would be reasonable to suggest that in the long term many of the peripheral neighbourhood streets will eventually be permit only for residents which could put a further strain on desired parking capacities in the local area.



## 7.2.2 The Glebe's Retail Positioning

The Glebe's retail market is already functioning at healthy levels, with acceptable levels of vacancy that de-risk further rent escalations, and with overrepresented businesses being naturally filtered out due to customer demand. The overall goal for the Glebe's ideal retail positioning will be to add businesses for the sake of increasing productivity for existing businesses, rather than adding new retail spaces that could dilute the overall productivity of each business. Since average retail lease rates in and around Bank St are among the higher end in the city, retailers must have strong financial capacity and marketing to ensure longevity and consistent market penetration.

An objective for the Glebe BIA resulting from this study is to create a framework for BIA businesses to continue to be profitable while also supporting the current rents and potential increases.

Added businesses would ideally complement existing businesses in order to attract more customers and therefore more spending to the Glebe. Some store types benefit from one another in the form of "cross-shopping," while others compete for total retail spending - although some competition can be healthy for a market. For example, adding shoe stores to an area that already has shoe stores can result in an increase in customers visiting that area specifically in search of footwear, because they know they will be able to accomplish their task. An indoor climbing gym may attract new customers who will then stop at a nearby café or restaurant, or perhaps pick up some groceries, while they are in the neighbourhood. A toy store, gaming store or comic book store may attract similar clientele to retailers such as Compact record shop. Suggested compatible business types are discussed in section 7.2.4.

## 7.2.3 Local versus Brand Mix

Local independent businesses are important in any market, and they are of particular importance to the defining character of the Glebe BIA. Generally, independent stores contribute to community vitality with unique offerings and

experiences, and often have more flexibility to adapt to changing environments compared with larger businesses. An added benefit is a higher portion of money spent in local small businesses tend to stay in the community compared with non-local and larger businesses.

Among the highest priorities for the Glebe is to continue to cultivate local independent store types to promote the area's success as an independent business destination and stronghold.

## 7.2.3 Retail Redevelopment

With any urban main street area that has a current mix of predominantly older buildings, the pressure to redevelop or assemble properties for redevelopment will become more prominent. The Glebe BIA's allure is driven in large part by its current composition and variety of buildings and spaces therein.

As pressures for redevelopment will undoubtedly occur, the BIA must not be distant from these conversations and work with the City and developers to avoid scenarios like that which occurred at the south end of Bank St (Amica Building) where a redevelopment resulted in an oversized sidewalk area that has had the unintended impact of creating unusable, less animated space and therefore less conducive to a strong retail street frontage presence. While wider sidewalks can be an effective and safe mobility and circulatory mechanism, they must work with the street enclosure (i.e. building heights to street widths). The redevelopment at the Amica could provide a glimpse into a longer term view for the corridor which would have a major transformative impact on the heart of Bank St if conversations about functional sidewalks are not given priority conversations.

Given that 62% of customers walk to the BIA and the high density of walkability advocates, improving the pedestrian realm is critical. Therefore, these conversations should include appropriate sidewalk widths that prioritize the expansion and maintenance of clear, unobstructed sidewalks, but in a way that maintains the character of the street.

**Table 23: Compatible Business Types for the Glebe Retail Market**

Store/Merchandise Category	Description	Range of Store Sizes (sf)	Target Consumer Segment	Potential District Location(s) Based on Opportunity Level Moderate to High	Opportunity in GLEBE Based on Existing Inventory		
					Low	Medium	High
Boutique Clothing Stores	Independent fashion retailers offering unique, high-quality apparel for men, women, or children.	800 - 2,500	Style-conscious consumers, families, young professionals	North, Central		High	
Vintage/Thrift Stores	Second-hand shops with curated vintage or gently used items.	1,500 - 3,000	Bargain hunters, eco-conscious shoppers, students			Low	
Specialty Food Stores and Coop type Grocery	Local grocers or gourmet food shops offering organic, ethnic, or artisanal products.	1,000 - 3,000	Food enthusiasts, health-conscious individuals, ethical consumers, families, seniors			Low	
Health & Wellness Stores	Focused on natural health products, vitamins, supplements, and wellness services.	1,000 - 2,000	Fitness enthusiasts, health-conscious individuals	Central		High	
Home Décor & Furniture	Stores featuring unique furniture, home accents, and seasonal décor.	1,500 - 5,000	Homeowners, interior design enthusiasts	Lansdowne		High	
Outdoor & Recreation Stores	Retailers offering gear and apparel for camping, hiking, cycling, and outdoor activities.	2,000 - 4,000	Outdoor enthusiasts, families, adventure seekers			Low	
Axe Throwing Bar and Indoor Climbing Centre	Arts & entertainment combined with craft brewery or late night entertainment combined with study areas for students	2,000 - 4,000	Students, Residents & Visitors	Central, Lansdowne		High	
Specialty Sports Stores	Retailers specializing in sports equipment and apparel for niche markets (e.g., hockey, soccer) including used or consignment product	2,000 - 4,000	Athletes, families, sports enthusiasts			Low	
Pet Supply Stores	Specialty stores providing high-quality pet food, toys, and grooming services.	1,000 - 3,000	Pet owners, families	Central		Moderate	
Books & Hobbies	Bookshops or stores catering to hobbies such as crafting, model building, or board games.	1,000 - 2,500	Students, hobbyists, families			Low	
Craft Breweries/Cideries/ Distilleries	Local craft beer, cider, or spirits producers with retail and tasting options.	2,000 - 4,000	Young adults, professionals, food & beverage enthusiasts			Low	
Whisky & Wine Bar with Speakeasy	Worldwide spirits and cocktails in an intimate venue with possibly back room for events	1,000 - 2,500	Adults, Visitors	Central, Lansdowne		High	
Art Galleries/Studios	Spaces selling local artwork or offering art classes and workshops.	1,000 - 2,500	Art enthusiasts, families, tourists, home-based businesses			Low	
Fitness Studios	Specialized fitness facilities offering yoga, pilates, spin, or martial arts classes.	1,500 - 3,000	Fitness enthusiasts, families, young professionals			Low	
Child Enrichment Centers	Businesses focusing on educational toys, books, and extracurricular activities for kids.	1,000 - 3,000	Parents, families	North, Lansdowne		Moderate	
Toys & Hobbies	Interactive specialty toys, arts & crafts, board games and hobbies stores	750 - 1,500	Childre, youth, families, seniors visitors	Central		High	
Technology/Gadget Stores	Stores offering electronics, smart devices, and accessories.	1,000 - 2,500	Tech-savvy individuals, students, professionals	North, Central		Moderate	
Local Cafés & Bakeries	Unique coffee shops and bakeries offering local flavors and community space.	800 - 2,000	Coffee lovers, professionals, students, families			Low	
Ethnic Fare Restaurants & Bistros	Curated for specific ethnic gaps for the local area	1,250 - 2,000	Foodies, families, seniors, students, home-based businesses	North, Central		Moderate	
Oils & Vinegars	Specialty culinary store with liquid ingredients	750 - 1,000	families, couples and visitors	North, Central		Moderate	
Candy Shop, Chocolates & Confections	Retailers specializing in international candies, specialty chocolates and other worldwide sweets	750 - 1,500	Children, youth, families, students, seniors and visitors	Central		High	
Chocolate & Fondue Coffee Bar	Combination retail and specialty bistro	750 - 1,250	Residents & Visitors	Central		Moderate	

## 7.2.4 Retail Gaps & Positioning

The productivity and market share analysis revealed the following gaps in the Glebe's BIA's current retail offering that could be captured with new local or destination retailers:

- Boutique Clothing Stores
- Health & Wellness Stores
- Home Decor & Furnishings
- Whisky & Wine Bar
- Toys & Hobbies
- Candy Shops & Specialty Confections

Comparing the online survey results, Customers and BIA Business Members noted that they wish that there were more of the following types of retail available in the Glebe:

1. Clothing & Footwear
2. Arts & Entertainment
3. Home Furniture & Décor
4. Books, Video Games, & Other Media
5. Groceries & Specialty Goods.

For a category like Home Furniture & Decor, the Glebe could target retailers compatible for Lansdowne such as Restoration Hardware, Crate & Barrel or Pottery Barn.

Missing certain types of shops and services was selected as a main barrier to shopping in the Glebe by 246 out of 589 customer survey respondents.

To support the BIA in being strategic in its retention and attraction efforts, **Table 2323** identifies a roster of store types that respond to the gaps in the Glebe's retail offering and suit the trade area's demographic and spending profile. The table provides the typical store size and target audience for each business type, and identifies the area within the Glebe (Retail Node) in which the given type would best fit.

One method to attract businesses is to work with the existing leaseholders or property owners to consider re-demising larger spaces into temporary smaller micro retail units or pop ups that can incubate local concepts while generating cash flow for the landlord(s).

## 7.2.5 BIA Boundary Expansion

Expanding the BIA boundary to include the businesses located along Bank St in Old Ottawa South is another opportunity for the Glebe. This could frame the Lansdowne Park area with another local hotbed. At present, the retail on the "south side of the bridge" feels disconnected and could be brought into the magic of the Glebe.

## 7.3 Opportunities by Node

Since the Glebe is almost fully built-out, major future changes to the retail environment are going to come largely through redevelop (as is in the process of being done with Lansdowne 2.0). As properties are redeveloped, it is essential that developers remain cognizant of the character of the section of the street on which they are building.

### 7.3.1 North Node

The North Node's character is somewhat disjointed at this point, with it's mix of professional offices, residential homes, some smaller format retail, and also several larger format neighbourhood staples, particularly Loblaws and the Pretoria Animal Hospital.

Among the nodes, the North Node offers perhaps the most space available to increase the Glebe's retail offering - especially for attracting local business that may want smaller footprint locations - by converting certain parking lots into retail spaces.

**Strategic positioning:** Consideration should be given to the type of character the BIA envisions for this area moving into the future. The area's geography could in fact be seen as two distinct areas, one with the day-to-day conveniences and the other on Bank St that is effectively the gateway and sense of arrival to the district.

The statement that this district has, particularly along Bank St sets the stage for the experience that consumers will have as they walk, cycle, drive or bus along Bank St. First impressions are long-lasting.

Therefore it will be critical for the Glebe to work with property owners on any redevelopments at the corners of Bank St and Pretoria Ave, when or if they are announced. They must have a retail presence to along Bank St to create the opening act for the streetfront retail story of the Glebe BIA.

Suggested store type targets in the North Node:

- Boutique Clothing Stores
- Toys & Hobbies
- Candy Shops & Specialty Confections
- Targeted Ethnic Fare

### 7.3.2 Central Node

The Central Node continues to be the “heart” of the Glebe shopping area, with the area’s characteristic diverse mix of business, many of which are owned and operated by local owners.

Future redevelopments: To maintain the distinctive historic building design and compact assortment of varied shops and services that define the Glebe’s reputation is crucial in the Central Node, as it currently contains the portion of the Glebe that most reflects the area’s well-established and distinctive character.

**Strategic positioning:** It should seek to maintain its existing mix of businesses, with an opportunity to focus on continue to welcome local independent businesses or highly compatible locally-owned franchise brands. The local vs brand ratio which is 73%:27% is critical to the success and longevity of the Glebe’s core.

Suggested targets for acquisitions:

- Boutique Clothing Stores
- Health & Wellness Stores
- Whisky & Wine Bar
- Candy Shops & Specialty Confections

### 7.3.3 Lansdowne Node

**To be or not to be “local”:** A strong theme that emerged from the surveys and interviews was that local businesses are underrepresented specifically in the Lansdowne Node. The Farmers’ Market provides a short term, seasonal opportunity for locals; however, that activity has not translated into long-term retail spaces within Lansdowne.

The Glebe BIA will need to decide whether it will endeavor to create opportunities for more local businesses to set up in the Lansdowne node, or if it will allow the Lansdowne area to continue as a distinct brand-focused retail area while the other two nodes continue to host a strong representation of local businesses. If it decides that it would like to attract more local businesses to this area, it must establish a **Lansdowne-specific local business retention and attraction plan**. Such a plan would require Lansdowne to allocate a selection of smaller spaces of an appropriate size that would enable Lansdowne to incubate new and independent businesses, providing spaces in the size range of 500 to 1,000 sf.

**Strategic positioning:** As Lansdowne 2.0 looks at its next stage of destination events and commercial growth, the reality is that costs and retail footprints may continue to be larger and therefore future pursuits will and likely should continue to look to branded retailers, possibly looking at home and personal fashion categories. Examples could include retailers like Crate & Barrel or Restoration Hardware whose demographic profile fits well with the Glebe’s immediate and broader trade area segments.

**Table 24: Glebe Retail Strategy Action Matrix**

Strategy	Action Item	Priority Level	Timeline	Key Actor(s)
<b>1. Optimize Customer Experience &amp; Accessibility</b>				
Parking Enforcement & Access	Advocate to the City for standardized parking time limits and less punitive enforcement.	High	Immediate (0-1 yr)	BIA, City Council, Parking Authority
Parking Validation & Utilization	Promote off-street parking (parkades/lots) and explore a customer validation/discount program to increase utilization.	Moderate	Near-Term (2-5 yrs)	BIA, Business Members, Property Owners
Pedestrian Realm Connectivity	Prioritize expansion and maintenance of clear, unobstructed sidewalks particularly on perpendicular streets to Bank. The BIA should support city plans that prioritize pedestrians and cyclists in areas that do not impact necessary parking for customers and businesses	High	Near-Term (2-5 yrs)	BIA, City Planning/Public Works
Marketing Campaigns	Word of mouth is the most effective information source: Develop marketing campaigns that leverage positive customer experiences and feature the unique owners and stories of local businesses.	High	Immediate (0-1 yr)	BIA, Business Owners
<b>2. Retail Attraction &amp; Filling Gaps</b>				
Local Business Incubation	Work with landlords/property owners to create temporary micro-retail units or pop-up shops to test local concepts and fill vacancies.	High	Immediate (0-1 yr)	BIA, Landlords, Realtors
Targeted Recruitment (BIA-Wide)	Proactively recruit businesses in Toys & Hobbies, Ethnic Fare, Boutique Fashions and Home Furniture & Décor categories. Make sure Invest Ottawa "thinks retail" as well as office and industrial	High	Immediate/Near-Term	BIA, Regional Economic Development (Invest Ottawa)
<b>3. Retail Retention &amp; Positioning</b>				
Expand BIA Boundary	Work with retail business and commercial property owners located along Bank St in Old Ottawa South to become members of the Glebe BIA	Moderate	Near-Term (2-5 yrs)	BIA, Local Businesses, Property Owners, City Administration
Preserve Historic/Local Character	Launch a <b>"Support Local" loyalty program</b> to reward spending at independent businesses.	High	Immediate (0-1 yr)	BIA, Local Businesses
Independents	Implement an <b>"Independent First" policy</b> for vacant streetfront retail in the Central and North Nodes.	High	Immediate (0-1 yr)	BIA, Property Owners
Place a High Value on the Ratio of Locals vs Brands	Ensure the local and independent businesses are prioritized and curated in the North and Central areas of the BIA	High	Immediate (0-1 yr)	BIA, Property Owners
Lansdowne Node Integration	Create a co-marketing strategy for Lansdowne: <b>local integration</b> (e.g., pop-ups for local businesses) or <b>brand exclusivity</b> (focused on regional draw events).	High	Immediate (0-1 yr)	BIA Board
Unwanted Business Control	Monitor and advocate against the clustering of <b>Alcohol, Tobacco, and Cannabis</b> and <b>Fast Food/Grab-and-Go Restaurants</b>	High	Long-Term (5-10 yrs)	BIA, City Planning, Zoning Committee

# APPENDICES



# Appendix A: Trade Area Demographic Tables

Formatted by FBM using data from Manifold Data Mining, Inc. 2024/2025 data vintage.

## Benchmarking Legend

The below colours depict how statistics from each trade area compare to the benchmark (the Ottawa-Gatineau CMA).

Index	Description
>= 180	Extremely High
>=110 and <180	High
>=90 and <110	Similar
>=50 and <90	Low
<50	Extremely Low

## Demographic Summary by Trade Area

	<i>Benchmark</i>		Walking TA			Cycling TA			Driving TA			Lansdowne		
	Ottawa-Gatineau (CMA)		10 Minutes - walking time			10 Minutes - cycling time			10 Minutes - driving time			20 Minutes - driving time		
	value	percent	value	percent	index									
<b>SUMMARY</b>														
Total population	1,668,821		13,578			97,616			176,771			700,030		
Total population age 15 and over	1,406,932		12,140			89,083			159,733			609,276		
Total number of private households	674,251		6,311			49,531			88,582			310,822		
Average number of persons in private households	2.43		2.09		86	1.93		79	1.95		80	2.20		91
Total population in families	1,329,567		9,637			58,038			107,029			491,061		
Total number of labour force age 15 and over	964,995		8,759			62,570			110,405			393,951		
Land area (square km)	8,046.99		1.62			8.26			22.73			256.41		
Inhabited area (square km)	4,580.36		1.62			8.26			22.73			255.61		
<b>POPULATION AGE</b>														
Population age 0-14	261,889	15.69%	1,439	10.60%	68	8,533	8.74%	56	17,038	9.64%	61	90,757	12.96%	83
Population age 15-24	212,466	12.73%	1,884	13.87%	109	16,354	16.75%	132	27,959	15.82%	124	95,172	13.60%	107
Population age 25-34	240,667	14.42%	2,487	18.31%	127	22,975	23.54%	163	40,156	22.72%	158	125,353	17.91%	124
Population age 35-44	231,000	13.84%	1,704	12.55%	91	14,200	14.55%	105	25,966	14.69%	106	97,252	13.89%	100
Population age 45-54	209,310	12.54%	1,589	11.70%	93	10,458	10.71%	85	18,510	10.47%	83	77,056	11.01%	88
Population age 55-64	214,935	12.88%	1,647	12.13%	94	9,727	9.96%	77	17,974	10.17%	79	81,539	11.65%	90
Population age 65+	298,554	17.89%	2,829	20.83%	116	15,367	15.74%	88	29,168	16.50%	92	132,904	18.99%	106
<b>DWELLING</b>														
Total number of occupied private dwellings	674,251		6,311			49,531			88,582			310,822		
Average dwelling value \$	\$724,072		\$1,088,661		150	\$755,964		104	\$711,977		98	\$646,740		89
Home owners	438,236	65.00%	3,406	53.96%	83	20,638	41.67%	64	37,224	42.02%	65	154,788	49.80%	77
Home tenants	236,014	35.00%	2,905	46.04%	132	28,893	58.33%	167	51,358	57.98%	166	156,035	50.20%	143
Band housing	0	0.00%	0	0.00%		0	0.00%		0	0.00%		0	0.00%	
<b>HOUSEHOLDS</b>														
One-family households	426,993	63.33%	3,442	54.54%	86	21,129	42.66%	67	38,737	43.73%	69	162,911	52.41%	83
Multiple-family households	17,798	2.64%	53	0.84%	32	518	1.05%	40	918	1.04%	39	5,632	1.81%	69
<b>EDUCATION</b>														
Total population by highest certificate, diploma, or degree	1,406,611		12,140			89,022			159,677			609,259		
No certificate, diploma, or degree	178,772	12.71%	601	4.95%	39	6,197	6.96%	55	12,283	7.69%	61	73,019	11.98%	94
High school diploma or equivalent	327,805	23.31%	1,840	15.15%	65	17,224	19.35%	83	31,862	19.95%	86	138,008	22.65%	97
Post-secondary certificate, diploma, or degree	900,034	63.99%	9,699	79.90%	125	65,600	73.69%	115	115,533	72.35%	113	398,231	65.36%	102
Postsecondary certificate or diploma below bachelor level	384,328	27.32%	1,510	12.43%	45	13,710	15.40%	56	26,586	16.65%	61	134,700	22.11%	81
Apprenticeship or trades certificate or diploma	80,158	5.70%	164	1.35%	24	1,745	1.96%	34	3,687	2.31%	41	23,340	3.83%	67
College, CEGEP or other non-university certificate or diploma	270,908	19.26%	1,214	10.00%	52	10,988	12.34%	64	20,606	12.90%	67	98,670	16.20%	84
University certificate or diploma below bachelor level	33,262	2.37%	131	1.08%	46	977	1.10%	46	2,293	1.44%	61	12,690	2.08%	88
University certificate, diploma, or degree at bachelor level or above	515,706	36.66%	8,190	67.46%	184	51,890	58.29%	159	88,947	55.70%	152	263,533	43.25%	118
Bachelor's degree	311,055	22.11%	4,058	33.43%	151	27,955	31.40%	142	47,828	29.95%	135	149,201	24.49%	111

## Age Breakdown by Trade Area

	Benchmark		Walking TA			Cycling TA			Driving TA			Lansdowne		
	Ottawa-Gatineau (CMA)		10 Minutes - walking time			10 Minutes - cycling time			10 Minutes - driving time			20 Minutes - driving time		
	value	percent	value	percent	index									
Total population by age groups	1,668,821		13,578			97,616			176,771			700,034		
0-14	261,889	15.69%	1,439	10.60%	68	8,533	8.74%	56	17,038	9.64%	61	90,757	12.96%	83
0-4	80,184	4.81%	405	2.98%	62	2,696	2.76%	57	5,513	3.12%	65	28,982	4.14%	86
5-9	87,720	5.26%	470	3.46%	66	2,900	2.97%	56	5,817	3.29%	63	30,792	4.40%	84
10-14	93,985	5.63%	564	4.15%	74	2,937	3.01%	53	5,709	3.23%	57	30,982	4.43%	79
15-64	1,108,378	66.42%	9,311	68.57%	103	73,716	75.52%	114	130,565	73.86%	111	476,373	68.05%	102
15-19	100,332	6.01%	717	5.28%	88	4,221	4.32%	72	7,486	4.24%	71	34,699	4.96%	83
20-24	112,134	6.72%	1,167	8.60%	128	12,133	12.43%	185	20,472	11.58%	172	60,473	8.64%	129
25-29	117,340	7.03%	1,275	9.39%	134	11,925	12.22%	174	20,728	11.73%	167	63,159	9.02%	128
30-34	123,327	7.39%	1,212	8.93%	121	11,051	11.32%	153	19,428	10.99%	149	62,194	8.88%	120
35-39	117,691	7.05%	931	6.85%	97	8,032	8.23%	117	14,558	8.24%	117	52,199	7.46%	106
40-44	113,309	6.79%	773	5.69%	84	6,168	6.32%	93	11,408	6.45%	95	45,053	6.44%	95
45-49	105,851	6.34%	755	5.56%	88	5,226	5.35%	84	9,421	5.33%	84	38,967	5.57%	88
50-54	103,459	6.20%	834	6.14%	99	5,232	5.36%	86	9,090	5.14%	83	38,089	5.44%	88
55-59	105,123	6.30%	838	6.17%	98	4,902	5.02%	80	8,852	5.01%	80	39,391	5.63%	89
60-64	109,812	6.58%	809	5.96%	91	4,825	4.94%	75	9,122	5.16%	78	42,148	6.02%	91
65 and over	298,554	17.89%	2,829	20.83%	116	15,367	15.74%	88	29,168	16.50%	92	132,904	18.99%	106
65-69	93,551	5.61%	684	5.04%	90	4,362	4.47%	80	8,255	4.67%	83	37,750	5.39%	96
70-74	74,276	4.45%	652	4.80%	108	3,859	3.95%	89	7,159	4.05%	91	31,679	4.53%	102
75-79	58,393	3.50%	625	4.60%	131	3,196	3.27%	93	5,908	3.34%	95	26,161	3.74%	107
80-84	36,423	2.18%	418	3.08%	141	1,924	1.97%	90	3,736	2.11%	97	17,433	2.49%	114
85 and over	35,911	2.15%	450	3.31%	154	2,025	2.07%	96	4,109	2.32%	108	19,881	2.84%	132
85-89	22,976	1.38%	247	1.82%	132	1,375	1.41%	102	2,619	1.48%	107	12,350	1.76%	128
90-94	10,223	0.61%	167	1.23%	202	393	0.40%	66	1,007	0.57%	93	5,749	0.82%	134
95-99	2,478	0.15%	32	0.24%	160	252	0.26%	173	452	0.26%	173	1,618	0.23%	153
100 and over	233	0.01%	4	0.03%	300	5	0.01%	100	31	0.02%	200	164	0.02%	200
Average age of total population	41.10		43.30		105	40.30		98	40.60		99	41.60		101

## Households Income by Trade Area

	Benchmark		Walking TA			Cycling TA			Driving TA			Lansdowne		
	Ottawa-Gatineau (CMA)		10 Minutes - walking time			10 Minutes - cycling time			10 Minutes - driving time			20 Minutes - driving time		
	value	percent	value	percent	index									
<b>HOUSEHOLD INCOME</b>														
Total number of households	674,251		6,311			49,531			88,582			310,823		
Average household income \$	\$131,499.00		\$189,674.00		144	\$131,531.00		100	\$125,131.00		95	\$118,549.00		90
Median household income \$	\$110,956.00		\$140,834.00		127	\$93,671.00		84	\$92,868.00		84	\$96,412.00		87
Household with income under \$5,000	5,369	0.80%	42	0.66%	83	1,423	2.87%	359	2,619	2.96%	370	6,320	2.03%	254
Household with income \$5,000 to \$9,999	4,604	0.68%	35	0.55%	81	772	1.56%	229	1,511	1.71%	251	4,461	1.44%	212
Household with income \$10,000 to \$14,999	7,091	1.05%	33	0.52%	50	1,230	2.48%	236	2,196	2.48%	236	6,096	1.96%	187
Household with income \$15,000 to \$19,999	10,540	1.56%	53	0.84%	54	1,324	2.67%	171	2,506	2.83%	181	7,639	2.46%	158
Household with income \$20,000 to \$24,999	17,004	2.52%	94	1.49%	59	1,685	3.40%	135	3,062	3.46%	137	9,729	3.13%	124
Household with income \$25,000 to \$29,999	16,010	2.37%	118	1.86%	78	1,667	3.37%	142	2,940	3.32%	140	9,658	3.11%	131
Household with income \$30,000 to \$34,999	16,335	2.42%	131	2.07%	86	1,631	3.29%	136	2,871	3.24%	134	9,671	3.11%	129
Household with income \$35,000 to \$39,999	17,865	2.65%	135	2.14%	81	1,670	3.37%	127	2,963	3.35%	126	10,560	3.40%	128
Household with income \$40,000 to \$44,999	19,416	2.88%	107	1.70%	59	1,645	3.32%	115	3,086	3.48%	121	11,449	3.68%	128
Household with income \$45,000 to \$49,999	20,564	3.05%	166	2.62%	86	1,858	3.75%	123	3,577	4.04%	132	12,807	4.12%	135
Household with income \$50,000 to \$59,999	37,296	5.53%	271	4.30%	78	2,961	5.98%	108	5,296	5.98%	108	18,937	6.09%	110
Household with income \$60,000 to \$69,999	41,968	6.22%	336	5.33%	86	2,994	6.05%	97	5,405	6.10%	98	19,591	6.30%	101
Household with income \$70,000 to \$79,999	42,086	6.24%	342	5.41%	87	2,962	5.98%	96	5,336	6.02%	96	19,177	6.17%	99
Household with income \$80,000 to \$89,999	41,135	6.10%	368	5.83%	96	2,929	5.91%	97	5,189	5.86%	96	18,876	6.07%	100
Household with income \$90,000 to \$99,999	40,332	5.98%	337	5.34%	89	2,691	5.43%	91	5,003	5.65%	94	18,934	6.09%	102
Household with income \$100,000 and over	336,635	49.93%	3,744	59.33%	119	20,088	40.56%	81	35,023	39.54%	79	126,918	40.83%	82
Household with income \$100,000 to \$124,999	75,407	11.18%	558	8.83%	79	4,233	8.55%	76	7,790	8.79%	79	30,372	9.77%	87
Household with income \$125,000 to \$149,999	69,355	10.29%	589	9.33%	91	4,012	8.10%	79	7,113	8.03%	78	26,819	8.63%	84
Household with income \$150,000 to \$199,999	83,191	12.34%	748	11.86%	96	4,600	9.29%	75	7,959	8.99%	73	29,500	9.49%	77
Household with income \$200,000 and over	108,682	16.12%	1,849	29.30%	182	7,243	14.62%	91	12,160	13.73%	85	40,228	12.94%	80
Household with income \$200,000 to \$249,999	60,509	8.97%	932	14.77%	165	3,650	7.37%	82	6,127	6.92%	77	20,258	6.52%	73
Household with income \$250,000 to \$299,999	25,226	3.74%	374	5.92%	158	1,463	2.95%	79	2,456	2.77%	74	8,120	2.61%	70
Household with income \$300,000 and over	22,944	3.40%	543	8.60%	253	2,125	4.29%	126	3,567	4.03%	119	11,793	3.79%	111

## Projections by Trade Area: Population, Household Growth, & Household Income

	Benchmark		Walking TA			Cycling TA			Driving TA			Lansdowne		
	Ottawa-Gatineau (CMA)		10 Minutes - walking time			10 Minutes - cycling time			10 Minutes - driving time			20 Minutes - driving time		
	value	percent	value	percent	index									
<b>PROJECTIONS</b>														
Annual population growth in the period: Next 5 years		1.63%		1.45%	89		1.86%	114		1.82%	112		1.56%	96
Annual household growth in the period: Next 5 years		1.74%		1.87%	107		2.02%	116		1.97%	113		1.60%	92
Annual population growth in the period: 5 to 10 years from 2025		1.45%		1.27%	88		1.64%	113		1.61%	111		1.38%	95
Annual household growth in the period: 5 to 10 years from 2025		1.55%		1.66%	107		1.80%	116		1.75%	113		1.43%	92
<b>POPULATION GROWTH</b>														
Current year total population	1,668,821		13,578			97,616			176,771			700,030		
5-Year Projections - Total population	1,809,656		14,601			107,130			193,605			756,893		
10-Year Projections - Total population	1,944,364		15,560			116,314			209,829			810,998		
<b>HOUSEHOLD GROWTH</b>														
Current year total number of households	674,251		6,311			49,531			88,582			310,822		
5-Year Projections - Total number of households	734,878		6,928			54,804			97,736			336,787		
10-Year Projections - Total number of households	793,501		7,525			59,976			106,690			361,714		
<b>HOUSEHOLD INCOME GROWTH</b>														
Current year average household income	\$131,499		\$189,674		144	\$131,531		100	\$125,131		95	\$118,550		90
5-Year Projections - Average household income	\$158,451		\$221,716		140	\$159,036		100	\$152,744		96	\$143,769		91
10-Year Projections - Average household income	\$187,593		\$250,140		133	\$186,462		99	\$180,898		96	\$169,229		90

## Labour Force Activity & Industry (by NAICS) by Trade Area

	Benchmark		Walking TA			Cycling TA			Driving TA			Lansdowne		
	Ottawa-Gatineau (CMA)		10 Minutes - walking time			10 Minutes - cycling time			10 Minutes - driving time			20 Minutes - driving time		
	value	percent	value	percent	index									
<b>LABOUR FORCE ACTIVITY - TOTAL</b>														
Total population 15+ years	1,406,611		12,140			89,022			159,677			609,257		
In the labour force	964,995	68.60%	8,759	72.15%	105	62,570	70.29%	102	110,405	69.14%	101	393,950	64.66%	94
Employed	918,203	65.28%	8,395	69.15%	106	59,210	66.51%	102	104,111	65.20%	100	370,069	60.74%	93
Unemployed	46,792	3.33%	364	3.00%	90	3,360	3.77%	113	6,294	3.94%	118	23,880	3.92%	118
Not in the labour force	441,616	31.40%	3,381	27.85%	89	26,452	29.71%	95	49,272	30.86%	98	215,309	35.34%	113
Participation rate (%)		68.60%		72.15%	105		70.29%	102		69.14%	101		64.66%	94
Employment rate (%)		65.28%		69.15%	106		66.51%	102		65.20%	100		60.74%	93
Unemployment rate (%)		4.85%		4.16%	86		5.37%	111		5.70%	118		6.06%	125
<b>LABOUR FORCE INDUSTRY</b>														
Total labour force population aged 15+ years by NAICS Category	964,995		8,759			62,570			110,405			393,950		
Industry - not applicable	21,847	2.26%	179	2.04%	90	1,571	2.51%	111	2,851	2.58%	114	11,227	2.85%	126
All industries	943,148	97.74%	8,580	97.96%	100	60,998	97.49%	100	107,554	97.42%	100	382,723	97.15%	99
11 Agriculture, forestry, fishing, and hunting	5,332	0.55%	0	0.00%	0	92	0.15%	27	208	0.19%	35	897	0.23%	42
21 Mining, quarrying, and oil and gas extraction	1,005	0.10%	0	0.00%	0	20	0.03%	30	20	0.02%	20	392	0.10%	100
22 Utilities	3,259	0.34%	18	0.20%	59	43	0.07%	21	77	0.07%	21	716	0.18%	53
23 Construction	62,346	6.46%	210	2.40%	37	1,327	2.12%	33	2,921	2.65%	41	16,705	4.24%	66
31-33 Manufacturing	29,662	3.07%	190	2.17%	71	1,369	2.19%	71	2,424	2.20%	72	9,160	2.33%	76
41 Wholesale trade	17,213	1.78%	94	1.07%	60	666	1.06%	60	1,288	1.17%	66	5,340	1.36%	76
44-45 Retail trade	95,756	9.92%	575	6.57%	66	4,410	7.05%	71	8,446	7.65%	77	37,598	9.54%	96
48-49 Transportation and warehousing	32,014	3.32%	83	0.95%	29	1,039	1.66%	50	2,343	2.12%	64	12,700	3.22%	97
51 Information and cultural industries	19,001	1.97%	226	2.58%	131	2,355	3.76%	191	3,742	3.39%	172	9,527	2.42%	123
52 Finance and insurance	29,050	3.01%	249	2.84%	94	2,588	4.14%	138	4,188	3.79%	126	12,615	3.20%	106
53 Real estate and rental and leasing	13,875	1.44%	179	2.05%	142	1,038	1.66%	115	1,674	1.52%	106	6,156	1.56%	108
54 Professional, scientific, and technical services	93,186	9.66%	1,407	16.06%	166	8,101	12.95%	134	13,797	12.50%	129	40,594	10.30%	107
55 Management of companies and enterprises	1,043	0.11%	31	0.35%	318	40	0.06%	55	101	0.09%	82	428	0.11%	100
56 Administrative/support, waste management, & remediation services	39,727	4.12%	147	1.67%	41	2,212	3.53%	86	3,971	3.60%	87	18,528	4.70%	114
61 Educational services	74,146	7.68%	917	10.47%	136	6,032	9.64%	126	10,264	9.30%	121	32,423	8.23%	107
62 Health care and social assistance	113,888	11.80%	1,110	12.68%	107	6,768	10.82%	92	12,177	11.03%	93	46,819	11.88%	101
71 Arts, entertainment, and recreation	16,310	1.69%	289	3.30%	195	1,891	3.02%	179	2,805	2.54%	150	7,997	2.03%	120
72 Accommodation and food services	47,546	4.93%	375	4.28%	87	3,366	5.38%	109	6,097	5.52%	112	22,441	5.70%	116
81 Other services (except public administration)	36,531	3.79%	308	3.51%	93	2,321	3.71%	98	4,248	3.85%	102	15,106	3.83%	101
91 Public administration	212,258	22.00%	2,174	24.82%	113	15,321	24.49%	111	26,761	24.24%	110	86,582	21.98%	100

## Workforce Commute by Trade Area

	<i>Benchmark</i>		Walking TA			Cycling TA			Driving TA			Lansdowne		
	Ottawa-Gatineau (CMA)		10 Minutes - walking time			10 Minutes - cycling time			10 Minutes - driving time			20 Minutes - driving time		
	<i>value</i>	<i>percent</i>	<i>value</i>	<i>percent</i>	<i>index</i>									
<b>PLACE OF WORK</b>														
Total employed labour force 15 years and over by place of work status	918,203		8,395			59,210			104,111			370,069		
At home	164,897	17.09%	2,131	24.33%	142	14,597	23.33%	137	24,417	22.12%	129	72,262	18.34%	107
Outside Canada	3,155	0.33%	22	0.25%	76	273	0.44%	133	511	0.46%	139	1,528	0.39%	118
No fixed workplace address	123,823	12.83%	722	8.24%	64	6,121	9.78%	76	11,228	10.17%	79	46,836	11.89%	93
Usual place of work	626,326	64.91%	5,520	63.02%	97	38,218	61.08%	94	67,955	61.55%	95	249,443	63.32%	98
Employed Males	465,865	48.28%	4,019	45.88%	95	29,836	47.68%	99	52,233	47.31%	98	187,838	47.68%	99
Employed Females	452,338	46.88%	4,376	49.96%	107	29,374	46.95%	100	51,878	46.99%	100	182,233	46.26%	99
<b>COMMUTING DESTINATION</b>														
Total employed labour force 15 years and over with a usual place of work	626,326		5,520			38,218			67,955			249,443		
Commute within area of residence (with same census subdivision)	510,415	52.89%	5,199	59.36%	112	35,913	57.40%	109	64,261	58.20%	110	229,691	58.30%	110
Commute to a different area within province or territory of residence	56,554	5.86%	19	0.22%	4	884	1.41%	24	1,307	1.18%	20	4,853	1.23%	21
Commute to a different province or territory	50,734	5.26%	301	3.43%	65	1,416	2.26%	43	2,382	2.16%	41	14,890	3.78%	72
<b>MODE OF TRANSPORTATION</b>														
Total employed labour force 15 years and over who commute to work by mode	750,150		6,242			44,340			79,183			296,279		
Car, truck or van	600,822	62.26%	3,507	40.04%	64	24,876	39.76%	64	44,261	40.09%	64	200,526	50.90%	82
Public transit	71,606	7.42%	367	4.19%	56	5,766	9.22%	124	11,915	10.79%	145	44,751	11.36%	153
Walked	46,523	4.82%	1,754	20.03%	416	10,658	17.03%	353	17,374	15.74%	327	34,546	8.77%	182
Bicycle	9,842	1.02%	482	5.51%	540	2,050	3.28%	322	3,276	2.97%	291	6,971	1.77%	174
Other method	21,356	2.21%	131	1.49%	67	990	1.58%	71	2,357	2.13%	96	9,485	2.41%	109
<b>COMMUTING DURATION</b>														
Total employed population aged 15 years and over with a usual place of work	750,150		6,242			44,340			79,183			296,279		
Less than 15 minutes	202,314	20.97%	2,729	31.15%	149	16,148	25.81%	123	27,198	24.63%	117	89,885	22.82%	109
15 to 29 minutes	297,598	30.84%	2,615	29.85%	97	19,745	31.56%	102	35,319	31.99%	104	131,574	33.40%	108
30 to 44 minutes	161,070	16.69%	567	6.47%	39	5,288	8.45%	51	10,900	9.87%	59	48,320	12.27%	74
45 to 59 minutes	50,449	5.23%	213	2.43%	46	1,735	2.77%	53	3,050	2.76%	53	13,374	3.39%	65
60 minutes and over	38,719	4.01%	119	1.36%	34	1,423	2.28%	57	2,717	2.46%	61	13,125	3.33%	83
<b>TIME LEAVING FOR WORK</b>														
Total employed population aged 15 years and over who commute to work	750,150		6,242			44,340			79,183			296,279		
Leave for work between 5 am and 5:59 am	46,329	4.80%	238	2.72%	57	2,374	3.79%	79	3,833	3.47%	72	13,930	3.54%	74
Leave for work between 6 am and 6:59 am	143,011	14.82%	510	5.82%	39	4,910	7.85%	53	9,616	8.71%	59	44,735	11.36%	77
Leave for work between 7 am and 7:59 am	203,783	21.12%	1,578	18.01%	85	11,582	18.51%	88	20,234	18.33%	87	76,265	19.36%	92
Leave for work between 8 am and 8:59 am	156,582	16.23%	2,213	25.27%	156	11,795	18.85%	116	21,059	19.07%	117	69,902	17.74%	109
Leave for work between 9 am and 11:59 am	92,296	9.56%	1,161	13.25%	139	8,076	12.91%	135	13,864	12.56%	131	44,798	11.37%	119
Leave for work between 12 pm and 4:59 am	108,148	11.21%	542	6.19%	55	5,603	8.95%	80	10,578	9.58%	85	46,651	11.84%	106

# Appendix B: Customer Survey Questions

Created by FBM on Jotform.com

## The Glebe BIA Retail Gap Analysis - Customer Survey

For the Retail Market & Gap Analysis of the Glebe Business Improvement Area

The Glebe Business Improvement Area (BIA) has commissioned FBM to prepare a Retail Market & Gap Analysis to assess the ideal offering of shops and services for the local market and identify any potential opportunities to enhance the offering. The goal of the study is to support the BIA in maintaining and growing its role as a vibrant shopping district in Ottawa.

This Customer Survey is intended for anyone who has, does, or may in the future visit the Glebe shopping area. Your input is valuable and represents an opportunity for you to influence the manner in which the Glebe shopping area may evolve in the future.

The survey will take about 6 minutes and will be open until Sunday, July 13, 2025.

For more information about the businesses in the Glebe BIA, please visit the website.

This survey is running at the same time as a Member Survey intended for member businesses of the Glebe BIA. If you are also a BIA member and wish to respond to the Member Survey, please see the Weekly Members' Bulletin or contact the BIA to request a link.

The Glebe Business Improvement Area [Boundary Map](#) is shown below for reference.

### The Glebe BIA's Current Retail Offerings

1. Thinking about the goods and services currently offered in the Glebe BIA (see Boundary Map above), which of the following would you A) consider seeking in the Glebe shopping area; B) like to see more of being offered in the Glebe shopping area; and C) believe there are too many of in the Glebe shopping area. (Check all that apply)

	A. I would seek products or services in this category in the Glebe	B. I wish there were more in the Glebe	C. I think there are too many in the Glebe
Groceries & Specialty Foods (incl. bakery)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pharmacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alcohol, Tobacco, or Cannabis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal Services (e.g. salons, laundromat)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Clothing & Footwear	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jewelry & Accessories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health & Beauty Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Furniture & Decor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Improvements & Gardening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Appliances & Electronics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Books, Video Games and other Media	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sporting Goods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toys & Hobbies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fast food or Grab-and-Go Restaurants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Full-service Restaurants & Pubs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Arts & Entertainment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fitness & Leisure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Auto Parts & Accessories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Specialty Retail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional services (e.g. banking, medical, wellness)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. How is the balance between local and brand\* offerings available in the Glebe? (choose 1 per row) (\*Brand refers to recognizable franchises with businesses in multiple locations.)

	Too Few	Just Right	Too Many	Unsure
Local Businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Branded Businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. Do you have any additional comments about what shops and services are or are not currently offered within the Glebe BIA, including branded versus local businesses?

## Travelling to the Glebe Shopping Area

4. What mode of transportation are you most likely to take to the Glebe shopping area? (choose one)

- Motor vehicle/car
- Motorcycle/Moped-style Scooter
- E-bicycle or e-scooter
- Bicycle or other active transport options
- Public transit (bus)
- Walking
- Other

5. Using your most likely mode of transportation identified above, how long would it typically take you to travel to the Glebe shopping area from where you live? (choose one)

- I live there already.
- 5 minutes or less
- 5 to 15 minutes
- 15 to 30 minutes
- 30 to 45 minutes
- 45 to 60 minutes
- More than 60 minutes

6. Do you have any additional comments about travelling to or accessing the Glebe BIA?

## Your Perspective on the Glebe Shopping Area

7. What is the primary reason you visit the Glebe shopping area? (choose one)

- I live there.
- Groceries or other day-to-day essentials
- Shopping other than groceries/essentials
- Restaurants
- Events at Lansdowne Park/TD Place
- Events hosted and/or within the Glebe BIA
- Meeting with friends or relatives
- Work/professional meetings

Other (please explain in the next question)

8. If you selected "Other" for the previous question, what would be your primary reason to visit the Glebe shopping area?

9. What do you feel are the Glebe shopping area's greatest strengths? (Check all that apply)

- Centrally located
- Historic aesthetic (the look and feel of the buildings)
- Lots of people and activity along the main streets
- A wide variety of restaurants
- A wide variety of shops and services
- Events at Lansdowne Park/TD Place
- Lots of public seating and other public amenities
- Great public transit options
- Other (please explain in Question 11)

10. What are the main barriers, challenges, or deterrents to you visiting the Glebe shopping area? (Check all that apply)

- Missing certain key types of shops and services
- Inaccessible for those with mobility challenges
- Too crowded
- Too many motor vehicles
- Too many bicycles/scooters or lack of dedicated racks
- Lack of motor vehicle parking
- Poor public transit options
- It feels unsafe
- It is dirty or poorly maintained
- It is too far away from where I spend my time
- It is too expensive
- Low quality goods or services
- I like shopping in other places more
- Other (please explain in Question 11)

11. Do you have any additional comments about the Glebe shopping area's strengths or weaknesses?

12. How would you describe the defining character of the Glebe shopping area in only one (1) to three (3) words?

## Your Personal Shopping and Dining Preferences

13. Are you willing to pay slightly more for a locally-made product or a service provided by a locally-owned business?

- Yes
- No
- Unsure

14. Considering your average annual Retail and Food & Beverage (e.g., restaurant) spending, what percentage do you think you spend in the Glebe BIA at shops and services?

- Less than 10%
- 10% to 20%
- More than 20%

15. How do you typically find out information about the places you shop or dine? (check all that apply)

- Word of mouth
- Google
- Social Media - Instagram/Facebook/TikTok
- Other social media sources
- Radio
- Newspaper (print or online)
- Printed Posters (on power polls, bulletin boards, etc)
- Community Flyers or Newsletters (print or online)
- Other (please explain in Question 18)

16. What kind of restaurants are you most interested in visiting (in the Glebe or in general)? (check all that apply)

- Café or Coffee Shop
- Fast food
- Family-style sit-down restaurants
- High-end dining
- International Foods
- Pubs & Bars
- Other (please explain in Question 18)

17. Thinking about your typical Food & Beverage activity, would you most often choose take-out, delivery, or dine-in when you buy food from a restaurant? (choose one)

- Take-out
- Delivery

- Dine-in
- A combo of all or some of the above
- I do not buy food from restaurants

18. Do you have any additional comments regarding your personal shopping and dining preferences, including where you selected "Other" in the above questions?

## Optional Demographics Questions

The final questions are optional demographic questions that help us understand how the survey results represent the community. The answers also help add nuance to analysis of the survey results. All submissions are anonymous, individual responses are kept confidential, and results will only be presented in aggregate (grouped together) in the final report.

19. What is your age (in years)?

- Under 19 years
- 20-34
- 35 - 49
- 50 - 64
- Over 65 years

20. What is your gender?

- Female
- Male
- Transgender/Two-Spirit/Non-binary/Gender-fluid
- Other
- Prefer not to answer

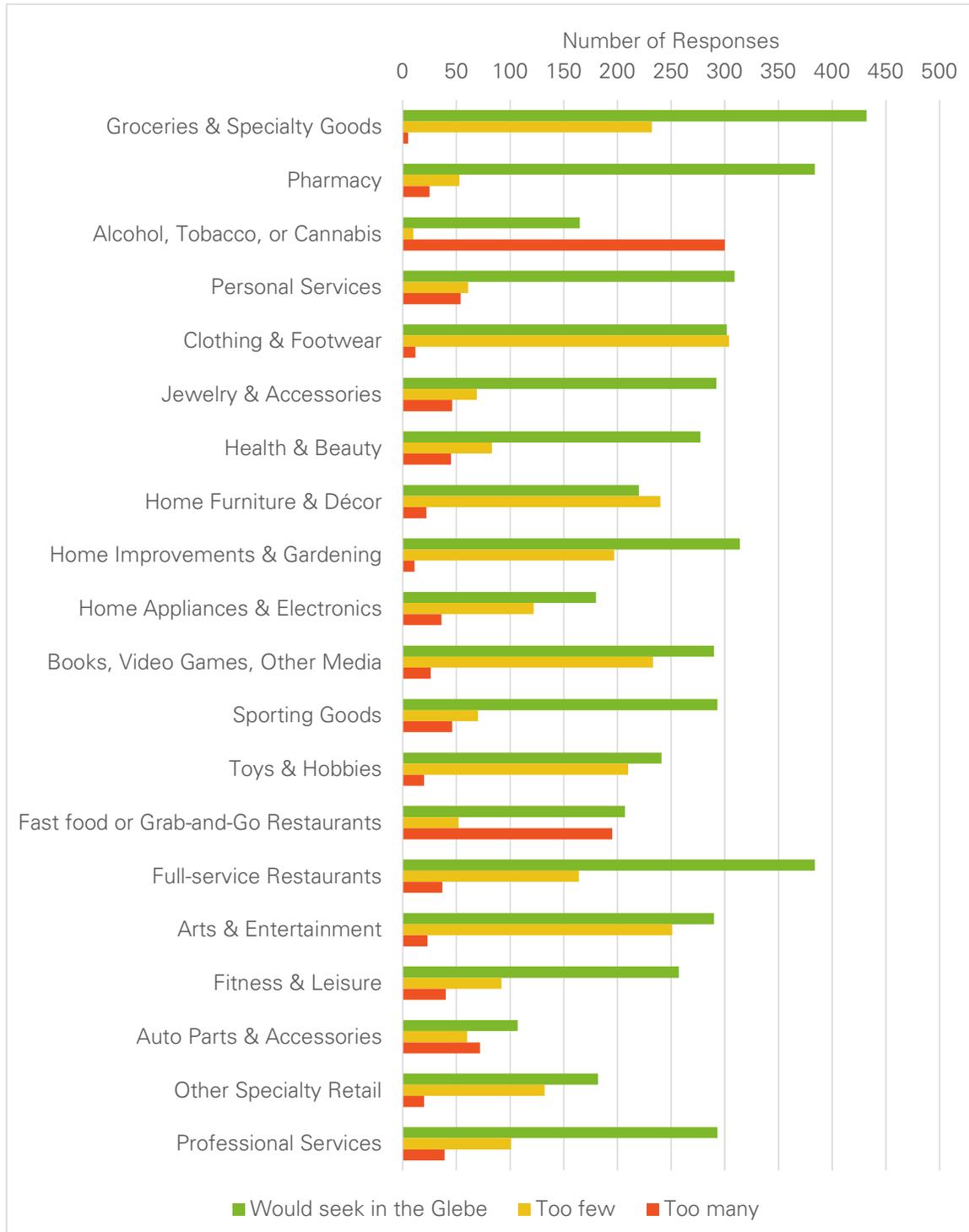
21. What is your postal code? (This helps us understand which areas in and around the Glebe BIA have been represented by the survey)

A sincere thank you for taking the time to complete this survey.  
Please hit the below "Submit" button to submit your response.

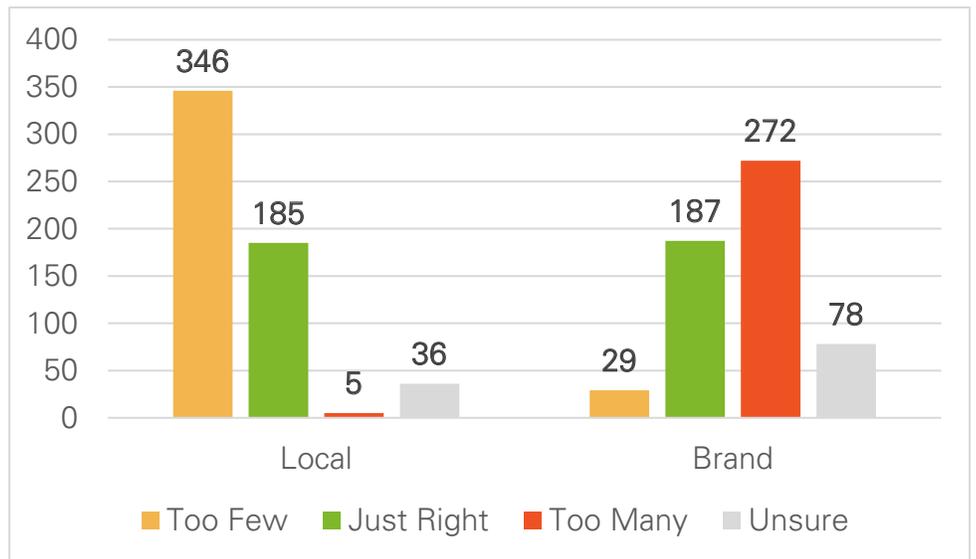
# Appendix C: Customer Survey Results

The following summarizes responses to the 'Glebe BIA Retail Gap Analysis - Customer Survey' that ran from June 23 to July 13, 2025. Responses to open-ended questions are excluded from this report to protect respondent anonymity (questions 3, 6, 8, 11, 12, 18, and 21), as are responses to the voluntary postal code question.

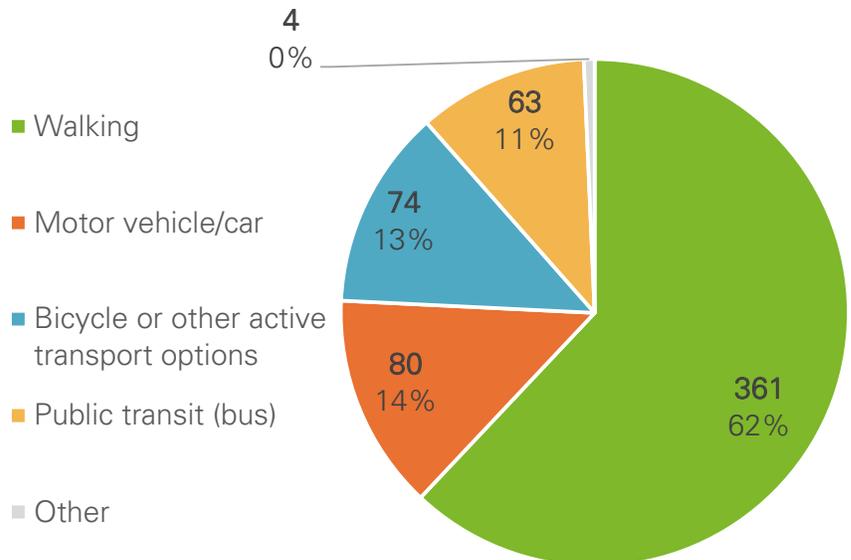
1. Thinking about the goods and services currently offered in the Glebe BIA, which of the following would you A) consider seeking in the Glebe shopping area; B) like to see more of being offered in the Glebe shopping area; and C) believe there are too many of in the Glebe shopping area. (Check all that apply)



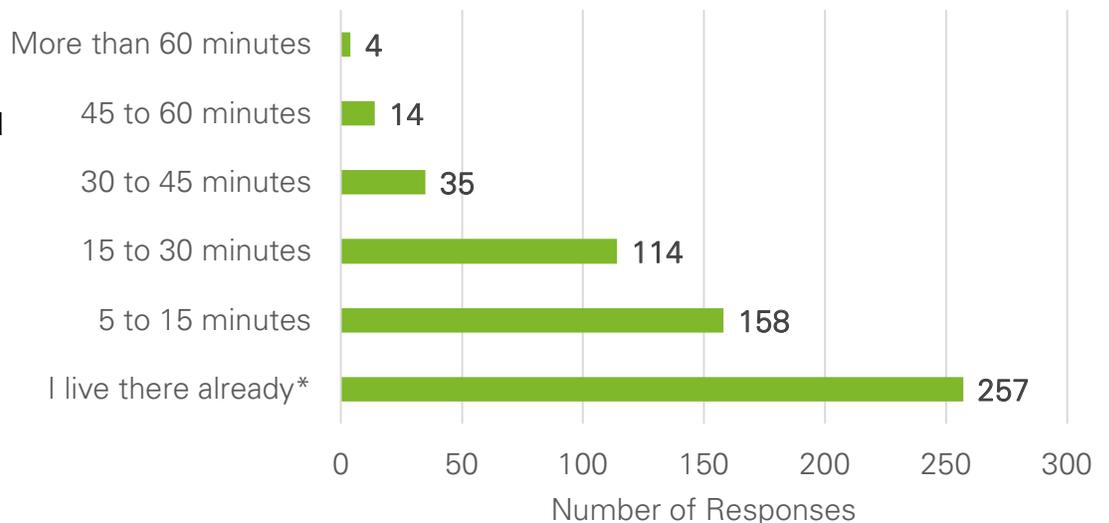
2. How is the balance between local and brand\* offerings available in the Glebe? (choose 1 per row) (\*Brand refers to recognizable franchises with businesses in multi locations.)



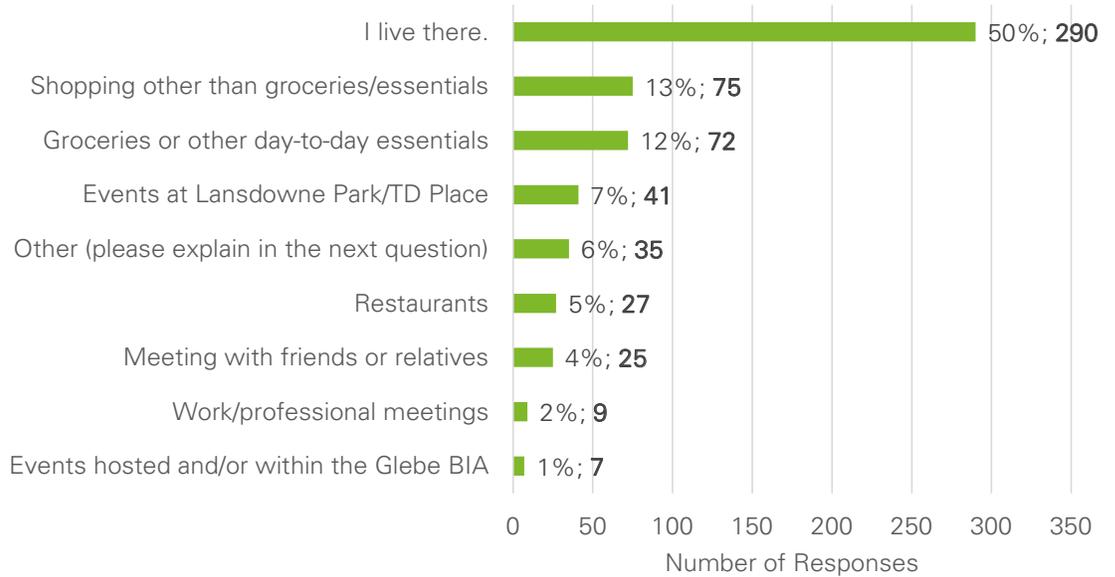
4. What mode of transportation are you most likely to take to the Glebe shopping area? (choose one)



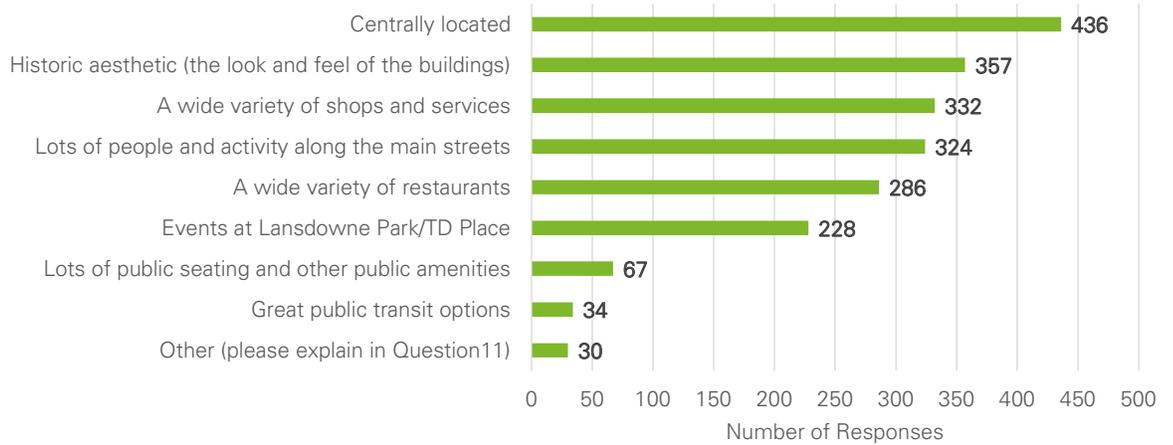
5. Using your most likely mode of transportation identified above, how long would it typically take you to travel to the Glebe shopping area from where you live? (choose one)



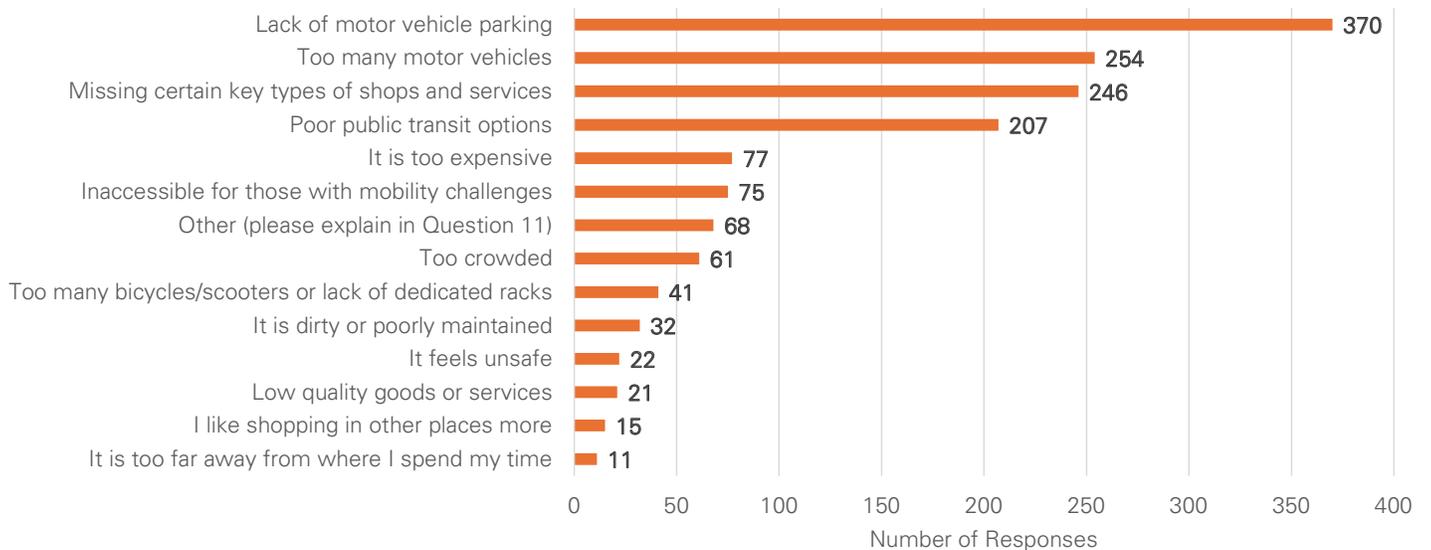
7. What is the primary reason you visit Glebe shopping area? (choose one)



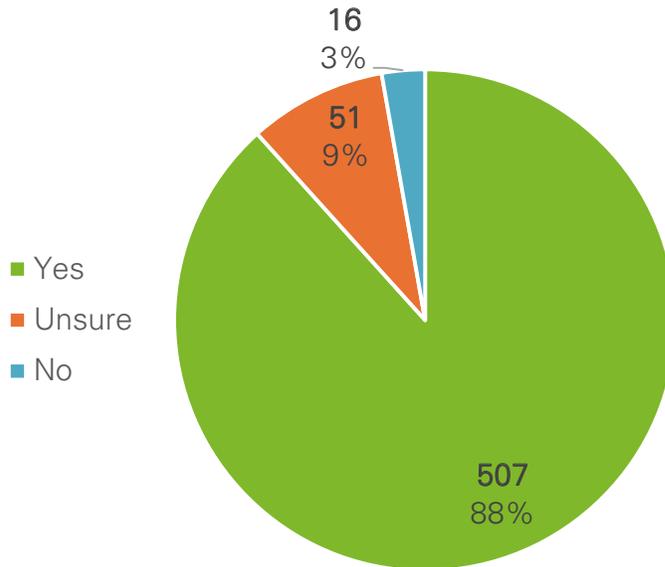
9. What do you feel are the Glebe BIA's greatest strengths? (Check all that apply)



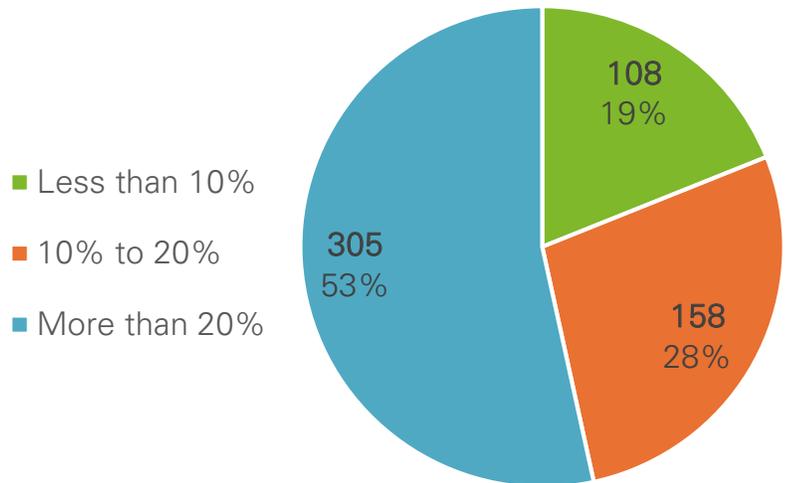
10. What are the main barriers, challenges, or deterrents to customers or clients visiting the Glebe BIA? (Check all that apply)



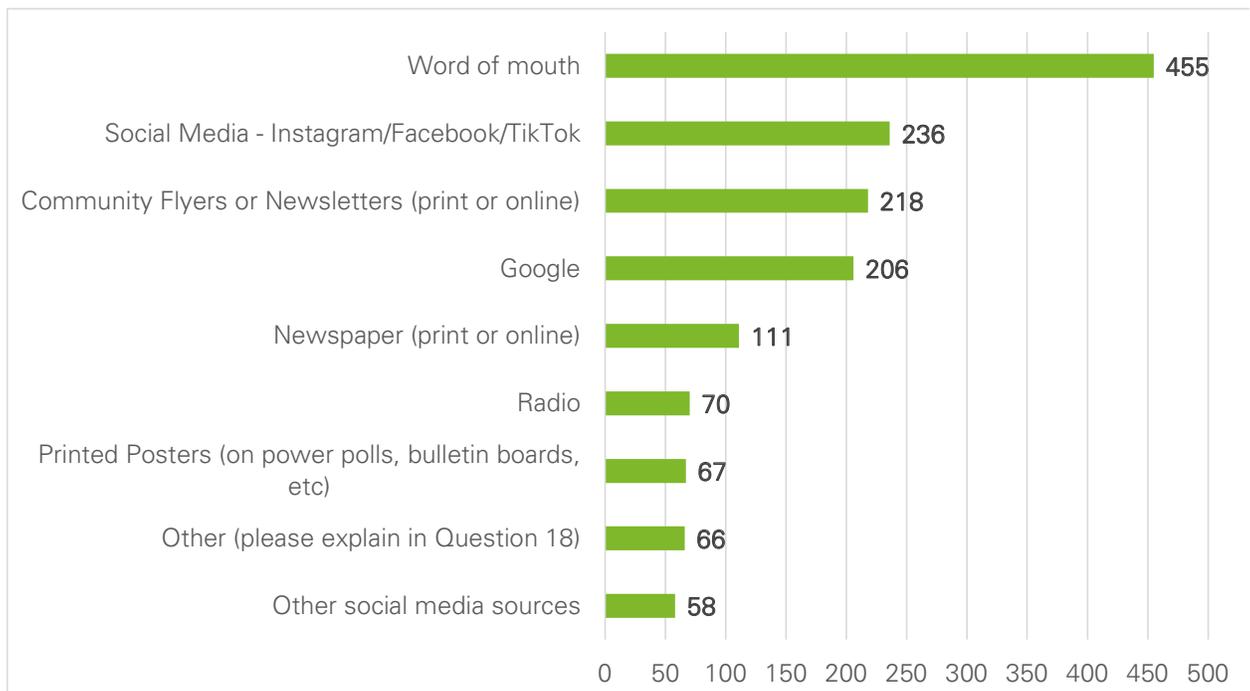
13. Are you willing to pay slightly more for a locally-made product or a service provided by a locally-owned business?



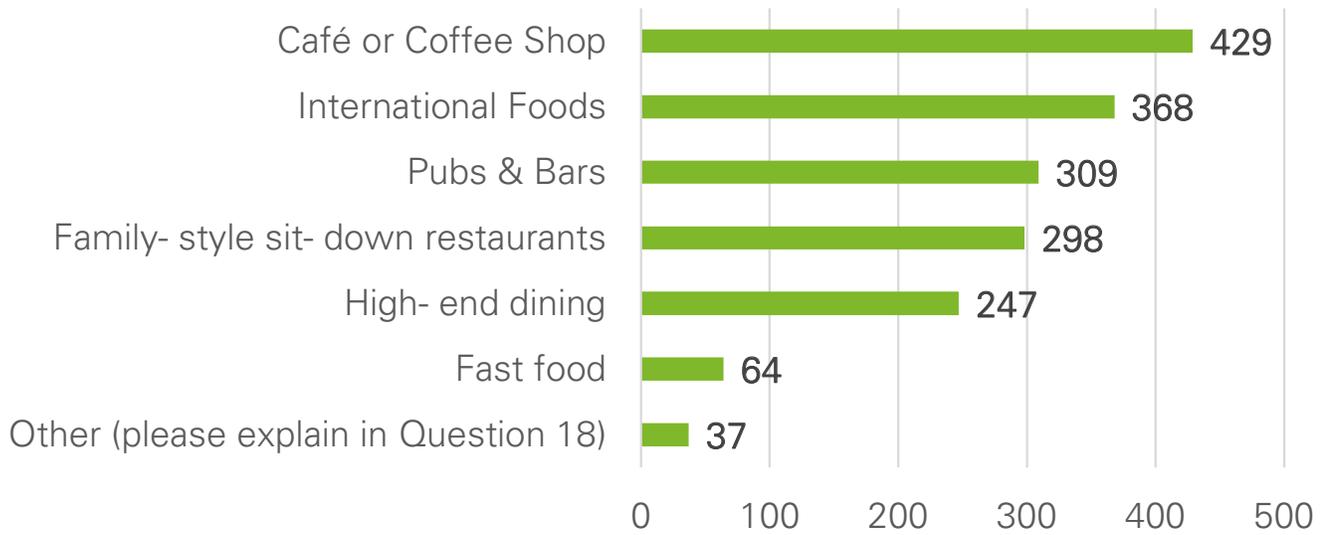
14. Considering your average annual Retail and Food & Beverage (e.g., restaurant) spending, what percentage do you think spend in the Glebe BIA at shops and services?



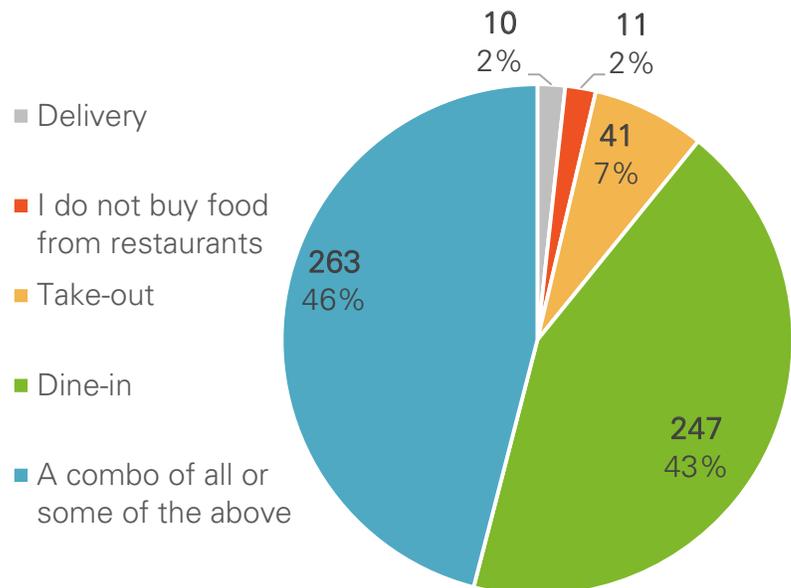
15. How do you typically find out information about the places you shop or dine? (check all that apply)



16. What kind of restaurants are you most interested in visiting (in the Glebe or in general)?  
(check all that apply)

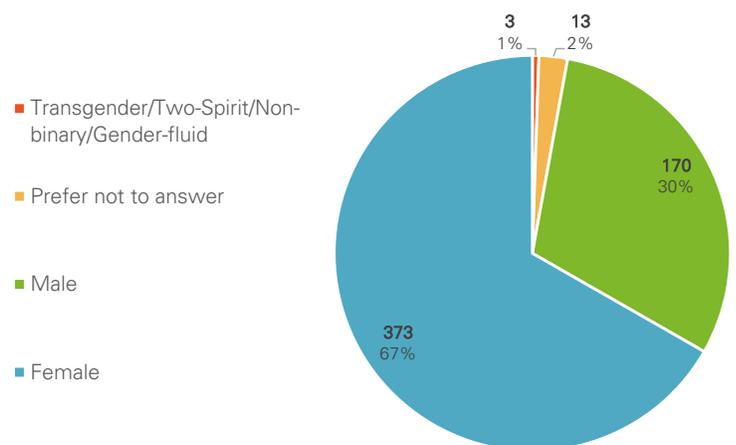
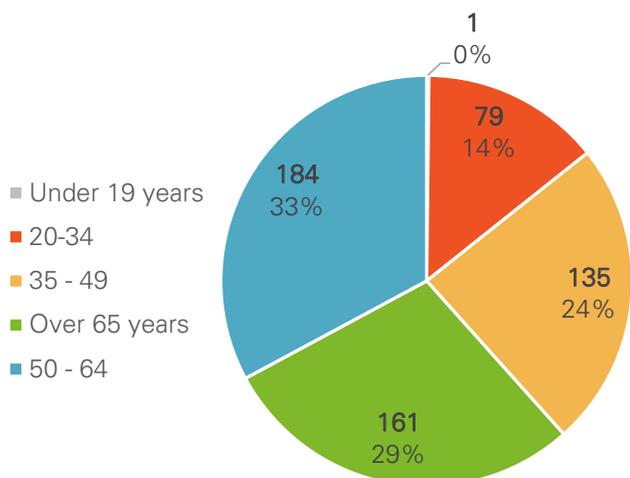


17. Thinking about your typical Food & Beverage activity, would you most often take-out, delivery, or dine-in when you buy food from a restaurant? (choose one)



19. What is your age?

20. What is your gender?



# Appendix D: BIA Member Survey Questions

Created by FBM on Jotform.com



## The Glebe BIA Retail Gap Analysis - Member Survey

For the Retail Gap Analysis of the Glebe Business Improvement Area

The Glebe Business Improvement Area (BIA) has commissioned FBM to prepare a Retail Gap Analysis to assess the ideal offering of shops and services within the Glebe shopping district. The goal of the study is to support the BIA in maintaining and growing its role as a vibrant shopping district in Ottawa.

This Member Survey is intended for the Glebe BIA member businesses. Your input is valuable and represents an opportunity for you to influence the manner in which the Glebe shopping area may evolve in the future.

The survey should take about 6 minutes and will be open until Sunday, July 13, 2025.

This survey is running at the same time as a Customer Survey designed to capture potential BIA customer perspectives. If you wish to access and share the customer survey, please [click here](#).

The Glebe Business Improvement Area [Boundary Map](#) is shown below for reference.

### The Glebe BIA's Current Retail Offerings

1. Thinking about the goods and services currently offered in the Glebe BIA (see Boundary Map above), which of the following categories would you A) perceive the Glebe BIA to be known for in the community; B) like to see more of being offered in the Glebe BIA; and C) feel there are too many of in the Glebe BIA. (Check all that apply)

A. The Glebe is known for this type of good or service.    B. We need more in the Glebe.    C. There are too many in the Glebe

Groceries & Specialty Foods (incl. bakery)

Pharmacy

Alcohol, Tobacco, or Cannabis

Personal Services (e.g. salons, laundromat)

Clothing & Footwear

- Jewelry & Accessories
- Health & Beauty Products
- Home Furniture & Decor
- Home Improvements & Gardening
- Home Appliances & Electronics
- Books, Video Games and other Media
- Sporting Goods
- Toys & Hobbies
- Fast food or Grab-and-Go Restaurants
- Full-service Restaurants & Pubs
- Arts & Entertainment
- Fitness & Leisure
- Auto/Motorsport/RV Dealership
- Auto Parts & Accessories
- Other Specialty Retail
- Professional services (e.g. banking, medical, wellness)

2. How is the balance between local and brand\* offerings available in the Glebe? (choose 1 per row)  
 (\*Brand refers to recognizable franchises with businesses in multiple locations.)

	Too Few	Just Right	Too Many	Unsure
Local Businesses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Branded Businesses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

3. Do you have any additional comments about what shops and services are or are not currently offered within the Glebe BIA?

## Travelling to the Glebe BIA

4. What mode of transportation are you most likely to take to travel to your business in the Glebe BIA? (choose one)

- Motor vehicle/car
- Motorcycle/Moped-style Scooter
- E-bike or e-scooter
- Bicycle or other active transport options
- Public transit (bus)
- Walking
- Other

5. Can you please rank in order of importance the following ways customers or clients travel to or from your business, to the best of your knowledge? (Drag and drop the below modes of transportation to change their order.)

- Motor vehicle / car
- E-bike or e-scooter
- Motorcycle / Moped-style scooter
- Walking
- Public transit
- Bicycle or other active transport options

## Your Perspective on the Glebe BIA

6. What do you feel are the Glebe BIA's greatest strengths? (Check all that apply)

- Centrally located
- Historic aesthetic (the look and feel of the buildings)
- Lots of people and activity along the main streets
- A wide variety of restaurants
- A wide variety of shops and services
- Events at Lansdowne Park/TD Place
- Professional services (e.g. banking, medical, wellness)
- Lots of public seating and other public amenities
- Great public transit options
- Other (please explain in Question 9)

**7. What are the main barriers, challenges, or deterrents to customers or clients visiting the Glebe BIA? (Check all that apply)**

- Missing certain key types of shops and services
- Too crowded
- To many motor vehicles
- Too many bicycles/scooters or lack of dedicated racks
- Lack of motor vehicle parking
- Poor public transit options
- It feels unsafe
- It is dirty or poorly maintained
- It's location
- It is too expensive
- Low quality goods or services
- Other shopping areas are more appealing or popular

**8. Which nearby BIAs or areas do you perceive to be the Glebe BIA's strongest competitors for business?**

- Westboro Village BIA
- Wellington West BIA
- Preston Street BIA
- Somerset-Chinatown BIA
- Downtown BIA
- Centretown BIA
- Downtown Rideau BIA
- Vanier BIA
- Other particular shopping areas/nodes (please explain in Question 9)

**9. Do you have any additional comments about the Glebe shopping area's strengths, weaknesses, or competitors?**

**10. How would you describe the defining character of the Glebe shopping area in only one (1) to three (3) words?**

## Payment and Business Approach Options

11. What percentage of your annual business revenue is online e-commerce (as opposed to in-store)?

- Less than 5%
- 5% to 10%
- 10% to 15%
- 15% to 20%
- More than 20%

12. If you represent a retail store located in the Glebe BIA (i.e., not a service or restaurant), what options do you offer for customers who purchase your products? (check all that apply)

- In-store purchases
- In-store pick up of online orders (via website or app)
- Curbside pick up of online orders (via website or app)
- Delivery (via a staff person)
- Delivery (via a third party delivery service)
- Other (please explain in Question 16)
- N/A

13. If you represent a food and beverage establishment (incl. restaurant, take out counter, juice bar, etc), which of the following options do you offer to your customers? (check all that apply)

- Dine-in (full table-service)
- Dine-in (order at counter)
- Take-out
- Delivery (via a staff person)
- Delivery (via a third party delivery service)
- Heat-at-home prepared meals
- Other (please explain in Question 16)
- N/A

14. Which of the following food delivery websites or apps does your business use, if applicable? (Check all that apply)

- DoorDash
- Uber Eats
- Skip the Dishes
- Menu Ottawa
- Grubhub
- Zomato
- Instacart
- Other (Please explain in Question 16)

**15. Thinking about how your customers or clients most often pay for your products or services, could you please rank in order of popularity the following methods of payments? (Drag and drop the below methods of payment to change your order.)**

- Tap via mobile phone (credit or debit)
- Tap via physical card (credit or debit)
- Chip (credit or debit)
- Swipe (credit or debit)
- E-transfer
- Cash
- Gift card

**16. Do you have any additional comments regarding how customers or clients pay for or collect your products or services, including where you selected "Other" in the above questions?**

## Optional Questions About Your Business

*The final questions are optional questions that help us understand how the survey results represent the businesses in the Glebe BIA. The answers also help add nuance to analysis of the survey results. All submissions are anonymous, individual responses are kept confidential, and results will only be presented in aggregate (grouped together) in the final report.*

**17. In what area within the Glebe BIA is your business located? (choose one)**

- North (area north of Patterson Creek/Central Park green corridor)
- Central (Bank St area between Powell Ave & Holmwood Ave)
- South (Lansdowne Park and TD Place area)

**18. Which of the following categories best fits your type of business? (Choose one; if your business fits in more than one of the following (such as a hair salon that also sells beauty products), please select the category that represents the primary focus on your business.)**

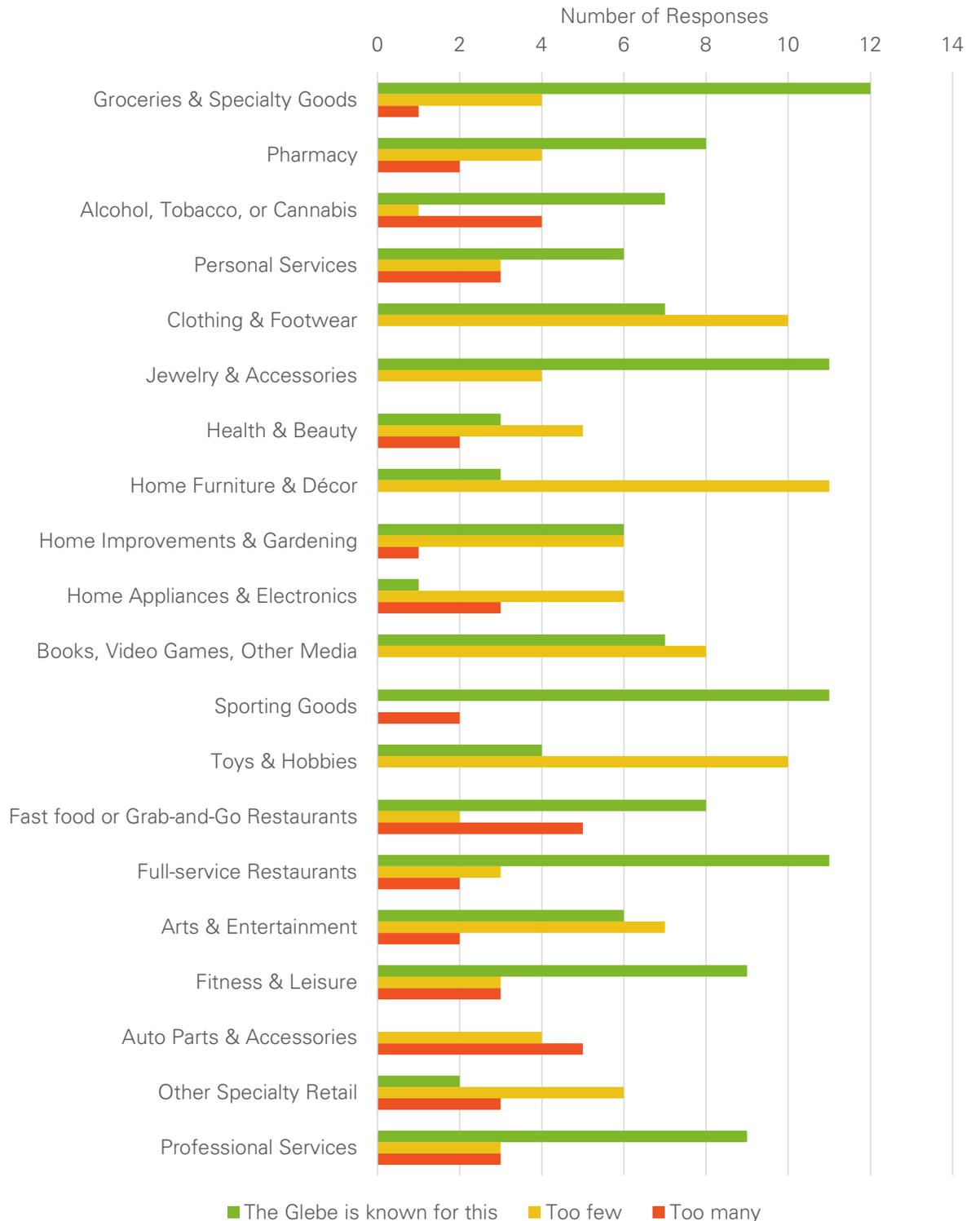
- Sale of retail products
- Services (e.g., barber, pet grooming, laser clinic, tailoring, etc)
- Food and Beverage (e.g., full service restaurant, take-out, bars, fast food, ice cream parlour)
- Fitness or Leisure facilities
- Events, arts, or entertainment
- Other

**A sincere thank you for taking the time to complete this survey.**  
Please click the below "Submit" button to submit your response.

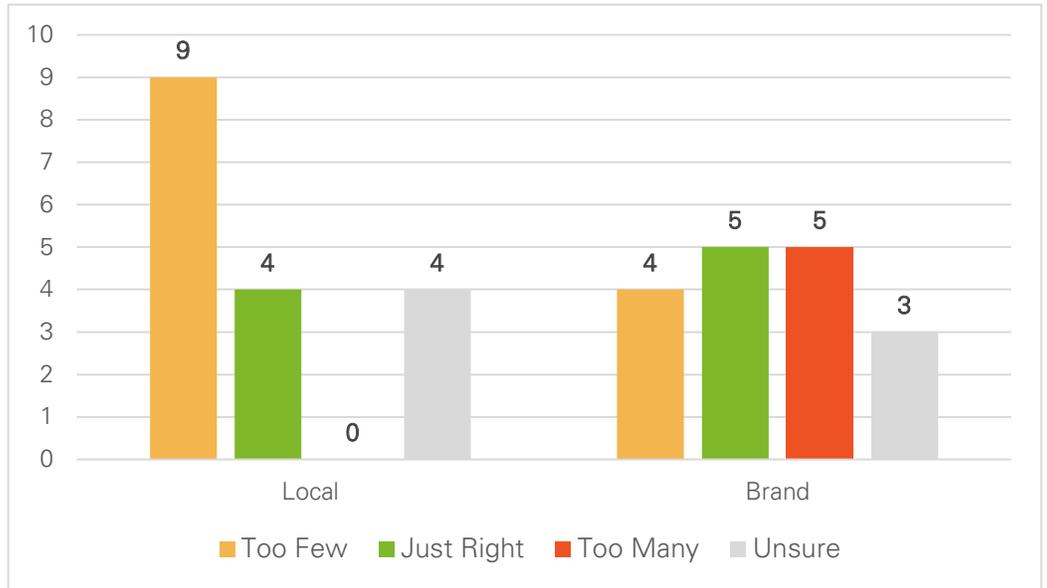
# Appendix E: BIA Member Survey Results

The following summarizes responses to the 'Glebe BIA Retail Gap Analysis - Member Survey' that ran from June 23 to July 13, 2025. Responses to open-ended questions are excluded from this report to protect respondent anonymity (questions 3, 9, 10, and 16).

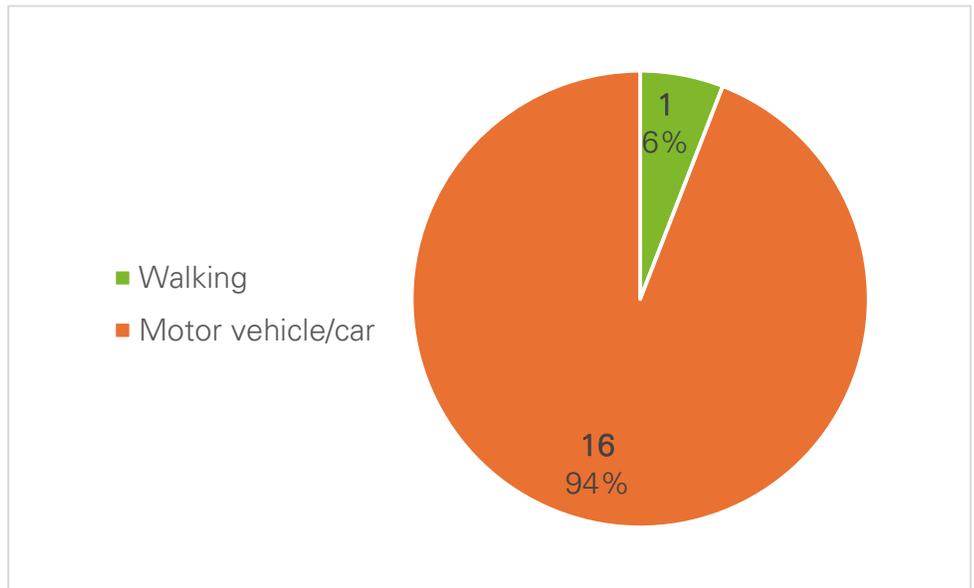
1. Thinking about the goods and services currently offered in the Glebe BIA, which of the following would you A) perceive the Glebe BIA to be known for in the community; B) like to see more of being offered in the Glebe shopping area; and C) believe there are too many of in the Glebe shopping area. (Check all that apply)



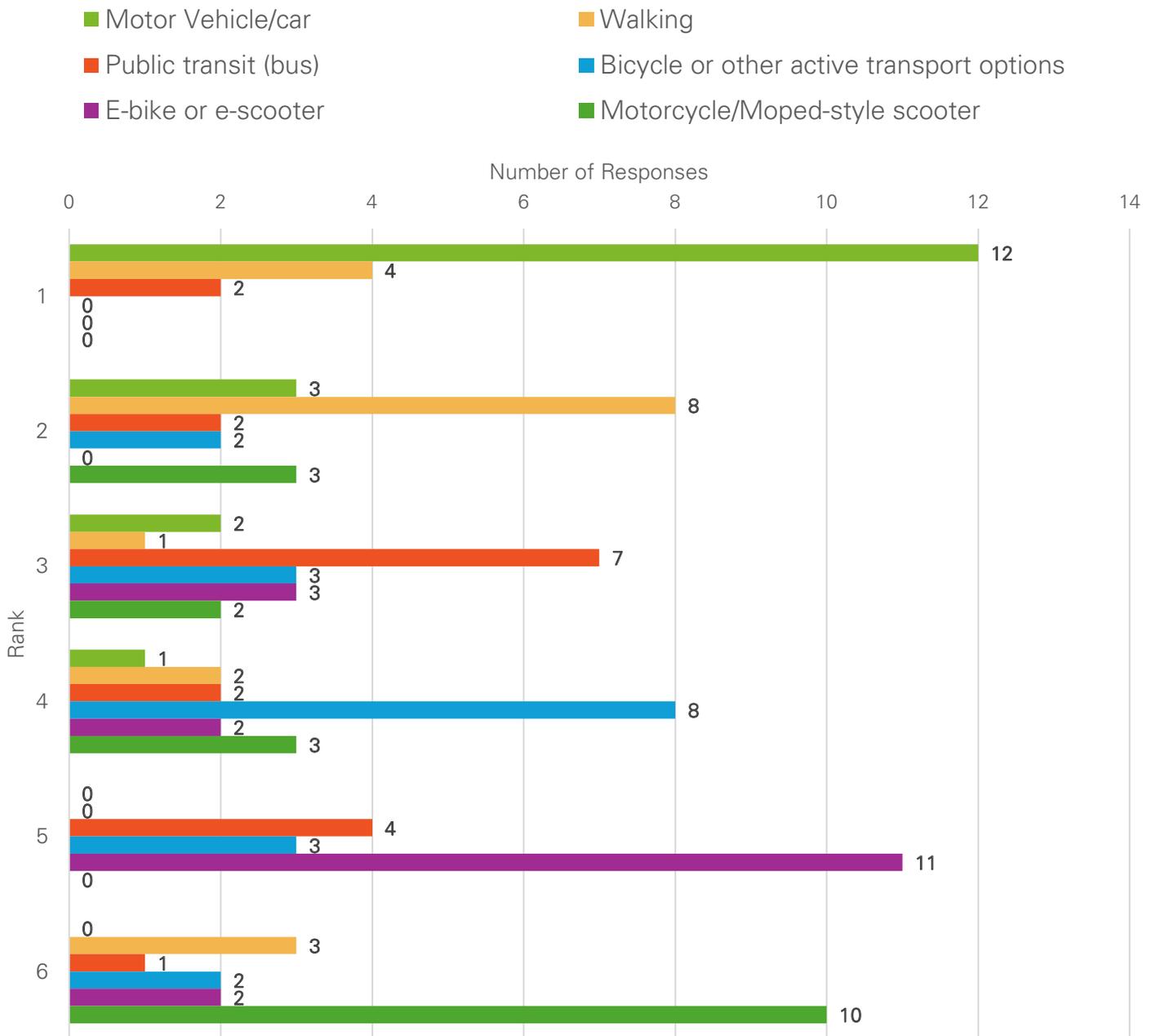
2. How is the balance between local and brand\* offerings available in the Glebe? (choose 1 per row) (\*Brand refers to recognizable franchises with businesses in multi locations.)



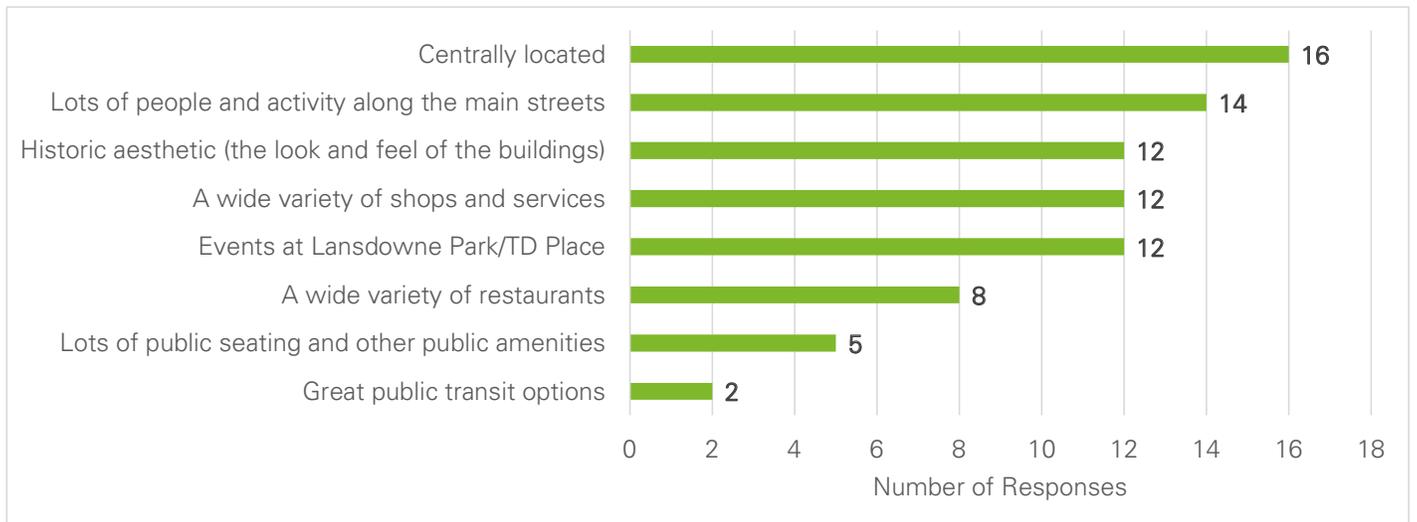
4. What mode of transportation are you most likely to take to your business in the Glebe BIA? (choose one)



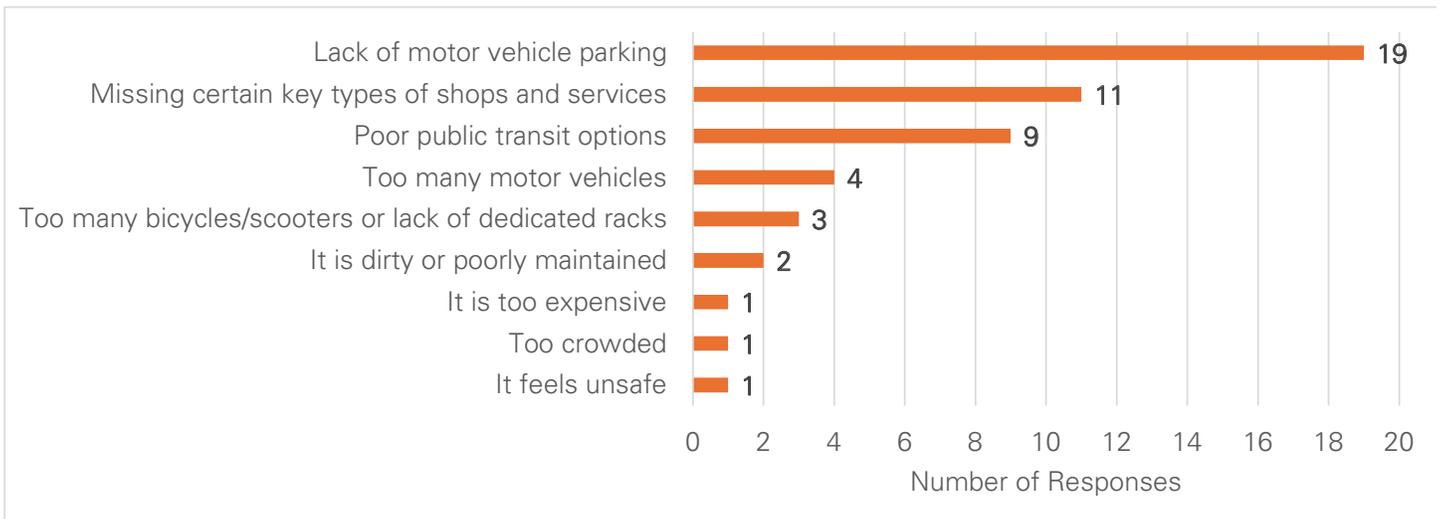
5. Can you please rank in order of importance the following ways customers or clients travel to or from your business, to the best of your knowledge?



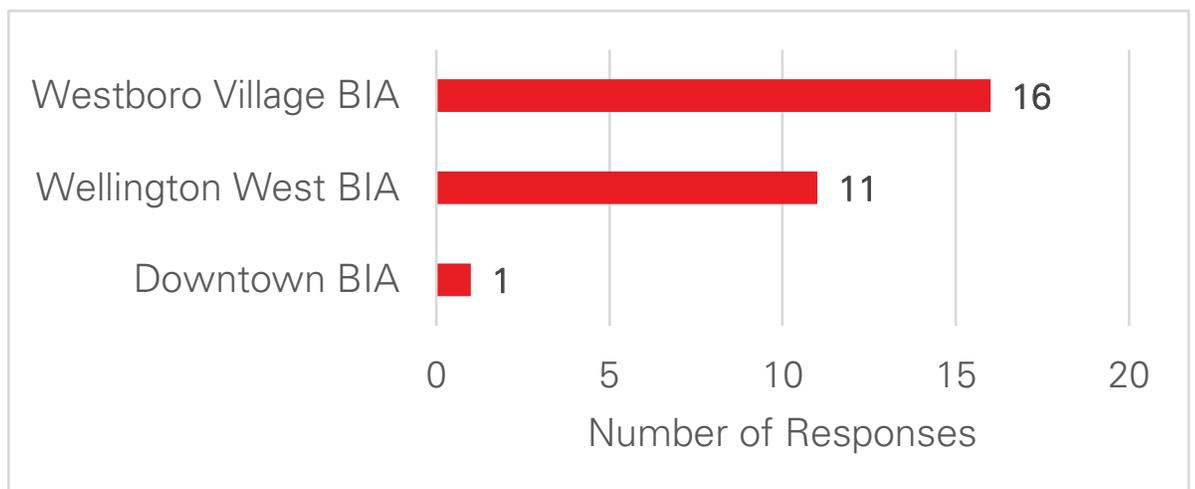
6. What do you feel are the Glebe BIA's greatest strengths? (Check all that apply)



7. What are the main barriers, challenges, or deterrents to customers or clients visiting the Glebe BIA? (Check all that apply)

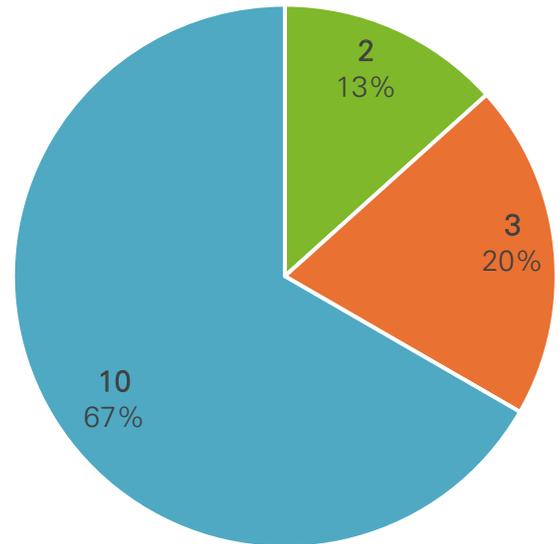


8. Which nearby BIAs or areas do you perceive to be the Glebe BIA's strongest competitors for business?

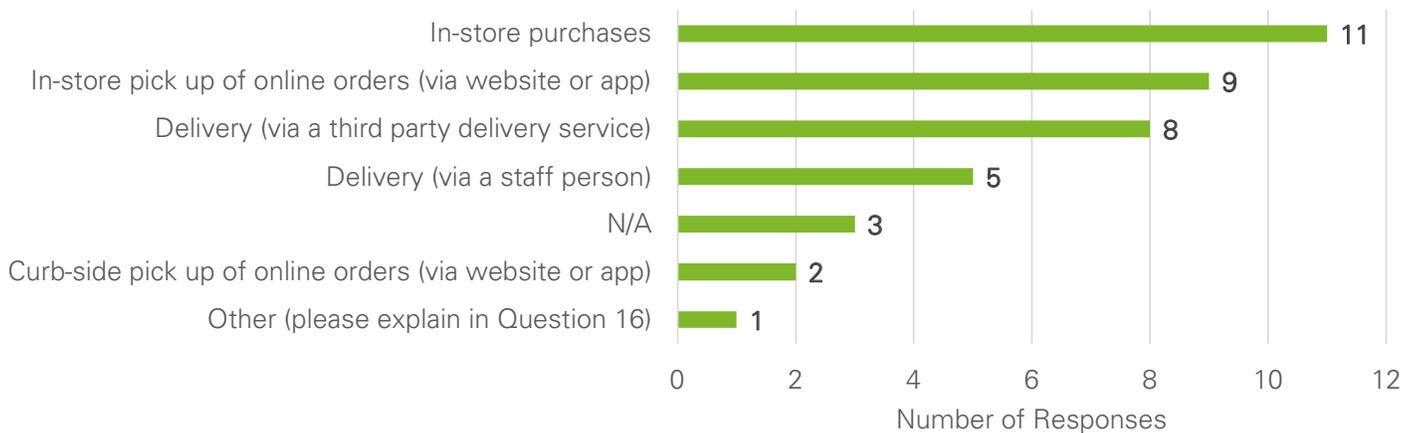


11. What percentage of your annual business revenue is online e-commerce (as opposed to in-store)?

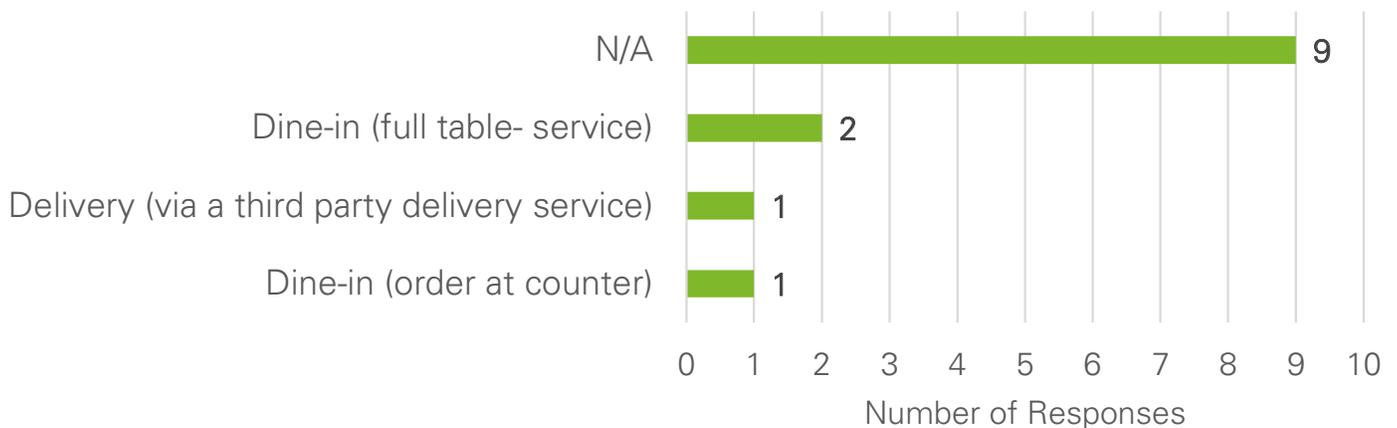
- More than 20%
- 5% to 10%
- Less than 5%



12. If you represent a retail store located in the Glebe BIA (i.e., not a service or restaurant), what options do you offer for customers who purchase your products? (check all that apply)



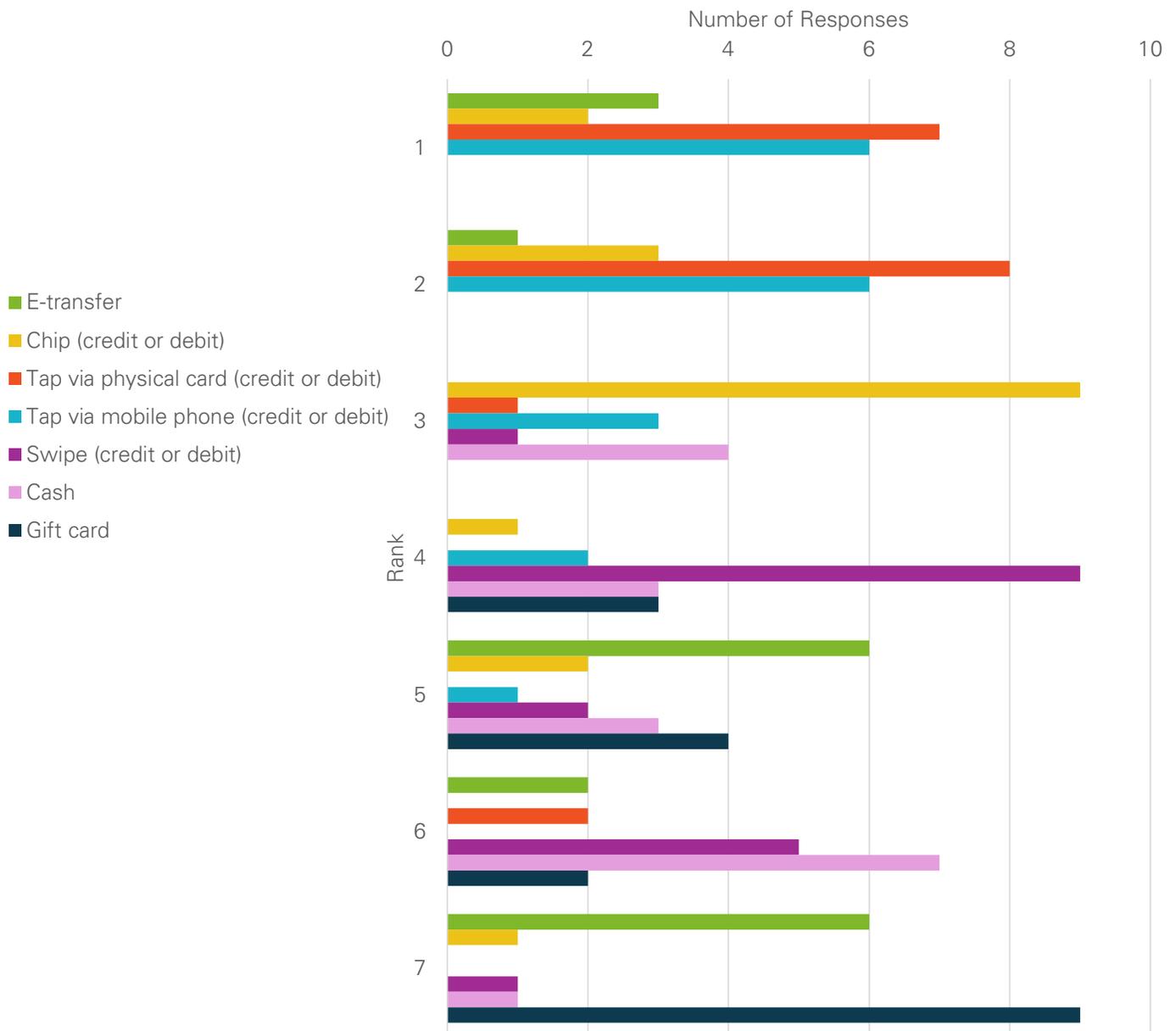
13. If you represent a food and beverage establishment (incl. restaurant, take out counter, juice bar, etc.), which of the following options do you offer for customers who purchase your products? (check all that apply)



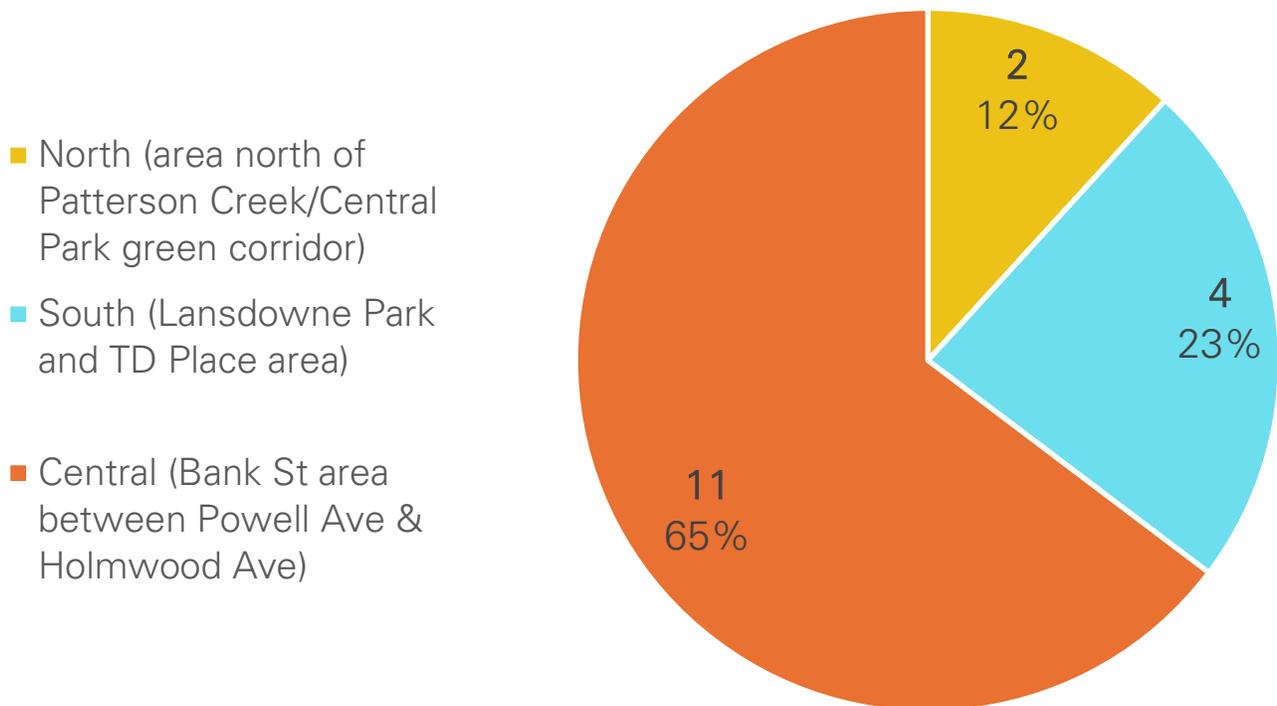
14. Which of the following food delivery website or apps does your business use, if applicable? (check all that apply)

**This question received a very small number of responses which are, therefore, excluded.**

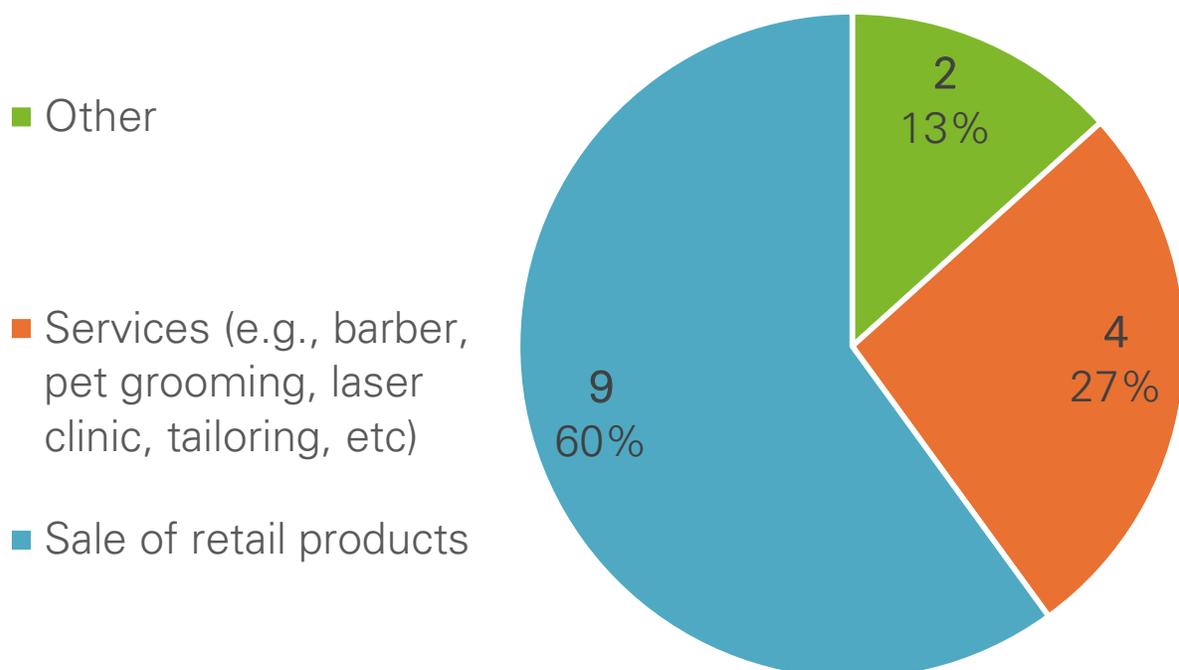
15. Thinking about how your customers or clients most often pay for your products or services, could you please rank in order of popularity the following methods of payments?



17. In what area within the Glebe BIA is your business located? (choose one)



18. Which of the following categories best fits your type of business? (Choose one) If your business fits in more than one of the following (such as a hair salon that also sells beauty products), please select the category that represents the primary focus on your business).





FBM

**Glebe**  
BUSINESS IMPROVEMENT AREA