

PLANNING THE COMMERCIAL STRIP:

**A Case Study of Pembina Highway,
Winnipeg, Manitoba**

By

Raymond James Duhamel

**A Practicum
Submitted to the Faculty of Graduate Studies
in Partial Fulfillment of the Requirements
for the Degree of**

Master of City Planning

**Department of City Planning
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Winnipeg**

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RAYMOND JAMES DUHAMEL

**A Thesis/Practicum submitted to the Faculty of Graduate Studies of The University
of Manitoba in partial fulfillment of the requirements of the degree
of
MASTER OF CITY PLANNING**

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Thank-you all,

A handwritten signature in black ink, appearing to read 'Raymond Duhamel', written in a cursive style.

Raymond Duhamel

EXECUTIVE SUMMARY

A city's commercial structure plays an important role within the overall urban framework. Even though commercial use accounts for only a small percentage of land use, it has significant impacts in terms of employment levels and economic development. In addition, commercial use has the ability to stabilize neighbourhoods, attract tourism and stimulate physical growth in new areas of a city. However, all of these positive attributes are sometimes overshadowed by the many negative connotations sometimes attached to commercial areas. Terms such as blight, vacancy, and overbuilding are only a few of the common impressions of these areas of our cities. One very obvious component of a city's commercial structure is the commercial strip.

The objective of this practicum is to address the fundamental question "How do we plan for a successful commercial strip?". A Case Study will be used as one method in which to address this question. However, for the purposes of clarification, it is important to mention that this practicum is not intended to be a vehicle to provide the ultimate solutions for successful planning for commercial areas. In contrast, this practicum is an analysis tool for providing a better understanding of the role of planning and planners with respect to one aspect of a city's commercial structure, namely, the commercial strip.

This practicum is largely based upon field research in the form of a land use analysis and a questionnaire of a sampling of businesses along Pembina

Highway, a major commercial strip located within Winnipeg, Manitoba. The field research is strengthened by more detailed analysis on certain individual properties located along this strip that are owned or managed by Shindico Realty, who agreed to provide detailed information on their properties. The field research and individual property analysis has been supplemented with a literature review. All told, the findings of this practicum provide insight into the functional role of Pembina Highway within the overall commercial structure of Winnipeg, as well as addressing current issues and future considerations with respect to planning for a successful commercial strip.

TABLE OF CONTENTS

ACKNOWLEDGEMENTS	i
EXECUTIVE SUMMARY	ii
LIST OF FIGURES	viii
LIST OF TABLES.....	ix
LIST OF MAPS	x
GLOSSARY OF TERMS.....	xi
CHAPTER 1: INTRODUCTION	1
1.1 Objectives and Rationale	2
1.2 Study Limitations.....	5
1.3 Chapter Highlights	7
1.3.1 Chapter One	7
1.3.2 Chapter Two	7
1.3.3 Chapter Three.....	7
1.3.4 Chapter Four.....	8
1.3.5 Chapter Five	8
1.3.6 Chapter Six	9
1.3.7 Chapter Seven.....	10
CHAPTER 2: STUDY METHODOLOGY.....	11
2.1 Methods and Data Collected.....	14
CHAPTER 3: REVIEWING THE LITERATURE	18
3.1 Land Use Models: The Internal Structure of Cities	19
3.1.1 Ernest W. Burgess: Concentric Zone	20
3.1.2 Homer Hoyt: Sector Theory	21
3.1.3 Chauncy D. Harris & Edward L. Ullman: Multiple Nuclei Model.....	21
3.2 Central Place Theory	22
3.2.1 Summarizing Christaller's Central Place Theory	23
3.3 Identifying & Classifying The Retail Environment	25
3.3.1 City Retail Structure: Malcolm Proudfoot	25
3.3.2 Urban Land Economics: Richard Ratcliff.....	26
3.3.3 Nature and Function of Retail String Development: Merry	28
3.3.4 Business Structure and the Retail Hierarchy: Berry	29
3.3.5 Alternative Retail Classifications	32
3.3.5.1 Boal & Johnson, 1965.....	32
3.3.5.2 Davies, 1976.....	32
3.3.5.3 Jones, 1984	34
3.4 Chapter 3 Summary.....	35

CHAPTER 4: PLANNING AND TRENDS	36
4.1 Historical Growth of the Commercial Strip.....	37
4.1.1 The Extension of Main Street (1900 - 1940)	37
4.1.2 The Classic Automobile Strip (1948 - 1973).....	40
4.1.3 The "Superhighway" or "Corporate" Strip	42
4.2 Role and Purpose of the Strip	42
4.3 Planning For the Strip	45
4.3.1 Pre-WWII	48
4.3.2 1950's & 1960's	49
4.3.3 1970's & 1980's	50
4.3.4 Contemporary Planning for the Strip.....	52
4.4 Urban and Development Trends	54
4.4.1 Suburbanization / Decentralization.....	55
4.4.2 The New Economy.....	57
4.4.3 Overbuilding.....	58
4.4.4 The Changing Commercial Environment.....	59
4.4.4.1 The Shopping Centre.....	59
4.4.4.2 New Format Retailing	61
4.4.4.3 Department Stores	63
4.4.4.5 Specialty Areas.....	64
4.4.4.6 Strip Malls.....	65
4.5 Chapter 4 Summary.....	66
CHAPTER 5: CASE STUDY BACKGROUND	68
5.1 Winnipeg's Market Context	68
5.2 Winnipeg's Commercial Structure	69
5.2.1 Downtown.....	70
5.2.2 Shopping Centers	72
5.2.3 Winnipeg's Commercial Strips	74
5.3 Winnipeg's Commercial Planning and Policy Initiatives.....	77
5.3.1 Plan Winnipeg / Plan Winnipeg: Towards 2010.....	77
5.3.2 Land Use Policies - Zoning	80
5.3.3 Implications for the Commercial Strip.....	82
5.4 The Pembina Highway Case Study.....	83
5.4.1 Case Study Parameters	87
5.5 Chapter 5 Summary.....	87

CHAPTER 6: CASE STUDY COMPONENTS	89
6.1 Land Use Analysis	89
6.1.1 Frequency of Functional Units	90
6.1.1.1 By Location.....	92
6.1.1.2 Frequency of Units By Type and Location	96
6.1.2 Other Significant land Use Characteristics	98
6.1.3 Part A Summary	98
6.2 Questionnaire.....	99
6.2.1 Questionnaire Respondents.....	99
6.2.2 Examining Pembina Highway	101
6.2.3.1 Tenure	101
6.2.3.2 Location.....	105
6.2.3.3 Business Characteristics.....	111
6.2.3.4 Business Perceptions & Preferences.....	116
6.2.3.5 Additional Findings and Analysis	119
6.2.4 Some Final Thoughts About the Questionnaire Analysis.....	121
6.2.5 Part B Summary	123
6.3 An Analysis of Shindico Realty's Properties	124
6.3.1 Background Information.....	125
6.3.2 The Planning Process.....	126
6.3.3 Shindico Realty's Nine Property's	128
6.3.3.1 Lincoln Centre, 756 Pembina Highway	128
6.3.3.2 1103 / 1107 Pembina Highway	130
6.3.3.3 Southside Plaza, 1295 Pembina Highway	131
6.3.3.4 1686 Pembina Highway	132
6.3.3.5 1855 Pembina Highway.....	133
6.3.3.6 1861 - 1881 Pembina Highway.....	134
6.3.3.7 2005 Pembina Highway	134
6.3.3.8 Dalhousie North Shopping Centre, 2696 / 2716 Pembina Highway	135
6.3.3.9 Greencrest Plaza, 2750 Pembina Highway.....	135
6.3.3 Broad Findings.....	136
6.3.4 Specific Findings.....	138
6.3.5 Part C Summary	139
6.4 Chapter 6 Summary.....	140
CHAPTER 7: PLANNING THE COMMERCIAL STRIP	143
7.1 Alternative Planning Trends and Ideas.....	143
7.2 Planning Pembina Highway	149
7.2.1 The Role of Pembina Highway.....	149
7.2.2 Recommendations For Pembina Highway	151
7.2.2.1 Alternative Design.....	154
7.3 Who Benefits from Successful Planning?.....	160
7.4 Recommendations for Further Research	160
7.6 Chapter 7 Summary.....	162

CHAPTER 8: CONCLUSION	164
BIBLIOGRAPHY	171
Appendix A: Case Study Business Classifications	177
Appendix B: Pembina Highway Land-Use Data Base (June 1996)	178
Appendix C: Case Study Questionnaire	196

LIST OF FIGURES

Figure 3-1: Internal Structure of Cities	19
Figure 3-2: Christaller's Concept of an Urban Hierarchy	23
Figure 3-3: Berry's Structure Of Business & Commerce.....	30
Figure 3-4: A Structural Model of Retail Locations	33
Figure 3-5: Ken Jones, The Urban Retail Landscape.....	34
Figure 4-1: Retail Patterns Before and After Suburbanization.....	56
Figure 4-2: The Differences Between Retail Strips and Shopping Centres	60
Figure 5-1: Winnipeg Employment By Industry, 1995.....	69
Figure 5-2: Plan Winnipeg Towards 2010, Commercial Development Policy	78
Figure 5-3: City of Winnipeg Council Jurisdiction Parameters	79
Figure 5-4: Winnipeg Commercial Districts: Intent and Purpose	81
Figure 6-1: Frequency of Functional Units Along Pembina Highway.....	91
Figure 6-2: Business Establishments Along Pembina Highway.....	93
Figure 6-3: Frequency of Functional Units By Segment, Pembina Highway	97
Figure 6-4: Questionnaire Responses; Tenure and Age by Location	104
Figure 6-5: Questionnaire Responses; Size of Businesses in Square Feet	113
Figure 6-6: Questionnaire Responses; Percentage of Businesses By Number of Employees.....	114
Figure 6-7: Pembina Highway Traffic Counts	137
Figure 7-1: Author's Concept: Alternative Design for the Fort Richmond Shopping Centre	157

LIST OF TABLES

Table 5-1: Winnipeg's Regional Shopping Centres	73
Table 5-2: Winnipeg's Neighbourhood and Community Shopping Centres	73
Table 5-3: Winnipeg's Commercial Strips (est.)	76
Table 6-1: Business Establishments Along Pembina Highway	94
Table 6-2: Number of Functional Units by Segment (Pembina Highway)	95
Table 6-3: Questionnaire Distribution	100
Table 6-4: Questionnaire Responses; Type of Tenure	102
Table 6-5: Questionnaire Responses; "if the building is rented, from whom?" ..	103
Table 6-6: Questionnaire Response; Average Age of Businesses	104
Table 6-7: Questionnaire Responses; Locational Preference	106
Table 6-8: Questionnaire Responses; Important Location Characteristics	107
Table 6-9: Questionnaire Responses; Trade Area	110
Table 6-10: Questionnaire Responses; Preferred & Unwanted Development..	118
Table 6-11: Questionnaire Responses; Factors Hindering Business.....	119
Table 6-12: Market Information On Shindico Properties (3 mile radius)	127
Table 6-13: Shindico Realty Inc. Property Holdings	128

LIST OF MAPS

Map 1: Winnipeg's Commercial Structure..... 71

Map 2: The Study Area..... 84

Map 3: Shindico Realty's Properties Along Pembina Highway 129

GLOSSARY OF TERMS

Big-Box: A term used to describe New Format retailing.

Case Study: Defined as an empirical study that accomplishes three things; (i) investigates a contemporary phenomenon within its real life context; when (ii) the boundaries between phenomenon and context are not clearly evident; and in which (iii) multiple sources of evidence are used (Yin 1989, 23).

Category Killers: One example of a 'big-box' retailer. These retailers consist of large stores, three or more times larger than other formats in the retail sector, that carry a wide selection of goods in a specific category of merchandise (Simmons, et al. 1996, 79).

Commercial Structure: See Retail Structure.

Commercial Strips:

A linear development of stores, services and offices located along major roadways and extending to lengths varying from one block to several miles. The commercial establishments that comprise the district face outwards at street level on one side only of buildings or on two sides only at corner buildings (Silberberg 1976, 11)

A major street of considerable length with commercial activities (Ford 1995, 225)

Retailing activity which is totally separate from the shopping centre hierarchy. Strips, on average, account for one third of a cities retail activity, and are most often located along arterial strips of highway corridors. (Hartshorn 1992, 390)

This term came into widespread use in the 1950's to describe developments where commercial or residential buildings were strung out along a highway (Liebs 1985, 229).

Community Centres: Higher than the neighbourhood shopping centre, yet lower than the regional mall in terms of the retail hierarchy. These centres offer more than just convenience provisions including apparel, a bank, or a bookstore. Each community centre is designed to serve between 35 - 50,000 people. These centres also have a junior department store as an anchor (i.e. K-Mart) (Leung 1992, 107).

Convenience Store: Means any store where food is sold, alone or in combination with other goods or services, which is open at any time during the period between 11:00 p.m. of one day and 7:00 a.m. of the following day (By Laws II-3).

Developer: An intermediary in the process by which land users find locations for their activities in capitalist economies (Guy 1980, 26).

Development: Means the construction of a building or structure on, over or under land, a change in the use or intensity of use of a building or land, the removal of soil or vegetation from land, the deposit or stockpiling of soil or material on land, and the excavation of land (By-laws II-4).

Floor Area: Means the sum of the gross horizontal areas of the several floors of all buildings and structures on the zoning lot, measured from the exterior faces of exterior walls, or from the centre line of partitions, except spaces in a basement, cellar or penthouse used for mechanical or heating equipment, and any space within the building used as a parking area or loading area (By-laws II-5).

Floor area, gross leaseable: Means the total floor area designed for exclusive tenant occupancy and use in all principal and accessory buildings, including basements, mezzanines, upper floors, and ten per cent (10%) of the area of any enclosed mall spaces, measured from the centre line of joining partitions and from outside wall faces, but does not include public or common areas, such as public washrooms, corridors and stairwells, elevator lobbies, ninety per cent (90%) of the area of enclosed mall spaces, or areas used for services and equipment pertaining to the building function (By-laws II-5).

Floor area ratio: Means the total floor area of the buildings and structures on a zoning lot, divided by the total area of the zoning lot (By-laws II-5).

Frontage: Means that part of a zoning lot fronting on a street and located between side lot lines (By-laws II-5).

Mega Malls: See Superregional Centres.

New Format retailers: These retailers stress product dominance in a market and provide consumers with a wide range of product choice, low prices, quasi self-service and a destination shopping environment. These retailers have been defined to include category killers (large format specialty stores), superstores, membership and warehouse clubs.

Nodes: See Nucleations.

Neighbourhood Centres: Serve a population of 7-15,000 people and average under 70,000 square feet of retail floor space. These centres provide for the daily needs of their customers, selling such provisions as food, hardware and personal services (Leung 1989, 107).

Nucleations: Clustering of retail uses which appear at more important intersections. Frequently, nucleation's appear as peaks of development in a string street. The junction of two string streets is usually the focus of a nucleation. Nucleations have a defined pattern of arrangement of uses unlike the string street which lacks internal organization (Ratcliff 1949, 389).

Power Center: "These are enclosed, planned shopping centres that are typically anchored by large value-oriented stores (i.e. Walmart, Toys R Us), linked to a group of ancillary tenants (Jones et al 1994, 4).

Power Node: A cluster of three or more freestanding New Format retailers or power centres. Customers visiting one store become aware of the others (Simmons, et al. 1996,79).

Regional Mall: Comprises on average 500,000 square feet of retail floor space and have at least one major department store as an anchor. These centres provide a wide variety of goods and services and are located in areas which generally have 50-200,000 people within its trade area (Leung 1989, 107).

Retail Hierarchy: A means by which to differentiate the numerous components of a cities retail structure. This hierarchy was first postulated by Brian Berry in the late 1950's in which he determined that shopping centres fit into a hierarchical pattern with the small convenience store or centre at one end of the hierarchy and regional or superregional malls at the other. Interesting to note is that Berry did not include retail strips or specialty shopping areas in his hierarchy.

Retail Location: Set of propositions that seeks to explain the spatial structuring of the retail system (Potter 1982, 26).

Retail Shop: A permanent or semi-permanent structure which is either wholly or partly devoted to the conduct of retail trade or complementary service and catering activities, and which is accessible to the general public or prescribed segments of that public (Potter 1982, 7).

Retail Shopping Centre: Spatial grouping of retail shops (Potter 1982, 8).

Retail Structure: A system of regular interaction between customers and stores determined by economic and cultural values, the same sort of regularities which result in the distribution of cities. (Simmons 1964, 2)

Ribbons: British named equivalent to the North American commercial strips (Liebs 1985, 229).

Specialized Shopping Districts: Commercial development which is in either clustered or ribbon form and caters to special needs/functions. The uses often share parking and create a mass of stores by which to attract customers. Retailers in these areas promote a distinctive image that is commonly based upon a single exclusive good such as women's fashion, antiques, or art (Jones 1984, 31).

String Streets: See Commercial Strips.

Superregional Centres: The top of the retail hierarchy, these centres locate in cities which are one half a million or more in population. These centres also have one million square feet of retail floor space (Jones and Simmons 1990, 199)

Trade Area: The area which may represent a region that encloses all customers (really defining outer range) or it can encompass an area within which a certain percentage of the customers come. Indicates various levels of customer attraction to a particular retail area.

Urban Arterials: See Commercial Strips.

Urban Corridors: See Commercial Strips.

CHAPTER 1: INTRODUCTION

The transfer of goods and services between consumers and merchants has long been considered an important function for a city's economic viability. In contemporary Western society, commercial activity accounts for billions of dollars in annual revenue and is responsible for absorbing approximately one-third of our disposable income (Jones 1991, 379). However, the commercial structure of a city contributes far more than simple economics. Retailing activities play a significant role in shaping the environment in which we live. "Much of the colour, smells, the noises, that make up a community - the stimuli of different people, new styles, and innovative technology - are contributed by stores, restaurants, and shopping districts and their consumers" (Jones 1990, 7). Shopping areas have even been replacing the more traditional public squares as a place to gather and socialize.

There are many components which comprise a city's commercial structure. Strong interest has focused on the large 'planned' shopping mall during the past few decades. However, this is but one component of a much larger system. There are numerous 'unplanned' retailing formats which have existed for the greater part of this century and have received far less attention. Commercial strips, ethnic and cultural districts and specialty shopping regions are just a few examples of these unplanned elements of our city's commercial structure. Commercial strips in particular, can be found within nearly every North American

city. The retailing and commercial activity located along these major arterial streets actually accounts for more than forty percent of the retail and service space in many Canadian cities (Jones and Simmons 1990, 185).

How and why we need to plan for a successful commercial strip will be the focus of this practicum. The main methods of examination will be a literature review and a case study. The case study, centered on Pembina Highway, a major North-South arterial located within the City of Winnipeg, Manitoba, will consist of a land use analysis, a questionnaire, and a detailed examination of a number of individual properties along this strip.

1.1 Objectives and Rationale

The main objective for undertaking the research in this practicum is to identify, examine and understand what constitutes planning for a successful commercial strip.

The commercial strip is a vibrant component of a city's commercial structure. However, all too often, the strip receives very little attention from practitioners and students of the urban scene. Planners attitudes towards the strip have long been disparaging and pessimistic. From their perspective, the commercial strip epitomizes the automobile based society. Strips also contribute to the fragmentation of communities and neighbourhoods, promotes sectionalism, and are generally aesthetically unappealing. Having stated only a few of the

negative connotations attached to the commercial strip it is important to note that strips have and will continue to play a very important role within the overall urban commercial structure. As Gerald Ford states;

It is hard to deal with the strip objectively. It has come to stand simultaneously for all that is right and all that is wrong with cities. It represents chaos and flexibility, poor taste and economic opportunity, unwise planning and efficiency, and congestion and mobility. Like the skyscraper and the single-family house, it tells us a great deal about our cultural values (Ford 1995, 227).

Ford's statement provides an accurate illustration as to the contentious nature of the issue of planning for a commercial strip. As the commercial structure of Canadian cities continues to change, the need for long term planning of all of its components becomes a very serious issue, with commercial strips being no exception to this rule.

Planning for a successful commercial strip remains contingent upon understanding and facilitating a variety of interests. The many actors involved include; planners, developers, surrounding residents, shop owners, franchise operators, politicians, and the community. Quite simply, the interests involved are numerous, and the effects of planning can have far reaching implications for the success not only of the commercial strip, but for other areas of our cities. In essence, the problem we are describing is how do we plan for a commercial strip so that it is a viable, effective, responsive and useful area within a cities commercial structure and the surrounding areas?

There are a number of sub-questions which will be answered with respect to the general objective of this practicum including:

1. What are the various functioning units of a commercial strip?

What types of retail activity are present? How many nodes exist? Information such as this helps to identify how commercial strips differ from other commercial environments such as shopping centres. Strips are comprised of many individual retailers, what is their role in helping to determine the success of the strip?

2. Why is planning for the commercial strip an important aspect of urban development management?

This question is the foundation for ascertaining what relationship exists between the commercial strip and its urban surroundings. That is to say, how are the residential neighbourhoods, environment, transportation system and economic development in the region all connected to the strip? Can or does one part of this interrelationship have significant impacts on the system as a whole? For example, what link exists between neighbourhood residential uses and individual businesses?

3. Does the lack of planning create a commercial environment which is continually plagued with problems?

Commercial strips have evolved over much of this century as unplanned and largely uncontrolled commercial environments. Has this lack of planning control

been the ultimate reason why commercial strips have constantly been regarded as problem areas of our cities?

4. What are some of the issues of the future for this type of retailing environment?

How will the evolution of retail (i.e. big box retail, power centers, superstores, warehouse stores) transform or impact the existing commercial strip?

Answers to these questions will help determine how we plan for a successful commercial strip. However, the objective of this practicum is not to develop an action plan or all inclusive manual on how to make all commercial strips successful, but rather, the objective is to understand -- through an examination of a commercial strip and its evolution -- how we plan for a successful commercial strip. Even though this study ignores other such developments within Winnipeg, it may shed light on the general subject of commercial strips. It is hoped that the results of the present study will be useful to all who will participate in planning the future commercial land use of this or any city.

1.2 Study Limitations

The initial emphasis of the research was concerned with commercial development and commercial planning within the City of Winnipeg. However, the decision was made to focus specific attention on the study and planning of commercial strips. After more consideration it was decided that only one commercial strip, namely Pembina Highway, located within Winnipeg, Manitoba,

would be used for examination and analysis. This strip contains a number of common elements which are dominant in some of the smallest and the largest strips across this country. Pembina Highway has neighbourhood or main street elements found in smaller city strips while also containing big-box retailers which are generally only found in larger metropolitan areas.

One of the obvious limitations for research surrounding Pembina Highway is that not every business owner, customer and resident of the surrounding areas can be personally addressed to provide insight from their own perspective. Therefore, it was determined that the main analysis and findings of this practicum will be based upon a sample of Pembina's population.

The basis for determining the sample is as follows;

- 1) The percentage distribution of each type of functional unit located along Pembina Highway was determined.
- 2) These frequency distributions were then graphed to easily distinguish both dominant and more unique units along this strip.
- 3) The frequency distributions then act as a guide for determining the components of the sample. The sample mirrors the frequency distribution of the functional units. For example, 17% of the functional units along Pembina Highway¹ are dedicated to miscellaneous retail uses, then 17% of all questionnaire's were be delivered to this type of functional unit. It should be noted that certain functional uses were omitted from the sample including; Residential uses, Vacant Building and Land, Institutional, Government and Public Services and Head Quarters and Company Offices.

¹ For the purpose of the questionnaire, certain uses including Residential, Vacant Land and Buildings, Institutional, Government and Public Services and Head Quarters and Company Offices were excluded from the sample. Therefore, the total units along Pembina Highway for sample purposes is 602, and not the 811 which was reported.

Through this method of determining a sample for Pembina Highway, the information collected will provide an understanding and a basis for substantiating basic trends and information which is evident along this strip.

1.3 Chapter Highlights

The following subsections provide a brief summary of each of the practicum's main chapters.

1.3.1 Chapter One

This introductory chapter covers the rationale for undertaking the research for this practicum as well as clearly defining the limitations of this study. More importantly, this chapter discusses the main objectives this practicum addresses.

1.3.2 Chapter Two

The second chapter outlines the practicum's methodology. Included in the study methodology is a detailed account of all the methods and techniques used for gathering and obtaining research data for this practicum.

1.3.3 Chapter Three

This chapter provides insights into the first generally accepted studies on commercial structure, while at the same time, providing insights into the one specific component of this structure, namely the commercial strip. This literature review includes work by prominent authors such as Walter Christaller, Brian Berry and Ken Jones.

1.3.4 Chapter Four

The fourth chapter introduces the commercial strip as one component of urban commercial structure. This is accomplished by chronicling the historical growth of the North American commercial strip into one of the dominant retail land use components of cities. Highlights of this chapter include a discussion surrounding the role and purpose of the commercial strip in contemporary society. This chapter also details the planning techniques utilized when planning for a commercial strip during the past fifty years.

In addition to introducing the commercial strip, this chapter also provides a contemporary perspective of some of the dominant trends which are affecting the commercial structure of cities in general, and that of commercial strips in particular. Some of the more dominant trends covered include; suburbanization, overbuilding and the influx of New Format retailing in the Canadian urban scene.

1.3.5 Chapter Five

The fifth chapter is used to provide background information for this practicum's case study of Pembina Highway, a major north-south arterial located within Winnipeg, Manitoba. Winnipeg's commercial structure and policies are also examined in this chapter. The chapter concludes with a detailed examination of the various actors involved in commercial development and commercial planning along Pembina Highway.

1.3.6 Chapter Six

This chapter is used to break down the findings and analysis of the three components of the practicum's case study: the land use analysis, questionnaire, and detailed examination of Shindico Realty's properties along Pembina Highway.

The land use analysis provides an examination of all the functional units along Pembina Highway through the development of a detailed classification system. Of specific interest is the frequency of different functional units by classification.

The questionnaire provided information from a business owner or operator point of view, as well as identifying specific consumer characteristics. Based upon owner / operator perception, questions such as "How extensive is the area your business serves", "How do your customers travel to your business" and "Are your customers regulars, new or other", were asked. In addition, some of the questionnaire's more unique findings are explained at this time.

Examining Shindico Realty's properties helped to identify many of the issues which inherently affect property management and developer's along this strip. In addition, this analysis helped to sharpen the overall focus of this practicum through the analysis of much more detailed information than is generally available on other businesses along Pembina Highway. Examples of this type of detailed information include property assessment values, present and historical building activity and current development practices.

1.3.7 Chapter Seven

This chapter provides insight into many of the specific planning issues and concerns which have been identified as a result of the research discussed in previous sections. This chapter also identifies how some of the issues discussed in this practicum have implications for the planning profession.

The final subsections of this chapter detail recommendations which have been developed as a result of this practicum's research, as well as identifying further research required in this subject area.

CHAPTER 2: STUDY METHODOLOGY

The first stage in developing a methodology for this practicum was to develop a preliminary research question. Initially this question was "How do cities plan for commercial development?". This research question provided the starting point for information gathering and this information helped refine the question towards how we plan for commercial strips. Only after determining what information was initially available could any firm decisions be made about inquiry techniques and methods to be utilized for the study of planning for the commercial strip.

Upon completion of the preliminary research it became apparent that this practicum would be based upon two main 'building blocks'.

a) **Literature and Theory Review:** Provides a foundation for all subsequent research compiled during the completion of this practicum.

b) **A Case Study**

The case study is one social science method which allows for an investigation to retain the meaningful characteristics of real-life events. To successfully complete a case study it was deemed important to set-up some controlling guidelines. Borrowing from Robert Yin's Case Study Research Manual, the following guidelines were used during the completion of this practicum's case study (Yin 1989, 146);

- 1) Physical boundaries must be given specific attention
- 2) An exhaustive effort must be made during the collection of evidence

- 3) The case study should not end due to non-research constraints such as a lack of available funding or time.
- 4) The alternative perspectives must be considered. These may include the planner, developer, consumer and independent retailer.

In keeping with the above guidelines, the following three components constitute this specific Case Study of Pembina Highway.

I) Land Use Analysis:

A land use survey, conducted during the summer of 1996, was carried out in order to obtain first hand information regarding the functional characteristics of Pembina Highway. In addition to the author's field work, the annually published Henderson's City Directory, and a business database obtained from Winnipeg 2000, helped in developing an accurate business directory for the Pembina Highway commercial strip.

II) Questionnaire:

The questionnaire was designed to aid in determining the unique characteristics and functional role of this strip from a business owner/operator perspective. Approximately 175 businesses were contacted during the time period October 1996 through to February 1997. Of these 175 businesses, 100 hundred agreed to complete the questionnaires. Examples of questions include the following;

- Do you own or rent the building you occupy?
- How many people are employed by your firm?
- How many square feet of selling space?
- Do you plan on relocating your business in the near future?

These questions, among others, helped to provide information regarding tenure, amount of operating space, rent, trade area, customer base, physical condition of the building they occupy, length of their occupancy, and operational problems.

The success of the questionnaire was determined by a number of different factors. Most importantly, this questionnaire was fashioned after a similar survey conducted by Norah Chow at the University of Alberta in 1968. Chow's questionnaire aided significantly in the formatting and generation of questions for the questionnaire. Questions were designed to be of a simple nature, easily understood by the recipients; while at the same time providing sufficient data to enable a detailed examination. The responses were eventually compiled into a relational database so that an infinite number of query's on the data could take place.

The survey's success was also reflective of both pretesting and delivery methods. Pretesting occurred during the month of September of 1996. Although the questionnaire was edited by a number of people including professors, students, and the ethics committee, an additional five business operators along Pembina Highway were given the questionnaire in order to make comments and suggestions which aided in the development of the final questionnaire (See Appendix A). Pretesting allowed for a limited screening of the questionnaire to judge its ability to collect the required information.

The method used to deliver the questionnaire was personal delivery and pick-up. This method was preferred over straight mailing due to the added interaction with business owners/operators. Businesses were much more receptive to completing the questionnaire when first contact was made by telephone rather than in person. If the owner or operator agreed to complete the questionnaire it was dropped off and then a second telephone call was made to arrange a pick-up date and time. One final note with regards to the questionnaire was that delivery was made only to owners or managers in order to maintain consistency with the responses.

III) Examining Shindico Realty's Properties:

Success of this specific property examination component of this practicum was contingent upon the collection of detailed information from Shindico Realty. Information received came in such varied forms as historical building activity, development databases and property assessment values. Close contact with Shindico Realty's leasing agents, as well as the president, Mr. Shindleman, was a top priority from the onset of this component of the case study.

2.1 Methods and Data Collected

A strong combination of both primary and secondary reference material was used in the completion of this practicum. Much of the literature review comes in the form of secondary information from books as well as, current and historical journals, and the City of Winnipeg's Plan Winnipeg. However, a number of

primary sources were also used. Some of these sources include a questionnaire, interviews, and a land use survey.

Research in the form of a questionnaire, statistical data and personal observations provided the foundation upon which many of the findings and analysis within this practicum were based.

The following is a list of inquiry techniques, sources of information and references to uses of the research;

- 1) Shindico Realty Leasing Agent Interviews: These interviews were used to help provide a private business perspective for property development along Pembina Highway. The line of questioning included determining 'what were the more contentious issues' or 'what current problems hinder development along Pembina Highway'?
- 2) City of Winnipeg Employee Interviews: These interviews were useful in order to obtain any relevant information the City of Winnipeg had relating specifically to Pembina Highway. In addition, interviews provided perspectives from an administrative and political point of view.
- 3) Questionnaire: The primary purpose of the questionnaire was to analyze the many variables pertaining to such things as floor space, rent, and consumer behaviour. The questionnaire was another step in communicating with all the actors involved along Pembina Highway. The questionnaire was distributed to a sample of businesses and functional units along Pembina Highway.
- 4) Census Data: This data provided a wide array of statistical information such as tenure, age, and income for the surrounding residential neighbourhoods along Pembina Highway. This information was used to help identify

Pembina's trade area and consumer base. Information of this sort is used Shindico Realty and was made available through a program titled PCensus.

- 5) Traffic Counts: Provide an understanding in both a graphical and numerical perspective as to the volume of traffic and number of potential consumers who frequent this commercial strip. This information was made available from the City of Winnipeg's Manager of Transportation services (Ken Rosin), and from information collected from Shindico Realty.
- 6) Articles, Journals, Books, Internet Sites: These sources provided a foundation for studying both a city's commercial structure and commercial strips. In addition, this reference material helped to provide insight into the latest directions and 'state of the art' research currently being completed which referenced the commercial strip. One valuable Internet site was the Conference for New Urbanism (CNU) list service which devoted a lot of time to New Format retailing.
- 7) Field Work & The Henderson Directory: This aspect of the practicum's research was used to develop a unique and very detailed site analysis of who and what was exactly located along Pembina Highway. This information was collected personally during the summer of 1996. The uses of such a database are infinite. They provide a basis for statistically representative data. In addition, this data can serve as a basis for continued research on a variety of topics relating to Pembina Highway. Such potential topics may include, residential characteristics and housing analysis, transportation planning and economic development.
- 8) Case Studies: Used to help guide the structure and framework of this practicum's case study of Pembina Highway. Case studies, such as Chow 1970 and O'Connor 1988, help to provide insight into more efficient courses of action and problem areas.

Research methods and data collection are invaluable tools used by planners in attempting to successfully plan for any component of an urban area. For this reason, the methods and data collection mentioned above helped significantly in our understanding of how to plan for a successful commercial strip and to understand why this is an important aspect of urban development management. In addition, gathering this information proved to be a critical step in attempting to determine what the various functional units of the Pembina Highway commercial strip are, and to help in our understanding of how planning techniques or a lack thereof, may affect the strip now and into the future.

The next chapter will examine the classic and contemporary research which is related to the study of commercial strips.

CHAPTER 3: REVIEWING THE LITERATURE

There exists an extensive amount of literature focusing on the commercial structure of urban areas. However, when reviewing the literature there is confusion as to how all components of a city's commercial structure relate to one another. There is a disproportionate share of research centering on shopping centres and retail location; whereas, significantly less attention is paid to the commercial strip and its role within the commercial structure of the city. What constitutes a commercial strip? Are they variations within the shopping centre hierarchy or are they completely separate components of a cities commercial structure? This literature review will examine classic and contemporary research which addresses these questions.

This review will be broken into two parts. Part A will provide an historical examination of land use theories identifying all components of a urban area. In addition, Part A will also examine the significance of Central Place Theory to the study of urban structure. Part B will focus on the research contributions of theorists which have made a direct contribution to the examination of the commercial strip.

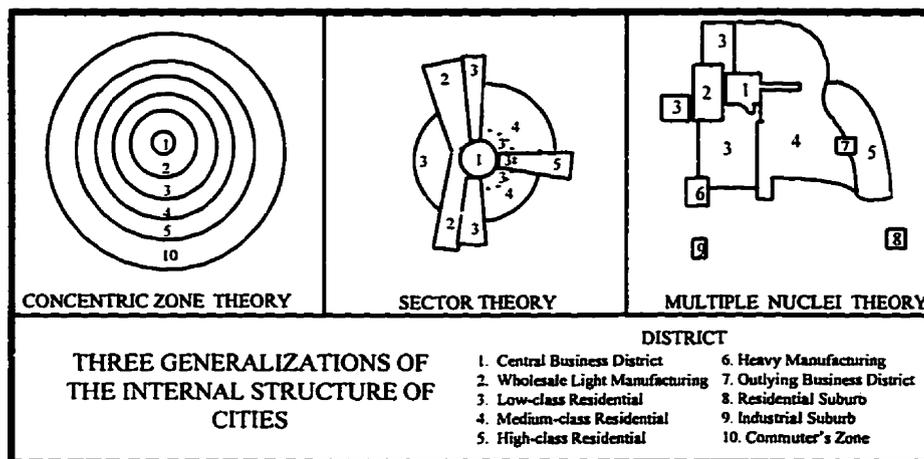
For the purposes of this review, the term "commercial strip" will be synonymous with a number of terms used by researchers to describe this component of our cities including; "urban corridor", "string street", "ribbon", "urban arterial", "business thoroughfare" and a "shoe-string development".

Part A

3.1 Land Use Models: The Internal Structure of Cities

As far back as 1826, when Johannes Heinrich von Thun en wrote 'Der Isolierte Staat' (The Isolated State), people have been characterizing the internal structure of cities. von Thun en was the first person to recognize that cities were in large part, spatially determined by various activities accessibility to the market. He also noted that development occurred along major transportation routes; thereby, postulating the first concrete theory establishing the commercial strip as a component of an urban area (Berry et al. 1987, 218). However, it was not until Ernest W. Burgess' publication The Growth of the City (1925), that urban land use theory seem to concern itself with more than the relationship of a few variables. Burgess' "Concentric Zone" model is widely recognized as one of three patterns of urban structure and social space (Figure 3-1) in pre-World War II American cities (Harris and Ullman 1970, 97).

Figure 3-1: Internal Structure of Cities



(Source: Harris & Ullman 1970, 97)

3.1.1 Ernest W. Burgess: Concentric Zone

Burgess, an urban sociologist in Chicago, developed his model while he was trying to explain urban growth during a time of large scale immigration from Europe (Berry et al. 1987, 233). Burgess' model describes the growth pattern of a city through five concentric zones. The model, although similar in configuration to von Thunēn's, expands the underlying ideas quite significantly. Burgess submitted that the CBD of a city is surrounded by a zone of transition largely characterized by deteriorated land use brought about through the process of speculation fueled by anticipated CBD expansion (Bunting 1991, 300).

Burgess' third zone was coined the 'zone of independent workers', occupied by, industrial workers wishing to escape the deteriorating 'zone of transition' while still maintaining close proximity to their place of employment. Next was the 'zone of better residences' occupied by middle to upper income people. They tended to be people who could afford higher transportation costs due to the increased distances to their place of employment (Harris and Ullman 1970, 97). Burgess notes that this zone tends to have several business and recreational centers that would include such things as banks, high-class restaurants, theatre's and an automobile display row, very often located along major arterial routes (Berry et al. 1987, 234).

In the final rings of his model, Burgess refers to the 'commuters' zone' in which there are encircling small cities, towns and hamlets which are occupied by higher

income residents. Once again, he maintains that people living in these zones can afford the higher costs involved in commuting to the central city.

The concentric zone theory offers an explanation of city structure which is debated within academic circles to this day. However, this is just one of three dominant land use models of the internal structure of cities.

3.1.2 Homer Hoyt: Sector Theory

The second generalization of the internal structure of cities, depicted in Figure 1, is that of the 'Sector Model'. This model was developed by Homer Hoyt in 1939. Hoyt's model is based on the fact that different segments of the urban environment, such as manufacturing and residential areas, occupy different areas of the city and extend outward from the center reminiscent of 'slices of a cake' (Berry et al. 1987, 235). Unlike the concentric ring model, the sector model illustrates how land uses and values are distributed by radial routes into the city center, such as residential along major automobile arterials and heavy industry along rail lines (Bunting 1991, 301). In addition, although the CBD is still the focal point of all commercial activities, this model postulates that retail development does occur along these radial routes.

3.1.3 Chauncy D. Harris & Edward L. Ullman: Multiple Nuclei Model

The third generalization on the internal structure of cities is represented by Chauncy D. Harris and Edward L. Ullman's Multiple Nuclei model developed in 1945 and published in a journal entitled "The Nature of Cities" (Harris and

Ullman, 1970, 91). Their model, unlike the first two, considers the major impacts of the automobile on society and city form (Figure 1). Through their model, Harris and Ullman suggest that many land use patterns in cities are not formed around a single centre but around several discrete nuclei (Harris & Ullman, 1970, 98). These nuclei develop for a variety of reasons. They may be determined by transportation; where, retailing attaches to the point of greatest intracity accessibility and manufacturing districts are closely tied to water or rail. Nuclei may also develop due to the fact that certain retail activities profit from clustering together, while other activities, such as residential and manufacturing would be detrimental to one another. Finally, certain activities such as large retail or industrial land users cannot locate within high rent areas and are therefore forced to move to other locations within the city. Examples of activities which fall in this category include; car dealerships which locate along major arterials and bulk wholesaling and storage activities which may locate on the periphery of the city. In some instances, these nuclei have existed since the city originated while others developed during city growth from migration and specialization.

3.2 Central Place Theory

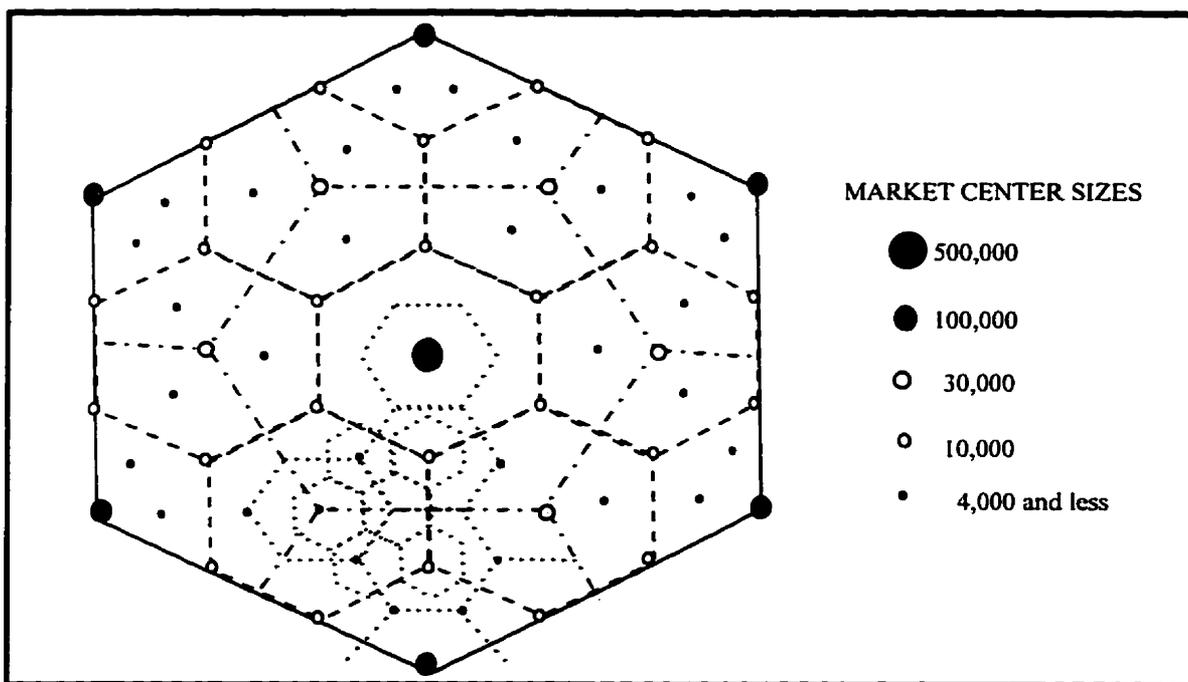
In 1927, two years after Burgess introduced his concentric ring theory, a German geographer by the name of Walter Christaller published ideas which suggested that geographers were too concerned with the internal geography of cities. That is, past theories did not address the fundamentally unanswered question, "What

are the causes for the existence, present size, and character of a city"? (Ullman 1970, 59). To address this area he published his book Central Places in Southern Germany in 1933.

3.2.1 Summarizing Christaller's Central Place Theory

A discussion surrounding Central Place Theory can be quite detailed and time consuming. For the purpose of this literature review only the essential features of Christaller's arguments will be summarized (Figure 3-2).

Figure 3-2: Christaller's Concept of an Urban Hierarchy



(Source: Jackson 1973, 188)

Christaller's Central Place Theory assumes the following;

- a) Homogeneous plain with a uniform rural population
- b) F.O.B pricing (consumer pays at point of production)
- c) Identical demand by all consumers at any real price

- d) Consumers are assumed to act in a rational economic manner in which they will minimize their costs by visiting the nearest place offering goods and services
- e) No institutional or legal restrictions on the entry of producers in the market (Potter 1982, 28-29).

The essence of his theory surrounds the belief that a certain amount of productive land supports an urban center. As a result, the center exists to provide essential services to the surrounding land (Ullman 1970, 59). Christaller stated that "goods and services are produced and offered at a few necessarily central points in order to be consumed at scattered points." (Potter 1982, 28)

There are three conclusions determined by Christaller's theory;

1. The higher the class of an urban center, the greater the number of smaller centers and their corresponding regions served (Jackson 1973, 187).
2. "Low-order places offer convenience goods that are purchased frequently within small market areas and hence their range is small (max. distance consumers are willing to travel)...Higher-order places are fewer in number and are more widely spaced than lower-order places providing goods with greater ranges." Generally, the greater the range, the greater the threshold (min. sales level necessary for the seller to make a profit) (Berry et al. 1987, 382).
3. A hierarchy of central places exists (See Figure 2 & 3).

Christaller's Central Place Theory has proven to be applicable to the analysis of nucleated shopping centres and the retail hierarchy due to its ability to explain the nature and function of the various shopping centre formats and the types of goods and services they offer (Berry 1963; Simmons 1964). However, a further exploration of this theory reveals that it is not applicable to urban arterial or highway oriented business districts. This is due in part to the physical variability

and multifunctional nature of commercial ribbons (Chow 1970). Although it is important to note the significant contributions Central Place Theory has made to the study of urban commercial structure, its limited applicability to commercial strip developments makes further examination in this specific context unnecessary.

Part B

3.3 Identifying & Classifying The Retail Environment

A few years prior to the introduction of the Sector Theory by Homer Hoyt, much of the pioneering work in retailing was being completed by Malcolm Proudfoot in his work entitled City Retail Structure (1937).

3.3.1 City Retail Structure: Malcolm Proudfoot

Through his research Malcolm Proudfoot determined that there had been a marked improvement in the number of general urban studies undertaken during the 1930s. However, he also stated that there was little attention given to the study of urban land used for retail purposes "either as to structure or function in relation to city life." (425) Consequently, Proudfoot went on to classify and characterize the principle types of city retail structure. He concluded that American cities generally have five types of retail structure (425);

1. The Central Business District
2. Outlying business center
3. Principal business thoroughfare
4. Neighborhood business street
5. Isolated store cluster

Of specific value to the study of commercial strips is Proudfoot's classification of the principal business thoroughfare. These thoroughfares serve as both a bus street and traffic artery, carrying high density mass and vehicular traffic. They possess large, widely spaced shopping and convenience goods stores which survive by attracting a very small percentage of passengers of this "inter-community" traffic (Proudfoot 1937, 427).

In essence, Proudfoot was the first to actually document the trend toward increasing growth of curbside commercial units along major urban roadways. One could say his work was the first real (albeit partial) study of commercial strips in American cities.

3.3.2 Urban Land Economics: Richard Ratcliff

In 1949, ten years after Proudfoot had completed his classification of the city retail structure, an economist by the name of Richard Ratcliff published his book Urban Land Economics. This book would significantly contribute to the amount of available literature surrounding retailing and the study of commercial strips (which he coined string-streets). Ratcliff stated that although residential uses consume more land, the retailing uses in a city are "essential to urban life...in the sense that out of them flows the economic life blood of the community." (Ratcliff 1949, 123)

Ratcliff openly supported the concentric ring theories of land distribution put forth by von Thunën and Burgess. However, he also stated that there are two

exceptions to the Concentric Ring Theory. These exceptions included the outlying retail structure composed of string-streets and suburban nucleation's, and the wholesale and light manufacturing districts (Ratcliff 1949, 388). As well, Ratcliff determined that string-streets lacked internal organization; whereas, the nucleation's had a more definite pattern of arrangement of uses (Ratcliff 1949, 394).

In his research, Ratcliff ascertained that retail uses had come to dominate the landscape of major urban thoroughfares due to the fact that "retail functional units appear to possess an inherent capacity to pay higher rents than other types of units." (Ratcliff 1949, 384)

In concluding his points about commercial strips, Ratcliff left the door open for much further research and study. He stated that "since there are infinite variations in the relative importance of major streets as arteries and as the cores of residential districts, the nature of string-street retail development cannot be strictly defined." (Ratcliff 1949, 389) In his attempts to determine the nature of the uses comprising principal business thoroughfares, Ratcliff concluded that;

The nature of the uses depends upon the extent to which the street is a main automobile artery and the degree to which it is the core of a residential area. The use of the street as a traffic artery attracts retail shops serving the transients — filling stations, accessory shops, automobile showrooms, quick lunches and refreshment stands, and fruit stands. The proximity of residential districts encourages convenience type outlets — drug stores, grocery stores, laundry and cleaning branches, hardware stores, delicatessens, and pool halls. (Ratcliff, 1949, 389)

Ratcliff's contributions to the study of the commercial strip are quite evident. His work predates nearly all of the literature written on commercial ribbon's and string-streets, and although he admitted that he could not define the nature of string-street retail, he did, nonetheless, provide a foundation for future study.

3.3.3 Nature and Function of Retail String Development: Merry

Paul R. Merry's 1955 Ph.D thesis research focused on the study of a commercial ribbon in Denver, Colorado. Merry's work centered on an analysis of location habits of businesses spread along the highway; relationships between certain business types; traffic volumes; traffic direction; and the extent of immediate residential neighborhoods (Berry 1959, 149). Unlike Ratcliff's Urban Land Economics, Merry's work was exclusively concerned with a specific commercial strip, rather than the larger relationships found within the whole of the urban environment.

Merry stipulated that business ribbons were highly specialized forms of development along traffic arteries which contained such businesses as; automobile facilities, furniture, household and general merchandise (Berry 1959, 149). Merry's conclusions on the commercial strip were neatly summarized by Brian J . L. Berry (1959, 149-150);

1. Density of stores diminished with increasing distance from the CBD
2. Some marked variations in density with peaks at major intersections
3. Traffic volumes are greater inbound, with this side of the highway having relatively more gas station and automotive dealers
4. Stores agglomerated in high density zones, i.e. beauty shops, bakeries

5. Low-density zones are more frequented by auto dealers, repair, gas stations and chain grocery
6. Certain functional units have neither tendency for high or low density, i.e. restaurants, laundries, furniture sales

Merry's work marked the beginning of a more specific and detailed analysis of a rapidly accelerating component of city retail structure.

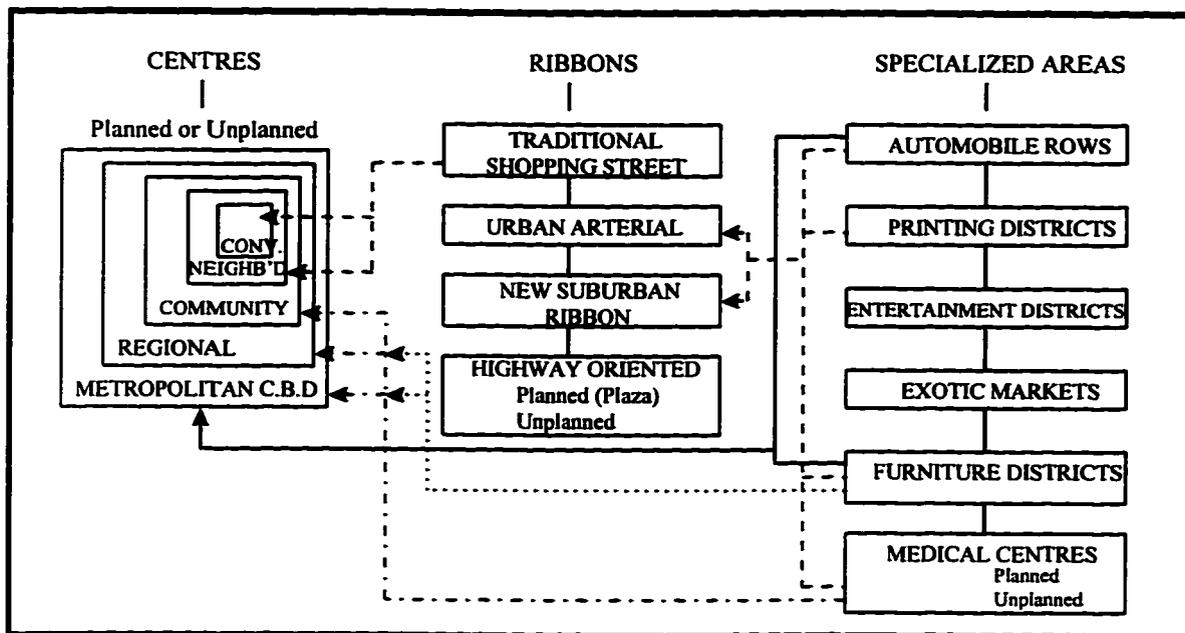
3.3.4 Business Structure and the Retail Hierarchy: Berry

Any examination of the study of commercial structure and commercial strips would not be credible if it did not identify Brian J. L Berry's contribution to the subject area. His study in 1959 of "Ribbon Developments in the Urban Business Pattern" and the 1963 study of Commercial Structure and Commercial Blight are referenced in almost all subsequent works published on this subject area.

Berry's largest contribution to the study of commercial strips was to provide the most comprehensive classification – at that time – of the business pattern of American cities. In his classification, Berry determined that the structure of business in American cities can be broken down into three main typologies; centres, ribbons and specialized areas. Each one of these types is then broken down further to illustrate the interrelationships among the various conformations.

As figure 3-3 illustrates, business ribbons are broken down into four separate types. To begin with, Berry describes the *Traditional Shopping Street* as little more than a linear extension of a nucleated centre.

Figure 3-3: Berry's Structure Of Business & Commerce



(Source: Berry 1963, 20)

Next he refers to *Urban Arterial* ribbons that move outward from the CBD and contain commercial functions demanding large spatial requirements and easy access to the urban market. These urban arterial functions offer products of a specialized demand nature which is characterized by an infrequent, special-purpose trip (Berry 1963, 23). *New Suburban Ribbons* are those functional units which develop in various suburban locations either adjacent to existing shopping malls or as independent ribbons which provide goods and services to the suburban population, i.e. sporting goods and discount stores (Simmons 1964, 136). Berry's last type is that of the *Highway-Oriented* ribbon which, in his own words, are natural strip developments.

Functional units along these ribbons serve the demands that tend to originate from highway traffic. In general, the heavier the traffic volume, the greater the demand for and density of, highway-oriented uses. Examples of these types of uses are gas stations, motels and restaurants; their very nature suggests that they cater to single-purpose shopping (Berry 1963, 23).

Berry was the first to recognize that although his classification delineates four types of commercial ribbons and that they are mutually exclusive as functional groups, he noted that these conformations need not be spatially exclusive among themselves or among other specialized areas or center conformations (Berry 1959, 149). In perspective, Berry concluded that functional units found in a nucleated shopping center can also be present in an urban arterial, as well as a specialized entertainment district (149).

Although Berry has contributed a great deal to the study of commercial structure and of commercial strips, his work has been strongly criticized for one main reason. Put simply, Berry made no attempt in his work to describe the various types of ribbons in terms of a hierarchy or to relate them to equivalent business forms in the rural settlement system (Davies 1976, 123). Although Berry clearly classified nucleated centres based upon a retail hierarchy, he felt that Central Place Theory was "not adequate to explain stretches of highway-oriented or urban arterial businesses." (154)

3.3.5 Alternative Retail Classifications

As mentioned previously, Brian Berry's work has been extensively critiqued by countless authors. The following section highlights four prominent authors alternative's to Berry's model.

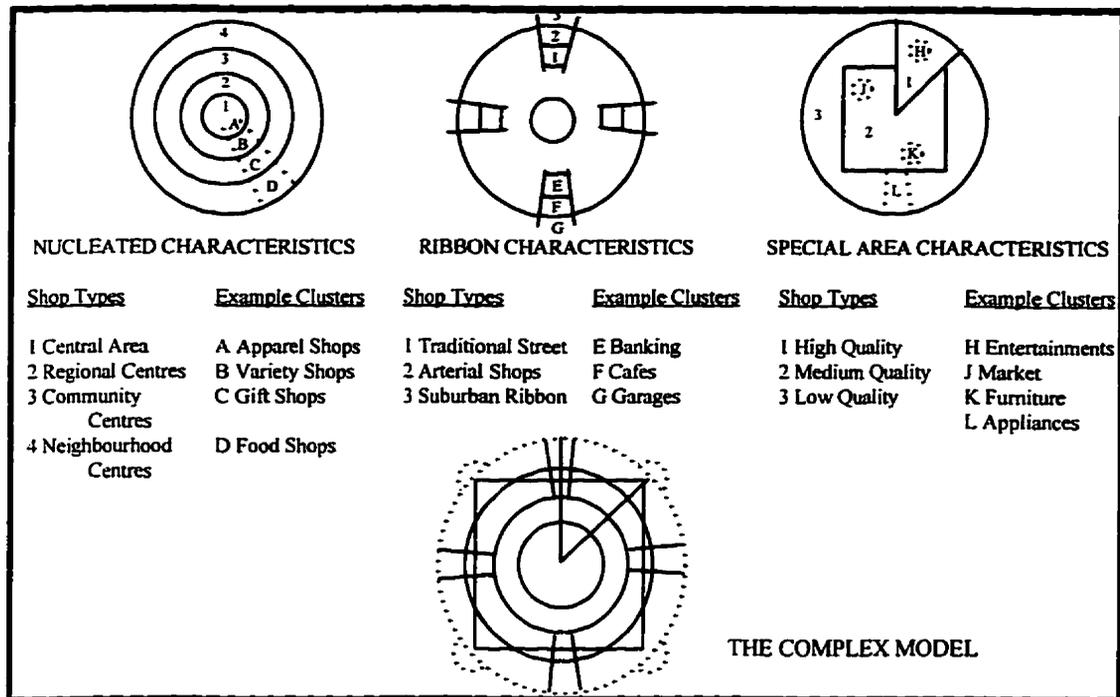
3.3.5.1 Boal & Johnson, 1965

In their work "The Functions of Retail and Service Establishments on Commercial Ribbons", F. W. Boal and D. B. Johnson determined that some of the retail establishments along ribbons classified by Berry as being part of a hierarchy derived a considerable amount of consumers from passing traffic. Berry believed that hierarchical functional units along ribbons drew only a minimal amount of consumers from passing traffic (Boal and Johnson 1965, 156). In addition, Boal and Johnson noted that some highway-oriented establishments drew a considerable amount of customers from nearby residential, industrial and shopping areas, and not simply from through traffic as Berry had suggested (Boal and Johnson 1965, 168). Boal and Johnson concluded that both ribbons and specialized retailing areas are but modifications of nucleated centres and should not be classified as separate components of business structure (Potter 1982, 46).

3.3.5.2 Davies, 1976

Unlike Boal and Johnson and Scott, Ross L. Davies developed his own integrated model of urban retail form (Figure 3-4).

Figure 3-4: A Structural Model of Retail Locations



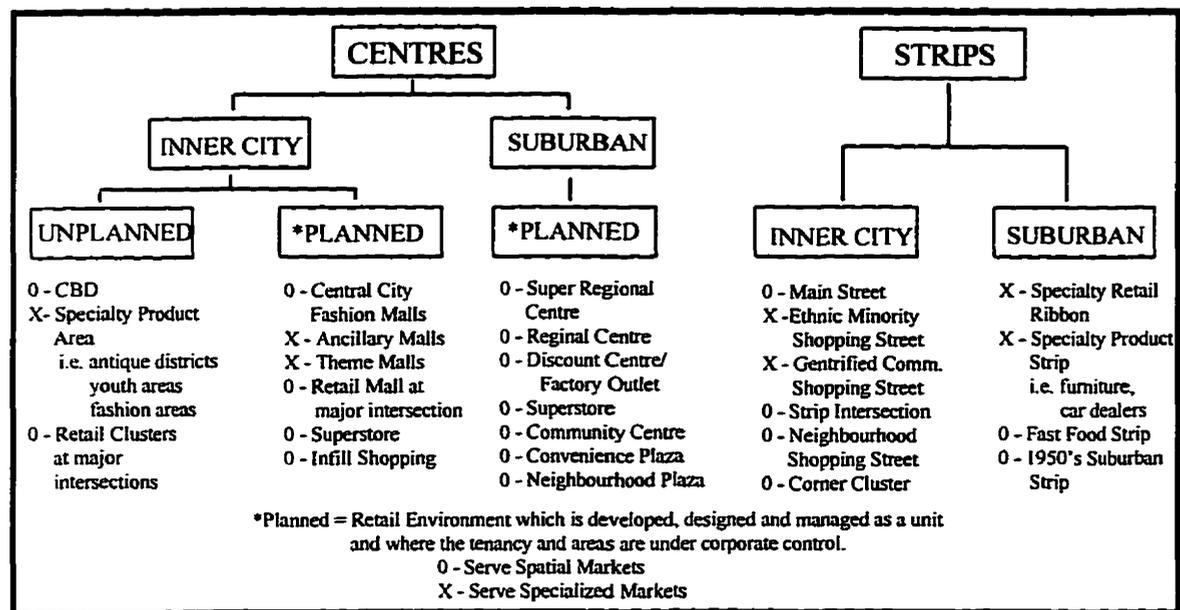
(Source: Davies 1976, 147)

His model was first published in 1972 and then later in his book Marketing Geography with Special Reference to Retailing. This model was based on the simultaneous overlapping of nucleations, ribbons, and specialty retail area characteristics. According to Davies, the retail pattern of the city centre can be viewed in broad terms as one nucleation with a series of concentric rings of retail activity located within (Davies 1976, 146). Superimposed on these zones are various clusters of specialized retailing. Arterial and suburban ribbons are located within the most outer concentric zones (Davies 1976, 148).

3.3.5.3 Jones, 1984

Ken Jones' Ph.D work was published in his book Specialty Retailing in the Inner City in 1984. Jones' work was essentially a reworking of the business structure put forth by Brian J. L. Berry nearly twenty years earlier (Figure 3-5).

Figure 3-5: Ken Jones, The Urban Retail Landscape



(Source: Jones 1991, 395)

Jones noted that changes in the urban retail landscape have forced a few variations in Berry's original model. In contrast to Berry's earlier model of Business Structure (Refer back to Figure 3-3), the number of typologies have been reduced from three to two in Jones' version. In essence, Jones suggests that there are numerous specialty shopping districts which are located in both ribbon and nucleated centre environments. From this perspective, Jones included specialty areas not as a separate business typology but as sub-components of both ribbons and centres. Examples of these include the

gentrified community shopping street located within inner city strips (differentiated according to their physical location in the suburbs or inner city) as well as, antique districts which can be located in unplanned inner city centres.

Although numerous authors have provided alternative retail classifications, the model introduced by Berry over two decades ago remains the dominant classification for use in the study of retailing and commercial strips.

3.4 Chapter 3 Summary

This literature review has provided an overview of the research and theory surrounding commercial development and commercial strips. Of all the models and theories discussed, the model put forth by Brian Berry during the 1960's has maintained its place as the benchmark for describing and understanding the commercial structure of cities. However, this model does not accurately distinguish between centres and strips as does the model put forth by Ken Jones. This has resulted in a certain level of confusion as to the role and function of commercial strips. This confusion has had an affect on planning and planners in that there seems to be a stark division in the attitudes and preferences of practitioners concerning the need for planning of the various components of a city's commercial structure.

The next chapter will identify the trends and techniques utilized by planners throughout the historical growth of the commercial strip.

CHAPTER 4: PLANNING AND TRENDS

At one time, retailing and office activities were located within the exclusive domain of the Central Business District (CBD). However, due to a variety of market changes since the Second World War, there is at present a bewildering variety of commercial groupings which have come to dominate all physical areas of our cities. Technological advancements, decentralization, taxation and periods of recession are just a few of the factors which have caused widespread change in the commercial structure of Canadian cities. These changes have been partially responsible for the movement of commercial activities out beyond the city centre.

As a result of this movement, commercial strips, 'Chinatowns', suburban malls and big-box retailers have arrested control of the city's commercial structure away from the CBD. The future affects of this change and evolution have even prompted suggestions that one half of all the retailers now in existence will disappear by the year 2000 (Jones, Evans and Smith 1994, 2). The disturbing nature of this type of prediction highlights the necessity for effective planning of our cities commercial activities.

This chapter will examine the historical growth of both the commercial strip and the planning attitudes centering on it. In addition, the dominant urban and development trends which are impacting the commercial strip will also be discussed.

4.1 Historical Growth of the Commercial Strip

There is a reasonable amount of literature in existence which documents the historical growth of the North American commercial strip (Venturi, Brown and Izenour 1977; Horwitz 1985; Liebs 1985; O'Connor 1988; Ford 1995). By summarizing some of the research of these authors, the following subsections will attempt to piece together the historical growth of the commercial strip during this century. Much of the documentation centres on the large American metropolis as a key example since large American cities were the first to experience the evolution of the commercial strip. For this reason, they provide an ideal foundation for an historical analysis.

4.1.1 The Extension of Main Street (1900 - 1940)

Main Streets in cities and towns across North America were the dominant location for shopping activities during the 19th century. However, as automobile usage increased during the early decades of this century, many of the traditional Main Streets could not handle the ever increasing volumes of traffic. Main Streets began to experience the negative effects created by enormous amounts of traffic congestion. Where a downtown location had once provided shop owners with hundreds of customers stopping every day; these changes resulted in thousands of customers passing by every day without ever stopping to shop (Liebs 1985, 10).

The troubles facing the downtown Main Street would eventually lead to an expansion in roadside retailing. Thus, many of the earliest commercial strips were simply extensions of downtown Main Streets. These extensions were initially associated with the increasing accessibility created by the linear expansion of the streetcar line. During the 12 year period from 1890 to 1902, the number of miles of streetcar track within the United States increased from a mere 1,260 miles to an incredible 26,000 miles (O'Connor 1988, 39). Retailers located farther away from the city centre in order to lure an increasing number of customers to their shops uninhibited by massive traffic congestion. Ironically, businesses who had only a few decades before sought Main Street locations, now were quite prepared to search out other location options.

The Main Street extension represents the success of the linear city over the more compact square or circular center associated with many traditional cities. The extended streetcar strip represented a continuation of this way of organizing urban space (Ford 1994, 231).

As the streetcar lines continued to expand and retailers relocate, a number of problems developed. Quite simply, there were just too many commercial strips in the typical American city, and most of them were far too long. The reasons for this was land speculation. Private developers would build streetcar lines in conjunction with selling land for new single-family homes located in peripheral areas of the city (Ford 1994, 231). As the streetcar lines overextended to reach the land developed for new homes, the commercial property along the strip was devalued (Ford 1994, 232). To make matters worse, developers began building

“taxpayer” buildings along the strip. These buildings were one storey structures built with the intention of generating enough income to pay property taxes. They were designed with the assumption that urban settlement would continue to spread out from the city centre and would eventually allow the land along the strip to become more intensely developed. By the turn of the century, “taxpayer” strips began to form vast commercial corridors in most American cities (Liebs 1985, 12).

However, the ongoing problem faced by the “taxpayer” strips was that they never became more intensely developed. With the streetcar and the automobile allowing shop owners to locate anywhere along the strip, there was never reason enough to pay a high price to redevelop a “taxpayer” building when one could just as easily buy a new parcel of land farther down the strip. It became painfully obvious that private developers had grossly underestimated the extent of decentralization. Instead of slowly increasing density, the strip continued to sprawl unabated (Liebs 1985, 15).

This time period also saw technological improvements in building design. New techniques and technology allowed buildings to expand vertically beyond anything built in the previous decades. As a result, there was a renewed interest in locating near the Peak Land Value Intersection (PLVI) of the city. However, this renewed interest only further compounded the problems facing the “taxpayer” strip (Ford 1994, 231).

4.1.2 The Classic Automobile Strip (1948 - 1973)

Although the streetcar and the automobile drastically altered retailing and the commercial structure of the American city, it wasn't until after the Second World War that the full affects of suburbanization and the automobile could readily be assessed. "America was built upon the search for freedom, and the automobile was a symbol of human spatial freedom." (O'Connor 1988, 57)

During this period in history of the commercial strip, significant changes continued to occur, further affecting roadside retailing. For instance, automobile ownership during the 20th century had skyrocketed. United States automobile registrations increased from approximately 8,000 at the turn of the Century to a staggering 27.5 million by 1949 (Liebs 1985, 17, 22). Consequently this increase in automobile use dictated a need for more parking and as a result, shop owners and developers had started to build their shops one car length or more back from the road to allow for increased roadside parking. Merchants also paved vacant lots, cut driveways through curbs and placed additional parking in the rear of their buildings.

By the middle of this century, the traditional 'Main Street' philosophy towards parking had been cast aside. Parking was no longer exclusively located along the roadside (Venturi, Brown and Izenour 1977, 40). The strip no longer behaved like downtown, parking was plentiful and as such, many new space-extensive forms and functions such as motels and gas stations emerged.

The increased usage of the automobile coincided with three decades of decline in streetcar use. By the 1950's nearly all the streetcar tracks in the United States were taken up and paved over. It was these particular changes in transportation that initiated the emergence of a whole new urban landscape by the 1950's. Freeways, widened streets and large parking lots began to dot the landscape. For the first time in the history of urban development, pedestrian movement seemed to take a back seat to automobile travel.

It was also during the fifties and sixties that the birth of franchising would forever alter the commercial strip. Franchises provided an investor with a well known name and product, while at the same time eliminated the original business owners requirements of having to deal with the day to day operations of each and every store (O'Connor 1988, 83). Franchise operations "infused the strip with larger amounts of capital than had ever been the case during the era of the small entrepreneur." (Ford 1994, 240)

The growth of franchises would coincide with the rise of the planned shopping centre. People no longer needed to travel alongside the strip or to the congested downtown to appease all their consumer goods and services needs. The controlled environment of the shopping centre provided an inviting atmosphere which neither the downtown nor the commercial strip was able to duplicate.

Up until the early 1970's, the car culture completely dominated functions and activities along the commercial strip. However, the oil crisis of 1973, along with a reduction in the amount of inexpensive land which increased the price of existing land, resulted in a decrease in the number of automobile dependent uses along the strip (O'Connor 1988, 110).

4.1.3 The "Superhighway" or "Corporate" Strip

Many authors agree that the newest evolutionary stage of the commercial strip is that of the "superhighway" or "corporate" strip (Liebs 1985, 36; Ford 1994, 248). These strips have developed as frontage roads near major highway interchanges, and may include a clustering of uses such as hotels and convention facilities, office buildings and sports stadiums which are all linked to the highway but not to each other (Ford 1994, 249). One of the unique features of this new strip typology is the ability of motorists to "conduct high-speed scans of the businesses flashing by without ever having to leave the highway...Where once pedestrians strolled casually along Main Street, now it is possible to window shop at 55 mph." (Liebs 1985, 36)

4.2 Role and Purpose of the Strip

The task of accurately identifying the role and purpose of the commercial strip is a daunting one indeed. The unique evolution of the strip over the past hundred years has ensured that it plays a dynamic role within the urban environment. The early strips dominated by streetcar lines served as neighbourhood centres

with businesses catering to the daily needs of nearby residents. Later, automobile based strips contained businesses which were dedicated, for the most part, to servicing the needs of the traveler (O'Connor 1989, 128). Although the role of the commercial strip has changed over time, this section will be limited to identifying the role of the contemporary commercial strip within the urban environment.

On a purely functional basis, the commercial strip acts as a transportation corridor and convergence point. The form of this corridor may be that of a highway or primary entrance route leading into an urban area, or as a Main Street for a particular neighbourhood. The commercial strip may also act as a major urban arterial, facilitating intracity movement and providing access to and from important areas of a city. In addition, strips commonly provide a foundation for public transit systems; whereby, they act as a collection point for smaller routes, as well as providing express routes to various parts of the city. In keeping with the fact that the strip functions heavily on a transportation basis, it is quite understandable that a large proportion of units located within its confines cater specifically to the automobile. For instance, service stations, motels and other functions which attract the automobile traveler, abound the commercial strip.

Despite the basic transportation function of the strip, there are a number of other factors that determine its role. In particular, market factors "such as the relation

of the strip to the surrounding area, the type of traffic utilizing the roadway and the actual location of the strip within the town or city” play a factor in determining the role of the strip within the urban context (Silberberg et al. 1976, 11)

The commercial strip is a multi-use and multi-purpose shopping region, providing an alternative to shopping in large suburban malls, where nearby residents have access to its services without requiring the use of the automobile. The variety of uses and functional differences along the strip provide an indication that they are a desirable location for a wide range of establishments. For this reason, they generally include a host of activities such as; large and small volume retailers, office developments, warehouses, institutional uses such as hospitals and schools, government offices, and in some instances, manufacturing uses may still be present. In addition, the strip provides an alternative to the mass paving of huge land areas which suburban malls require in order to provide parking. The strip as a whole, not being under the direct control of one developer or property management company, provides more of a laissez faire environment than other types of commercial districts.

In many instances the commercial strip encourages the preservation and revitalization of houses and buildings. In the process, it helps to build neighbourhood cohesion and pride which strengthen a community (Silberberg et al. 1976, 20). The strip is also one of the few economically viable areas for small retailers to set up shop without the large overhead requirements found

downtown or within suburban malls. In this way, the strip acts as an incubator for new businesses. This is largely due to the fact that the strip serves a very unique market area; serving passing traffic, nearby residential, commuting traffic and nearby industrial areas -- all the while feeding off other nearby shopping areas. The various markets ensure that businesses need not be dependent solely upon one type of consumer (Boal and Johnson 1965, 167).

In conclusion, consider some of Kirk Bishop's thoughts on the role the commercial strip plays within the urban environment, taken from his book Designing Urban Corridors, 1989.

For the road cannot be considered in isolation. It is not just a track for motorists; it is an all-embracing, all-penetrating network that, together with the vehicles on it, the signs, the bridges, the roadside ancillaries, is an integral part of our life and landscape. (1989: 5)

Well-planned commercial corridors prompt visitors to extend their stay or make a return trip, encourage appropriate development or redevelopment, and attract people for the first time. (1989: 13)

4.3 Planning For the Strip

The previous section identified both the dynamic nature and the positive roles played by the commercial strip within the urban environment. However, it must be stated clearly that planners for the most part dislike the commercial strip and all that it symbolizes. Even though some people feel that the strip provides everything from neighbourhood cohesion to preservation, planners feel that the many negative externalities created by the strip far outweigh the positive roles it may play.

Consider a newspaper columnist's perception of one of San Diego's commercial strips.

That gaudy, linear sterile strip of signs and undefined architecture, a thoroughfare of visual blight. Development proceeded piecemeal over the decades, resulting in a hodgepodge of store fronts, signs and shopping centers that create confusion for motorists. Vacant store fronts attested to the streets' gloomy commercial appeal; signs were abominable; second-hand stereo and auto dealerships were vying for attention next to new L-shaped shopping centers that were becoming more prolific. Zoning seemed haphazard; street lighting was inconsistent. (Ford, 1994: 225-226)

This characterization accurately describes many commercial strips located throughout North America. In general, most of the negative attitudes are presumably based upon the commercial strips' evident dependence on the automobile for survival. Consequently, it is this dependence that creates a whole host of urban problems, many of which will be discussed below.

Many commercial strips are sprawling, loosely developed and unplanned land masses with very few examples of retail or office space that occupies more than two floors. Also, huge expanses of parking separate sidewalk pedestrian traffic from store fronts, while boulevards and vehicle speeds act as a physical and safety barrier. These barriers also tend to sectionalize and fragment the surrounding communities and neighborhoods. In addition, many uses along the strip which cater to the automobile are incompatible with surrounding residential uses. Examples would include hotels and all night service stations.

By catering to the automobile, the strip has become quite aesthetically unappealing. "Strips are accompanied by increased quantities of posts and poles and overhead wires, a variety of traffic signs and signals and advertising signs and hoarding. The conglomeration of which can become one of the most unsightly products of this age." (Faithfull 1959, 44) Furthermore, the backside of the strip is usually a series of alleys and right of ways which further enhance the fragmentation of residential neighbourhoods and is aesthetically unpleasant. The strip is seen as devoid of the atmosphere, excitement and vibrancy which is characteristic of some malls and downtown areas. As Ruth Knack explains in her article "Zipping up the Strip";

There's no there there - its hard to see a pattern as you drive up and down the corridor. A series of inconsequential decisions have built to a massive calamity. A hole series of things have happened through the years, and the result is a lack of coherence. (1986: 23)

Planning professionals have also been faced with the reality that traditional planning techniques have not been successful in mitigating the strips negative externalities. Land use controls have allowed the entry of an excessive number of establishments, creating an environment of instability along the strip (Boal and Johnson 1965, 155). This instability creates difficulties in long-range planning, and the subsequent high turnover has the resultant effect of blight and high vacancy rates.

The following subsection provides an illustration of how the many problems identified in this section have actually been part and parcel to poor planning practices during the better part of this century.

4.3.1 Pre-WWII

Planning for commercial strips during the early part of this century was simply a land use function. It was generally accepted that commerce belonged in narrow strips along major urban thoroughfares, which made particular sense at the time when zoning bylaws were being drafted in the United States during the 1920s (Barnett 1992, 94). That is, many major thoroughfares had streetcars on them, and therefore the zoning by-laws simply confirmed the existing Main Street shopping patterns of the time period. "The streetcar produced a linear form of commercial development, as passengers [could] get on and off at almost every block, and both visibility and accessibility - and thus commercial value - [dropped] off sharply a block or two from the street-car line." (Barnett 1992, 94)

The designation of long strips of land along major thoroughfares was also a throwback to development pressure which suggested that the taxpayer buildings along the thoroughfare would become more intensely developed as commerce grew outward from the CBD (Nelson and Aschman 1957, 343). The lack of planning policies at this time allowed neighbourhoods and streetcar lines to be built on any cheap available land (O'Connor 1988, 42).

Planning for commercial strip development during the early part of this century was simple and automatic. In fact, there was little discussion concerning the potential negative effects of this type of commercial development; instead, it was simply accepted that commercial strips along many major arterials were the most proper land use solutions to a congested downtown. This was further supported by the visibility and accessibility provided by arterial roadways. Although the arterials provided a temporary reprieve from traffic congestion, it quickly returned to the forefront in the years after 1920's. As streetcar popularity declined and automobile use increased, any and all developments had to consider making room for the car a top priority (O'Connor 1988, 54).

4.3.2 1950's & 1960's

As the post war retailing environment changed, so too did planning attitudes and perceptions towards commercial development. Planning for commercial land use became a much more complex subject. It was at this time that the use of market analysis, compatibility studies and design studies were employed by planners to draft plans for commercial land use (Nelson and Aschman 1957, 345).

In the late fifties, Brian J. L Berry examined and critiqued the then contemporary planning techniques employed with respect to urban commercial development. Berry noted that there was considerable debate surrounding the fundamental question "what should be the ideally planned neighbourhood, community, and

regional center?" (Berry 1959, 309). He also suggested that planners felt there was little difference in business structure between planned and unplanned centres. It was for this reason, that planners had made the decision that a city is only in need of three types of retail and service areas, namely, convenience, shopping and specialty goods. Berry stated that this approach was the basic planning concept employed to promote an efficient business structure.

The problem which surfaced centered around the lack of any mention made within planning circles specifically identifying the need for highway oriented or urban arterial business districts. Planners felt that strip developments "were not conducive to the maximum social welfare of an urban area." Even more, planners had labeled ribbon developments as uneconomical and hazardous; thereby justifying their rejection of 'strip' or 'shoestring' zoning along all highways (Berry 1959, 310)

The fifties and sixties set the stage for the planning of commercial development during the next few decades. The 'planned' shopping centres dominated commercial development; whereas, 'unplanned' strip developments, which had been experiencing significant growth, were largely left untouched.

4.3.3 1970's & 1980's

Although planning attitudes were not appreciative of the commercial strip, there were nonetheless, attempts made to deal with the existing forms of negative urban arterial development. Subsequently, the ideas of revitalization and

retrofitting came into place during the mid-seventies and continued near to the end of the 1980's. Journals, consulting firms and municipalities all contributed to an influx of published literature with such titles as; "A Guide to the Revitalization of Retail Districts", "Zipping Up the Strip" and "Designing Urban Corridors". Each of which was undertaken with the intent to help the commercial strip reduce many of its negative externalities.

"By the 1970's most downtown redevelopment schemes and urban renewal projects were either completed or under way and planners began to turn at least a little attention on the strip." Some examples of planning influences were sign control ordinances, landscape requirements, parking and access regulations. (Ford 1985, 246).

The seventies and eighties saw the focus shift towards architecture and aesthetic appeal as the solution to the functional difficulties experienced by the strip. Policies were aimed at cleaning up, organizing, unifying and beautifying the commercial strip through such methods as encouraging smaller commercial designs and planting more trees and shrubs (O'Connor 1988, 150). Unfortunately, regardless of any attempts to plan for the commercial strip, imposing these suburban values on the strip did not obtain the desired result and once again, strips were left largely to evolve at their own pace, untouched.

4.3.4 Contemporary Planning for the Strip

At first glance, contemporary planning techniques for the commercial strip seem unchanged by the passage of time. Planners continue to use a number of controls to plan for the strip including; land use regulations, site planning, traffic impact analysis, access and traffic controls. Indeed, many of these techniques have been in existence for the greater part of this century, but due to their lack of success in controlling the strip, it has been left to evolve and sprawl nearly at will for fifty years. Small scale planning techniques such as landscaping requirements, sign ordinances and zoning have done little to mitigate most of the problems 'created' by the commercial strip.

However, long-standing planning techniques should not be confused with some of the newer ideas and concepts proposed by various people. For example, such concepts as Neotraditional planning, Transit-Oriented Developments, and Pedestrian Pockets, all of which fall under the guise of New Urbanism, have been offered as alternative commercial environments. These concepts center around trying to "conserve land, reduce people's reliance on automobiles, and essentially bring back the ambiance and civic cohesiveness characteristic of small towns before World War II." (Achimore 1993, 33) Some argue that these new concepts would be easy to bring about by simply changing some of the traditional approaches towards land use controls such as zoning. Jonathan Barnett, in his article "Accidental Cities: The Deadly Grip of Outmoded Zoning", suggests that the alternative to zoning highway commercial, would be to zone a

few places along the strip for more concentrated development. This development would be supported by public parking garages and other investment incentives long understood in city centers but not yet much used in the suburbs.

The rise in new planning concepts is largely in response to the enormous changes occurring within the commercial structure of urban areas. These changes, either precipitated by the New Economy, New Format retailers, changing development trends or many other reasons -- have created a very complex city wide commercial system. Unfortunately, this complexity has created confusion among many planning professionals as to what exactly constitutes a commercial strip in the 1990's. This state of confusion was specifically identified in a study completed by professors Deborah Howe and William Rabiaga at the University of Oregon. This study involved the questioning of members of the Oregon Chapter of the American Planning Association on their personal feelings and attitudes towards the commercial strip. Their findings suggest that;

Neither planners nor consumers exhibited a clear idea of what centers or strips are or what each form should offer. Changes in retailing technology, particularly the addition of superstores and megastores as elements in the sprawling structure of ancillary malls, have created a commercial system of greater complexity than that contained within the ideal. (1992: 219)

In order to identify the complex nature of planning for commercial districts in the nineties, one should consider the following: Are New Format retailers locating

within 'corporate strips' simply part of strip evolution or are they part and parcel of a much larger evolution of the greater commercial structure of cities? Consider also that planners have generally preferred downtown or centre retailing environments to those located along commercial corridors (Howe and Rabiega 1992, 213). Are these beliefs likely to change in the future given the massive changes occurring within the commercial structure of cities?

The difficulty in answering the above questions, in conjunction with the fact that planning for the commercial strip has been haphazard during this century, gives a sense of urgency to develop sound planning practices for the commercial strip heading into the next millennium.

The last section of this chapter will examine the many trends which must be taken into consideration if any effective long term planning for commercial strips is to take place.

4.4 Urban and Development Trends

Although numerous trends impact the urban environment of cities, the following section will examine four particular trends which have had the largest impact on the commercial strip. More specifically, this section will describe the trends of *Suburbanization/Decentralization, the New Economy and Overbuilding*, all of which are reflective of a *Changing Commercial Environment*.

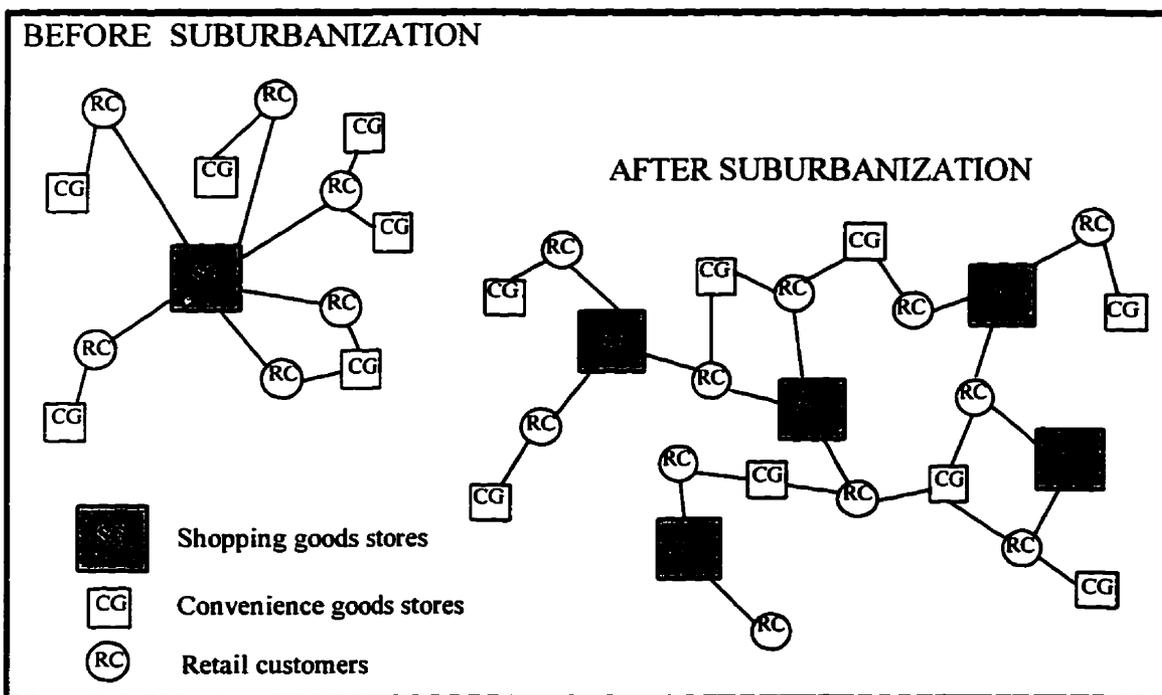
4.4.1 Suburbanization / Decentralization

Suburbanization and decentralization are probably the most significant and the most dominant urban trends responsible for shaping the landscape of North America over the past fifty years. During this time, the movement of people, industry and commerce away from the centre of the city has been relentless in its intensity. In particular, during the years after the Second World War, this movement escalated at an enormous rate. Although suburbanization and decentralization resulted from a variety of reasons, two key factors played a particularly important role. The first was the massive increase in new home construction to accommodate a post war population increase. The second was the increase in family incomes, brought about by higher wages and a rise in two income families.

Consequently, both of these factors led to a even greater increase in overall car usage. In fact, people were forced to use the automobile as a means of transportation due to ever expanding suburban residential developments that were not serviced by public transit. The increasing post war family affluence which facilitated this suburban growth also contributed to the elimination of traditional thinking which suggested that the automobile was a luxury. Citing a local example, during the period 1962 - 1992, both the number of registered vehicles and the total urban developed area in hectares within the City of Winnipeg increased by over 100% (City of Winnipeg (E) 1995, 3).

The intense suburbanization process of the 1950's and 1960's led to a startling population fact. For the first time, the population of the suburbs in American cities exceeded that of the central cities (Hartshorn 1992, 65). As a result, the suburbanization process was inherently blamed for the decentralization of the downtown. This trend was dictated by the fact that as people, industry and retail moved away from the city centre, its dominance as the functional centre of the city greatly declined. On the other hand, suburbanization enabled retailers to locate throughout the city, as they were no longer confined to the CBD (Figure 4-1).

Figure 4-1: Retail Patterns Before and After Suburbanization



(Source: Hartshorn 1992, 365)

In addition, the outward movement of people also helped to secure the future of the commercial strip. As more and more people moved into new suburban

developments, and subsequently using the automobile for transportation, the need for major urban thoroughfares increased. This, along with the commercial zoning attached to these arterials, would provide the ideal environment for curbside commercialism.

4.4.2 The New Economy

Another trend which has had a significant impact on urban areas is the growth of the New Economy. Traditional economies that were based upon commodities and manufacturing, have given way to a new economy based upon information technology. Advancements in computing and communications greatly alter how companies go about their business. For instance, the use of fax machines, teleconferencing, teleshopping and the World Wide Web have reduced the importance of location for commercial and industrial firms alike. Physical interaction is simply no longer a prerequisite for successful business transactions.

Teleshopping [will] transform the structure and location of retailing, diminish the importance of CBDs and regional shopping centres, encourage the growth of large warehouse firms, distribution firms, home delivery firms and other service organizations associated with teleshopping. Within cities, the only visible physical movement would be the function of distribution. (Greig 1995: 104)

Telecommunications technology has also changed traditional thinking regarding trade areas and competitive markets. For instance, the North American Free Trade agreement and the new European Union are at the forefront of new levels of national and international trade and competition. These 'political' agreements,

in conjunction with the exponential growth in the use of the Internet as a business tool have enabled even the most modest of business operations to compete on an international scale. As location becomes less and less important to business operations, commercial environments such as the commercial strip which thrive on location and visibility, will experience significant change in terms of functional make-up in the future.

4.4.3 Overbuilding

There are a number of individual perceptions as to the extent and impact of overbuilding on North American cities. Suburban malls, office development and suburban residential development all, have arguably gone through massive periods of overbuilding. The most obvious effects of which are miles of suburban residential sprawl and thousands of square feet of vacant retail and office space.

Although the number of good development sites are becoming more scarce, new investors do not necessarily notice this. "Caught up in the boom mentality, they only see the profits from prior projects, and they build in already saturated areas or select marginal locations." (Lockwood 1985, 35) Over five decades of "fads and fashions" have dominated the built form of the strip. Rarely, has anyone made an attempt to determine if the new retailing space or new commercial units were actually needed along the strip (Ford 1994, 255). In addition, developers along the commercial strip tend to build in high traffic areas, but often at times, they will overlook the necessary population density which provides crucial

neighbourhood walk-in traffic. This neighbourhood market can often mean the difference between profit and loss for a business located on the commercial strip (Lockwood 1985, 35).

The overbuilding trend has enabled many businesses to locate along the commercial strip due to the increased availability of inexpensive land and buildings. However, this trend may have serious repercussions for the future of the commercial strip if these buildings are not adequately maintained.

4.4.4 The Changing Commercial Environment

Suburbanization and decentralization, the New Economy, and decades of overbuilding have all significantly influenced the commercial structure of North American cities. The following section will provide an examination of the current state of the commercial structure in contemporary cities.

4.4.4.1 The Shopping Centre

The shopping mall had its beginnings during the 1960's. The consumer, realizing the convenience and the uniqueness of this type of commercial district propelled the shopping centre to the position of most dominant component of the commercial structure of cities. In fact, the dramatic impact and influence this type of retailing environment has had on our cities, is evident by the following international statistics:

- 43,000 shopping centres, outlet malls, power centers, and warehouse clubs have been built since the Second World War, including 1,500 regional malls
- One in 10 nonagricultural workers is employed in a shopping centre

- Shopping centres account for almost 60% of total retail sales, excluding automobiles. (Thomas 1994, 22)
- The world's largest shopping centre (West Edmonton Mall) has over 800 stores and 3.8 million square feet of retail space (Jones and Simmons 1991, 200)

Not until the 1990's, after more than thirty years of dominating commercial development, has this trend finally tapered off (Shillingburg 1994, 82). (Figure 4-2 illustrates the differences between commercial strips and shopping centres).

Figure 4-2: The Differences Between Retail Strips and Shopping Centres

	RETAIL STRIPS	SHOPPING CENTRES
Centre Size	Flexible, growing/declining with trade area and competition	Essential, fixed to serve a finite market system
Location	Accessibility must evolve as centre grows Transit system may become necessary	Level of automobile traffic (road capacity) determines market and scale. Often isolated from pedestrian traffic
Store Size	Greatly varying, no correlation with centre size	Highly structured, average store size increases with plaza
Business Type	Number increases (log-linearly) with number of stores High-order centres contain all low-order activities	Relatively little duplication, low order activities drop out of high-order centres Chain stores dominate
Occupancy Cost	Declines with distance to central intersection (rent gradient)	Largely a spatial decline with store size and store's ability to generate traffic. Flat rate plus per cent of gross sales
Internal Structure	High traffic, shopping goods activities at high-value intersection	Often BI-modal, with connecting mall between largest tenants Parking location and access carefully planned
Competition	Primarily among similar stores in the same centre	With competing shopping centres across metropolitan area
Renovation	Evolves as stores are replaced, individual adjustments	Systematically, after 5 to 10 years, often involves changes in tenant mix and format

(Source: Jones & Simmons 1991, 193)

4.4.4.2 New Format Retailing

The introduction of an enormous amount of new retailing formats during the past few decades has had a drastic affect on the city wide retailing system. These New Format retailers, which include category killers (large format specialty stores), superstores, membership and warehouse clubs, have taken over the development dominance once held by the shopping centre. The 1990's , more than ever before, is showcasing how these new retailing formats are changing the way retailers do business, and likewise, drastically change the retailing structure of cities. The majority of these changes are due largely to the fact that New Format retailers have much lower gross margins, generally an overall lower cost structure, and they depend on a large volume of sales (Jones, Evans and Smith 1994, 1).

The affects that New Format retailers are having impacts on traditional strip retailing units is becoming more and more evident. For instance, while traditional strip mall development has decreased in some areas of cities, growth has occurred in strip 'centres' which are anchored by a few New Format retailers (coined 'power nodes') in these areas. These 'power nodes' tend to have a much larger market area and consequently, attract higher traffic volumes (Jones, Evans and Smith 1994, 1).

In Canada and the United States, many of these changes have been spawned by the changing economic landscape of the 1990's that retailers face. This

landscape has changed in the wake of a decade that saw such things as the Free Trade Agreement, a surge in cross border shopping, and the imposition of the Goods and Services tax. These combined pressures have led to a vast and unavoidable restructuring of the retail environment in Canadian cities. In a report entitled New Formats in the Retail Economy, Ken Jones, Wendy Evans and Christine Smith, examined changes occurring within retailing during the 1990's. Their findings suggest that retailing stores are changing to the point that "the focus is on larger sizes, lower costs, efficient inventory systems, and lower prices, and often this results in the creation of a category killer." (1994, 29)

Jones, Evans and Smith's findings also suggest that the regional shopping centre has not yet been directly affected by these new formats. However, fashion retailing is preparing for the onslaught of these New Format retailers by creating fashion superstores in some regional malls across the country (31).

Unfortunately, one can only speculate on the future affects of new format retailing on Canadian city structure. Planners, developers and retailers are divided in their opinions of these new types of retailers; however, the affects of these New Format retailers are definitely significant. In fact, the most pronounced affects are evident by the fact that, "New Format retailers have changed consumer buying patterns and have educated the consumer to demand a wider assortment of merchandise, at lower prices and with improved service." In addition, "power retailers are shaping a new retail structure and hierarchy that

is characterized by power destination nodes and large, free-standing, price dominant, value retailers." (Jones, Evans and Smith 1994, 32)

New Format retailers affect the commercial strip in a number of ways. These include; reducing the economic viability of smaller stores who cannot compete on straight price, establishing a trend towards larger, more physically dominant buildings, and perpetuating the automobile oriented environment by encouraging people to drive the extra distance to their stores.

4.4.4.3 Department Stores

Department stores were a particularly dominant form of commercial development for the first half of this century. During the decades after the War, there was a trend for department stores to move from downtown free standing locations to become anchor tenants in large suburban malls. Another point worth mentioning is the fact that the current department store environment is being greatly influenced by the emergence of large discount department stores such as Wal-Mart. Older and more traditional department stores such as Sears, Eaton's and The Bay, are facing increasing pressures in terms of competition and reduced customer loyalty. Unfortunately, as their sales continue to drop, these longtime retailers are facing very serious economic difficulties. A review of some recent newspaper headlines is appropriate.

⇒ "Hardware, garden giant may sprout stores in city", Winnipeg Free Press, March 20, 1996.

- ⇒ "Department stores bleed as discounters succeed", Winnipeg Free Press, July 25, 1996.
- ⇒ "Retail chain pulls plug: Consumers closing 8 Manitoba outlets, 129 across country", Winnipeg Free Press, August 10, 1996.
- ⇒ "The Bay takes it on the chin: Sales gains elude historic chain", Winnipeg Free Press, August 23, 1996.
- ⇒ "Food giants race to head off rivals: Chains fear growth of new-concept retailers", Winnipeg Free Press, September 14, 1996.
- ⇒ "Wal-Mart to open more stores" Globe and Mail, Oct 9, 1996.
- ⇒ "Home Depot deal OK'd", Winnipeg Free Press, October 10, 1996.

4.4.4.5 Specialty Areas

In response to the fierce competition provided by the shopping centre, new types of commercial districts have risen in popularity. As a point of fact, these retailing environments have arguably existed for decades. Dating as far back as 1963, Brian Berry had suggested that there has always been a specialized retailing component within a city's retail structure. However, it is not the existence of these areas which is of particular importance, but rather, It is the rapid growth in the importance and variety of these retailing environments which represents the considerable change (Jones and Simmons 1990, 202).

Specialty shopping districts are commonly tied to ethnic populations. For instance, 'Chinatown' provides a recognizable example. However, specialty shopping areas can also be found along small rural town Main Streets, within the city centres of large metropolitan urban areas or even along commercial (specialty) strips. The main advantage of specialty shopping areas is found in

the uniqueness of the products offered for sale and in the environment the retailers provide. Crafts and 'homemade' items are plentiful in these areas and -uncharacteristic of today's in and out commercial environment- walking and browsing are actually encouraged. These specialty areas have managed to emulate some of the shopping and retailing conditions that were present in some of the shopping arcades of the 19th century.

4.4.4.6 Strip Malls

Many of the negative planning attitudes discussed earlier in this chapter can be applied not only to the whole of the commercial strip, but to the strip malls and centres which locate along them as well. From a planners perspective, the problems with strip malls include; inadequate parking, overly bright lighting and noise produced by uses which conflicts with surrounding residential areas (Lockwood 1985, 35).

According to Charles Lockwood, strip centres were the most popular commercial development during the mid-eighties. Characteristically, these centres are defined by groups of six to twelve small shops with parking in the front and often anchored by a convenience store such as 7-Eleven or Mac's (1985, 34). In fact, Lockwood suggests that the eighties was a perfect breeding ground for these strip centres. With the closing of thousands of gas stations across North America in the late seventies and early eighties, prime strip mall areas were found in these high traffic corner lots that were already zoned commercial.

These lots were too small (approximately 15,000 square feet) to be of any interest to larger grocery stores or other users, but were perfect for strip retail centres (Lockwood 1985, 34).

4.5 Chapter 4 Summary.

The examination of (i) the historical evolution of the commercial strip, (ii) roles, planning techniques and attitudes, and (iii) urban and development trends, in this chapter has provided an examination of the commercial strip as one individual component of a cities commercial structure.

A discussion of the historical evolution of the commercial strip provided insight into how roadside retailing evolved from its early location along Main Street to become a dominant fixture along most major urban thoroughfares. In the process, the commercial strip came to become one of the most dominant retail land use areas within cities. This discussion of its evolution also provided some insight into the nature of the roles played by the commercial strip. Further examination of its roles revealed that the strip can have both positive and negative impacts on an urban area. In general, the strip provides a unique retailing environment that often caters solely to automobile traffic, while playing a very poor role in the facilitation of pedestrian movement.

These insights naturally led to questions about why the strip was able to develop as it had. The literature indicates that planning practices and techniques during

this century have done little to mitigate the negative externalities caused by the strip, although current planning techniques are attempting to address some of the more unique functions, nature and problems of the commercial strip. The final section of this chapter examined some of the dominant urban and development trends which have contributed to the current commercial strip environment. Trends such as suburbanization, the rise of the New Economy and overbuilding have heavily influenced the changing commercial environment. As a result, there has been a rise in New Format retailers, specialty shopping areas and an overall decline in the development of new shopping centres and traditional department stores. Commercial strips on the other hand, bolstered by the strip mall boom of the 1980's, have continued to grow, as they have throughout most of this Century.

The next chapter will explore the commercial structure of Winnipeg, Manitoba, laying a foundation for this practicum's Case Study Of Pembina Highway.

CHAPTER 5: CASE STUDY BACKGROUND

The second half of this practicum will focus on a case study of one specific commercial strip (Pembina Highway) to illustrate how to more successfully plan for this type of commercial environment. More specifically, this case study will focus on Pembina Highway, a major commercial strip located within the City of Winnipeg, Manitoba. This chapter will begin by providing background information in the form of an analysis of Winnipeg's market context, commercial structure, and planning and policy initiatives. In addition, the specific case study parameters will be discussed and the current situation on Pembina Highway examined.

5.1 Winnipeg's Market Context

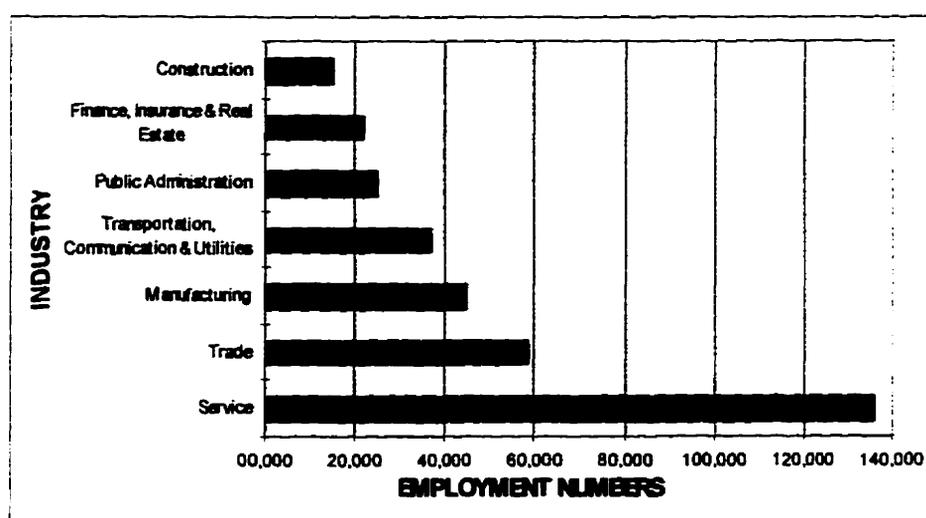
Winnipeg is the provincial capital of Manitoba, and with over 650,000 people, it ranks in the top ten in population among Canadian cities (City of Winnipeg (E) 1995, 6).

Winnipeg's strategic central location has made it a logical distribution and re-distribution hub for North America. Historically, it acted as the gateway to the west with a solid and diversified foundation in trade, manufacturing, and transportation. It has grown to become the largest distribution centre between Vancouver and Toronto (Winnipeg 2000:1994: 2).

The strength of Winnipeg's economy is based upon a combination of commercial, industrial and cultural activities, with no one sector being particularly

dominant. However, recent trends have shown that the commercial sector in the City of Winnipeg is experiencing moderately steady growth (Interviews: Mitchell, Shindleman). In addition, employment statistics provided by Winnipeg 2000, shown below in Figure 5-1, help to identify the fact that the service sector is the dominant employer within the City.

Figure 5-1: Winnipeg Employment By Industry, 1995



(Source: Winnipeg 2000 1996, 20).

5.2 Winnipeg's Commercial Structure

The commercial structure of an urban area is comprised of many components. Although office and warehousing activities constitute a significant proportion of the total commercial area of a city, it is the retailing component which is commonly the dominant force. For this reason, theorists have been examining the components of retail structure for much of the past fifty years. Some argue that the retail structure is primarily comprised of shopping centres, ribbons, and specialty shopping areas (Berry 1963, 20). Others argue that the retail

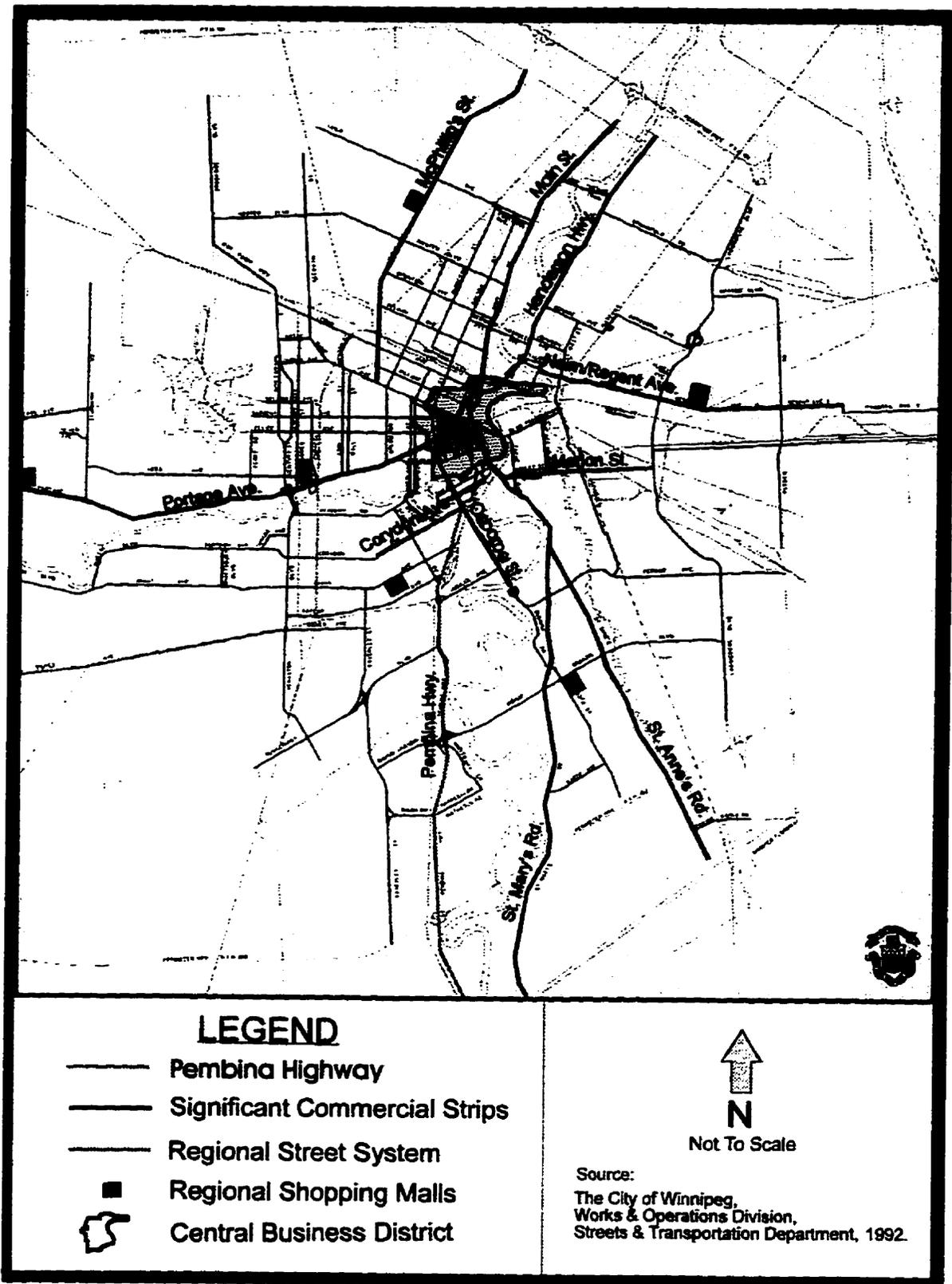
environment can and should be broken down further into forms such as specialty shopping regions and ethnic districts. Within the City of Winnipeg, the dominant components of the City's retail structure are arguably the downtown, shopping centres and commercial strips (Map 1). The following will provide a brief description of each of these components in the City of Winnipeg.

5.2.1 Downtown

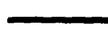
During the past thirty years, Winnipeg's downtown has experienced the many problems associated with the processes of suburbanization and decentralization. Throughout the years, millions of dollars of both public and private sector money has been spent trying to revitalize the area (Interview: Cambell). Perhaps because of this investment, the the downtown is the area of most concentrated employment within the City, accounting for 25.9% of the total City employment (City of Winnipeg (B) 1995, 18).

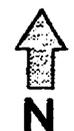
One of the most recent infusions of capital into the downtown was the 1987 construction of Portage Place, a six hundred thousand square foot regional shopping mall. This mall, through the incorporation of an indoor pedestrian walkway system, is connected to various other commercial establishments such as the Bay and Eaton's department stores. This connection exists despite the fact that stores are on the opposite side of Portage Avenue from the mall. In addition to this regional mall, the downtown is home to a number of neighbourhood and community malls including;

Map 1: Winnipeg's Commercial Structure



LEGEND

-  Pembina Highway
-  Significant Commercial Strips
-  Regional Street System
-  Regional Shopping Malls
-  Central Business District



Not To Scale

Source:
The City of Winnipeg,
Works & Operations Division,
Streets & Transportation Department, 1992.

Eaton Place, the Johnson Terminal, and Winnipeg Square. The Johnson Terminal is located at the junction of the Red and Assiniboine Rivers in what has become known as 'The Forks Market'.

Although it is inevitable that the downtown will have to continue to deal with problems such as crime and high vacancy rates, it has managed to maintain a significant level of vibrancy and economic stability, which is necessary for long term survival.

5.2.2 Shopping Centers

Winnipeg contains almost five million square feet of gross floor area in its seven regional sized malls, which is approximately five percent of the Canadian total (Table 5-1)². This figure is up considerably from the 1960's when Polo Park was the only regional mall in Winnipeg containing less than one million square feet of floor area (City of Winnipeg (B) 1980, 4). It was not until the 1970 construction of the Garden City shopping centre that Winnipeg had more than one regional mall.

The reason for the increased development of all types of shopping centres in Winnipeg over the past thirty years is primarily due to increased usage of the automobile. In fact, passenger vehicle registrations increased by two and a half percent annually (over 100% cumulative) over the thirty year period 1962-1992 (City of Winnipeg (E) 1995, 19). This massive growth in the popularity of the automobile helped spawn the age of the large environmentally controlled

² A regional sized mall, according to Information Winnipeg, must have a minimum gross floor area of 300,000 square feet.

regional mall. Suburban residents are much more likely to drive to an indoor mall than to travel to the downtown where many shops are at street level and finding parking is a constant problem (City of Winnipeg (E) 1995, 19).

Table 5-1: Winnipeg's Regional Shopping Centres

REGIONAL CENTRE	DATE OPENED	GROSS FLOOR AREA (Sq. Ft)
Polo Park	1959	1,412,126
St. Vital	1979	796,692
Unicity	1975	553,869
Kildonan Place	1980	529,364
Garden City	1970	451,431
Grant Park	1963	377,100
Portage Place	1987	619,454
TOTAL		4,742,036

(Source: City of Winnipeg (B) 1990)

Although regional malls within the City of Winnipeg account for a considerable percentage of retail floor area, there are eighty-seven community and neighbourhood sized centres within the City (Sherlock City Map 1996). These shopping centres are listed in Table 5-2.

Table 5-2: Winnipeg's Neighbourhood and Community Shopping Centres

SOUTH	EAST	WEST
Charlevoix Mall Charlevoix	Alpine Plaza Transcona	Birchwood Plaza St. James
Dakota Park Plaza St. Vital	Cross Roads S/C Transcona	Border Plaza St. James
Dakota Village St. Vital	Cross Roads Village Transcona	Corydon Village Mall River Heights
Fr. Richman Fr. Gary	Dominion S/C St. Boniface	Country Club Plaza Assiniboia
Fr. Richman Fr. Gary	Eastwinds Transcona	Courts Of St. James St. James
Grandman Plaza St. North	Island Lakes Village St. Boniface	Crestview Plaza Assiniboia
Linear Centre Fr. Gary	Kildonan Market Transcona	Cunningham Court St. James
Meadowood Village St. Vital	Lakewood Plaza St. Boniface	Dublin Square St. James

references Winnipeg's commercial strips. The only credible reference sources include; aerial photographs (which have been digitized into a Geographic Information System package), transportation studies, various city maps (such as the ones produced by the Sherlock Publishing Corporation), and the Henderson City directories.

As any city map will indicate, there are a number of major urban arterials within the City of Winnipeg. In many cases these urban arterials are lined with commercial development. Specific examples of these include Pembina Highway, Portage Avenue and Henderson Highway. Winnipeg's Streets and Transportation Department in 1993 indicated that these three roadways experienced the heaviest traffic flows during peak rush hours of any streets within the city (City of Winnipeg (E) 1995, 33). In addition to these, there are also a number of other commercial strips within the City that are worth mentioning, these include; St. Mary's Road, St. Anne's Road, Marion Street, Nairn/Regent Avenue, Main Street, McPhillips Street, Corydon Avenue and Osborne Street.

Unfortunately, due to the lack of other sources of information on commercial strips, estimated values for strip length, the amount of commercial development, and the amount of development that occurs on only one side of the roadway was extracted from a 1996 Sherlock City Map of Winnipeg. The data illustrated in Table 5-3 represents a summary of the results of these 'estimates'.

Table 5-3: Winnipeg's Commercial Strips (est.)

Commercial Strip	Length (Km)	Developed Length (KM)	Single Sided Development	Percent Developed
St. Mary's Rd	16.7	6.1	21%	37%
Pembina Highway	15.0	10.6	23%	71%
Portage Ave	14.6	12.8	41%	88%
Main St.	10.8	9.1	14%	84%
McPhillips St.	9.5	6.4	28%	67%
Nairn/Regent Ave.	9.4	5.3	28%	57%
St. Anne's Rd	8.7	3.1	29%	36%
Corydon Ave	8.3	1.7	35%	21%
Henderson Hwy	6.6	5.3	83%	81%
Marion St.	4.1	2.2	27%	53%
Osborne St.	4.1	2.5	56%	62%
TOTAL	107.8	65.1	33%(Avg.)	----

As Table 5-3 illustrates, there is a broad range of development along these strips. This table provides information concerning the total length of each commercial strip, how many kilometres of that length is developed, what percentage of development is located on one side of the strip, and what the total development percentage is for each strip. Henderson Highway appears to be an example of one of the most densely developed commercial strips within the City. However, further examination reveals that over 80% of the commercial development exists solely on one side of the roadway, as indicated in the column 'Single Sided Development'. In contrast, Pembina Highway is one of the longest strips in the City and estimates place it as being 70% developed, with only 20% being single-sided.

5.3 Winnipeg's Commercial Planning and Policy Initiatives

There are two broad controls which guide commercial development in the City of Winnipeg. The first is that of long-range planning policy initiatives established in Plan Winnipeg. This development plan provides a 'vision' for the City of Winnipeg by outlining the social, economic, and environmental parameters necessary to guide the City into the twenty-first century (City of Winnipeg (G) 1993, 3). The broad commercial policy initiatives set out in this plan help to provide an operating framework for council to establish the second type of development control detailed in this section; namely, zoning by-laws. The zoning by-laws are used to establish development land use patterns and configurations for individual parcels of property. Should a development proposal not fit into the required zoning classification, the developer is required to apply for either re-zoning of the land, a conditional use order or a variance order which would permit alterations to the zoning by-law.

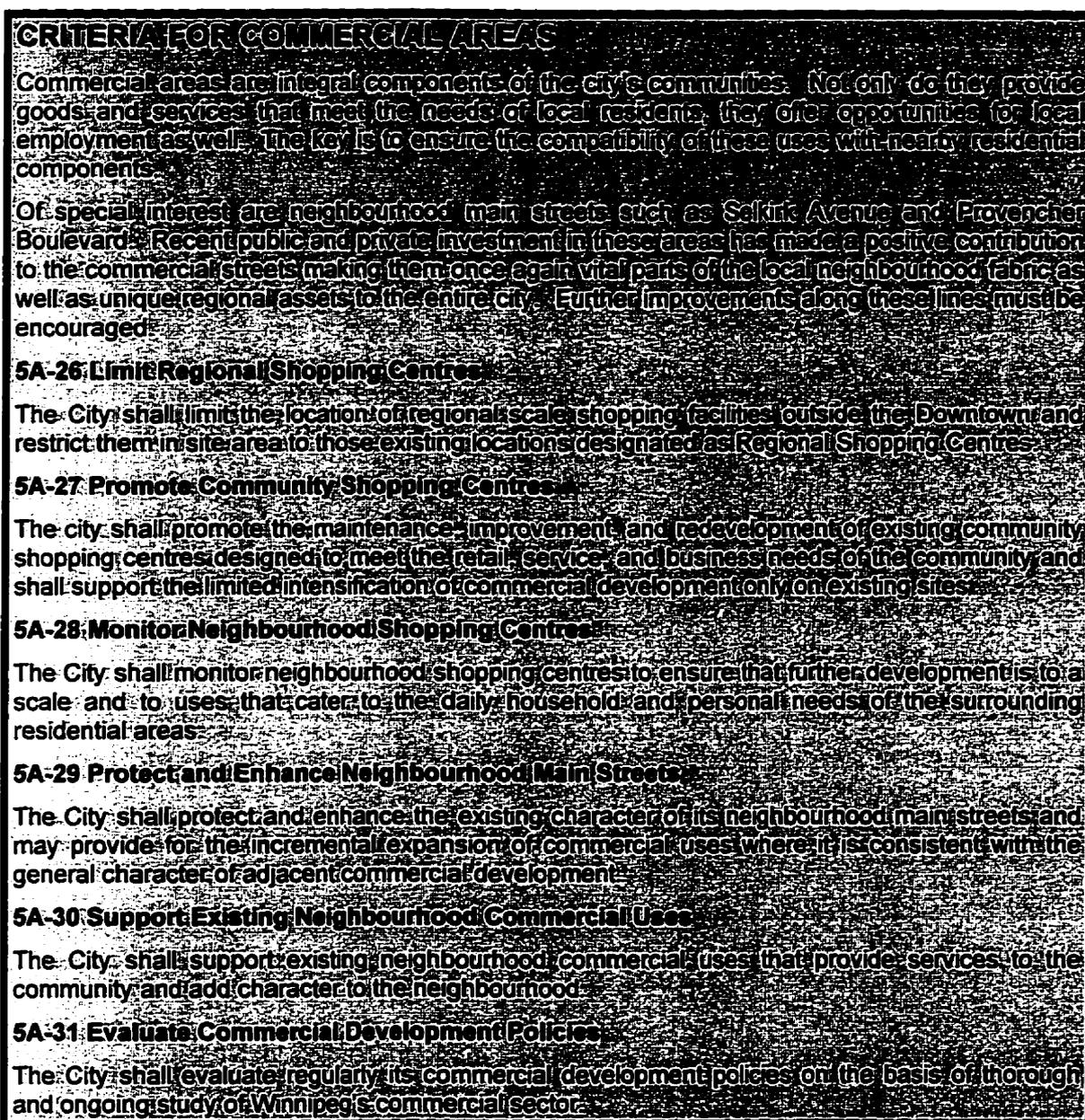
Specifics of each of these commercial development controls are detailed to a further extent in the following two subsections.

5.3.1 Plan Winnipeg / Plan Winnipeg: Towards 2010

There are several policy initiatives that were originally established in Plan Winnipeg (1986), and then later reiterated in the follow-up strategy Plan Winnipeg Towards 2010, that detail specific policy aimed at controlling

commercial development. Figure 5-2 provides a listing of Plan Winnipeg's commercial policy.

Figure 5-2: Plan Winnipeg Towards 2010, Commercial Development Policy



(Source: City of Winnipeg (G) 1993, 81)

Commercial development policies highlighted in Plan Winnipeg suggest that downtown revitalization, neighbourhood Main Street protection, and a re-

emphasis on small shopping centres are priorities for the City of Winnipeg in controlling commercial development. However, it should be noted that there is no specific mention made of the role or contribution commercial strips make to the whole of Winnipeg's commercial structure. More specifically, there is no mention concerning any overbuilding patterns along these strips or that they represent a significant component of the commercial structure of Winnipeg. The reason for this is that it is up to Council to enact by-laws which keep these factors in mind. The development by-laws Council enacts are "in order to control or prohibit the use of land and buildings and development in the city or part of the city." (City of Winnipeg Act, Amendment 1991, Section 589-2). Council's jurisdiction to enact development by-laws is detailed in Figure 5-3.

Figure 5-3: City of Winnipeg Council Jurisdiction Parameters

1. Classifications of uses of land and buildings;
2. Permitted and conditional uses of land and buildings;
3. The number and dimensions of dwelling units or non-residential buildings permitted on a lot or other unit of land;
4. The area and dimensions of lots or other units of land;
5. The number, lot coverage, floor area, dimensions, and location of buildings on units of land;
6. The location, height and maintenance of fences and walls;
7. Open space around and between buildings, and minimum distances between buildings;
8. Landscaping and buffers between buildings; units of land, and different uses of land and buildings;
9. The establishment and maintenance of parking and loading facilities;
10. The design details of buildings and building sites, including vacant sites, and the establishment of committees or boards to approve designs;

11. The location, dimensions and number of access points from a unit of land to a highway;
12. The use and placement of exterior lighting on land and the exterior of buildings;
13. The outdoor storage of goods, including machinery, building materials and waste materials;
14. The removal, deposit or movement of soil, gravel or other material;
15. The cutting and removal of vegetation;
16. The placement of pedestrian walkways;
17. The kind, number, nature, location and dimensions of outdoor signs and displays;
18. The protection of scenic areas, heritage resources and sensitive areas;
19. The protection of waterways including the setback of buildings from a waterway;
20. The protection of a water or sewage treatment facility, waste disposal facility or any other utility or public work from incompatible uses;
21. The sequence in which development is undertaken;
22. Such other matter as council considers necessary or advisable.

The next subsection will identify the zoning by-laws and ordinances which were enacted as part of Plan Winnipeg policy.

5.3.2 Land Use Policies - Zoning

As previously discussed, zoning by-laws, empowered by The City of Winnipeg Act, establish development parameters for individual development proposals. The City of Winnipeg adopted a new zoning by-law on February 1, 1995 in order to unify the zoning classifications that were used by the various regional districts throughout Winnipeg³. These new zoning by-law ensured that there was a

³ Zoning by-law 6400/94 applies to all areas outside of the Downtown. The Downtown is regulated by zoning by-law 4800.

standard classification for all zoned areas within Winnipeg. Figure 5-4 details the commercial zoning classifications of this new by-law (No. 6400/94).

Under the new zoning classifications, Pembina Highway does not contain any sections which are zoned "C3" or "CR". In fact, the bulk of the commercial area on this strip is zoned "C2" with the rest of the land being occupied by various multi-family residential districts. The strip is also home to a few areas zoned "M1" and "M2" industrial districts, "PR-1" and "PR-2" for park land and a few areas containing "R1-3.5" and "R2" for single and two family developments.

Figure 5-4: Winnipeg Commercial Districts: Intent and Purpose

C1: Intended to provide for local commercial uses (typically found within neighbourhoods)
C1.5: Intended to regulate commercial development with less of a neighbourhood orientation, typically found along commercial corridors within existing older neighbourhoods
C2: Intended to regulate more intensive commercial sites that do not have a local or neighbourhood orientation
C3: Intended to provide for highway commercial type development with a significant orientation to automobile and truck-related uses
C4: Intended to regulate shopping centre sites (other than regional shopping centre sites)
CR: Intended to regulate development upon the six existing regional shopping centre sites as identified by Plan Winnipeg
OI: The Office and Institutional Planned Building Group District is intended to accommodate civic, institutional, cultural and office buildings through the application of urban design principles

(Source: City of Winnipeg (F) 1995, VII-1)

A few examples of zoning by-law restrictions affecting Pembina Highway are as follows:

From the North limit of River Lot 22, Parish of St. Vital, South to the municipal boundary, By-law 2899/85 minimum distance to the Pembina Highway lot line for any sign shall be 20 feet. (City of Winnipeg (F) 1995, XIII-19)

An owner, agent, firm, corporation or person ... shall not locate, erect, place or display a mobile advertising sign ... unless the sign has an identification number issued by the City of Winnipeg Land and Development Services Department permanently affixed to the end (City of Winnipeg (F) 1995, XII-12)

On both sides of this strip, from the River Lot # 16, Parish of St. Vital, South to the municipal boundary, the minimum distance from Pembina Highway lot line for any building shall be 40 feet. (City of Winnipeg (F) 1995, XIII-13)

In addition to general land use zoning classifications, Pembina Highway is also controlled to some extent by other development by-laws. These by-laws may be in the form of building code restrictions or fire code regulations.

5.3.3 Implications for the Commercial Strip

The planning and policy initiatives detailed in the previous two sections help to provide insight into how the City of Winnipeg currently plans for their commercial strips. In particular, it should be noted that planning these commercial environments is strictly a land use and regulatory function. There appears to be no analysis of their affect on the commercial structure as a whole or how the additional floor space affects the overall retail hierarchy. This is particularly true given the broad generalizations made in Plan Winnipeg 2010 which makes no attempt to establish policies for strips other than those with a neighbourhood main street focus. In addition, there are no steps taken to determine the functional characteristics of highway oriented commercial strips and how to determine how a lack of specific planning controls can ultimately affect the

various strips located throughout the City. In general, it appears there is no attempt currently being made in the City of Winnipeg to successfully plan for their commercial strips.

5.4 The Pembina Highway Case Study

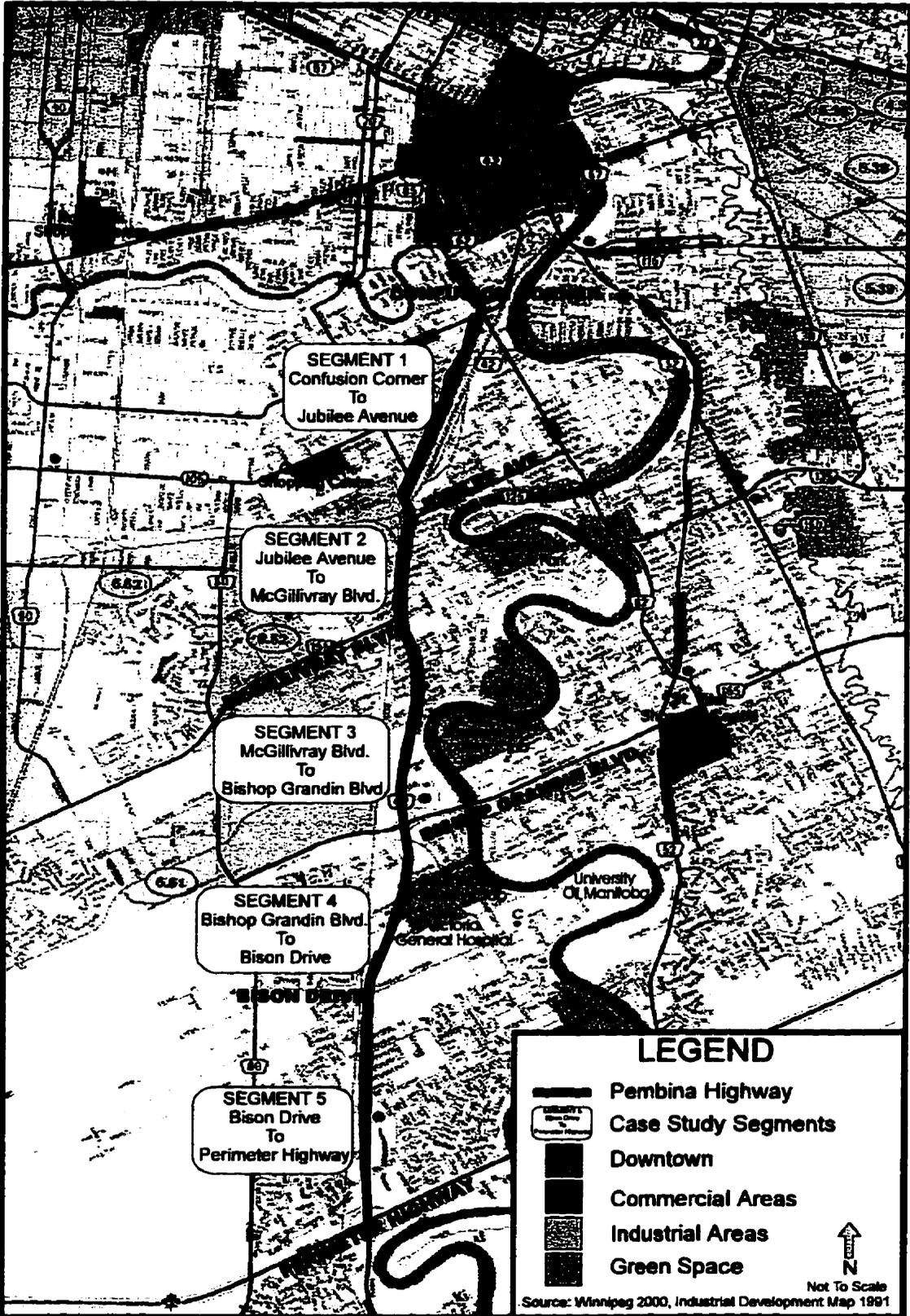
This practicum is devoted to the study of Pembina Highway, a 12 kilometre long stretch of commercial strip located along a North-South axis within Winnipeg, Manitoba (Map 1). Pembina Highway is one of several major commercial strips located within Winnipeg (Map 2).

Pembina Highway is located within the neighbourhoods of Fort Rouge and Fort Garry and is intersected by major roadways including; Grant Avenue, Jubilee Avenue, McGillivray Boulevard and Bishop Grandin Boulevard (Map 2). In addition, Pembina Highway is confined to a certain degree by the Red River to the east and a major rail line to the west⁴. The rail line and the river may limit future expansion along Pembina Highway, particularly with respect to the growth of New Format retailing.

In total, Pembina Highway is home to 811 functional units -- many of these being typical elements found in many commercial strips across North America. Examples of these functional units include; high and medium density residential developments, single family homes, numerous retailing units, office buildings,

⁴ The rail line actually begins on the east side of Pembina Highway and does not cross to the west until the rail overpass on Jubilee Avenue.

Map 2: The Study Area



hotels, government offices and institutional uses such as hospitals, schools and libraries. This strip is also home to one 'Power Centre', one indoor community sized shopping mall (Fort Richmond Shopping Centre), dozens of strip malls, a golf course, the University of Manitoba and a police station.

The following is a list of some of the key characteristics of Pembina Highway;

1. Pembina Highway is an example of an uninhibited private market. General commercial zoning has allowed sporadic and unmanaged growth throughout the strip.
2. Pembina Highway serves a variety of roles for the City of Winnipeg. These include acting as a commuter strip to downtown, a link to other parts of the City, a convenient place for local residents to shop and as a direct route to southern Manitoba and the Canada/U.S border.
3. Current perception by some planning professionals within Winnipeg is that there are not many real issues/concerns for business operators along the strip. "There may be a few signage concerns but that is about the extent of it...If there were problems people would have come forward" (Interview Knoll).
4. Chevrier to Jubilee Avenue is considered the original Main Street of that particular neighbourhood (the original City of Fort Garry). In effect, this is the only real Main Street area in existence along Pembina Highway (Interview Knoll).
5. The northern tip of Pembina Highway is generally older and more physically blighted, while the southern end is engulfed in numerous strip malls and more open spaces.
6. Pembina Highway intersects with a number of major commercial strips at the very northern section (Grant, Corydon, Osborne). Although a few major urban arterials intersect further south, throughout the entire 12 kilometre's, there are no significant commercial strips which intersect farther than 1.5 kilometre's from Confusion Corner. The term Confusion Corner refers to the junction of Osborne Street, Corydon Avenue and Pembina Highway.
7. No Business Improvement Zone has been established by business owners along Pembina Highway, nor is the strip home to a neighbourhood chamber of commerce.

When examining the current situation of Pembina Highway, one quickly learns that traffic congestion has become a serious problem. On any given day, automobile traffic along certain parts of Pembina Highway can reach a staggering 55,000 vehicles in a twelve hour period (City of Winnipeg (C) 1992). Unfortunately, for many of the people who live in the southern portion of Winnipeg and have employment in the central city, Pembina Highway represents the only viable means by which to travel to their workplace.

Average vehicle operating speeds along most of Pembina Highway during peak A.M hours has been recorded at less than twenty-five kilometers per hour. In contrast, both Portage Avenue and Henderson Highway averaged speeds above twenty-five kilometre's per hour (Kph), with Portage averaging above forty Kph (City of Winnipeg (E) 1995, 35).

Business owners and nearby residents regularly cited traffic congestion, accidents and pedestrian safety concerns as some of the most serious problems surrounding Pembina Highway. The residents and business owners concerns are well founded; of the 19 intersections with stop lights along Pembina Highway, 17 were approaching, at, or over vehicle volume capacity during peak hours (City of Winnipeg (E) 1995, 37). Of the thirty intersections identified as locations of most frequent traffic accidents in 1992, three were located along Pembina Highway (City of Winnipeg (E) 1995, 48-9).

5.4.1 Case Study Parameters

In order to ensure that this case study remains manageable, the following three parameters were used as an operational framework for studying this commercial strip: (i) Only functional units which were accessible directly off of Pembina Highway were said to be included in the land use analysis. This is due to the fact that there is significant off street growth along Pembina Highway and to include all of these units would skew the reality of what exactly constitutes this commercial strip. (ii) Certain units such as the University of Manitoba and the Southwood Golf and Country Club that do not have a Pembina Highway address were still considered part of the strip due to the significant amount of frontage occupied along this Strip. (iii) The boundary of the study area extends from the last business unit on Pembina Highway before the junction of Osborne Street, Corydon Ave, Donald Street and Pembina Highway, otherwise known as 'Confusion Corner' (the most northern point). From this junction it continues south from this junction until the Perimeter Highway. For study purposes, the section of Pembina Highway located south of the Perimeter Highway in St. Norbert will not be included.

5.5 Chapter 5 Summary

The purpose of this chapter was to provide a resource guide and background material for the case study analysis which will be presented in the next chapter.

This was accomplished by examining the commercial structure of the City of Winnipeg, as well as introducing the case study of Pembina Highway.

The market, policy and land use control analysis helped to place the case study of Pembina Highway into an appropriate regulatory context. While in addition, the description of Winnipeg's commercial structure was useful in identifying the relationship Pembina Highway has with other commercial environments throughout the City. Some highlights of the City's commercial structure included the fact that Winnipeg's downtown has had a considerable amount of capital invested in revitalization; that there is a significant shopping centre component within Winnipeg, and that Pembina Highway is one of the most dominant commercial strips.

The final component to this chapter was the introduction of the Case Study of Pembina Highway. This introduction revealed that this strip is a dynamic commercial environment which is beset with a number of planning concerns such as transportation and safety, both of which will be identified further in the next chapter.

The next chapter will explore three particular components of the case study including; a land use analysis, questionnaire distribution and examination of Shindico Realty's commercial properties along Pembina Highway.

CHAPTER 6: CASE STUDY COMPONENTS

The purpose of this chapter is to analyze the data collected on Pembina Highway. This data has been divided into three components including; a land use analysis, questionnaire analysis, and an analysis of Shindico Realty's properties. The land-use analysis covers all of Pembina Highway in order to provide a first hand account of what types of functional units are currently found along this commercial strip. The questionnaire analysis contains the results of a questionnaire distributed to 100 businesses along Pembina Highway. Lastly, the analysis of Shindico Realty's properties centers on the examination of their nine properties located along various points of this Strip.

PART A

6.1 Land Use Analysis

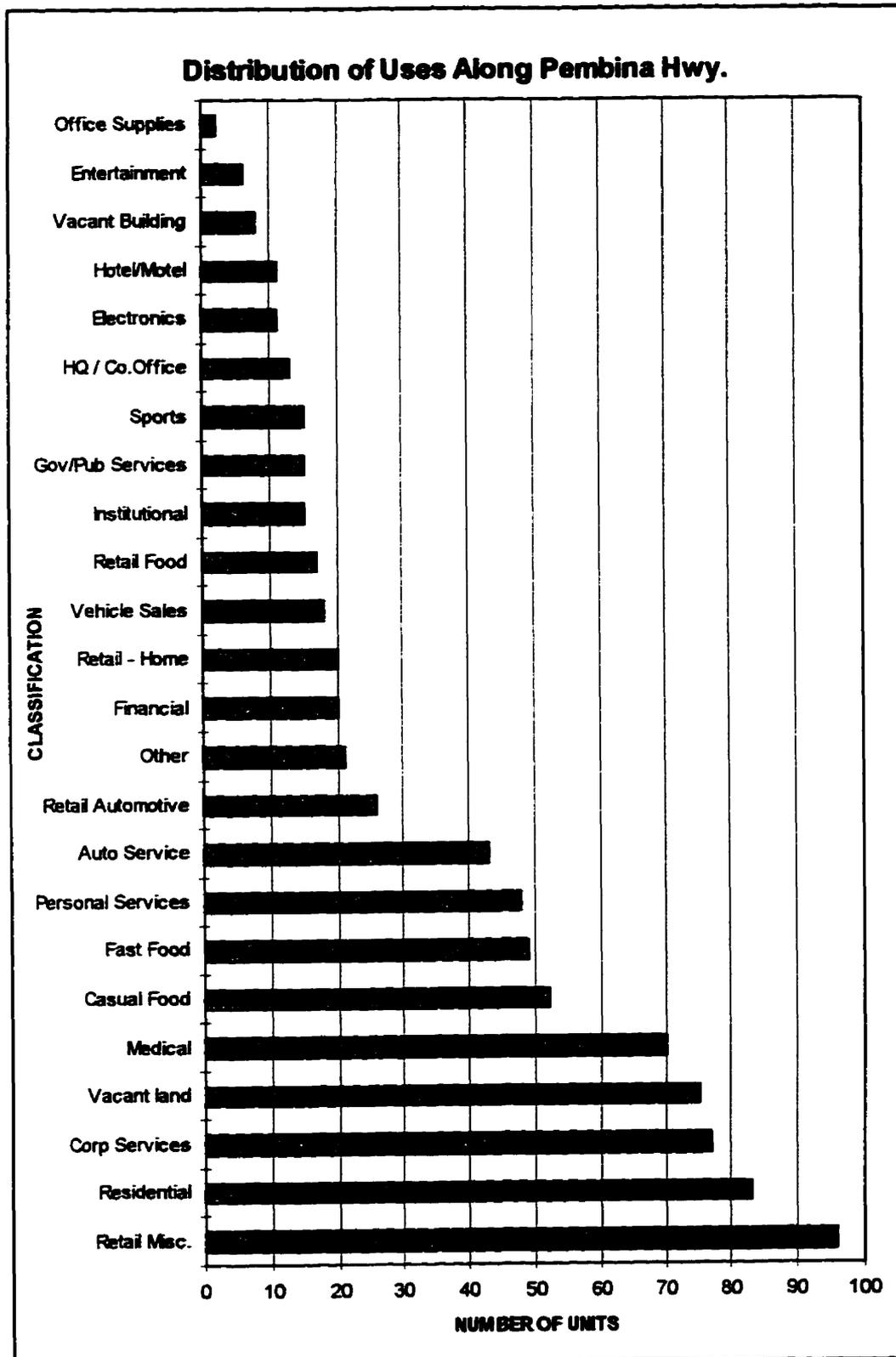
The land use analysis for this case study was completed during the summer of 1996. During this time, personally conducted field research provided an accurate and up to date listing of all 811 functional units along Pembina Highway. The results of this field research led to the construction of a database that provided a foundation upon which to examine the land uses along this Strip. A detailed classification of uses was constructed and specific emphasis placed on the development of frequency distributions by type of use along Pembina Highway.

6.1.1 Frequency of Functional Units

In order to accurately identify the frequency of the various uses along Pembina Highway it was determined that a classification system was needed. For this reason, each functional unit along Pembina Highway has been assigned a business classification number (Appendix A: Case Study Business Classifications). The twenty-four classifications were used help to differentiate between similar types of businesses such as casual and fast food, while at the same time, linking together similar uses such as hair dressers and beauty salons. Figure 6-1 illustrates the breakdown of all the functional units along Pembina Highway within the twenty-four business classifications. As shown, the largest concentrations of units are Retail Miscellaneous, Residential and Corporate Services uses.

Of the total 811 units along Pembina Highway, these three classifications comprise 256, or 32% of the total uses along this Strip. Overall, it has been determined that nine of the uses total more than thirty units each and when combined account for 593 (73%) of the 811 units. A number of these uses such as; Vacant Land, Automotive Services, Food - Fast and Retail Miscellaneous have been historically present along many commercial strips located across North America, and it is evident that Pembina Highway is no exception. However, in contrast, some of the nine uses that are dominant along Pembina Highway have not historically been dominant along commercial strips. For instance, Medical Services, Corporate Services and Residential uses.

Figure 6-1: Frequency of Functional Units Along Pembina Highway



The reason for this is that due to the process of decentralization, the downtown is no longer the sole location for office and private medical facilities. Commercial strips now provide a competitive location alternative. The Strip is also home to a high percentage of Residential uses; particularly, multi-unit, high-density apartment and condominium blocks. This can be directly attributed to the residential building trends of the late 1970's and 1980's influenced by proximity to the University of Manitoba, major transit lines and the Red River.

Along Pembina Highway some of the more traditional commercial strip businesses, such as hotels and motels are notably absent. Many of these uses have been replaced with more higher density commercial and retail establishments. As Bid Rent theory explained in Chapter #3 Reviewing the Literature, certain competing uses economically outbid other uses for locations within an urban area. As such, shopping centre, strip mall and New Format retail developers buy-out the less viable uses such as motels along the strip. The most recent Pembina Highway example of this phenomenon is the demolition of the Motel 75 at Stafford Street in March of 1997.

6.1.1.1 By Location

In order to perform a very thorough analysis of Pembina Highway, it was deemed necessary to (i) examine what functions locate on the various sides of this Strip, and (ii) to determine what functions locate along various areas of Pembina Highway. Figure 6-2 and Table 6-1 provide details regarding the number of business establishments on the West and East side of Pembina Highway.

Figure 6-2: Business Establishments Along Pembina Highway

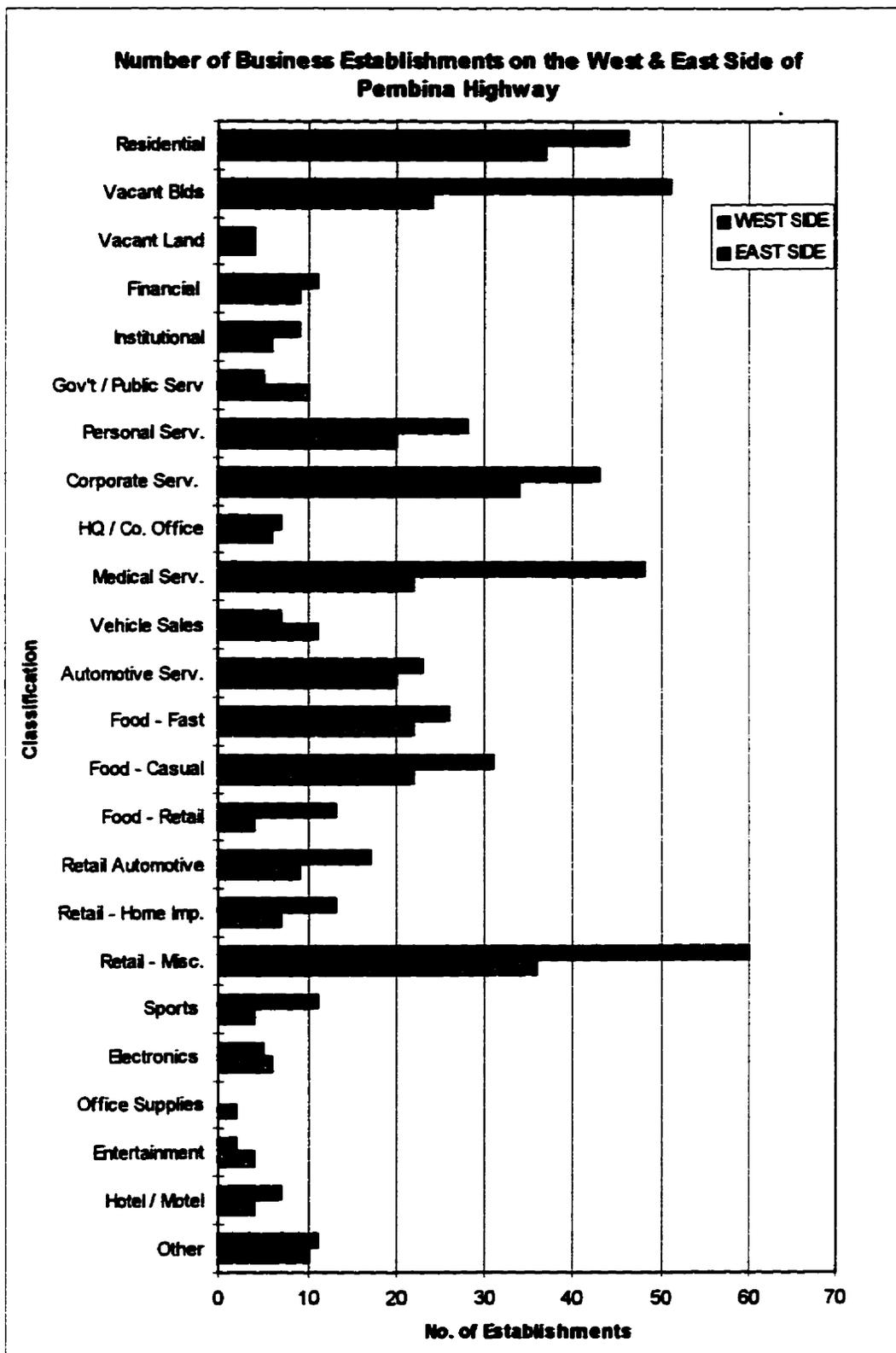


Table 6-1: Business Establishments Along Pembina Highway

	WEST SIDE						EAST SIDE						TOTALS
	A	B	C	D	E	Totals	A	B	C	D	E	Totals	
Residential	0	0	18	17	11	46	0	3	12	10	12	37	83
Vacant Buildings	10	2	18	8	13	51	4	12	3	1	4	24	75
Vacant Land	1	0	1	0	2	4	0	1	1	2	0	4	8
Financial Serv.	2	2	1	4	2	11	0	2	2	0	5	9	20
Institutional	0	1	6	0	2	9	0	0	2	2	2	6	15
Gov't / Public Serv	1	0	2	1	1	5	0	1	6	0	3	10	15
Personal Serv.	4	2	12	3	7	28	2	10	2	0	6	20	48
Corporate Serv.	15	2	18	5	3	43	7	14	6	0	7	34	77
HQ / Co. Office	1	0	1	1	4	7	1	3	2	0	0	6	13
Medical Serv.	4	3	6	30	5	48	6	11	2	0	3	22	70
Vehicle Sales	2	1	0	0	4	7	9	0	0	0	2	11	18
Automotive Serv.	7	2	4	4	6	23	8	2	3	3	4	20	43
Food - Fast	3	5	8	3	7	26	4	6	7	0	5	22	48
Food - Casual	6	2	10	7	6	31	3	4	11	1	3	22	53
Food - Retail	0	1	8	3	1	13	0	2	0	0	2	4	17
Retail Automotive	4	4	3	3	3	17	3	0	3	0	3	9	26
Retail - Home Imp.	4	1	4	1	3	13	1	1	3	0	2	7	20
Retail - Misc.	3	7	25	14	11	60	10	10	1	2	13	36	96
Sports Equip & Appl	8	0	0	1	2	11	1	0	2	0	1	4	15
Electronics S. & Serv.	2	1	2	0	0	5	0	1	2	0	3	6	11
Office Supplies	0	0	0	0	0	0	1	0	1	0	0	2	2
Entertainment	0	0	1	0	1	2	0	2	2	0	0	4	6
Hotel / Motel	2	1	1	0	3	7	0	1	2	1	0	4	11
Other	3	0	5	1	2	11	5	1	1	2	1	10	21
TOTALS	82	37	154	108	99	478	65	87	76	24	81	333	811

Notes:
A = Confusion Corner to Jubilee Avenue
B = Jubilee Avenue to McGillivray Boulevard
C = McGillivray Boulevard to Bishop Grandin Boulevard
D = Bishop Grandin Boulevard to Bison Drive
E = Bison Drive to the Perimeter Highway

An analysis of business location has determined that establishments are far more likely to be located on the west side of this Strip than the east. Of the 811 total functional units along Pembina Highway, 478 or fifty-nine percent (59%) are located on the west side. The only exceptions to this trend were Government and Public Services, Vehicle Sales, Electronics Sales & Service, Office Supplies and Entertainment. However, it should be noted that these five classifications

only account for six percent (6%) of the total units along Pembina Highway. This information suggests that most businesses are located on the west side of Pembina in order to capitalize on southbound traffic (the route home from downtown) and exposure; whereas, other business uses which are located primarily on the east side, are much less dependent upon drive by traffic.

On the other hand, Government and Public Services, which are located predominantly on the eastern side of Pembina, are generally closed when people are traveling home after work.

The second method used to examine business location along Pembina Highway was to divide the strip into smaller more manageable segments. For this reason, major intersecting arterials were found to provide natural break points along Pembina Highway. The segments that resulted are detailed in Table 6-2. This table illustrates the number of units, length and relative density of each segment.

Table 6-2: Number of Functional Units by Segment (Pembina Highway)

DISTRICT	NUMBER OF UNITS	LENGTH (KM)	UNITS PER KM
Confusion Corner to Jubilee Ave	147	2.57	57.2
Jubilee Ave to McGillivray Blvd	124	1.22	101.6
McGillivray Dr to Bishop Grandin Blvd	230	2.49	94.7
Bishop Grandin Blvd to Bison Dr	130	1.96	66.3
Bison Dr to the Perimeter Hwy	180	2.70	66.7
ALL OF PEMBINA HWY	611	10.88	74.5

The most densely concentrated segment of commercial activity along Pembina Highway is the section located between Jubilee Avenue to McGillivray Boulevard. There are over 100 units per kilometre along this section of the Strip. A point worth noting is that this section also happens to be the only area of Pembina Highway which is considered the original Main Street of the area (Interview: Knoll).

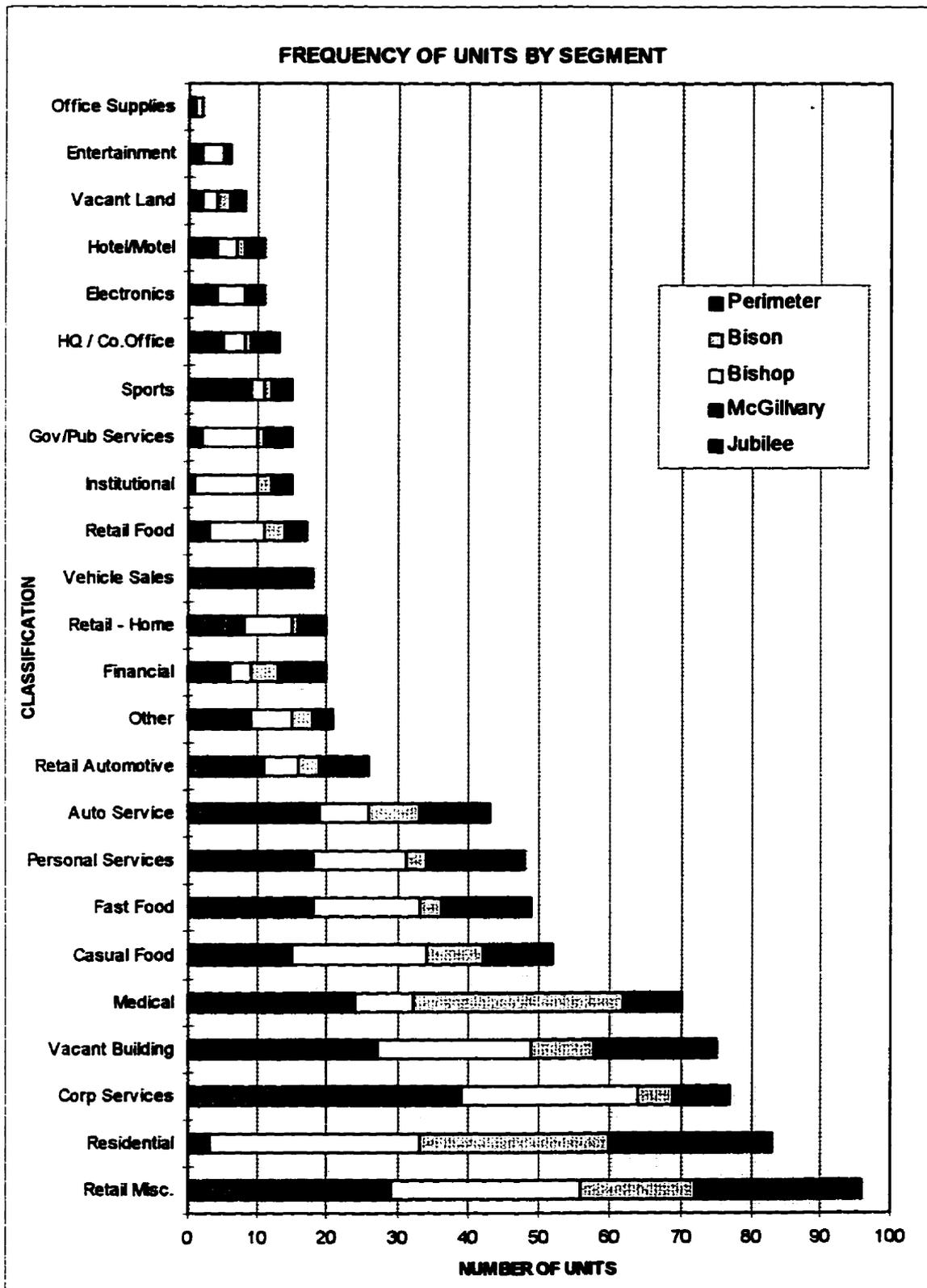
6.1.1.2 Frequency of Units By Type and Location

Figure 6-3 illustrates the distribution of uses along Pembina Highway using the five segments identified in the previous subsection. Of particular interest is the fact that certain areas of Pembina Highway seem to be devoid of certain types of functional units. For example;

1. The Confusion Corner to Jubilee Avenue segment does not contain any residential uses, Institutional uses, Government / Public Services uses, or Food - Retail uses.
2. The Jubilee to McGillivray segment lacks Sports Equipment and Apparel and Office Supply uses.
3. The Bishop Grandin to Bison segment does not contain any Electronic Sales & Service, Office Supply, Entertainment and Vehicle Sales uses.
4. The Bison to the Perimeter Highway segment lacks Office Supply uses.

The only segment of Pembina Highway that contains each business classification is the McGillivray to Bishop Grandin Boulevard section, despite the fact that the Jubilee to McGillivray segment contains the most units per kilometre.

Figure 6-3: Frequency of Functional Units By Segment, Pembina Highway



6.1.2 Other Significant land Use Characteristics

A significant land use characteristic of Pembina Highway is the very limited amount of vacant undeveloped land along this Strip. Further development along Pembina Highway will have to take the form of 'redevelopment' of existing buildings. Whether this will prove to be attractive to businesses wishing to locate along this Strip remains to be determined.

Another significant characteristic of Pembina Highway is that all segments appear to have an equal amount of vacant buildings and vacant land. The overall vacancy rate for this Strip is 9.8%. Interviews with several people have indicated that a vacancy rate of between 5% to 15% is considered average (Interview: Shindleman, Mitchell).

6.1.3 Part A Summary

The land use analysis has shown that the 811 uses along Pembina Highway are dominated by traditional 'commercial strip' or highway commercial type uses such as fast food restaurants and automotive service establishments. However, the analysis also indicated that there is a significant proportion of non-traditional uses locating along this Strip. In addition, it was determined that almost sixty percent of businesses are located along the West of the Strip and that the area of most concentrated development was the segment of Pembina Highway located between the Jubilee Avenue and McGillivray Boulevard arterial roads. Lastly, it was determined that the amount of vacant land along Pembina Highway is at a premium and that the vacancy rate is approximately ten percent (10%).

PART B

6.2 Questionnaire

In order to gauge specifics about business operations and owner/operator perceptions, this case study will be based to a large extent on the information obtained through questionnaires. A total of 100 questionnaires were distributed during a five month period between October of 1996 through to February 1997. Gathering information in this manner provided a wealth of information which simply would not have been available otherwise.

6.2.1 Questionnaire Respondents

The questionnaires developed for this practicum were only distributed to business owners and operators along Pembina Highway. The method of delivery for this questionnaire was a stratified random sample in which specific target groups were randomly sampled. Table 6-3 illustrates the final questionnaire distribution. Particular mention should be made of the fact that the following six business classifications did not receive any questionnaires as outlined in Chapter #2: Study Methodology: Residential, Institutional, Government/Public Services, and Head Quarters/Company Offices. This is due to the fact it was not possible to survey all residents and that surveying such uses as Institutional, would not provide any data relevant to the study of Pembina Highway.

Table 6-3: Questionnaire Distribution

BUSINESS CLASSIFICATION	NUMBER OF QUESTIONNAIRES DISTRIBUTED	NUMBER OF UNITS ALONG PEMBINA HIGHWAY
1. Retail - Miscellaneous	17	96
2. Corporate Services	12	77
3. Medical Services	12	70
4. Food - Casual	9	52
5. Food - Fast	7	49
6. Personal Services	7	48
7. Automotive Service	7	43
8. Retail - Automotive	4	26
9. Other	4	21
10. Food - Retail	4	17
11. Financial	3	20
12. Retail - Home Improvement	3	20
13. Vehicle Sales	3	18
14. Sports Equipment & Apparel	2	15
15. Hotel / Motel	2	11
16. Electronics Sales & Service	2	11
17. Entertainment	1	6
18. Business Supplies	1	2
TOTAL	100	602

The distribution of questionnaires was determined by their frequency along Pembina Highway. For example, Retail Miscellaneous uses are the dominant business activity along the Strip, and as such, received the largest number of questionnaires (17 in total).

6.2.2 Examining Pembina Highway

The following subsections will detail the information gathered from the questionnaire responses. Individual findings will be brought forward within each subsection; whereas, other findings will be detailed at the end of this chapter.

6.2.3.1 Tenure

Business owners and operators along Pembina Highway were asked four questions relating to the tenure of their business. These included;

- Is the building your business occupies owned or rented?
- If the building is rented, then state from whom?
- How long has your business been in this present location?
- If applicable, please name the previous address / area of the city of your business?

A large percentage (70%) of the questionnaire respondents reported that the building they operate their business from was rented rather than owned, this is not surprising considering the number of leasing signs located along Pembina Highway which advertise property management and development companies. Clearly these companies play a dominant role along this Strip. The businesses classifications of Automotive Services and Food - Casual, were the types most likely to be owned with 86% and 56% respectively reporting that they owned their premises (Table 6-4). In contrast, the business types most likely to be rented were Corporate Services (100%), Medical Services (92%), and Retail Miscellaneous uses (77%). All told, seventy percent (70%) of businesses were rented while only thirty percent (30%) were owned.

Table 6-4: Questionnaire Responses; Type of Tenure

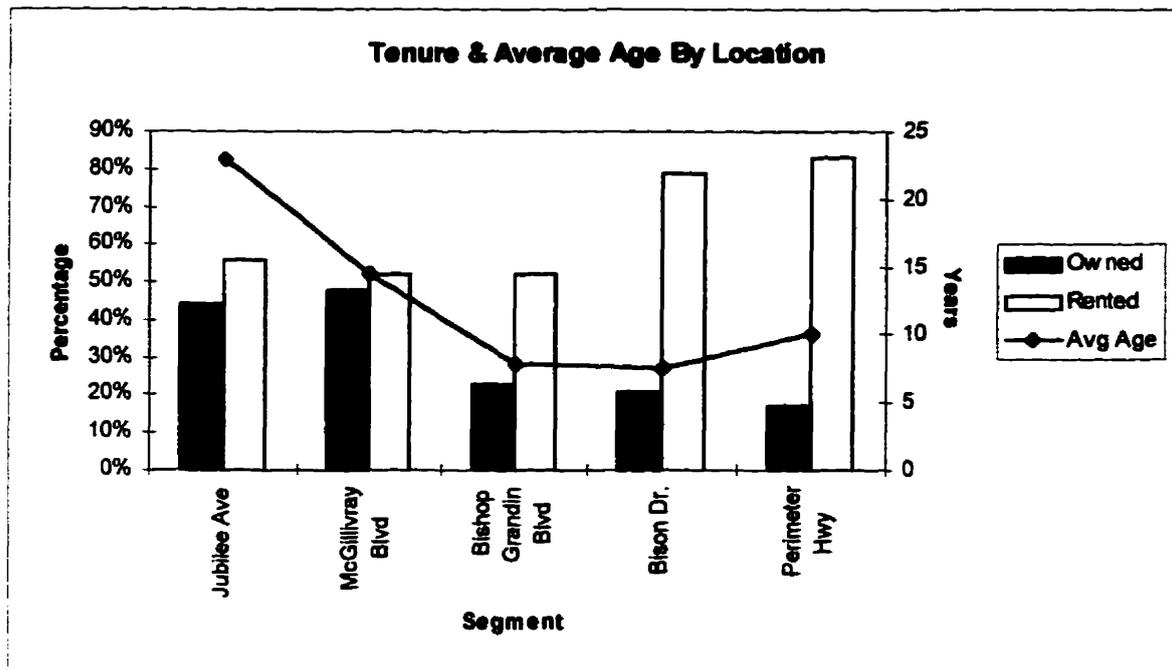
Classification	Owned	Rented
Financial Services	0	3
Personal Services	2	5
Corporate Services	0	12
Medical Services	1	11
Vehicle Sales	1	2
Automotive Service	6	1
Food - Fast	0	7
Food - Casual	5	4
Food - Retail	1	3
Retail - Automotive	2	2
Retail - Home Improvement	2	1
Retail - Miscellaneous	4	13
Sports Equipment & Apparel	1	1
Electronics Sales & Service	1	1
Business Supplies	0	1
Entertainment	0	1
Hotel / Motel	2	0
Other	2	2
Total of Pembina Highway	30	70

When the owners and operators were asked “from whom do they rent their premises?”, a total of seventeen different answers were given. Of the 58 out of 70 respondents who said they rented and answered this question, a large percentage (69%) indicated that they rented from property management companies or developers. Colliers Pratt McGarry, was indicated as the landlord for 18% of the 57 respondents. Table 6-5 lists the responses to this question in more detail.

Table 6-5: Questionnaire Responses; “if the building is rented, from whom?”

A: Developers / Property Mgmt Co. & No. of Corresponding Responses (40 of 58 responses or 69%)			
Colliers Pratt McGarry	10	Atlas Acceptance Corporation	2
Lakewood Agencies	4	Armord Realty	1
Superior Property Management	3	IDI Ventures	1
London Property Management	3	Pioneer Properties	1
Royal Realty	2	Elias Construction	1
Cambridge Realty	2	Althone Investments Ltd	1
Shindico Realty	2	Other	7
B: Private Individuals / Companies and No. of Corresponding Responses (18 of 58 responses or 31%)			
Private Within Manitoba	11	Private Outside Canada	1
Private Outside Manitoba	3		

When asked about the length of time they have occupied their current location, the average response was nearly 12 years. However, this average has been skewed due to the number of extremely long and short tenures. For example, one business was reported as being in its current location for 69 years, while another business reported being there only 1 month. Figure 6-4 provides an illustration of how the relationship between tenure and average age changes as you move through the various segments outlined in Part A of this chapter, Land-Use Analysis. Businesses located along the northern portions of Pembina Highway were much more likely to be owned than their southern counterparts. This same trend appears with respect to average age. Those businesses at the southern end had an average age significantly lower than the businesses in the northern sections.

Figure 6-4: Questionnaire Responses; Tenure and Age by Location

Further to the analysis of average age of businesses along the strip, owned businesses were far more likely to be at their current location for longer periods of time than rented businesses. This trend was present for each of the five segments along Pembina Highway (Table 6-5). Overall, the average age of owned businesses along all of Pembina Highway was almost two times higher than the average age of rented businesses.

Table 6-5: Questionnaire Response; Average Age of Businesses

DISTRICT	OWNED Avg. Age	RENTED Avg. Age
Confusion Corner to Jubilee Ave	28.7	18.4
Jubilee Ave to McGillivray Blvd	17.9	7.7
McGillivray Dr. to Bishop Grandin Blvd	9.7	7.1
Bishop Grandin Blvd to Bison Dr.	13.9	5.9
Bison Dr. to the Perimeter Hwy	11.0	9.8
ALL OF PEMBINA HWY	17.4	9.2

An explanation as to why rented businesses have a lower average age may be due in part to their apparent inter-strip movement. Of all businesses along the Strip, a total of nineteen percent (19%), indicated that they had been located at a different point along Pembina Highway prior to opening in their current location. Of these nineteen percent (19%), seventy-four percent (74%) were rented, while only twenty-six percent (26%) were owned. Moreover, the most common business classification that had previously located along the Strip was Retail - Miscellaneous at eight of seventeen respondents or 47%. Not coincidentally, this classification was determined to be rented in seventy-six (76%) of the cases it appeared on the Strip. Clearly, there are strong indications that there is a significant level of inter-strip movement of businesses, and that rented businesses are more likely to move along the strip than owned businesses who tend to stay in one location for longer periods of time. Obviously this reflects the ease of movement allowable with renting compared to the permanency of owning. One final note, a number of businesses who rented their premises indicated that conflicts with their landlord had forced them to seek another location along Pembina Highway.

6.2.3.2 Location

A large proportion of the questions asked of owners/operators dealt with locational preferences and perceptions. Many of the questions asked were with reference to the following;

- What is the prime location for your business?

- What factors influenced why you located at your present site?
- Would you consider opening more locations, expand your current location, or change the location of your business in the near future?
- What is the trade area of various business classifications along Pembina Highway?

When business owners/operators were asked about their prime location preference, over thirty-six percent (36%) of respondents provided more than one answer. However, as a whole, the commercial strip was the first choice of thirty-three percent (33%) of the respondents (Table 6-7). In addition, locations such as strip malls and power centres held far more appeal to businesses located on the Strip than did downtown or shopping mall locations.

Table 6-7: Questionnaire Responses; Locational Preference

LOCATION PREFERENCE	% OF RESPONDENTS
Specialty Shopping Area	3%
Downtown	4%
Large Shopping Centre	4%
Other	4%
Small Shopping Centre	5%
Free Standing Building	5%
All Locations	5%
Power Centre	9%
No Answer	11%
Strip Mall	16%
Commercial Strip	33%
TOTAL	100%

Of particular interest was the fact that five specific business classifications seemed to prefer the commercial strip as their prime locational choice. These businesses included; Retail Home Improvement (66%), Food - Casual (66%),

Sports Equipment and Apparel (50%), Automotive Services (40%), and Retail Miscellaneous at (31%). These relatively high percentages suggest that these businesses are more closely tied to the Strip than other business types.

In addition to providing details regarding location preferences, owners/operators were also asked to identify the characteristics which were important in helping to decide on their proper business location. Table 6-8 illustrates the answers and results of the questionnaires; whereby, the respondents were asked to rank each of them according to whether they were very important, somewhat important or not important factors in determining their current location.

Table 6-8: Questionnaire Responses; Important Location Characteristics

CHARACTERISTIC	VERY	SOMEWHAT	NOT	N/A
Low Rent	31%	33%	18%	18%
Suitable Building / Land	74%	14%	3%	9%
Sufficient Parking Space	66%	21%	6%	7%
Rush Hour Traffic	32%	25%	37%	6%
Near To Passing Traffic	57%	21%	13%	9%
Good Neighbourhood	56%	31%	7%	6%
Nearby Residential Development	57%	23%	14%	6%
Near To Bus Line	36%	31%	26%	7%
Access To Downtown	20%	25%	48%	7%
Access To Perimeter Highway	16%	24%	53%	7%
Access To Highway 75	16%	25%	50%	9%
Access To University Of Manitoba	18%	35%	38%	9%
Other Important Characteristics: Access to personal residence, central location, foot traffic, visibility, bought an existing franchise operation				

As was mentioned in Chapter #5. Case Study Components, Pembina Highway is a unique commercial strip in that it provides access to the downtown, the University of Manitoba, Highway 75, and the Perimeter Highway. However, not one of these seemingly important characteristics was rated as being a particularly important location decision to any of the businesses. The highest percentage given any of these four characteristics was access to the downtown at twenty percent (20%).

Overall, the main characteristics which largely effected location decisions were a good neighbourhood, suitable building and land, being near to passing traffic and residential development and having adequate parking space. Over fifty percent (50%) of questionnaire respondents indicated that these five characteristics were very important in determining a business location. It is also important to note that there were very few business classifications which deviated from the averages displayed in Table 6-8. The only notable example was the fact that while low rent was considered very important for Retail Miscellaneous uses (41%), it was cited as being not important for the majority (71%) of Automotive Service classifications.

When asked if they were likely to open additional locations, a significant percentage (30%) indicated that they believe they will in the near future. The businesses which were most apt to open more locations were Food - Fast (57%) and Personal Services (43%); whereas, only 17% of Medical and Corporate

Services indicated that they would open additional locations within the City. This analysis indicates that a large number of businesses feel that opening additional stores is a means to increase their competitiveness. This fact is consistent with the views of Mr. Sandy Shindleman, President of Shindico Realty, who suggests that the “days of owning only one store and being overly successful are over ... nowadays, retailers are forced to open multiple locations in order to turn any kind of profit.” (Interview: Shindleman)

In addition to the analysis of business location, a majority (59%) of businesses indicated that they would not be considering expanding their existing operation in the near future. Furthermore, seventy-three percent (73%) of respondents stated that they would not be changing their location anytime in the near future. Interesting enough, the majority of these seventy-three percent were from businesses that rented their premises. This suggests that although there is significant inter-strip movement of rented businesses along Pembina Highway, rental tenure is not always a sure indication that a business is not tied to its current location.

The final aspect of location to be examined is that of trade area. Owners/operators were asked to define what they felt accurately reflected their trade area. The most common answer to this question was all of Winnipeg. In fact, thirty-two percent (32%) of respondents felt that their business served customers from ‘all over Winnipeg’. Remarkably, only six percent (6%) felt that

Pembina Highway specifically was their prime trade area. This would suggest that many businesses locate on the strip simply because of its inexpensive overhead compared to other commercial environments such as shopping centres. In addition, businesses may only locate along the strip because it is zoned commercial and the space has been provided by a number of developers.

Table 6-9 illustrates questionnaire responses to trade area by linking together common answers into five categories including; Winnipeg, Pembina Highway, surrounding Neighbourhood, Manitoba and Canada.

Table 6-9: Questionnaire Responses; Trade Area

TRADE AREA	TOP RESPONDANTS
NEIGHBOURHOOD	
Neighbourhood	17%
Neighbourhood & Manitoba	7%
Neighbourhood & Winnipeg	4%
TOTAL	25%
PEMBINA HIGHWAY	
Pembina Highway	6%
Pembina Highway & Neighbourhood	4%
Pembina Highway & Winnipeg	1%
TOTAL	11%
WINNIPEG	
Winnipeg	32%
Winnipeg & Southern Manitoba	5%
Southern Winnipeg	6%
TOTAL	43%
MANITOBA	
Manitoba	16%
Manitoba & Ontario	2%
TOTAL	18%
CANADA	
Canada	3%
TOTAL	3%
COMBINED TOTALS	100%

Upon examining the trade area questionnaire responses, it appears that owners/operators believe their products and services serve a distinct market area. Out of all the questionnaires, only those in the Automotive Services classification had similar opinions on what exactly constituted their trade area. In fact, Fifty-seven percent (57%) of the Automotive Services businesses surveyed indicated that all of Winnipeg was their primary trade area.

Overall, the analysis of business location has indicated that the majority of current businesses along Pembina Highway prefer their current location along the strip over other more 'identifiable' retailing locations such as downtown or shopping malls. Furthermore, while only eight percent (8%) of businesses will actually change their current business location in the near future, a fair percentage (30%) are considering opening additional locations within the City. In addition, fourteen percent (14%) of respondents were undecided when asked whether they would changing their business location. These facts support the findings of the last subsection in which it was determined that there is a significant amount of inter-strip movement along Pembina Highway.

6.2.3.3 Business Characteristics

This subsection of the questionnaire analysis will examine the specific characteristics of businesses located along Pembina Highway in order to build a profile of average business establishments along this Strip. Specific questions asked of the owners/operators dealt with;

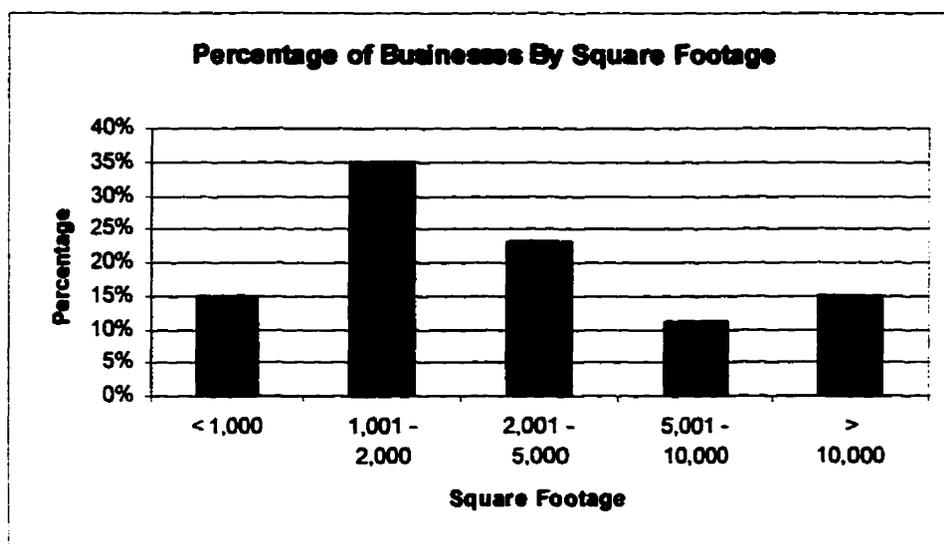
- What is the current physical condition of the building you occupy?
- How many square feet and how many employees does your business have?
- Provide insight into your current business volume, customer types and travel habits.

When asked about the condition of the building they occupy, business owners/operators were given the choice of answering (i) excellent, (ii) good, (iii) in need of minors repair in the neighbourhood of \$2,000 dollars, or (iv) in need of major repairs in excess of \$2,000 dollars. Responses to this question were varied; however, a majority (54%) of owners/operators felt their premises was in good condition. A particular note should be made to the fact that seventy percent (70%) of the businesses who felt their premises were in good or excellent condition were rented. This leads us to speculate that property management companies tend to maintain their properties in order to make them attractive to a wide range of businesses. Of the respondents who felt their business was in need of some repair, twenty-three percent (23%) stated a need for minor repairs, while an additional twenty percent (20%) felt the need for major repairs.

With regards to the size of businesses along Pembina Highway, the most common was the category of 1,000 to 2,000 square feet. In fact, thirty-five percent (35%) of business owners/operators indicated that their establishment fell within this range. Upon further examination, seventy-five percent (75%) of Medical Services, and fifty eight percent (58%) of Corporate Services, were the two business classifications which were most likely to fall into this square foot

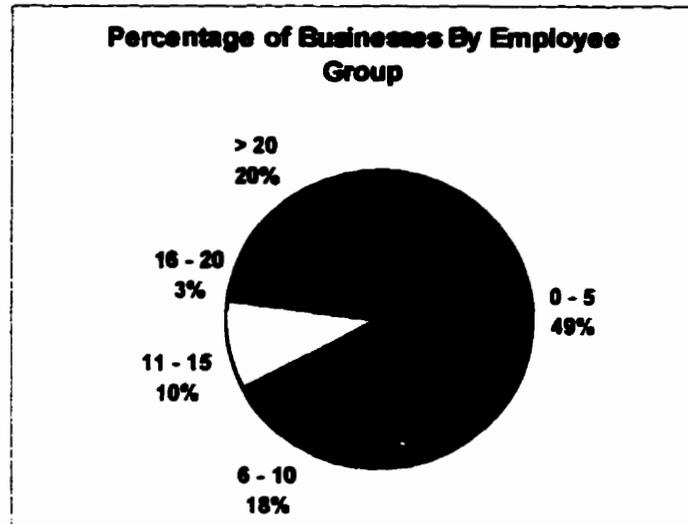
range. Twenty-three percent (23%) of all respondents fell within the next size classification (2,001-5,000 square feet), with both Automotive and Financial Services being dominant. The facts are further illustrated by Figure 6-5.

Figure 6-5: Questionnaire Responses; Size of Businesses in Square Feet



The next step in analyzing business characteristics focuses on the number of employees by businesses along Pembina Highway. Almost fifty percent (50%) of businesses surveyed stated that they employed five or less employees. Figure 6-6 is a pie chart which illustrates the percentage of businesses which have 0-5 employees, 6-10, 11-15, 16-20 and greater than twenty employees. Ironically, the second largest category were those businesses employing in excess of twenty employees. These findings are consistent with information concerning the average size of businesses. The majority of Pembina Highway is occupied by businesses who contain between 1,000 to 2,000 square feet and employ five or less employees.

Figure 6-6: Questionnaire Responses; Percentage of Businesses By Number of Employees



Further analysis of the number of employees indicated that certain business types were more likely to have similar numbers of employees than others. For example, 82% of all Retail Miscellaneous uses indicated that they had five or less employees. Similarly, 71% of Personal Services, 67% of Corporate Services and 58% of Medical Services indicated the same. On the other hand, 56% of Food - Casual uses indicated that they employed in excess of twenty employees. All the other business classifications showed no indications of being similar with regards to their number of employees.

The final component of the business characteristics analysis is the examination of the customers and business volume of the respondents. The majority of respondents (70%) indicated that they rely heavily on regular customers to support their business. Only a small percentage (10%) of businesses, all of

which have been in operation under five years, rely heavily on new customers for support. Consequently, it can be assumed that these businesses are not yet completely established, and therefore, are dependent upon new customers. The remaining respondents replied that they simply rely on both new and regular customers to support their business.

When asked about the method of travel taken by their customers, an overwhelming majority of the respondents (84%) stated that the automobile was the primary method. This fact is consistent with the automobile-oriented character of a commercial strip. In addition, travel by bus and walking were the other two most common responses to this question. However, it should be noted that six percent (6%) of respondents identified other travel arrangements for their customers. A few businesses, such as Corporate Services, travel to the customer; while in other cases, a number of businesses indicated that a majority of their business transactions are completed by phone, fax or mail order. With the continuous advances in telecommunications technology, one can suspect that this percentage will rise in the future. This may have drastic implications for the commercial strip in that small businesses may choose to work out of their homes rather than rent space along the Strip. In this respect, the future built form of the strip may be completely dominated by large retailers, with little or no place for the smaller independent.

The final aspect of the business characteristics analysis centers on business volume. Overall, forty-nine percent (49%) of respondents indicated that their business volume had increased over last year, thirty-one percent (31%) felt their volume had remained the same, and thirteen percent (13%) suggested their volume had decreased from a year ago. Unfortunately, seven percent (7%) did not respond to this question. The businesses most likely to have increasing business volume are Automotive Services at seventy-one percent (71%) and Retail Miscellaneous uses at forty-seven percent (47%).

This section provided information necessary to build a profile of the average business along Pembina Highway. Overall, It was determined that on average, business owners/operators felt their premises were in good physical shape, they operated in 1,000 to 2,000 square feet of space and employed five or less people. Furthermore, the average business relies heavily on regular customers who travel by automobile to their location. Finally, it was determined that the average business along Pembina Highway experienced an increase in business volume over the previous year.

6.2.3.4 Business Perceptions & Preferences

The purpose of this section is to analyze the individual perceptions of the owners/operators with regards to operating a business along Pembina Highway.

This section will focus on the responses to the following questions;

- Are you happy with Pembina Highway as a business location?

- How would you rate the appearance of Pembina Highway and what suggestions can you provide which may improve its appearance?
- Describe the types of businesses you would prefer to locate around you.
- What current problems exist which hinder the operation of your business?

When respondents were asked whether they were happy with Pembina Highway as a business location, ninety-three percent (93%) stated that they were. Overall, eighty-eight percent (88%) of respondents indicated that the Strip was a fair to attractive environment upon which to conduct their business. However, when asked to describe how they would improve the appearance of the Strip a wide range of suggestions were provided. The most common of these are listed below. (Percentage of respondents is indicated in parenthesis).

1. Encourage business owners to upgrade their premises and have the City take a more proactive stance on blight along the Strip. (16%)
2. Provide additional landscaping to the boulevard and sidewalks. (13%)
3. Improve year-round maintenance such as litter, snow removal. (7%)
4. Improve traffic congestion. (5%)
5. Control overbuilding along certain sections of the Strip. (2%)

Businesses were also asked about their preferences concerning future development in their area. Table 6-10 summarizes the most common answers to this question.

One interesting trend that developed was the fact that a number of businesses listed the same type of development, but some viewed it negatively while others viewed it positively. For example, six percent (6%) of respondents felt that they

would like to see Big-Box Retail develop around them, while four percent (4%) of respondents felt the opposite.

Table 6-10: Questionnaire Responses; Preferred & Unwanted Development

PREFERRED BUSINESS DEVELOPMENT	PERCENTAGE OF RESPONDENTS
Service Businesses	13%
Restaurants	10%
Any development which increases customer traffic	7%
Big - Box Retail	6%
Grocery Stores	4%
Other Retail Stores	4%
UNWANTED BUSINESS DEVELOPMENT	PERCENTAGE OF RESPONDENTS
Adult Video Stores	8%
Manufacturing / Light Industrial	6%
Big - Box Retail	4%
Bars / Nightclubs	4%
Any Development which increases vehicle traffic	3%
Arcades	3%
Low - End Retail Stores	3%
Convenience Stores	2%

The last component to the business perceptions and preferences analysis provides an examination of the factors that respondents suggested hinder the operation of their businesses. As table 6-11 illustrates, the factors which were of most concern were traffic congestion, lack of available parking space, competition and high rent; whereas, the factors cited as providing the least hindrance to their businesses were inadequate facilities and being located in an unattractive neighbourhood.

Table 6-11: Questionnaire Responses; Factors Hindering Business

PROBLEM	% YES	% NO
Traffic Congestion	27%	73%
Lack of Parking Space	26%	74%
Competition	24%	76%
High Rent	24%	76%
Decreasing Sales Volume	22%	78%
Low Sales Volume	20%	80%
Location	20%	80%
Unsuitable Building	18%	82%
Inadequate Facilities	16%	84%
Unattractive Neighbourhood	13%	87%
Unsuitable Land	12%	88%
OTHER PROBLEMS: Access, Taxes, Landlord, Services, Side of the Strip		

Of particular interest is the fact that most respondents felt that they rely on regular customers who travel via the automobile to their business, yet they state that traffic congestion and parking problems are the most serious of their concerns.

6.2.3.5 Additional Findings and Analysis

The final section of the questionnaire asked respondents for any additional remarks. Many of the comments made were specific planning related issues.

1. Business sales and customer traffic decreases significantly south of the Fort Richmond Shopping Centre.

This opinion was mentioned by two different chain stores. One of these businesses had to close down a store in this location due in part, to low sales and low traffic volume. This is important in providing insight into the fact that certain areas of the Strip are considerably more viable than others.

2. Rents along Pembina Highway have decreased over the past five years.

One business operator suggested that rents along Pembina Highway have decreased over the past number of years. This may signify that Pembina Highway's attractiveness to businesses is decreasing, or that artificially inflated rent prices are dropping down to a more obtainable level. This could in turn help small privately owned or new businesses. Decreasing rents may also be a result of competition. Examples include, (i) areas of the Strip may be overbuilt and to maintain full occupancy, property management companies are forced to lower their rents to attract new tenants and keep their existing ones, and (ii) Pembina Highway may be experiencing serious competition from other major commercial strips within Winnipeg such as Portage Avenue.

3. On street parking is a problem for many businesses who depend upon it.

This issue deals with the vary nature of Pembina Highway. Is its primary function to serve as a commercial shopping environment, or is its primary role to serve as a major thoroughfare leading in and out of downtown? Indeed, during the times when businesses rely on on-street parking (peak periods) there is a by-law prohibiting parking at this time. This by-law is needed to stimulate traffic flow along the strip.

4. A significant amount of strip malls and free standing buildings only have exposure to one way bound traffic.

As it was mentioned early in this chapter, there are more business establishments on the west side of Pembina Highway than the east. A number of owners/operators indicated that the west side of Pembina is a good place for business due to it being on the side of traffic leaving the downtown after work when commuters don't have as many time constraints. This strip is busy enough at peak periods that to be located on the other side would act as a deterrent to potential customers who may wish to frequent a store, but chose otherwise due

to traffic congestion. In addition, some business premises are actually screened completely from southbound traffic due to their orientation to the roadway.

5. Improvements to buildings will help overall business sales.

Physical improvements such as upgrading exterior facades, installing new signs and repainting help not only the vendors but the nearby residents and the overall character of this commercial environment. Improvements would go a long way in removing some of the negative stigmatism attached to commercial strips.

6. City should support new businesses along the Strip.

Two different independent businesses suggested that the City of Winnipeg is not helping small businesses. These businesses indicated that a graduated tax system, in which taxes do not increase until after the business has made it through the tough early years, would help small businesses immensely. This system might even encourage more small business infilling along the Strip and help at the same time to reduce the vacancy rate.

6.2.4 Some Final Thoughts About the Questionnaire Analysis

The following brief section will provide insight from the authors perspective into the completion of a questionnaire along Pembina Highway. At the same time, these perceptions provide additional insight into the businesses who operate along this Strip. Upon completing the questionnaires it was realized that there were basically four types of business encounters. These have been divided into those businesses which were cautious, difficult to deal with, easy to deal with and most likely to decline to complete the questionnaire.

The businesses classifications which were the most secretive of their operations and the most cautious about answering the survey were those in the Corporate Services classification. These businesses include Real Estate, Insurance, Lawyer's Offices, Consultants and Travel agencies.

The businesses who presented the most difficulty with respect to answering the questions were large chains stores, typically those in the Food - Fast classification. These business types are not controlled by any one person on the premises. All planning and major decisions occur at head office. For this reason, the people who manage these businesses do not generally have the knowledge or experience to answer questions relating to their trade area, customer base, or location characteristics. In most of these cases, managers answered the questionnaire but had no overall regard to how their business fits into the larger commercial strip environment. Short of seeming overly pessimistic, these businesses almost demonstrate a 'cookie-cutter' approach to planning and business operation. If a particular location fits a certain set of predetermined parameters, a store is built. From this perspective, it would seem that few locational considerations such as; (i) does the neighbourhood require the services the store would provide, or (ii) how would the store impact its surrounding urban environment, are taken into account.

The businesses which were the easiest to deal with in terms of questionnaire distribution were independent business owners. These businesses owners

demonstrated an astute awareness of the problems facing business operators along this Strip. They also provided many insights and perceptions which greatly enhanced the overall questionnaire analysis.

Lastly, the business types who were most apt to decline to complete the questionnaire were those in the Medical Services classification. Time constraints seemed to be the main governing factor in these instances.

6.2.5 Part B Summary

The questionnaire analysis has provided a detailed examination into the operations of businesses along Pembina Highway. This information was useful in understanding the nature of the ownership of businesses along this Strip, as well as for providing insight into business location decisions concerning expansion, movement, or opening up additional locations. In addition, this information was useful in trying to determine the changes which may occur along this Strip in the future. In this respect, we learned that the majority of businesses along the Strip are rented rather than owned, and that there is a significant amount of movement of businesses up and down the Strip.

The questionnaire analysis also allowed us to build a profile of the average business along Pembina Highway, and provided some insight into business concerns and perceptions. In particular, it was determined that most businesses are happy with Pembina Highway as a business location; however, they feel that parking, traffic congestion and competition are hindering their business.

PART C

6.3 An Analysis of Shindico Realty's Properties

The purpose of this section is to examine the property's owned and managed by Shindico Realty Inc. This examination will provide additional information on businesses along Pembina Highway from that gathered through the land-use and questionnaire analysis. In addition, the analysis of Shindico Realty's properties will provide a look at Pembina Highway from a property management company / developer perspective. Overall this section will help to qualify any planning suggestions and recommendations made in the final chapter of this practicum.

As the questionnaire analysis in Part B of this chapter indicated, commercial property developers and property management companies control a significant amount of development along Pembina Highway. The number of private individuals financing and engaging in property development make up a very small percentage of the total commercial component of an urban area (Interview: Shindleman).

Some of the dominant developers and Property Management companies along Pembina Highway include; Shindico Realty, Colliers Pratt McGarry, Lakewood Agencies, Superior Management and London Management (Table 6-5). Developers are by definition people or companies acting as an intermediary in

the process by which land users find locations for their activities. Clifford Guy summarizes the business of developing;

A developer profits either by (i) annual income from the developed site (rent exceeding capital needed to finance the purchase of the land) or (ii) by seeking an increase in the value of the land itself, such that the developer can make a capital profit by selling the site after its developed. (Guy 1980, 26).

Due to the domination of the Strip by developers, it is important to examine the properties held, owned or managed by a single developer in order to shed light on development practices and interests in operating along a commercial strip. Therefore, this section of the case study analysis will focus solely on the nine properties held, owned and managed by Shindico Realty along Pembina Highway.

6.3.1 Background Information

Shindico Realty (hereafter referred to as Shindico) is owned and operated by two brothers, Sandy and Robert Shindleman. Their company has been in existence since 1981 and currently boasts a portfolio containing fifty-five properties located throughout various areas of the City of Winnipeg. Shindico has been a dominant force in the commercial development scene. In fact, Sandy Shindleman has even being singled out as the 'undisputed king of the Winnipeg suburban retail strip mall.' (Cash 1989, 10). As this statement suggests, their holdings are predominantly commercial in nature, however, they also have a mix of high and low density residential properties.

6.3.2 The Planning Process

The business activities of Shindico are quite varied, they “will build new buildings, acting as their own project manager and general contractor, or re-design existing ones; change the use of some, spruce up and retro-fit others” (Cash 1989, 11). However, all of these options are dependent upon having concrete information upon which to base business decisions and then being able to finance the project – which is one of the most critical aspects of a development.

Shindico's day-to-day business operations are largely governed by the company's ability to assess the market on a continuous basis. This market assessment may take the form of a general evaluation of the overall retail environment of an area or, it may determine the economic viability of a particular site or location. All told, market analysis is the primary tool used by developers and property management companies to make business decisions.

All of the Shindico properties along Pembina Highway have had a market analysis completed for them. The principle behind a market analysis is to determine the economic viability of a commercial site based upon a number of site characteristics. These characteristics can include such variables as size, age, condition, layout, facilities (i.e. H.V.A.C, parking), location, and tenant structure and stability. In addition, care must be taken to consider the demographic and socio-economic variables of surrounding neighbourhood residents, surrounding business uses, as well as, the sites proximity to schools,

major intersections and other direct competing uses. All of these variables determine the marketability of a particular site. Table 6-12 provides an example of some of the key statistical information used to differentiate between various sites along Pembina Highway.

Table 6-12: Market Information On Shindico Properties (3 mile radius)

Address & Property Name	Population	Average Household Income	12 Hour Traffic Counts	No. Of Parking Stalls
756 - Lincoln Centre	194,118	\$43,187	46,401	120
1103-1107 Pembina Hwy.	167,056	\$46,182	52,441	56
1295 - South Side Plaza	167,056	\$49,548	46,063	130
1686 - Pembina Hwy.	140,087	\$50,671	42,013	27
1855 - Pembina Hwy.	104,936	\$53,395	42,675	Vacant Land
1861-1881 Pembina Hwy.	104,936	\$53,395	42,675	N/A
2005 - Pembina Hwy.	94,761	\$54,482	37,517	77
2750 - Greencrest Plaza	59,024	\$54,692	59,024	70
Dalhousie North S. Centre	61,403	\$55,163	41,055	N/A
AVERAGE	121,486	\$51,191	45,540	

Although current market information is vital to a successful business, the ultimate success comes in determining how the market will change and grow over the next ten year period.

Will that market grow? Is this an opportunity for someone to get in? How are they going to fare against competing shopping strips, competing tenants? How much are people spending in Lindenwoods on shoes, versus another area of a city? What routes are they likely to take to downtown? Where are they likely to drive by? What is their window vista? What is the probability of them shopping in the shopping strip? Will we get 25 percent of the people driving by from this four block range and 30 percent from that four block range? (Cash 1989, 13)

6.3.3 Shindico Realty's Nine Property's

This next subsection will examine the nine property's owned or managed by Shindico along Pembina Highway (See Map 3). (These nine property's contain twenty individual units, have a gross floor area of over 100,000 square feet, and have an assessed value of nearly seven million dollars (Table 6-13).

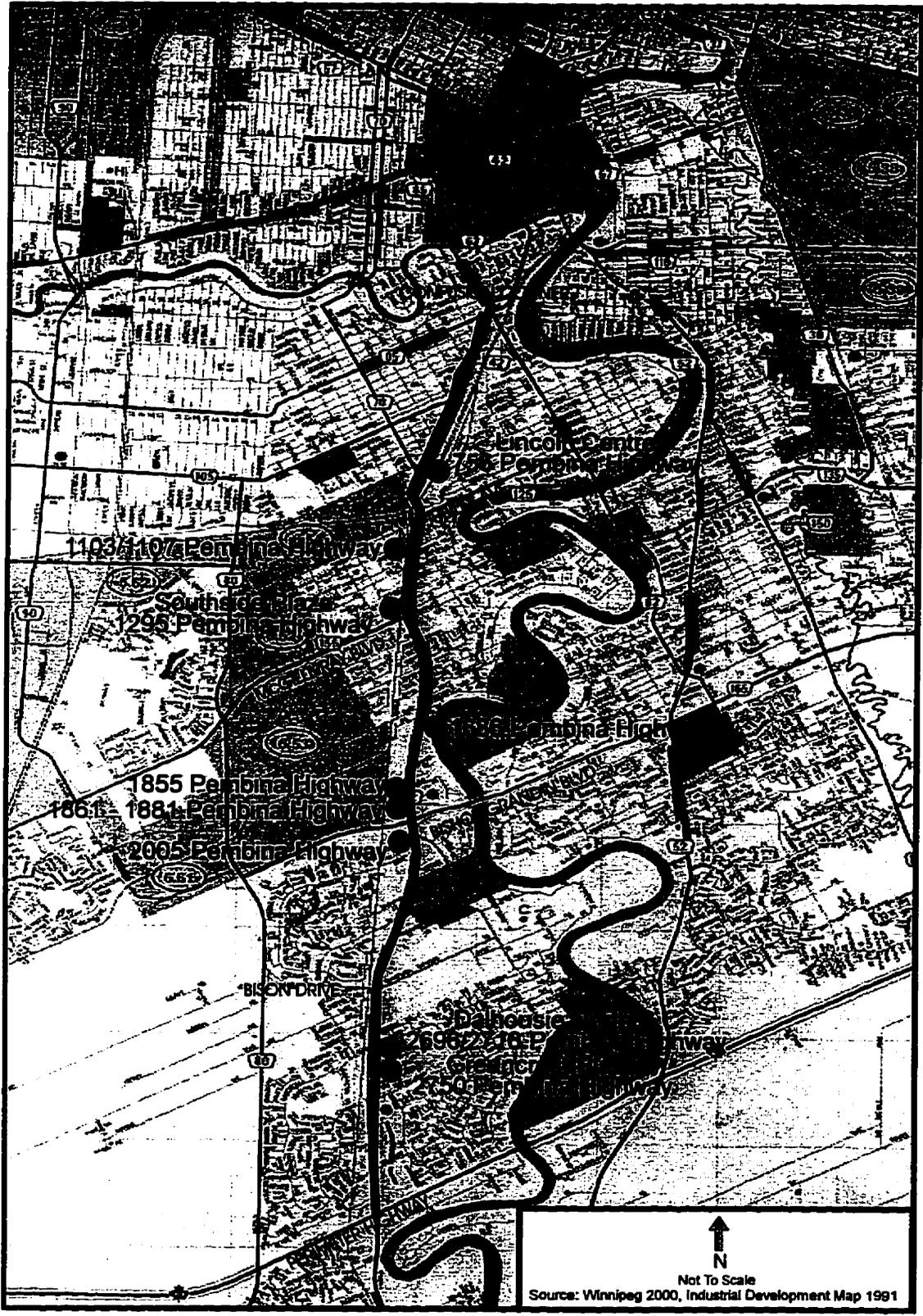
Table 6-13: Shindico Realty Inc. Property Holdings

Address & Property Name	No. Of Tenants	Total Square Feet	Assessed Value - 1994
756 - Lincoln Centre	4	19,324	\$1,506,000
1103-1107 Pembina Hwy.	2	4,705	\$660,000
1295 - South Side Plaza	5	20,405	\$1,171,000
1686 - Pembina Hwy.	1	10,600	\$552,000
1855 - Pembina Hwy.	0	Vacant Land	\$538,000
1861-1881 Pembina Hwy.	1	15,394	\$501,100
2005 - Pembina Hwy.	1	6,900	\$367,000
2750 - Greencrest Plaza	5	11,466	\$853,000
Dalhousie North S.C.	2	12,026	\$848,000
TOTAL	20	100,820	\$6,996,100

6.3.3.1 Lincoln Centre, 756 Pembina Highway

This property is located approximately 4.8 kilometres from the central core. The total size of the property is 69,300 square feet with over three hundred feet of frontage along Pembina Highway's east side. This site is currently comprised of two separate commercial structures, the first of which has three units totaling 15,724 square feet.

Map 3: Shindico Realty's Properties Along Pembina Highway



The units in this building are currently rented to a medical walk-in centre, Rogers Video and the third unit is vacant after having changed tenants twice since 1987 (formerly occupied by Uncle Willy's Buffet Restaurant and Changes Nite Club).

The second building on the site is a free standing structure with approximately 3,600 square feet of space. This building is currently leased to a Pizza Hut franchise. Combined sales for the businesses occupying these two buildings is in excess of two million dollars per year.

Other characteristics of this site include;

- This property is surrounded by a large automotive dealership, several restaurants, and a vacant parcel of land which was a former motel (demolished in March 1997).
- Pembina Highway is six lanes wide at the point of this property, with twelve hour traffic counts placed at 46,401 vehicles.
- There is no on-street parking at this point along Pembina Highway.
- There are twenty-one restaurants and eight automotive dealerships located within 1.6 kilometres of this site.
- Assessment value per square foot is \$77.93.
- Shindico Realty has held the property since 1985.

6.3.3.2 1103 / 1107 Pembina Highway

This site is actually two adjacent parcels of land located just south of Jubilee Avenue on the west side of the strip. There are two buildings on these two parcels of land and each has been built within the past five years. Total land area for these parcels is 40,817 square feet with the gross leasable area being

4,705 square feet. The current tenants of these two buildings include Kentucky Fried Chicken (2,612 sq. ft.) and Arby's restaurants (2,193 sq. ft.).

Immediately surrounding the property is a newly constructed service station, the Royal Canadian Legion, a strip mall, a bowling alley and a series of small independent retailers.

Other characteristics include;

- Twelve hour traffic counts for this section of Pembina Highway have been determined to be 52,441.
- Assessed value per square foot is \$140.28.
- No on-street parking along this portion of Pembina Highway.

6.3.3.3 Southside Plaza, 1295 Pembina Highway

This property is located in the area known as Fort Garry on the west side of Pembina Highway at the intersection of McGillivray Boulevard which is an arterial link to the new residential developments of Lindenwoods and Whyte Ridge. The property has a gross area of 57,656 square feet, of which 14,024 square feet is leasable space. The site is currently occupied by The Keg (8,019 sq. ft.), Toy Traders (2,700 sq. ft), a vacant unit (1,280 sq. ft.), Robin's Donuts (1,350 sq. ft.), and Presto Pizza (675 sq. ft.). This property also has 6,381 square feet of office space on the mezzanine floor (currently vacant) and part of the parking lot is leased to Discount Car Rental.

The neighbourhood surrounding this property is considered fully developed except for a vacant parcel of land directly across the Strip. As such, only a

minimum amount of additional development can occur on Pembina Highway without removing existing structures. Surrounding development includes; several strip malls, a large grocery store, several small retailers, a 169 room hotel, and several high density and low density residential developments.

Other site characteristics include;

- Twelve hour traffic counts along this six lane segment of Pembina Highway have been estimated at 46,063.
- A assessment value per square foot of \$83.50.
- No on-street parking at this location along Pembina Highway
- The building on this site is thirty-two feet in height and clearly dominates other commercial developments along this point of the Strip.
- The site held a grocery store as recently as 1984.

6.3.3.4 1686 Pembina Highway

This property has just recently been leased by Ruckers Entertainment Complex. This site was officially purchased in June of 1996; however, Shindico managed the property for some time prior to this. Former tenants of the property were The Salvation Army and prior to this, Factory Carpet.

The property (60,439 gross sq. ft.) is located on the east side of Pembina Highway, and contains one large freestanding building with 10,600 square feet.

The immediate area surrounding the site includes a large strip mall, several restaurants, a newly constructed big-box retailer, a number of luxury condominium units and high rise residential apartment buildings.

Other site characteristics include;

- Pembina Highway's six lanes of traffic generate a twelve hour traffic count of 42,013 vehicles.
- 135 feet of frontage along Pembina Highway.
- The property has the potential to be subdivided into two separate parcels. The front parcel would face the Strip and the other would over-look the Red River. Each parcel can be developed with separate access and signage rights.

6.3.3.5 1855 Pembina Highway

This property, located on the west side of Pembina Highway, was acquired by Shindico in March of 1995. The site had consisted of a 28,435 square foot strip mall. However, economic difficulties facing this development, due in part to poor orientation to the roadway, forced the demolition of the building. At present, the site remains vacant. A proposal was in place for a 30,000 square foot Office Depot to be built on site; however, factors have since caused this deal to be withdrawn. The gross area of development of this property is 76,929 square feet.

Surrounding uses include; a Power Centre, several strip malls, Bishop Grandin Boulevard, several restaurants, a motel, residential apartment complex, and vacant buildings to the south and east of the property (former Bonanza restaurant and Ramada Hotel).

The twelve hour traffic count for this area along Pembina Highway is 42,675.

6.3.3.6 1861 - 1881 Pembina Highway

This property is located adjacent and just south of the property detailed above (1855 Pembina Highway). Acquired in March of 1995, the site has a building complement of a linear shopping centre, restaurant, and two automotive buildings. The restaurant building (6,286 sq. ft.) was recently torn down leaving the total developed area of 19,711 square feet. Gross area of the site is 62,584 square feet and all structures, save two automotive buildings leased to Zirino's Automotive and Uhaul Centre, have been torn down.

Other site characteristics;

- St. Vital Shopping Centre is located a three kilometres east along Bishop Grandin Boulevard.
- Twelve hour traffic counts have been determined to be 42,675. This 1992 count is forty percent higher than a 1986 count in the same area along Pembina Highway (30,000).
- The site is configured in an elongated shape which restricts its frontage on Pembina Highway.
- Assessment value per square foot is \$20.88.

6.3.3.7 2005 Pembina Highway

Also located on the west side of Pembina Highway, this property was acquired and first developed in 1994. There is currently only one building on the property totaling 6,900 square feet which is leased to Earls restaurant. The gross area of development on the site is 46,000 square feet.

Surrounding uses include a substantial cluster of New Format Retail uses, strip mall, golf course, and several automotive service uses on the opposite side of

the strip. Immediately south of the property is undeveloped land which is rumored to be a future gas station development.

Other site characteristics;

- Twelve hour traffic counts for this six lane portion of the Strip are 37,517.
- Assessment value per square foot is \$53.19.

6.3.3.8 Dalhousie North Shopping Centre, 2696 / 2716 Pembina Highway

The Dalhousie North Shopping Centre is located just over one kilometre from the Perimeter Highway on the east side of Pembina Highway. This property is managed by Shindico Realty and currently contains two separate building structures (Goodyear, 5,526 sq. ft. and Blockbuster Video, 6,500 sq. ft.) Both of these buildings are located on a 66,097 square foot parcel of property.

Other site characteristics;

- Twelve hour traffic counts are 41,055.
- Plans are being finalized for 3,000 square feet of additional development.
- Assessment value per square foot is \$70.51.
- Surrounding this property are a number of automotive dealerships, strip malls and restaurants, as well as a church.

6.3.3.9 Greencrest Plaza, 2750 Pembina Highway

Greencrest Plaza is the Shindico Property located the farthest south along Pembina Highway on the east side of the the intersection of Greencrest Avenue. This property is located only two blocks from the Fort Richmond Shopping Centre. Other surrounding uses include several strip malls, and a library. Two

building structures exist on-site. The first of which is a five unit strip mall, home to Hyline Credit Union (2,573 sq. ft.), Subway (1,200 sq. ft.), the Richmond Family Chiropractic Centre (1,774 sq. ft), Theme Video (900 sq. ft.) and one unit is vacant totaling (1,410 sq. ft.). The second building is occupied by a Pizza Hut franchise with a total of 3,660 square feet.

The property has a combined leasable area of 11,466 square feet and a total area of development of 62,843 square feet.

Other site characteristics;

- Twelve hour traffic counts for this six lane portion of Pembina Highway are 41,055. Three hundred northbound vehicles per hour access Pembina Highway from Killarney Avenue and Kirkbridge Drive (two blocks south of this property).
- Assessment value per square foot equals \$74.39.

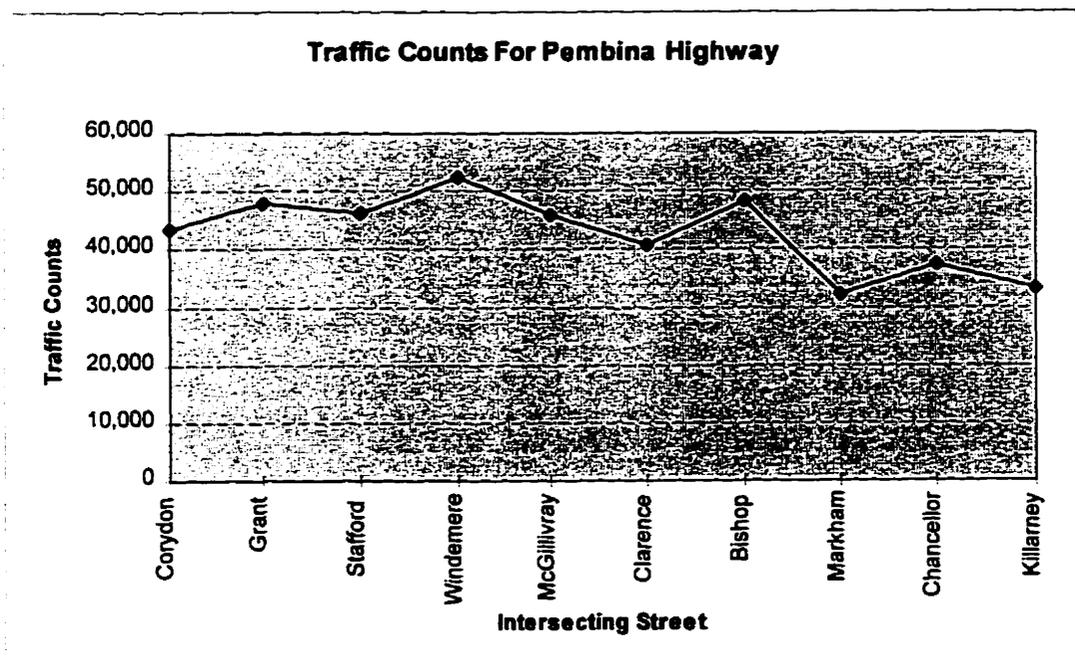
6.3.3 Broad Findings

Examining Shindico's development practices and their individual properties lead to a number of broad findings. Overall, it was determined that an ongoing market analysis is the primary means by which developers and property management companies plan the commercial strip. This market analysis indicates why the value of a parcel is not limited solely to location or size, but rather, is a function of a bewildering array of variables which range from quality of existing tenants to fluctuations in the commercial real estate market within the City of Winnipeg. In addition, this analysis indicated that having access to a major intersecting arterial, high traffic volume and significant surrounding

development does not ensure a successful business operation. For example, the amount of frontage or a businesses orientation to the Strip may be the deciding factor as to whether the site is economically viable.

Other broad findings include the fact that definite trends develop when analyzing residential population and traffic counts. The average income of the surrounding residential population increases and the population density decreases as you move southward along Pembina Highway. Furthermore, except for a few peaks, traffic counts also decrease as you move south along this Strip (Figure 6-7). However, traffic counts are not only a function of the proximity to downtown, but also to the proximity to major intersecting arterial roads (Grant, McGillivray, Bishop Grandin).

Figure 6-7: Pembina Highway Traffic Counts



6.3.4 Specific Findings

In addition to the broad findings state above, a number of more specific findings arose out of the analysis of Shindico's properties. In particular, it was determined that the majority of Shindico tenants are chain stores or franchise operations. This may suggest that developers and property management companies may have been partially responsible for the apparent decline in the number of small independent retailers operating along this Strip. From a property management perspective, chain and franchise stores are the types of tenants which are more stable and reliable in terms of rent collection. Another reason why chain operations dominate is due to the fact that they are preferred over independent businesses by current financial lenders.

A further examination of Shindico's properties indicated that they have a wide variety of tenants in their buildings in terms of size and structure. All of their properties have on-site parking, are occupied solely or in part by a well known franchise or chain store (i.e. Pizza Hut, Blockbuster Video, The Keg) and are in excellent physical condition. These attributes make Shindico's properties appealing to a wide array of businesses seeking to locate along Pembina Highway.

In addition, it was determined that the average size of the individual units owned or operated by Shindico Realty is approximately 3,572 square feet, well above the average determined by the questionnaires which suggested that the average

businesses was between 1,000 and 2,000 square feet. Through the analysis of Shindico's properties , it would appear that a large percentage of the property land area is not being effectively utilized. At present, only one fifth of the total land area of each site is being used for actual structural purposes. The rest of the area is being devoted to parking and landscaping requirements as set out in the City of Winnipeg By-laws. In addition, it is an accepted fact that developers feel higher parking ratio's equate to more success for the property as a whole (Interview: Shindleman).

The last specific finding came from personal access to a Shindico database which indicated that the number of vacant parcels of land for sale along Pembina Highway are at a premium. In total, there have been only twenty-five vacant land sales along this Strip since 1988. This supports the land use analysis where it was determined that as of June 1996, there were only eight vacant parcels of land along this Strip.

6.3.5 Part C Summary

Through the analysis of Shindico's properties it is evident that market analysis is the primary tool utilized by developers in determining the economic viability of buildings and land. In addition, the findings from this analysis suggest that the operations of developers and property management companies along Pembina Highway have a tremendous impact on the Strip as a whole. They heavily influence business size, type and locational decisions.

This analysis also indicated that the properties owned or operated by Shindico tend to be larger in size than the questionnaire analysis indicated was the average. In addition, it was determined that the building structure only averages twenty percent (20%) of the total developed area of each site.

Unfortunately, this analysis determined that there is no set formula for successfully locating a business. Having high traffic counts, being located next to business generators and being located near a major intersection arterial can all be offset by something as basic as having a building placed ineffectively in terms of orientation to the roadway.

6.4 Chapter 6 Summary

The purpose of this chapter was to perform a thorough examination of business establishments along Pembina Highway. This was accomplished through the use of a land-use analysis, questionnaire analysis, and an analysis of the properties owned or managed by Shindico Realty.

The land use analysis provided insight into the diversity of uses present along Pembina highway. In particular, we discovered that a number of uses dominate the Strip including; Retail Miscellaneous, Residential, Corporate Services and Medical Services. These five uses accounted for almost fifty percent of the uses along the whole of Pembina Highway. In addition, it was determined that major arterials such as Jubilee Avenue, McGillivray Boulevard, Bishop Grandin

Boulevard, Bison Drive and the Perimeter Highway provide natural intersecting break points along Pembina Highway. Of these five segments, the segment from Jubilee to McGillivray was found to be the area along Pembina with the highest density of commercial development.

The questionnaire analysis provided a detailed insight of the businesses along Pembina Highway. By receiving completed questionnaires from 100 businesses along the Strip it was possible to view patterns and trends that have developed. In addition, this analysis assisted in developing a profile of the average business characteristics along Pembina Highway.

The final component of this chapter was an analysis of the property's owned and managed by Shindico Realty. This analysis helped to narrow the focus of this chapter by providing insights into the development practices and perspectives of a prominent property management company along Pembina Highway. This information came in the form of tenant ownership, detailed sizes of lots and property configuration, site history and market analysis techniques. In addition, Shindico Realty provided information pertaining to traffic counts and demographic and socio-economic characteristics of the areas surrounding each of their nine properties. From the analysis it was determined that the individual success of businesses is very difficult to predict and not solely dependent upon location or business traffic. Overall, the Shindico property analysis has revealed that developers do play a significant role along the Strip. They are not 'planning'

the strip per se; however, they are to a large degree controlling what is developed and what types of businesses locate along the Strip.

The next chapter will utilize the findings of this chapter in assessing the role of the planner with regards to the commercial strip.

CHAPTER 7: PLANNING THE COMMERCIAL STRIP

The efforts of this practicum have been directed towards examining how to successfully plan for the commercial strip. In attempting to answer this question, the history of the commercial strip was researched, and historical and contemporary techniques used to plan for the strip were examined. In addition, the commercial strips relationship to the other commercial components of a city was examined. This research culminated in the examination of one particular commercial strip in order to provide insights into the functional characteristics of the businesses who occupy this commercial environment.

This chapter will examine both prominent authors ideas and personal recommendations on how to successfully plan for the commercial strip. Using these ideas and the findings and research of previous chapters, the chapter will then examine how they specifically relate to planning for Pembina Highway.

7.1 Alternative Planning Trends and Ideas

Throughout the course of researching and writing this practicum, a whole host of ideas which suggest new approaches for planning the commercial strip have been uncovered. These ideas relate specifically to how planners can successfully stimulate change to the bland and seemingly inflexible environment of the commercial strip. It is important to clearly state that these ideas, if adopted, would fundamentally change the commercial strip. It would be

changed and redeveloped to incorporate nodes, have a specific focus, and exhibit a number of internal relationships.

Throughout this practicum it has been mentioned that current planning practices are inadequate in their attempts to plan development along commercial strips. However, even though this seems to be a reality, it should be noted that there is a substantial body of literature in existence which provides suggestions and alternative methods for planning the strip (Archimore 1993; Barnett 1992; Knack 1986; Nasmith and Colthoff 1996; O'Connor 1988; Silberberg, et al. 1976). Many advocate that cooperation among the professions of planning, urban design, landscape architecture and architecture, will achieve more useful results.

A number of ideas presented by the aforementioned authors recognize the need for traditional land use planning controls to be relaxed. Even though these controls have been somewhat effective during past periods of rapid suburbanization, they are no longer flexible enough to meet the changing demands of the commercial strip environment. In this regard, it has been suggested that care should be taken not to zone vast expanses of property highway commercial. More proactive measures should be taken to address what type of retailing environment is required and desired over the long term. An example given by Jonathan Barnett suggests that "instead of continuous commercial zoning, the strip could be rezoned to a special mixed-use district

which permits garden apartments, townhomes, and ground floor offices and commercial development” (1992, 100).

Current zoning patterns of strips along highways ... provide both too much land and too little space to encourage compact alternative forms of development (Barnett 1992: 98).

Rezoning is only part of the solution, organizations such as the Main Street Advocacy Group put forth a number of additional ideas, all of which will alter the traditional form of the commercial strip. This group is comprised of a number of planners, architects, urban designers and politicians and, after establishing in Ontario in 1990, committed itself to creating healthy and vibrant main streets in Ontario. The Group is now focusing their energies on transforming the commercial arterial into a place where people want to live, work and shop (Nasmith and Colthoff 1996, 22). They suggest that more simple and flexible built form guidelines would protect sun access for adjacent residential uses while encourage development at transit-supporting densities. In addition, reducing the regulations for smaller development projects and having parking requirements based upon market demands and not predetermined formulas would help to identify the commercial strip as a unique environment. Lastly, the Group firmly states that a good pedestrian environment, one which encourages pedestrian and cycling movement, is essential for a successful commercial strip.

By reorganizing the existing setback zone to include parking spaces, cycling lanes and tree-lined pedestrian walkways, a dysfunctional commercial strip can be gradually transformed into a thriving, vibrant community where people can live, work and shop. (Nasmith and Colhoff 1996: 22)

If designed correctly, pedestrian movement will help transform the commercial strip from an isolated automobile oriented roadway to an environment which fosters community and social interaction. From this perspective, the quality of the retail environment will be enhanced significantly, as well as improving the quality of life for those residents which live along the Strip. An example of how to accomplish this involves incorporating pedestrian and cycling trails and to ensure that the sidewalk is an appealing place to walk and stroll along the strip; thereby, discouraging people from driving from shop to shop. This would only be possible if we re-think our current approach to parking lot design and construction. As noted by a number of questionnaire respondents along Pembina Highway, the vast parking lots found in front of the strip malls they occupy actually hinders the operation of their business, and forces people to travel by car to shop. Businesses prefer to have significant amounts of roadside exposure, and having a one hundred foot setback to satisfy parking requirements reduces their visibility and interaction with the strip. These ideas are only an example as to how and in what way a fundamental shift will occur with respect to the commercial strip.

Another suggestion for successful planning of the commercial strip is to resist the temptation to impose grandiose landscaping and design schemes on the strip in the hopes that will affect change along the strip. A fundamental shift in the philosophy behind how we think and plan for this type of commercial environment is needed in order to affect change. Consider the following

crucial step towards planning for a successful commercial strip. One point worth mentioning is the fact that in addition to the planning and design techniques and suggestions listed above, the success of the commercial strip will be very much dependent upon the contributions of all the actors involved. More

Any attempts to plan for the commercial strip will also have to incorporate sound transportation planning principles. Particular attention will have to be paid to traffic volume, capacity and the integration of public transit. This will only be possible if the strip is examined from boundary to boundary in order to determine functional concentrations. Transportation and design considerations, in addition to other land use standards can then be applied to the various segments. In this respect, it is noted that the kind of landscaping and design in a pedestrian environment will be quite different from the sections oriented to the automobile (Knack 1986, 25). The understanding of these functional characteristics is a

Planners have not demonstrated much ability to plan for the strip as a unique kind of place. Rather, they have typically attempted to impose controls borrowed from other countries. (ie. desire to turn strips into Parisian tree-lined boulevards or replicas of planned new town (boroughs). If a plan is too foreign for the environment it will not work; people will not know how to use the new space. Planners must be aware of the history and context of a place if the planning decisions are to work. A few plans have begun to recognize that commercial strips need plans and guidelines which relate to the functions and aesthetics of the strip as a unique kind of place (O'Connor, 1988, 147-150).

University;

statement by Anne O'Connor, a masters student from San Diego State

specifically, residents must be patrons to the nearby stores, various levels of government must cooperate with the business community to assist in the alleviation of problems specific to the area, and property owners must realize that it is in their own best interests to contribute towards the improvement of building structures (Silberberg, et al. 1976, 20). In addition, incentives must be developed which will encourage developers and property management companies to put community-oriented concepts and designs into practice. Developers feel that these proposals require additional land, more complex leasing negotiations, and they require increased capital which puts a development at a competitive disadvantage (Archimore 1993, 38). The planner could help facilitate the cooperation of the developers by providing financial incentives (i.e. tax relief), relaxing land use controls and other building regulations (i.e. setbacks, parking ratios), and by educating the developers as to the benefits of alternative designs such as; increased business sales, tenant stability, and increased property values.

Significant consideration to the above ideas will allow planners to appreciate how the commercial system should be integrated with other components of an urban area. In doing so, planners will be in a better position to take a much more proactive role in understanding retail needs, “develop ways of guiding what is most appropriate for the community and have the tools available to work with retail interests to ensure that development is seen with long-term horizons and is sustainable.” (Jamieson 1996, 10)

7.2 Planning Pembina Highway

Each commercial strip is unique in the roles it plays within the urban framework. For example, it may act as a major thoroughfare, contain a unique specialty shopping district, or may even act as a gateway, welcoming tourists and visitors to the city. In addition, the volume of traffic it handles, and the variety, structure and density of retail and non-retail developments along the strip help to define its role and place within the urban environment. For this reason, there is not one solution or one specific manual for success for all commercial strips. Each strip must be examined both in isolation and in relation to other commercial components of the urban area upon which it is found. Only after the strip is exhaustively examined and analyzed can one begin to make recommendations concerning improving the efficiency and functionality of this strip.

7.2.1 The Role of Pembina Highway

The examination of Pembina Highway revealed a number of unique characteristics which help to define its role within the City of Winnipeg. In particular, this Strip acts as a primary arterial route for automobiles traveling into the downtown. At some points along this Strip traffic counts reach nearly 60,000 vehicles per day. Pembina Highway also acts as a major trucking route via Provincial Highway Number 75 south to the United States border. Due to this connection to the United States, Pembina Highway also acts as a gateway to visitors with this Strip being the first glimpse of the City of Winnipeg.

Pembina Highway, in conjunction with the St. Vital Shopping Centre provide the vast majority of retailing space within south Winnipeg. Although retail activities account for a large percentage of functional units along this Strip, it is also home to a diverse number of uses including, a hospital, a university, government offices, and a wide variety of medical and corporate offices.

Pembina Highway is also one of the longest and most densely developed strips within all of the City of Winnipeg, and is heavily influenced by a large number of developers and property management companies who control the majority of properties located along it.

In addition to the above characteristics, Pembina Highway also shares some typical characteristics found in commercial strips across North America. In particular, this Strip has an average vacancy rate of approximately ten percent (10%), has traffic congestion problems and is oriented almost completely to vehicle traffic, with very little consideration given to pedestrian movement. In addition, Pembina Highway is dominated by chain and franchise operations which are typically rented and larger in size than most independent businesses. More importantly, this Strip is being planned by land use controls and regulations, there has been no attempt to plan the strip within the context of the overall commercial structure of the City, surrounding neighbourhood or understand the role of the functional ties within the Strip. For example, what businesses are tied specifically to what location and for what reason.

7.2.2 Recommendations For Pembina Highway

The recommendations which are detailed in this subsection are based upon the main belief that a fundamental shift must occur with respect to planning the commercial strip. Decades of traditional land use planning along Pembina Highway has had the affect of fostering a very bland and perhaps not a very functional, const effective land use and commercial environment. The three recommendations detailed below are based upon the planner playing a much more proactive role in improving the commercial strip.

- (i) Planners must ignore the temptation to address problems associated with certain areas of the strip, but rather, must examine the commercial strip from boundary to boundary.

The reason why Pembina Highway must be examined as a whole unit is to determine the functional nature of this Strip. Answers to such questions as “what is the role of this Strip”, and “who does this Strip serve” can only be answered after a detailed analysis of the businesses who occupy the strip has occurred. Traditionally, planners have tried to determine solutions for small problems such as parking and safety. However, these small ‘fixes’ do not address the greater strip wide planning concerns. For example, how can problems relating to traffic congestion be dealt with effectively if you do not understand the functional role of this commercial environment. Perhaps those businesses which rely heavily on passing traffic have come to depend upon the slow down in traffic for increased store recognition? Perhaps the alleviation of traffic will encourage even more commuters to travel along this Strip? From this perspective, it can be

appreciated that a thorough understanding of the environment being planned is essential if there is ultimately going to be success for the Strip.

Examining the whole of Pembina Highway also enables planners to understand what the dominant 'nodes' or segments are. This information may be useful in determining which areas should receive more concentrated development in the future. Perhaps some of these 'nodes' should be developed into neighbourhood or community centres. This information is also useful in establishing urban design guidelines. For instance, if businesses along a certain segment of the Strip rely heavily on the surrounding neighbourhood for survival, then a conscious effort can be made to increase pedestrian movement to allow residents to shop and stroll.

- (ii) The traditional land use controls currently used to 'plan' the commercial strip must be re-examined and in some cases, changed to more accurately reflect the unique nature of this type of commercial environment; to allow it to evolve as retail trends change and to facilitate a strong neighbourhood orientation.

Examining the historical growth of the strip has provided a strong argument as to why traditional land use controls should be relaxed. Huge expanses of Pembina Highway are currently zoned C2. This classification is "intended to regulate more intensive commercial sites that do not have a local or neighbourhood orientation." (City of Winnipeg (F) 1995, VII-1) One must question how it was determined whether an area has a neighbourhood orientation or not. Did the people who drafted the zoning by-laws survey the business owners along the Strip to determine if in fact they were oriented to the surrounding

neighbourhood? The findings of this practicum also suggest that there is a significant amount of inter-strip movement of businesses along Pembina Highway. Zoning classifications are not updated as this Strip evolves over time.

The relaxing of zoning by-laws would enable planners to plan for the commercial strip by accounting for changes which have occurred within and around the Strip over time. This approach would contrast current planning techniques which attempts to control the strip by making it conform to existing zoning regulations. In addition, if more appropriate built form guidelines were introduced then developers may be encouraged to experiment with more community oriented design proposals (if you can recall, the average building on Shindico Realty's properties consumed only one fifth the total property area). These proposals -- an example of which is detailed in section 7.2.2.1 -- can help planners mitigate many of the negative problems associated with commercial strips.

(iii) Planners must understand the role, and obtain the cooperation of the developers and property management companies along Pembina Highway.

Obtaining the cooperation of developers along the strip would go a long way towards helping change some of the ineffective building practices that have dominated the commercial strip for several decades. Examples of which include, building huge parking lots in the front of strip malls, constructing buildings which dominate surrounding structures, and orienting buildings and strip malls towards the strip while alienating the surrounding residents.

The role of developers and property management companies along Pembina Highway is crucial in order to successfully plan for this commercial Strip. The findings of this practicum suggest that these companies (i) dominate the strip in terms of the number of properties they control, (ii) have already completed detailed analysis of the commercial market, and (iii) are arguably the ones currently controlling commercial strip development. Developers and property management companies largely determine what types of tenants lease their properties, and in doing so, are planning the future environment of Pembina Highway. For this reason, it is easily understood how and why they play such a vital role in successfully planning for the commercial strip and that they will have an affect on any recommendations made for this type of commercial environment.

7.2.2.1 Alternative Design

Once the Strip has been examined, land use controls relaxed and the role of the developer and property management company has been examined, then individual problems and planning issues along Pembina Highway can be addressed. One way these can be addressed is to incorporate alternative urban design guidelines into new and existing developments along the Strip. Many of the most notable alternative urban designs come under the guise of 'New Urbanism' of which examples include; Pedestrian Pockets, Traditional Neighbourhood Developments, Urban Villages, Compact Communities and Transit-Oriented Developments (Calthorpe 1993, 41). These design ideas

suggest that a more compact clustering of uses (nodes) at certain points along the strip would help create meaningful public realms which would improve the quality of life for all who interact with the strip. These nodes must be of a human scale, and incorporate a wide diversity of uses and population (Calthorpe 1993, 17).

In order to appreciate the benefits alternative design would have on mitigating the negative qualities of the commercial strip, the author has provided an design proposal for the Fort Richmond Shopping Centre based upon the Transit-Oriented Development (TOD) concepts put forth by Peter Calthorpe. The shopping centre has the potential to be developed into one of the focal nodes along Pembina Highway. Other possible nodal areas along this Strip include the Grant Avenue intersection, McGillivray Boulevard intersection and the north side of Bishop Grandin Boulevard overpass (See Map 2).

The Fort Richmond area along Pembina Highway is currently dominated by retail uses. Including the twenty-four stores located in the Fort Richmond Shopping Centre, there are thirty-four retail units located in four strip malls, three gas stations and a free standing restaurant located in the immediate vicinity.

The purpose of including this proposal is to provide an actual 'Pembina Highway' example of how planning and design can facilitate changes to current land use controls and encourage different roles and approaches by developers (Figure 7-1). In addition, this design concept illustrates in what ways the current

regulatory environment which is 'planning' Pembina might be altered to more accurately reflect the true potential of commercial strips. For the proposal to be successful, land use controls would have to be altered and the developers would have to take a vested interest in alternative design proposals and how they could financially and socially benefit them.

The principles behind the project were based upon, but not limited to the following; (i) the design proposal must effectively incorporate pedestrian movement into the subject property, as well as the surrounding areas, (ii) public transit 'park & ride' facilities must be designed, and (iii) only minimal modifications to the existing building envelop can take place.

Based upon these principles, a concept was designed to account for the planning issues discussed in both the previous section and the previous chapter. These issues include; traffic congestion, pedestrian movement, competition and parking space. All four of these issues were instrumental in creating a final design concept.

This proposal directly alleviates traffic congestion and encourages pedestrian movement by incorporating attractive and easily accessible park 'n' ride facilities, and pedestrian and cycling pathways. In addition, vehicular traffic is controlled in the area rather than allowing vehicles to travel in any which direction.

Overall, entertainment and sporting facilities, open space, and gathering areas help to entice people to do more than just 'shop' when they visit this area. Stores, people, places and activities help to make this space a focal point for the surrounding neighbourhoods.

In order to redevelop the area into more of a community focus, it was necessary to re-orient parts of the shopping centre and strip mall away from retail-dominant uses. In this respect, community focused uses such as a library and a small community theatre were proposed. The reason behind this is that in order to encourage people to meet and socialize and create a more meaningful public space, it is necessary to offer more than simple shopping activities. In this respect, the library and theatre would be supplemented with sports facilities, and market stalls. It should be noted that the above comments and suggestions are made without having completed a detailed market analysis of the area. The suggestions and opinions stated serve only as an example of the types of changes which can be made in an area along Pembina Highway.

Lastly, the issue of parking was addressed by focusing on what businesses would require parking and at what times of the day. Based upon this information, even though the total number of parking spaces was reduced considerably, the focus of the parking was not affected. By altering the mix of uses in the space, there would not be any conflicts over parking space. For example, instead of two large retailers requiring vast amounts of parking during

weekends and early evenings, the area is now reoriented so as to provide parking for a grocery store which would not conflict with the parking requirements of the theatre who would need the space in the early to late evenings.

Overall, this project was not intended to be a model for all shopping areas along Pembina Highway, but rather, it provides an alternative perspective by which to view traditional automobile oriented spaces. In order for this type of proposal to become a reality, parking regulations will have to be relaxed. This fact is based upon the belief that certain uses require the bulk of their parking at different times of the day. A proposed theatre's nighttime parking requirements would not conflict with the parking needs of the Safeway grocery store which is rarely busy in the late evenings. In addition, focusing more on the neighbourhood and incorporating effective public transit would increase pedestrian traffic and reduce the need for parking.

This section has endeavored to provide substantive ideas and recommendations for improving and in essence, successfully planning for Pembina Highway. The above ideas and recommendations would go a long way to mitigating the problems and concerns voiced by business owners/operators along Pembina Highway. In addition, these recommendations would enhance the pedestrian environment which has been argued to be one of the most vital components of successful planning for the commercial strip.

7.3 Who Benefits from Successful Planning?

All parties involved benefit if the problems surrounding the commercial strip were addressed. The merchants along the strip benefit due to greater sales which results in increased business stability.

This stability benefits the property developer and property management company in that the value of their properties are increased and become more attractive to future tenants should an opening become available. Municipal governments also benefit from an increase in business and property taxes. The residents benefit because they have a more pleasant and safe environment to shop and stroll and the surrounding neighbourhood experiences greater cohesion and this strengthens the community. Lastly, the strip itself benefits because a healthy commercial environment influences the preservation, renovation and revitalization of houses and building, and in effect stabilizes the built form.

7.4 Recommendations for Further Research

There are two areas which require future research. The first of these is the subject concerning commercial saturation. As indicated throughout this practicum, there is a broad lack of attention paid to studying the commercial structure of urban areas. It is therefore understandable that even less information is available which examines how much development individual areas and the market as a whole can sustain. The 'saturation' point as it has been

coined is widely left to individual governments and the market to determine. Unfortunately, standards created are usually based more on individual perceptions of planners and city councillors than on factual data (Interview: Ken Jones).

The second area in need of further research has to deal with the subject of commercial strips in newly developing or redeveloped areas. There are a few examples of cities which have been designed exclusive of any commercial strips (i.e. Australia's capital city Canberra). Do we need commercial strips? This practicum has addressed the role of existing commercial strips and few can argue that they do not serve an important role in the commercial structure of cities. However, are additional commercial strips required? The answer to this question may have a profound impact on how planners, urban designers, and other professions view the commercial strip.

During the course of the past year the author has had much time to reflect on the issues and ideas surrounding planning for a commercial strip. Since the time of the original land use survey there has been a number of changes which have already occurred. At least three new buildings have been constructed along Pembina Highway and a number of units have changed occupancy. In addition, undocumented rumors surrounding the expansion and opening of several new chain stores along Pembina Highway (Canadian Tire, Superstore) have surfaced. Successful planning of this commercial strip will be forever dependent

upon continuous research and updating of databases in order to truly appreciate the unique nature of this retailing environment.

7.6 Chapter 7 Summary

The purpose of this chapter has been to examine how to successfully plan for a commercial strip. To accomplish this task, the ideas of prominent authors who have published material which relates to successful planning of the commercial strip were examined. These ideas, in conjunction with the analysis and research presented throughout this practicum, helped to identify recommendations which would fundamentally change how the commercial strip is planned. In particular, it was recommended that planners place attention on examining the whole of the commercial strip, and not individual segments. In addition, recommendations suggest that the current zoning and regulatory controls in existence along Pembina Highway should be relaxed to enable the development of more alternative design proposals which would help mitigate many of the negative problems associated with commercial strips. These recommendations suggest a fundamentally new way to approach planning the Strip. This new approach incorporates more concentrated urban development at certain focal points or 'nodes' along the Strip. One node in particular, that of the Fort Richmond Shopping Centre, was redeveloped using the concepts of 'new urbanism' in order to illustrate how changes to the built form of the strip can mitigate many of the problems which have been identified along the Strip. Lastly, this practicum

recommended that planners must appreciate the role of the developer and property management company along the Strip.

The final sections of this chapter examined the benefits of successfully planning the commercial strip as well as, providing a few recommendations for further research into this subject area.

CHAPTER 8: CONCLUSION

Throughout this practicum, an attempt has been made to examine the commercial strip as one specific component of a cities retail structure. The main objective was to address the fundamental question 'how do we plan for a successful commercial strip?' To address this question, this practicum utilized both a literature review, and a case study of the Pembina Highway commercial strip.

The literature review examined the works of authors which have contributed to the study of commercial strips. In this respect, the theories of such well known authors as Brian Berry and Ken Jones were examined. In support of the literature review, the historical growth of the commercial strip was examined and the various trends and techniques used to plan the strip were identified. In addition, current urban and development trends were identified in order to understand the changes occurring within the contemporary urban environment, and how these changes have affected the commercial strip.

Overall, the literature review and historical examination of the commercial strip identified that development along major roadways has provided businesses and other uses an alternative location for most of this century. The early popularity of the strip as a business location was due in part to the inability of the downtown to offer affordable retail and office space, as well as the inability of the downtown to effectively deal with the increasing amounts of traffic congestion caused by

the surge in the popularity of the automobile. Commercial strips expanded even farther outwards due to the linear expansion of the streetcar lines. Development quickly surrounded transit drop-off points, and later infilled throughout the strip.

The examination of planning trends and techniques revealed that commercial strips in general have been largely left to develop untouched throughout most of this century. The few attempts made by planning and planners to control the strip has come in the form of land use controls such as zoning by-laws and other regulations. In fact, it was determined that planners in general, dislike almost all aspects of the commercial strip, and instead prefer the controlled and planned environment of the suburban shopping centre.

In examining the urban and development trends which are affecting the commercial strip, it was discovered that a number of trends have had significant impacts on the urban structure of North American cities. In particular, the processes of suburbanization and decentralization, changes towards the New Economy, and marked periods of overbuilding have been essentially responsible for developing a very complex city commercial structure. This commercial structure has evolved to include such components as shopping centres, commercial strips, specialty shopping areas, ethnic and cultural districts as well as, the Central Business District. All of these components are currently being affected by changes occurring within the commercial environment; in particular, the slowdown in shopping centre construction during the past five years, rising

prominence of New Format retailing, economic difficulties faced by traditional Canadian department stores, the rise in the popularity of specialty shopping areas, and the impacts of the retail strip mall construction boom of the 1980's.

All of the aforementioned research and information provided a foundation for the Case Study of Pembina Highway. This Case Study was introduced by providing background information on the City of Winnipeg's commercial structure, as well as examining their planning and policy initiatives for commercial strip areas. At this point, Pembina Highway was introduced and extensively examined utilizing several research tools including; (i) a land use analysis, (ii) questionnaire analysis, and (iii) an analysis of Shindico Realty's properties along Pembina Highway. The land use analysis culminated in the development of a detailed business directory and business classification system for Pembina Highway. This was used to determine the frequency distributions of the various functional units along this Strip. From this analysis it was determined that nearly fifty percent of the 811 units along Pembina Highway were devoted to the following business classifications; Retail Miscellaneous, Residential, Vacant Buildings, Corporate Services, and Medical Services.

The Questionnaire analysis was based upon the questionnaire responses of 100 individual business owners/operators along Pembina Highway. The questionnaire responses provided information in regards to such areas as tenure, locational characteristics, and business characteristics, perceptions and

preferences. Overall, the information provided from the questionnaires helped in creating a profile of the average business establishment which located along this Strip. In this regard, it was determined that the average business owner rented their premises from a developer or a property management company, are unlikely to change the location of their business in the near future, occupy 1,000 to 2,000 square feet of floor area, employ five or less employees and believe they serve a trade area encompassing more than just their surrounding neighbourhood.

The analysis of Shindico Realty's nine properties provided the opportunity to examine Pembina Highway from a completely opposite perspective than that of the business owner/operator or planner. All told, this analysis revealed that an analysis of the market is the primary means by which Shindico makes business decisions. Interestingly enough, the properties owned or managed by Shindico did not fall into the 'average' profile as indicated by the questionnaires. This may be due in part to the fact that a large percentage of Shindico's tenants were chain or franchise operations, and not small independent retailers. Other findings from this analysis indicated that only a small percentage of the total land area of each of Shindico's properties contained a building structure, and that regardless of the location of any one property along Pembina Highway, there is no set locational formula which can guarantee success of a project.

The last component of this practicum used the wide array of information gathered, examined and analyzed as a basis for developing sound planning recommendations for Pembina Highway. The findings of this practicum suggest that a fundamental shift must occur with respect to how planners view and plan for the commercial strip. In particular, three main recommendations were put forth. The first of these suggests that the strip must be examined from boundary to boundary in order to understand the functional nature of this strip. Planners must resist the temptation to plan and design solutions for individual areas or problems along the strip. The whole of the strip must be examined to determine the functional relationships which exist. For example, what areas are particularly tied to the surrounding neighbourhood, or which areas are completely dominated by automobile traffic. Only by addressing the larger commercial strip environment can planners ultimately hope to plan for a successful commercial strip.

The second recommendation made for Pembina Highway is that planners must relax current zoning by-laws and regulations to more accurately reflect the unique nature of Pembina Highway. Traditional land use controls have not produced a viable, healthy and generally appealing commercial strip environment. In fact, one could argue that the lack of planning has essentially created an environment which will be forever plagued with problems of a functional and design nature. Re-addressing parking standards, zoning classifications and other regulations will allow for a more functional and

interactive use of space along the commercial strip. In this respect, large expanses of parking will be reduced, and an increasing mix of uses will allow for increased pedestrian movement throughout the whole of the Strip.

The last recommendation made for Pembina Highway suggests that planners must recognize the role the developer and property management company plays with respect to planning the Strip. As the questionnaire analysis indicated, these companies control a significant number of properties along the Pembina Highway commercial strip. If an attempt is not made to include these companies in planning efforts then the ultimate goal of planning for a successful commercial strip may never be realized. This cooperation will certainly not come easily, especially considering the fact that the commercial strip has been left to evolve largely untouched for most of this century. However, it is essential for planners to educate developers and property management companies about the long term benefits of alternative design.

Once Pembina Highway has been fully examined, zoning controls have been relaxed and the developers and property management companies have been educated and informed about the potential benefits of enhancing the environment of the commercial strip, alternative planning and design proposals can be put into place. These proposals, such as the authors design concept (Figure 7-1) will address many of the planning concerns and issues such as parking congestion, safety, and the lack of pedestrian movement which currently

plague the commercial strip. Many of these proposals suggest that more compact urban development at certain points along the strip is required to enhance the commercial environment of the strip and improve its relationship with the neighbourhood.

Planners have long ignored the commercial strip and its role within the commercial structure of our cities. For this reason, these areas of our cities are fraught with problems relating to everything from traffic congestion to physical deterioration. Planners must accept the existence of this type of commercial environment and make efforts to plan for a successful commercial strip. Hopefully, this practicum has educated and heightened the interest for planning of this type of commercial environment.

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Appendix A: Case Study Business Classifications

FUNCTIONAL USE	DETAILS (Pombina Highway Examples)
1. RESIDENTIAL:	Single Family, Apartments, Townhomes, Condominiums, Geriatrics Centre.
2. VACANT BUILDING:	Empty Units or Whole Vacant Buildings
3. VACANT LAND:	Undeveloped Lots
4. FINANCIAL:	Banks and Credit Unions
5. INSTITUTIONAL:	Churches, Schools, Legions
6. GOVERNMENT OFFICES & PUBLIC SERVICES:	Constituency Offices, Fire, Police, Library
7. PROFESSIONAL PERSONAL SERVICES:	Hair Dresser, Dry Cleaners, Tailors, Counseling (Arizona Fitness, Temple Kung-Fu, Tai Chi Soc)
8. PROFESSIONAL CORPORATE SERVICES:	Tax, Insurance, Real Estate, Consulting, Travel, Lawyer
9. CORPORATE HQ & COMPANY OFFICES:	Radio Station, (MTS Head Office)
10. MEDICAL SERVICES:	Hospital, Veterinary Clinic, MB Deaf Centre, Labs, Chiropractic, Dental
11. VEHICLE SALES:	New and Used Auto, Recreational Vehicle Sales
12. AUTOMOTIVE SERVICE:	Muffler Shops, Garages, Autobody, Autoglass,
13. FOOD - FAST:	Pizza, Convenience stores, (McDonald's)
14. FOOD - CASUAL:	Casual Dining (Keg, Earls, Grapes)
15. FOOD - RETAIL:	Bakery, Grocery Store, Deli's
16. RETAIL - AUTO:	Gas stations, Tire stores, Parts Suppliers, Vehicle Rental
17. RETAIL / SERVICE - HOME / BUSINESS IMPROVEMENTS:	Contractors, Plumbers (Windsor Lumber)
18. RETAIL MISCELLANEOUS:	Toys, Music, Printshops, Pet stores, Video Rental, Sign Retail and Manufacturers, Apparel (Athletes Wear, CyclePath, Sport Chek)
19. SPORTS EQUIPMENT AND APPAREL:	
20. ELECTONICS SALES AND SERVICE:	VCR Repairs (The Sony Store)
21. BUSINESS SUPPLIES:	(Staples, Willson Stationers)
22. ENTERTAINMENT:	Bowling Alley, Pool Hall, Curling Club, Night Club
23. HOTEL / MOTEL:	(Capri Motel, Montcalm Motor Inn, Holiday Inn)
24. OTHER:	Manufacturing, Wholesaling, Specialty Shops & Services, Yacht Charters, (Lawn Mower Service, Brew Doctor)

Appendix B: Pembina Highway Land-Use Data Base (June 1996)

ID#	ADDRESS	NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
1	101 Pembina	River Osbourne Community Centre	Community Centre	6
2	104 Pembina	Executive Low Cost Rent A Car - Auto Center	Auto Rental	16
3	105 Pembina	Marion Motors 1990 Ltd.	Auto Sales	11
4	115 Pembina	Royal LePage R.E	Res R.E	8
5	222 Pembina	Birchwood BMW	Auto Sales	11
6	284 Pembina	Pembina Insurance Services	Insurance Services	8
7	285 Pembina	Manitoba Deaf Centre		10
8	290 Pembina	Rocky's Men's Hair Stylists	Hair Dressers	7
9	481 Warsaw	Carrara Tile	Retail Tile Sales and Installation	17
10	300 Pembina	Pembina Dodge Chrysler Ltd	Auto Sales	11
11	311 Pembina	Diver's Den (MB)	Retail Scuba Training Sales & Service	19
12	311 Nassau	**Teresa Beauty Salon	Hair Dressers	7
13	311 Nassau	**Kremer Building	Chiropractic Offices	10
14	323 Pembina	Spirit martial Arts Supplies	Martial Arts Supplies	18
15	325 Pembina	Vacant 3 Units		2
16	327 Pembina	- Vacant Unit # 1		2
17	327 Pembina	- Emesol Distributors Ltd.	Mechanical / Wholesale	24
18	327 Pembina	- Commercial Pool Specialists		24
19	327 Pembina	- Consumer Care Maids	Maid Service	24
20	329 Pembina	Brian Sheridan The Windowman Ltd	Window and Door Sales	17
21	331 Pembina	Evergreen Restaurant		14
22	333 Pembina	Pembina Village Restaurant		14
23	337 Pembina	Fitness World	Retail Fitness Equipment	19
24	337 Pembina	Prime Time Communication		8
25	340 Pembina	Columbia Tire Ltd		16
26	344 Pembina	Accurate lawn Mower Service Ltd	Sell/Service:Lawn,Garden,Snow Equip	24
27	332 Nassau	Quintex - Uniform Rentals		24
28	332 Nassau	Todd - Uniforms for Business		8
29	390 Pembina	Pembina Auto Body Ltd		12
30	524 Fleet	Culligan Water Conditioner		18
31	400 Pembina	Pembina Veterinary Hospital Ltd		10
32	411 Pembina	Lifesport Ltd.	Bicycle Sales and Service	19
33	411 Pembina	Vacant-Seasonal Garden Centre		3
34	420 Pembina	Mb Gov't Public Insurance Corp	Company Office	9
35	435 Pembina	Lazaros Garwood Grill & Pizza Restaurant		14
36	453 Pembina	Lionetti Clothier & Tailor	Mens Apparel and Tailor	7
37	453 Pembina	Cdn Union Of Public Employees Local 998	Company Office	9
38	460 Pembina	Standard Auto Glass Ltd		12
39	465 Pembina	North Pembina Mohawk Gas Station		16
40	465 Pembina	- Food Store		13
41	477 Pembina	North Pembina Esso Gas Station		16
42	525 Pembina	Sampson's Sportland Ltd	Ski Shop	19
43	525 Pembina	Rainbow Ski School		19
44	525 Pembina	Affordable U Drives	Auto Rental	16

ID#	ADDRESS		NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
45	540	Pembina	Gery Gordon's Mazda - Used Car's		11
46	550	Pembina	Gery Gordon's Mazda		11
47	620	Lorette	JMAX Autobody	Autobody Shop	12
48	631	Lorette	Mobile Brakes		12
49	554	Pembina	A Paperwork Pro Inc	Print Shop	18
50	554	Pembina	Vacant Unit's	Former West Can Gas Inc	2
51	554	Pembina	X-L Leasing Co	Auto Leasing	11
52	631	Scotland	Winnipeg Tools and Fastners	Manufacturing	24
53	555	Pembina	Midas Muffler		12
54	560	Pembina	Taco Bell Of Canada		13
55	565	Pembina	Careway Auto	Tire Sales and Service	12
56	580	Pembina	- Athletes Wear II	Sporting Goods and Apparel	19
57	580	Pembina	- South Wpg Chiropractic Walk-In Clinic		10
58	580	Pembina	- Lambos Steven	Chiropractor	10
59	580	Pembina	- Barber and McKeown Ltd	Beauty Supply - Wholesale	24
60	580	Pembina	- Manhattan Restaurant & Bar		14
61	582	Pembina	Domo Gasoline Corporation Ltd		16
62	584	Pembina	- Desk Top Computer Works Ltd	Type Setting & Desk Top Publishing	8
63	584	Pembina	- Red Wing Shoes (Canada) Inc		18
64	584	Pembina	- Hook Line and Sinker Ltd		18
65	584	Pembina	- Dyna-Pro Environmental Store		18
66	584	Pembina	- V Watt & Associates	Travel Agency	8
67	584	Pembina	- Campaign Outfitters		18
68	584	Pembina	- Southwood Flowers		18
69	584	Pembina	- Beam of Canada (Midwest) Ltd		18
70	584	Pembina	- Jim's Fish and Chips & Deli Ltd		13
71	584	Pembina	- Hairtek		2
72	584	Pembina	- Subway Sandwiches & Salads		13
73	584	Pembina	- Quinton's Cleaners Ltd		7
74	584	Pembina	- Speedy Auto Glass		12
75	584	Pembina	- Preferred Properties Ltd	Real Estate	8
76	584	Pembina	- Hill Top Research Inc	Clinical Research Lab (Skin Research)	10
77	600	Pembina	McDiarmid Lumber		17
78	614	Dudley Ave	Boyd Auto Body Ltd		12
79	620	Pembina	Mister Transmission		12
80	625	Pembina	Mr. Submarine		13
81	630	Pembina	McDonald's Restaurants Of Canada Ltd		13
82	635	Pembina	Grant Inn		23
83	635	Pembina	- Cheeter's Cheesecake Restaurant		14
84	635	Pembina	- Cold Beer Store - Grant Inn		18
85	655	Pembina	Rogers Cantell Service Centre		8
86	660	Pembina	Auto Haus Fort Garry (1981) Ltd		11
87	661	Pembina	- Olypic Cycle & Ski	Retail Sporting Equipment	19
88	661	Pembina	- Henderson Krueger Appraisal Services		8
89	661	Pembina	- De Luca Rayleen & Associates	Consulting Psychologists	10
90	669	Pembina	- Pembina Hair Co	Hair Dressers	7
91	671	Pembina	- Network South Enterprises	Employment Organization	8

ID#	ADDRESS	NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
92	673 Pembina	- Lakeview Insurance Brokers Ltd	Insurance Brokers	8
93	675 Pembina	- Vacant Unit # 203		2
94	675 Pembina	- Vacant Unit # 206		2
95	675 Pembina	- Lazer-Fare Media Services Ltd	Service Macintosh Computers	20
96	675 Pembina	- Magne Brokopiw & Zielke	Chartered Accountants	8
97	675 Pembina	- Felspar Services Inc	Chartered Accountants	8
98	675 Pembina	- Chartered Mortgage Services	Mortgage Placement and Consulting	8
99	675 Pembina	- Zacharias Accounting & Mgmt	Chartered Accountants	8
100	675 Pembina	- James Dube Spraggs Adjusters Ltd	Insurance Adjusting Services	8
101	679 Pembina	- Fotovideo Camera Centres Inc		20
102	680 Pembina	Matthon Motors Ltd - The Volvo Store	Auto Sales	11
103	580 Ebby	Fort Rouge Auto Body		12
104	584 Ebby	Lockhart Roofing	Roof Installation	17
105	594 Ebby	Sunrise Auto Service		11
106	598 Ebby	Vacant Unit - Former Copper Connections		2
107	598 Ebby	Ronnettes Catering	Food Catering Service	24
108	681 Pembina	- Grandma Lee's Bakery and Eating Place		13
109	685 Pembina	Precision Fitness	Retail Fitness Equipment	19
110	689 Pembina	Vacant Unit		2
111	700 Pembina	Bob's Dominion Transmission Inc		12
112	701 Pembina	- Vacant Unit		2
113	701 Pembina	- Healthcare Equipment & Laboratory Planners		8
114	701 Pembina	- Lupe Bryan H & Associates Ltd	Insurance	8
115	701 Pembina	- P. C Engineering Ltd	Consulting	8
116	701 Pembina	- Sanford's Building & Decorating	Home Improvements	17
117	701 Pembina	- Stewart's Kitchen and Bath Centre Ltd	Home Improvements	17
118	701 Pembina	- Banks & Associates Inc		8
119	710 Pembina	Willson Stationers	Office Supplies	21
120	715 Pembina	Suzuki Central Inc	New & Used Car Sales	11
121	727 Pembina	Sciberras Automotive	Gas Station and Service Centre	12
122	733 Pembina	Hockey Hutch	Retail Hockey Equipment	19
123	735 Pembina	Cambrian Credit Union	Financial	4
124	745 Pembina	Thruway Muffler		12
125	745 Pembina	Auto Beauty Salon & Clinic		12
126	745 Pembina	Vacant		2
127	747 Pembina	Red River Co-op Gas Station	Gas Station	16
128	750 Pembina	Mid-Town Ford Sales Ltd	Auto Sales	11
129	756 Pembina	Vacant Unit		2
130	756 Pembina	Lincoln Walk-In Medical Centre	Medical Walk-In Centre	10
131	756 Pembina	- Medimart Pharmacy		18
132	756 Pembina	- Trainor Laboratory Ltd	Medical Laboratory	10
133	756 Pembina	Roger's Video	Video Rental	18
134	759 Pembina	Salisbury House	Restaurant	14
135	Stafford	Vacant - Shopping Centre		2
136	Stafford	- Sutton Group	Real Estate	8
137	Stafford	- Fantasia Hair Design	Hair Dressers	7
138	653 Stafford	**Vacant - Former Videon Building		2

ID#	ADDRESS	NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
139	Stafford	**Hy-line Credit	Financial Institution	4
140	Stafford	**Yamato - Japanese Restaurant		14
141	671 Stafford	**Crescentwood Chiropractic Centre		10
142	762 Pembina	Pizza Hut	Casual Restaurant	14
143	800 Pembina	The Round Table	Restaurant and Pub	14
144	829 Pembina	Motel 75		23
145	829 Harrow	**Car Wash	Coin Operated	12
146	850 Pembina	Ried Crowther	Engineering Consulting	8
147	850 Pembina	APEM		8
148	960 Pembina	Goodyear Canada Inc	Auto Service and Tire Sales	12
149	1002 Pembina	Peter J Moss Law Offices	Lawyer	8
150	1002 Pembina	Rail Cda Traffic Controllers National HQ		9
151	1002 Pembina	Transportation Communications Union	Company Office	9
152	1004 Pembina	Posttime Distributors Inc	Sign Manufacturer	18
153	1006 Pembina	Andy's Barber Shop	Barber	7
154	1008 Pembina	Vacant - House		2
155	1010 Pembina	Vacant - House		2
156	1011 Pembina	Pembina Hotel 1959 Ltd		23
157	1022 Pembina	Cambridge Hotel - TOJO's Restaurant		23
158	1038 Pembina	- Vic's Fruit Market and Deli		15
159	1038 Pembina	- Cottage Bakery Ltd		15
160	1038 Pembina	- Pembina Jewellers		18
161	1038 Pembina	- Colors For Hair	Hair Dressers	7
162	1048 Pembina	Vacant - Former Cdn Gov't Empl Cntr		2
163	1049 Pembina	Original Pancake House	Restaurant	14
164	1056 Pembina	Vacant - Former Cdn Gov't Empl Cntr		2
165	1058 Pembina	Vacant - Former Cdn Gov't Empl Cntr		2
166	1059 Pembina	Esso Gas Station		16
167	1059 Pembina	- Tim Horton's & Convenience Foods		13
168	1059 Pembina	- With Car Wash		12
169	1060 Pembina	Vacant - Former Cdn Gov't Empl Cntr		2
170	1062 Pembina	Mamma Troski Pizzeria	Fast Food	13
171	1064 Pembina	My Favorite Restaurant	Restaurant	14
172	1066 Pembina	SpeedPro Signs & Printing	Sign Manufacturer	18
173	1068 Pembina	Associate Hair Designs	Hair Dressers	7
174	1070 Pembina	Vacant - Former Sooter Photo		2
175	1072 Pembina	All Sports Trophies	Retail Trophy Sales	18
176	1072 Pembina	(Can) Central Vac Systems	Vacuum Sales and Service	18
177	1084 Pembina	New Golden Inn Chinese Restaurant		14
178	1088 Pembina	Ft. Garry Women's Resource Centre	Counselling	6
179	1094 Pembina	Vacant -		2
180	1096 Pembina	Pembina Chiropractic Office - Fogel R. B		10
181	1100 Pembina	Taoist Tai Chi Society		7
182	1103 Pembina	Kentucky Fried Chicken	Fast Food	13
183	1104 Pembina	Charming Hair Designs	Hair Dressers	7
184	1107 Pembina	Arby's	Fast Food	13
185	1110 Pembina	Tony's 2 For 1 Pizza	Fast Food	13

ID#	ADDRESS		NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
186	1110	Pembina	Do-It-Yourself Framing	Retail Picture Frames	18
187	1118	Pembina	Tait Denture Clinic		10
188	1118	Pembina	Garry Lanes	Bowling Alley	22
189	1118	Pembina	Diduch donna Beauty Salon	Hair Dressers	7
190	1118	Pembina	Goodine Unisex Hairstyling	Hair Dressers	7
191	1118	Pembina	House Of Pizza	Fast Food	13
192	1118	Pembina	Upper Garry Billiards	Pool Hall	22
193	1125	Pembina	Royal Canadian Legion		5
194	1140	Pembina	Swiss Chalet Chicken & Ribs Restaurant	Restaurant	14
195	1141	Pembina	Wildwood Yamaha	Motorcycle Sales	11
196	1151	Pembina	Wildwood Medical Centre		10
197	1151	Pembina	- Shnider Maurice	Physician and Surgeon	10
198	1151	Pembina	- V P Fredette Adjusters Ltd	Insurance Adjusting Services	8
199	1151	Pembina	- House of Venus Coiffure	Hair Dresser	7
200	1151	Pembina	Pharmasave	Retail Pharmaceuticals	18
201	1160	Pembina	Canadian Imperial Bank of Commerce	Financial Institution	4
202	1166	Pembina	Quinton's Cleaners Ltd	Dry Cleaners	7
203	1170	Pembina	Fort Garry Travel Service		8
204	1172	Pembina	- Ft Garry Travel Service	Chartered Accountants	8
205	1172	Pembina	- Hi-Therm Exteriors	Door and Window Sales	17
206	1172	Pembina	- Timothy Fultz Law Office	Barristers & Solicitors	8
207	1172	Pembina	- Hanke Bruce Health Consultant	Consultants	10
208	1172	Pembina	- Vacant Unit #5		2
209	1174	Pembina	Fort Garry Insurance	Insurance Brokers	8
210	1175	Pembina	Speedy Muffler		12
211	1176	Pembina	Pearl-City Restaurant	Restaurant	14
212	1180	Pembina	- Holukoff Chiarella	Chartered Accountant	8
213	1180	Pembina	- Berker Semih F	Dentist	10
214	1180	Pembina	- Volk Ronald E	Dentist	10
215	1180	Pembina	- Holukoff Chiarella - additional space	Space for Chartered Accountant	8
216	1180	Pembina	- Vacant Unit		2
217	1180	Pembina	- Pembina Dental Centre - Sauchan John	Dentist	10
218	1181	Pembina	- Laurentian Bank	Financial Institution	4
219	1185	Pembina	- Weldon Design	Beauty Salon	7
220	1187	Pembina	- Pembina Book Exchange	Retail New and Used Books	18
221	1188	Pembina	- Bank Of Montreal	Financial Institution	4
222	1189	Pembina	- Vacant (Former New Method College)		2
223	1191	Pembina	- Royal Realty Services Ltd	Real Estate	8
224	1193	Pembina	- LaTour Eiffel Pastry Shop	Pastry Shop & Catering	15
225	1195	Pembina	- The Flag Shop	Retail Flag Sales	18
226	1196	Pembina	Arnold's Hair Styling	Hair Dressers	7
227	1198	Pembina	M & N's Needle Point Place		18
228	1200	Pembina	- Burgess Craig	Chartered Accountant	8
229	1200	Pembina	- Vacant Unit # 102 -		2
230	1200	Pembina	- Vacant Unit # 103		2
231	1200	Pembina	- Keystone Courier & Messenger Service Ltd		8
232	1200	Pembina	- Automotive Trades Association Mb	Company Office	9

ID#	ADDRESS	NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
233	1200 Pembina	- Weppler Charles H	Chartered Accountant	8
234	1200 Pembina	- United Distilleries	Spirit Wholesalers	24
235	1200 Pembina	- Spyra Communications		8
236	1200 Pembina	- The Financial Corporation, TLG Tax prep	Financial Services	8
237	1200 Pembina	- Express Mortgage - Share Office	Mortgage Placement and Consulting	8
238	1200 Pembina	- Threshold Mortgage - Share Office	Mortgage Placement and Consulting	8
239	1201 Pembina	Petro Canada Gas Station		16
240	1201 Pembina	- With Service Station	Auto Service	12
241	1204 Pembina	Great Canadian Bagel	Fast Food	13
242	1204 Pembina	Perth Service Ltd	Cleaners	7
243	1210 Pembina	Maytag Home Appliance Centre Ltd	Retail Appliance Sales	18
244	1214 Pembina	Fort Garry Florists		18
245	1220 Pembina	Bank Of Nova Scotia	Financial Institution	4
246	1225 Pembina	Shell Canada Gas Station		16
247	1225 Pembina	- With Circle K Convenience Store		13
248	1230 Pembina	Bri Mar Residential Apartments	Multi-Family Res	1
249	1234 Pembina	Bri Mar Residential Apartments	Multi-Family Res	1
250	1235 Pembina	- Ft Garry Chiropractic Health Centre		10
251	1235 Pembina	- The Sony Store	Retail Electronics	20
252	1235 Pembina	- Academy florists		18
253	1235 Pembina	- Pasta & More	Retail Pasta and Crafts	18
254	1235 Pembina	- Liquor Mart	Liquor Store	18
255	1248 Pembina	Fort Garry Dental Centre - Chin Gordon		10
256	1250 Pembina	Residential Apartments		1
257	1252 Pembina	Sign Express Opening August 1996	Sign Manufacturer	18
258	1254 Pembina	Video Refit Shop	Electronic Services	20
259	1260 Pembina	Vacant Land - 18,090 Sq Ft		3
260	1280 Pembina	Curtis Carpets	Retail Carpet Sales	17
261	1288 Pembina	- Blouw Richard H	Physician and Surgeon	10
262	1288 Pembina	- Pemack Sheldon M	Family Practitioner	10
263	1288 Pembina	- Unicity Laboratory Services	Research	10
264	1288 Pembina	- Manitoba X-Ray Clinic	X-Ray Clinic	10
265	1292 Pembina	Gondola Pizza	Fast Food	13
266	1295 Pembina	- The Keg	Restaurant	14
267	1295 Pembina	- Toy Traders	Retail New and Used Toys	18
268	1295 Pembina	- Vacant		2
269	1295 Pembina	- Robin's Donuts	Donut Shop - Fast Food	13
270	1295 Pembina	- Presto Pizza	Fast Food	13
271	1295 Pembina	- Discount Car & Truck Rental	Auto Rental	16
272	1300 Pembina	- Royal Bank Of Canada		4
273	1305 Pembina	- Toronto Dominion Bank		4
274	1311 Pembina	- Zanadu Hair Cutters	Hair Dressers	7
275	1315 Pembina	- McKnight's Pembina Pharmacy		18
276	1319 Pembina	- Canada Safeway Ltd	Grocery Store	15
277	1319 Pembina	- Domo Gasoline Corp Ltd	Gas Station	16
278	1321 Pembina	- Adi's Video Shoppe	Video Rental	18
279	1330 Pembina	Holiday Inn - Winnipeg South		23

ID#	ADDRESS	NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
280	1330 Pembina	- Southfork Restaurant		14
281	1341 Pembina	Pembina Curling Club		22
282	1345 Pembina	- CEC Richards Barber Stylists	Hair Dressers	7
283	1345 Pembina	- Lithtec Industries Ltd	Print Shop	18
284	1345 Pembina	- Shear Designs & Unisex Hair Styling	Hair Dressers	7
285	1345 Pembina	- Vacancy Unit # 102		2
286	1345 Pembina	- Ryan Gateway Insurance Brokers Inc	Insurance	8
287	1345 Pembina	- U & R Tax Services Ltd	National Office	8
288	1349 Pembina	Chicken Delight	Fast Food	13
289	1350 Pembina	City of Winnipeg Policy Dept District # 6		6
290	1350 Pembina	- City of Winnipeg Social Services		6
291	1350 Pembina	- Fort Garry Lion's Outdoor Pool		6
292	975 Dowker	Vincent Massey Collegiate	High School	5
293	1355 Pembina	Constituency Office -Rosemary Vodrey		6
294	1355 Pembina	Hicks - Baker Ltd	Specialty Home Improvement Wholesalers	17
295	1355 Pembina	Antiques & Collectables	Retail	18
296	1360 Pembina	Fort Garry Public Library		6
297	1365 Pembina	Dillon Interior's	Furnishings	17
298	1373 Pembina	- Vacant		2
299	1373 Pembina	- Best West Pet Foods	Pet Food and Supplies	18
300	1373 Pembina	- Adults Only Video	Video Rental	18
301	1373 Pembina	- Mr. Bones Pizza	Fast Food	13
302	1373 Pembina	- Vacant		2
303	1373 Pembina	- World Of Water	Distilled Water Sales Health Foods	15
304	1382 Pembina	Mac's Convenience Store	Convenience Store	13
305	1382 Pembina	Subway Sandwiches & Salads	Fast Food	13
306	1383 Pembina	- Pemrad Buildings Ltd	Construction Contractors	17
307	1383 Pembina	- H& R Block	Income Tax Consultants	8
308	1383 Pembina	- Escape Communications Corp		8
309	1383 Pembina	- J Pura & Sons Ltd	Building Contractors	17
310	1383 Pembina	- Bennell & Arthur Law Office	Barristers & Solicitors	8
311	1383 Pembina	- Canadian Nan Lien Group	Exports / Imports	24
312	1383 Pembina	- Don Mar Realty Ltd	Real Estate - Residential	8
313	1383 Pembina	- Vacant Unit # 202		2
314	1389 Pembina	Copperfield Computer Books Inc	Retail books	18
315	1389 Pembina	Copperfield's Cookbook Corner		18
316	1391 Pembina	Copperfield's Computer Books Inc		18
317	1392 Pembina	Balcaen & Sons Ltd	Plumbing and Heating Services	17
318	1392 Pembina	- Balcaen Enterprises	Retail Plumbing Sales	17
319	1392 Pembina	- Coleman Outing Products Service	Repairs and Warrantee	17
320	1393 Pembina	Falcon Multimedia	Retail Computer Software Sales	18
321	1393 Pembina	Grower Direct - Fresh Cut Flowers	Fresh Cut Flower Sales	18
322	1395 Pembina	Georges Inn and Submarine		13
323	1397 Pembina	Tiger Play	Retail Video Game Sales	18
324	1399 Pembina	Stone-Ground Daily Bread		15
325	1400 Pembina	Hope Lutheran Church		5
326	1411 Pembina	**Kelsey Residential Apartments		1

ID#	ADDRESS		NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
327	1415	Pembina	Keytech Imports Inc	Wholesale Cash Registers	24
328	1419	Pembina	Unitech	(Affiliated with Keytech Imports inc)	24
329	1425	Pembina	Sweet Palace Restaurant		14
330	1430	Pembina	Garry Manor Residential Apartments		1
331	1441	Pembina	F O G Optical Ltd (Former Family Optical)	Retail Eye-wear	18
332	1444	Pembina	Motorlink Auto sales & Service Ltd	Auto Repair	12
333	1445	Pembina	Q 94.3 FM / Talk Radio AM 1290	Radio Station	9
334	1450	Pembina	Auto Value - Piston Ring Service	Auto Repair	12
335	1456	Pembina	Paradise Pools	Pool Supplies	18
336	1462	Pembina	Pembina Arms Residential Apartments	Multi-Family Res	1
337	1463	Pembina	Graceland's Munch and Mingle Club	Fast Food	13
338	1465	Pembina	Webers Meat & Delicatessen	Deli	15
339	1467	Pembina	Delicious Veg - Chinese Restaurant	Restaurant	14
340	1469	Pembina	Vacant - Former Phil's Pizza		2
341	1472	Pembina	Fletcher Arms Residential Apartments	Multi-Family Res	1
342	1473	Pembina	Landlords Resource Centre Inc		8
343	1475	Pembina	Fast, Henry	Physician	10
344	1475	Pembina	Recovery of Hope	Counselling	8
345	1477	Pembina	Enzo's Hair Design	Hair Dressers	7
346	1477	Pembina	Pembina Mortgage Corp Ltd	Mortgage Placement and Consulting	8
347	1480	Pembina	Between Friends	Restaurant	14
348	1480	Pembina	The Pound Note- British Rest. & Tavern	Rest and Tavern	14
349	1483	Pembina	- C.A.N.S.Y.S West Ltd	Computer Software Sales	18
350	1483	Pembina	- Magic Online Services Inc	Internet Services	8
351	1483	Pembina	- Vacant - Unit 200		2
352	1483	Pembina	- Noble Hospitality Canada Inc		2
353	1483	Pembina	- Getset computers	Computer Sales	20
354	1483	Pembina	- William Neilson		8
355	1483	Pembina	- Lindal Consulting Ltd	Consulting	8
356	1483	Pembina	- Roberts Sloane & Associates	Engineering & Consulting Firm	8
357	1483	Pembina	- Pagan Denture Clinic		10
358	1483	Pembina	- The Financial Planning Group		8
359	1483	Pembina	- Kenneth Pass Law Office	Barristers & Solicitors	8
360	1483	Pembina	- T V - Phone Inc	???	20
361	1483	Pembina	- Ft. Garry Group	???	2
362	1490	Pembina	Seven Eleven Food Store	Convenience Store	13
363	1495	Pembina	Archdiocese Of Winnipeg	Church Administrative Offices	5
364	1500	Pembina	Tony Roma's - A Place For Ribs	Restaurant	14
365	1510	Pembina	Tim Horton's donuts	Donut Shop - Fast Food	13
366	1515	Pembina	Royce Residential Apartments	Multi-Family Res	1
367	1520	Pembina	Silver Bay Residential Apartments	Multi-Family Res	1
368	1520	Finch Bay	Cascade Residential Apartments	Multi-Family Res	1
369	1521	Pembina	Om's Pantry	Bakery	15
370	1521	Pembina	Money Concepts	Financial Consulting	8
371	1531	Pembina	Craw Daddy's	Restaurant	14
372	1536	Pembina	Fort Garry Letter Carrier Depot	Post Office Depot	5
373	1540	Pembina	Cycle Path	Bicycle Sales and Service	19

ID#	ADDRESS		NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
374	1544	Pembina	Zirino's High Tech Auto	Auto Repair	12
375	1544	Pembina	- Uhaul Depot	Truck Rental	16
376	1551	Pembina	Ecole Pembina Crest	School	5
377	1563	Pembina	Vacant - Former Exalt Trading Co.		2
378	1566	Pembina	Shell Canada Ltd (Crescent park)	Gas Station	16
379	1566	Pembina	Vacant Land		3
380	1577	Pembina	Fort Garry Bakery	Bakery	15
381	1581	Pembina	Warehouse One Ltd	Retail Clothing	18
382	1601	Pembina	- Orchid Florist Ltd		18
383	1603	Pembina	- Henry Armstrongs Instant Printing	Print Shop	18
384	1605	Pembina	- Vacant - Jan 1996	Former ATD Micro Computers	2
385	1607	Pembina	- Scechuan Restaurant		14
386	1609	Pembina	- Reg Alcock - MP	Constituency Office	6
387	1616	Pembina	Pembina Highway Residential Apartments	Multi-Family Res	1
388	1619	Pembina	Vacant (Former A T & T Canada Inc)		2
389	1619	Pembina	Manitoba HVDC Research Centre	Research Studies - utilities etc	8
390	1619	Pembina	Vacancy (Former NCR Canada)		2
391	1626	Pembina	Pembina Highway Residential Apartments	Multi-Family Res	1
392	1629	Pembina	St Vital Catholic Church	Church	5
393	1636	Pembina	Single Family Detached Home		1
394	1639	Pembina	St Maurice High School	Ecole St. Maurice School	5
395	1650	Pembina	Arizona Plaza Residential Apartments	Multi-Family Res	1
396	1660	Pembina	The Ports - Residential Condominiums	Multi-Family Res	1
397	1660	Pembina	Vision Electronics (July 1996)	Retail Electronics	20
398	1679	Pembina	The Golden Door	Geriatric Centre	14
399	1681	Pembina	GeorgeTown Park - Res Apartments	Multi-Family Res	1
400	1683	Pembina	GeorgeTown Park - Res Apartments	Multi-Family Res	1
401	1685	Pembina	GeorgeTown Park - Res Apartments	Multi-Family Res	1
402	1686	Pembina	Ruckers Family Restaurant	Restaurant	14
403	1687	Pembina	GeorgeTown Park - Res Apartments	Multi-Family Res	1
404	1689	Pembina	GeorgeTown Park - Res Apartments	Multi-Family Res	1
405	1691	Pembina	GeorgeTown Park - Res Apartments	Multi-Family Res	1
406	1695	Pembina	GeorgeTown Park - Res Apartments	Multi-Family Res	1
407	1697	Pembina	GeorgeTown Park - Res Apartments	Multi-Family Res	1
408	1699	Pembina	GeorgeTown Park - Res Apartments	Multi-Family Res	1
409	1700	Pembina	Grapes Pier Seven	Restaurant	14
410	1700	Pembina	True North Yacht Charters		24
411	1710	Pembina	Wendy's Restaurants Of Canada Inc	Fast Food	13
412	1717	Pembina	Burger King Canada Inc	Fast Food	13
413	1720	Pembina	Pembina On The Red Residential Apts	Multi-Family Res	1
414	1725	Pembina	Vacant - House		2
415	1727	Pembina	Vacant - House		2
416	1728	Pembina	Mister Lube	Auto Service	12
417	1729	Pembina	- Value Village Ltd	Retail Sales	18
418	1730	Pembina	Vacant - Former Esso Station		2
419	1731	Pembina	- Vacant Unit		2
420	1739	Pembina	- Miss-Twitchetts Eye Needlework		18

ID#	ADDRESS	NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
421	1741 Pembina	- Ye Old Country Market	Grocery Store	15
422	1743 Pembina	- Dollar's Destiny	Retail Sales	18
423	1743 Pembina	- Domino's Pizza	Fast Food	13
424	1745 Pembina	- Landmark Framing	Retail Picture Frames	18
425	1745 Pembina	- Special Events Radio Caravan	Marketing	8
426	1747 Pembina	- Holsum Bakery Outlet	Bakery	15
427	1747 Pembina	- Pembina Medical Centre		10
428	1749 Pembina	- K L Hair Expressions	Hair Dressers	7
429	1750 Pembina	Armadale Hollows Residential Apartments	Multi-Family Res	1
430	1751 Pembina	- Fellowship Book Centre Fort Garry	Retail - Religious	18
431	1755 Pembina	- Marigold Restaurant		14
432	1761 Pembina	- Minute Muffler		12
433	1761 Pembina	- Duke & Sons Auto Upholstering		12
434	1761 Pembina	- Today's Tire Store	Service Station and Tire Sales	16
435	1761 Pembina	- 4 Enterprise Rent A Car	Auto Rental	16
436	1761 Pembina	- Beetle Bailey Car Wash Inc		12
437	1771 Pembina	Ft. Garry Mennonite Brethren Church		5
438	1771 Pembina	Emmanuel Korean Church		5
439	1776 Pembina	Fort Garry Care Centre		10
440	1777 Pembina	Fort Garry Manor Residential Apartments	Multi-Family Res	1
441	1781 Pembina	Fort Garry Manor Residential Apartments	Multi-Family Res	1
442	1785 Pembina	Fort Garry House Apartments	Multi-Family Res	1
443	1789 Pembina	Fort Garry House Apartments	Multi-Family Res	1
444	1792 Pembina	Norlander Inn Hotel	Hotel	23
445	1792 Pembina	- Playmaker's Gaming Lounge		14
446	1792 Pembina	- Scandals Night Club		22
447	1793 Pembina	Fort Garry House Apartments	Multi-Family Res	1
448	1797 Pembina	Fort Garry House Apartments	Multi-Family Res	1
449	1819 Pembina	Capri Motel		23
450	1824 Pembina	Vacant Building		2
451	1833 Pembina	Drury Manor Residential Apartments	Multi-Family Res	1
452	1842 Pembina	D'8 Shtove Restaurant		14
453	1844 Pembina	- Wpg child and Family Services Agency		6
454	1844 Pembina	- Northern Cafes Inc	Consultants	8
455	1844 Pembina	- Moonlight Sensations	Coffee Shop	13
456	1844 Pembina	- Alter Fashions	Alter Clothes	7
457	1844 Pembina	- Reform Party of Canada		6
458	1844 Pembina	- Remco Realty Inc	Real Estate	8
459	1844 Pembina	- Ritchot & Co	Accounting	8
460	1844 Pembina	- D'8 Shtove - Head Office		9
461	1844 Pembina	- Prairie Masonry Research Inst - MB Branch		8
462	1844 Pembina	- Derksen Realty Ltd	Real Estate	8
463	1844 Pembina	- Brandt Consultants Inc	Eng consultants	8
464	1844 Pembina	- Dr. Bruce Hutchison clinical Psychologist	Psychologist	10
465	1855 Pembina	Vacant Land - Former Southwood Plaza		3
466	1855 Pembina	Southwood Supper Club	Wedding Village	24
467	1863 Pembina	Vacant (Former Plaza)		2

ID#	ADDRESS		NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
468	1875	Pembina	- Arizona Fitness	Gym	7
469	1875	Pembina	- Golden Tan	Tanning Salon	7
470	1875	Pembina	- Hair Fitness	Hair Dressers	7
471	1875	Pembina	- Dry Cleaners		7
472	1875	Pembina	- Southwood Chiropractic Centre		10
473	1875	Pembina	- Centiple Printing	Print Shop	18
474	1875	Pembina	- Temple Kung-Fu		7
475	1875	Pembina	- A-1 House Of Spices		18
476	1875	Pembina	- Ho Tay Restaurant		14
477	1876	Pembina	- John M. Dillon	Dentist	10
478	1877	Pembina	- James M. Lanoway	Dentist	10
479	1877	Pembina	A & W Food Services of Canada Ltd	Fast Food	13
480	1890	Pembina	Red Lobster	Restaurant	14
481	1900	Pembina	Vacant Building - Former Kmart		2
482	1910	Pembina	- Pembina Crossing Pioneer Property Mgmt Inc		9
483	1910	Pembina	- Cinema City	Theatre	22
484	1910	Pembina	- Subway Sandwiches & Salads	Fast Food	13
485	1910	Pembina	- Dowling Insurance Brokers		8
486	1910	Pembina	- Oceana Restaurant		14
487	1910	Pembina	- Staples	Office Supplies	21
488	1910	Pembina	- Future Shop	Electronics Sales	20
489	1910	Pembina	- Sport Chek	Sporting Equipment and Apparel	19
490	1910	Pembina	- Shapes (Construction June 1996)	Women's fitness centre	7
491	1910	Pembina	- CIBC Bank Machine Only	Bank Machine	4
492	1915	Pembina	McDonald's Restaurants Of Canada Ltd		13
493	1921	Pembina	- Singleton's Professional Family Hair Care		7
494	1921	Pembina	- Vacant Unit		2
495	1921	Pembina	- Dalcraff's Craft Supply	Retail Craft Sales	18
496	1921	Pembina	- Brew Doctor	Personal Beer/Wine Making Supplies	24
497	1921	Pembina	- Vacant Unit		2
498	1921	Pembina	- Universal Laser	Movie Rentals	18
499	1921	Pembina	- Vacant Unit		2
500	1931	Pembina	Chuckie Cheese Pizza Time Theatre	Restaurant	14
501	1941	Pembina	Perkins Family Restaurant	Restaurant	14
502	2005	Pembina	Earl's Restaurant		14
503	2012	Pembina	Petro-Canada Gas Station		16
504	2012	Pembina	- Neighbourhood Convenience Store		13
505	2026	Pembina	Super Lube	Auto Service	12
506	2028	Pembina	Super Tune & Brake Inc	Auto Service	12
507	2030	Pembina	J. B Transmission	Auto Service	12
508	2048	Pembina	Evergreen Gardens	Multi-Family Res	1
509	2060	Pembina	Vacant Land - For Sale 28,784 Sq Ft		3
510	2065	Pembina	Applebee's Restaurant		14
511	2073	Pembina	Canadian Tire Petroleum Marketing Div.	Gas Bar	16
512	2073	Pembina	Royal Bank Of Canada		4
513	2077	Pembina	- Mac's Convenience Stores		13
514	2077	Pembina	- Pembina Village Walk-In	Clinic	10

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515	2077	Pembina	- Second Sun Tan Spa	Tanning Salon	7
516	2077	Pembina	- Original Sorento's Restaurant		14
517	2077	Pembina	- Vacant Unit # 6		2
518	2077	Pembina	- Consumers Optical	Retail Eye-wear	18
519	2077	Pembina	- In Full Bloom Florists Inc	Florists	18
520	2077	Pembina	- MASA Japanese Restaurant		14
521	2077	Pembina	- Pembina Physiotherapy & Sports Injury		10
522	2077	Pembina	- Vacant Unit # 10		2
523	2077	Pembina	- Sun Tung Lok Restaurant Ltd		14
524	2077	Pembina	- Malibu Banquet & Conference Centre		24
525	2077	Pembina	- The Sports Traders	Retail Used Sporting Equipment	19
526	2077	Pembina	- Lee Hermann	Orthodontist	10
527	2077	Pembina	- Perth's Dry Cleaners		7
528	2077	Pembina	- Ranger Unicity Insurance Brokers Ltd		8
529	2077	Pembina	- The Fish Bowl	Pet Supplies	18
530	2077	Pembina	- Canada West Boots -Factory Outlet		18
531	2077	Pembina	- Vacant Unit No 26		2
532	2077	Pembina	- Chancellor Dental Centre		10
533	2077	Pembina	- Disc Go Round	Retail Used CD's	18
534	2077	Pembina	- Vacant Unit # 28		2
535	2079	Pembina	Kentucky Fried Chicken	Fast Food	13
536	2080	Pembina	Southview Plaza Residential Apartments	Multi-Family Res	1
537	2081	Pembina	Salisbury House of Canada Ltd	Restaurant	14
538	2084	Pembina	Pembina Woods Housing Co-op Ltd - Res Apts	Multi-Family Res	1
539	2085	Pembina	- Shoppers Drug Mart	Pharmacy	18
540	2088	Pembina	Pembina Woods Housing Co-op Ltd - Res Apts	Multi-Family Res	1
541	2090	Pembina	Pembina Woods Housing Co-op Ltd - Res Apts	Multi-Family Res	1
542	2092	Pembina	Pembina Woods Housing Co-op Ltd - Res Apts	Multi-Family Res	1
543	2093	Pembina	Canada Trust Company		4
544	2094	Pembina	Pembina Woods Housing Co-op Ltd - Res Apts	Multi-Family Res	1
545	2116	Pembina	- Crafter's Marketplace	Retail	18
546	2116	Pembina	- Vacant Land -		3
547	2116	Pembina	Single Family Detached Home		1
548	2121	Pembina	- Pennington's Wearhouse	Retail Apparel	18
549	2124	Pembina	Single Family Detached Home		1
550	2127	Pembina	- Winners	Clothes Sales	18
551	2136	Pembina	Single Family Detached Home		1
552	2141	Pembina	Silver View Estates Residential Apts	Multi-Family Res	1
553	2145	Pembina	Silver View Estates Residential Apts	Multi-Family Res	1
554	2149	Pembina	Silver View Estates Residential Apts	Multi-Family Res	1
555	2155	Pembina	Apartment Blocks	Multi-Family Res	1
556	2155	Pembina	Canada Safeway Ltd	Grocery Store	15
557	2195	Pembina	Canadian Tire Associate Store	Hardware	17
558	2195	Pembina	- Canadian Tire Service Station	Auto Service	12
559		SouthPark Dr	Southwood Park Gardens Res Apts	Multi-Family Res	1
560	101	Markham	Southwood Golf and Country Club		24
561	2211	Pembina	- Consumers Distributing	Closing	18

ID#	ADDRESS	NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
562	2215 Pembina	- Bank Of Montreal		4
563	2217 Pembina	- Good Health Pharmacy		18
564	2217 Pembina	- Fort Garry Medical Clinic		10
565	2237 Pembina	- Country Host Pie Palace		15
566	2239 Pembina	- Feature Presentations	Video Sales	18
567	2241 Pembina	- Markham Garden Restaurant (1990) Ltd		14
568	2243 Pembina	- Ultracuts	Hair Salon	7
569	2245 Pembina	- Brads Quality Meats Ltd	Deli	15
570	2247 Pembina	- Community Police Office		6
571	2251 Pembina	- Cambrian Credit Union Ltd		4
572	2255 Pembina	- Markham Chiropractic Centre		10
573	2265 Pembina	- Markham Dental Centre		10
574	2265 Pembina	- Vacant Unit # 101		2
575	2265 Pembina	- Intra-Markham Travel	Travel Agency	8
576	2265 Pembina	- Reimer C Advertising Ltd	Advertising Agency	8
577	2265 Pembina	- Dr. Mark E Rykiss	Orthodontist	10
578	2265 Pembina	- Dr. M Jason	Physician - Urology	10
579	2265 Pembina	- Dr. Karen L. Boyd	Physician	10
580	2265 Pembina	- Dr. Ruth E. Simkin	Physician	10
581	2265 Pembina	- Dr. Adrian S. Kettner	Physician	10
582	2265 Pembina	- Dr. Robyn L Olson	Physician	10
583	2265 Pembina	- Dr. D J Scurrah	General Surgeon	10
584	2265 Pembina	- Dr. Y K Cho	Physician	10
585	2265 Pembina	- Dr. Chi M Gan	Physician	10
586	2265 Pembina	- Dr. Jonathon G Werier	Physician	10
587	2265 Pembina	- Central Medical Laboratories		10
588	2265 Pembina	- Dr. Phyllis M. Bedder	Physician	10
589	2265 Pembina	- Brotherhood of Maintenance Of Way Employees	Company Office	9
590	2265 Pembina	- Gutnik Law Office	Barristers and Solicitors	8
591	2265 Pembina	- Vacant Unit # 305		2
592	2265 Pembina	- K M MacDonald & Associates	Quantity Surveyors	8
593	2265 Pembina	- Dr. Connie Magura	Physician	10
594	2265 Pembina	- Markham Physiotherapy Clinic		10
595	2265 Pembina	- Domo Gasoline Corp Ltd	Gas Bar	16
596	2269 Pembina	- Henry Armstrongs - Instant Printing	Print Shop	18
597	2271 Pembina	- Pharma Plus Drugmarts Ltd	Pharmacy	18
598	2280 Pembina	Montcalm Gordon Motor Hotel		23
599	2280 Pembina	- Monty's Pub		14
600	2280 Pembina	- Cold Beer Store		18
601	2280 Pembina	- VLT Centre	Video Lottery Terminal	24
602	2295 Pembina	Markham Place Residential Apartments	Multi-Family Res	1
603	2310 Pembina	Vacant Building		2
604	2331 Pembina	Briarwood Residential Apartments	Multi-Family Res	1
605	2333 Pembina	Briarwood Residential Apartments	Multi-Family Res	1
606	2335 Pembina	Briarwood Residential Apartments	Multi-Family Res	1
607	2339 Pembina	Residential Townhomes	Multi-Family Res	1
608	2340 Pembina	Victoria General Hospital	Hospital	5

ID#	ADDRESS	NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
609	2343 Pembina	Residential Townhomes	Multi-Family Res	1
610	2349 Pembina	Residential Townhomes	Multi-Family Res	1
611	2355 Pembina	Residential Townhomes	Multi-Family Res	1
612	Univ Cres	University of Manitoba		5
613	2361 Pembina	Residential Townhomes	Multi-Family Res	1
614	2369 Pembina	Residential Townhomes	Multi-Family Res	1
615	2385 Pembina	- Radiology Consultants Of Winnipeg		10
616	2385 Pembina	- Unicity lab Services		10
617	2385 Pembina	- Klassen Norma F	Physician	10
618	2385 Pembina	- G J A Denture Clinic	Dentist	10
619	2385 Pembina	- Dr. Jamie Gillespie	General Surgeon	10
620	2385 Pembina	- Hilderman Lorraine G	Physician	10
621	2385 Pembina	- Sharkey Brian j	Physician	10
622	2385 Pembina	- Young David C	Physician	10
623	2385 Pembina	- Verma M R	Pediatrician	10
624	2385 Pembina	- Vacancy - One Unit		2
625	2393 Pembina	Rembrandt Gardens - Residential Apts	Multi-Family Res	1
626	2395 Pembina	Rembrandt Gardens - Residential Apts	Multi-Family Res	1
627	2405 Pembina	Boyd Auto Body	Auto Body Shop	12
628	2405 Pembina	Vacant -		2
629	2425 Pembina	Today's Tire and Automotive	Auto Service and Tire Sales	12
630	2425 Pembina	Kackenhoff's Garden Centre	Retail Garden Flowers and Supplies	18
631	2479 Pembina	Southside Autobody Ltd	Auto Body Shop	12
632	2525 Pembina	Dairy Queen Brazier Store		13
633	2535 Pembina	Bradon Brokerage - New and Used Auto	New and Used Auto Sales	11
634	2555 Pembina	Added Energy	Fireplaces, Stoves and Chimney's	18
635	2555 Pembina	Single Family Residential Home		1
636	2567 Pembina	Prairie Chiropractic	Chiropractic Office	10
637	2571 Pembina	Vacant		2
638	2583 Pembina	Palomino Plains Motor Inn	Motel	23
639	2599 Pembina	Unplugged Technologies	Cellular & Pager	18
640	2627 Pembina	Birchwood Nissan	Auto Sales and Service	11
641	2634 Pembina	Windsor Plywood	Lumber Sales	17
642	2645 Pembina	Dudar Auto Service	Auto Service	12
643	2654 Pembina	Crown Acura	Auto Sales	11
644	2659 Pembina	Brown & Brown Auto Sales	Auto Sales	11
645	2660 Pembina	Sunshine Toyota	Auto Sales	11
646	2677 Pembina	Eye-Deal Eyewear	Retail Eye-wear and Manufacture	18
647	2677 Pembina	The Burger Factory	Restaurant	14
648	2677 Pembina	Nu Manitoba Optical Laboratory	Wholesale Mfg Optical	24
649	2696 Pembina	Blockbuster Video	Video Rentals	18
650	2716 Pembina	Good Year Certified Auto Service Centre	Auto Service and Tire Sales	12
651	45 Dalhousie	Church of Jesus Christ & LD Saints	Church	5
652	2724 Pembina	Pembina Trail Library		6
653	2725 Pembina	- RPM Sports	ATV, Snowmobile, Motorcycles Sales	19
654	2725 Pembina	- JMS Complete Hair and Body Club		7
655	2725 Pembina	- Vacant - Former Pizza Place		2

ID#	ADDRESS		NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
656	2729	Pembina	Boston Pizza	Restaurant	14
657		Pembina	Vacant Land - North of Midas Muffler		3
658	2737	Pembina	Midas Muffler & Brake Shops	Auto Service	12
659	2739	Pembina	Broadway Construction Ltd.	Construction Company	17
660	2740	Pembina	China Garden Restaurant		14
661	2741	Pembina	Fawcett Auto Body Ltd.	Auto Body Shop	12
662	2747	Pembina	Centennial Animal Hospital Ltd.	Vetrinary Medicine	10
663	2747	Pembina	Centennial Pet Boarding & Grooming		24
664	2750	Pembina	- Richmond Family Chiropractic Centre		10
665	2750	Pembina	- Vacant Unit		2
666	2750	Pembina	- Vacant Unit		2
667	2750	Pembina	- Subway Sandwiches & Salads		13
668	2750	Pembina	- Hy-Line Credit Union	Financial Institution	4
669	2765	Pembina	MTS - Central Office	MB Telephone System	9
670	2770	Pembina	Pizza Hut	Restaurant	14
671	2790	Pembina	Palatal Yakiniku Restaurant	Mongolian and Japanese Food	14
672	2791	Pembina	Companion Community Church		5
673	2795	Pembina	- Fit Figures Ladies Health Spa & Babysitting	Spa	7
674	2795	Pembina	- Big Sky Hobbies Ltd	Retail Sales of Hobby Supplies	18
675	2795	Pembina	- Jim's Home Improvements Inc		17
676	2795	Pembina	- Greengage Restaurant		14
677	2799	Pembina	TD Bank and Trust	Financial Institution	4
678	2800	Pembina	- Moonshiners Unlimited	Wine and Beer Making	24
679	2800	Pembina	- B. S Sportswear	Sporting Apparel	19
680	2800	Pembina	- Mister Sub		13
681	2800	Pembina	- Vacant Unit # 108		2
682	2800	Pembina	- Sooter studio's	Studio Pictures	18
683	2800	Pembina	- McPhail Travel Pembina		8
684	2800	Pembina	- Wheatland Health Kitchens, Inc	Bosch Kitchen Centre	17
685	2800	Pembina	- Hair Options	Hair Salon	7
686	2800	Pembina	- SG IIII - Canada	Insurance	8
687	2800	Pembina	- Assiniboine Credit Union Ltd		4
688	2800	Pembina	- Vacant Unit # 101		2
689	2809	Pembina	Vacant		3
690	2815	Pembina	Richmond Auto Clinic	Auto Service	12
691	2830	Pembina	Firestone Tire and Auto Centre	Auto Service and Tire Sales	12
692	2835	Pembina	- Good Guy's Sport & Cycle	Sporting Equipment and Apparel	19
693	2835	Pembina	- Smitty's Pancake House Ltd		14
694	2835	Pembina	- Big Time Pizza Inc	Fast Food	13
695	2835	Pembina	- Ft. Richmond Framing Gallery	Frame and Art Gallery	18
696	2835	Pembina	- 2 Create Hair Studio	Hair Salon	7
697	2835	Pembina	- Consumers Insurance & Real Estate		8
698	2835	Pembina	- Vacant		2
699	1	Killarney	Bank Of Nova Scotia		4
700	3	Killarney	Video Doc	Electronics Servicing	20
701	5	Killarney	Quinton's Cleaners Ltd	Dry Cleaners	7
702	7	Killarney	Seven Eleven Food Store.	Convenience Store	13

ID#	ADDRESS	NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
703	2848 Pembina	Killarney Esso Gas Station		16
704	2855 Pembina	- Friesens	Company Office	9
705	2855 Pembina	- Robin's Donuts		13
706	2855 Pembina	- Vacant Unit		2
707	2855 Pembina	- Royal Bank	Financial Institution	4
708	2855 Pembina	- Vacant - Former Royal Bank		2
709	2855 Pembina	-The Cleaners	Dry Cleaners	7
710	2855 Pembina	- Ultracuts	Hair Dressers	7
711	2855 Pembina	- Ft. Richmond Dental Centre		10
712	2855 Pembina	- La Salle Insurance	Insurance Brokers	8
713	2855 Pembina	- Po Lung Grocery	Grocery Store	15
714	2855 Pembina	- First Class Flowers	Florists	18
715	2855 Pembina	- Vacant Unit		2
716	2855 Pembina	- Liquor Mart	Liquor Store	18
717	2855 Pembina	- Rogers Video	Video Rentals	18
718	2855 Pembina	- Vacant - Two Businesses in one year		2
719	2855 Pembina	- Winnipeg Clinic - Medical Facilities Inc		10
720	2855 Pembina	- Cold Beer Store		18
721	2859 Pembina	Turbo Full Service Gas Station	Gas Station	16
722	2860 Pembina	- Ft. Richmond Jewellers		18
723	2860 Pembina	- Bank of Montreal		4
724	2860 Pembina	- Saigon Custom Tailors	Tailor	7
725	2860 Pembina	- Ft. Richmond Shoe Repair		7
726	2860 Pembina	- Elinda's Hair salon	Hair Salon	7
727	2860 Pembina	- Marcel Laurendeau - MLA St. Norbert	Constituency Office	6
728	2860 Pembina	- Royal Lepage	Real Estate	8
729	2860 Pembina	- Sports Cards Manitoba	Retail - New and Used Trading Cards	18
730	2860 Pembina	- A1 Nutrition Unlimited	Health Food Store	15
731	2860 Pembina	- Shoppers Drug Mart	Pharmacy	18
732	2860 Pembina	- Photo Pro	Camera Shop	18
733	2860 Pembina	- KJ Portrait Express	Studio Pictures	18
734	2860 Pembina	- Ft. Richmond Travel Service		8
735	2860 Pembina	- Dr. D.H Bronstein	Dentist	10
736	2860 Pembina	- Richmond Electronics	Electronics Servicing	20
737	2860 Pembina	- W.M Lylyk Insurance Agencies	Insurance	8
738	2860 Pembina	- Hair Affair	Hair Dressers	7
739	2860 Pembina	- Safeway	Grocery Store	15
740	2860 Pembina	- Ft. Garry Florists South	Florists	18
741	2860 Pembina	- Little Mug Restaurant		13
742	2860 Pembina	- Carelton Card Shop		18
743	2860 Pembina	- Chicken Delight		13
744	2860 Pembina	- Perth's Services Ltd	Dry Cleaners	7
745	2860 Pembina	- Zellers	Department Store	18
746	2866 Pembina	- Impulse Electronics	Electronics Sales	20
747	2866 Pembina	- Bargains for A Dollar Or 2	Bargain Shop	18
748	2866 Pembina	- The Bargain Shop	Bargain Shop	18
749	2866 Pembina	- Ft. Rich Physiotherapy & Spts Inj Cntr		10

ID#	ADDRESS		NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
750	2866	Pembina	- H & R Block	Tax Services	8
751	2866	Pembina	- Canadian Imperial Bank Of Commerce		4
752	2868	Pembina	Domo Gas Station	Gas Bar	16
753	2870	Pembina	Pony Corral	Restaurant	14
754	2900	Pembina	Richmond Gardens Residential Apts	Multi-Family Res	1
755	2935	Pembina	Travelodge Astoria Hotel		23
756	2935	Pembina	- Park Ave Restaurant		14
757	2935	Pembina	- Palladium Bar & Night Club		22
758	2945	Pembina	Westminister Court Residential Apts	Multi-Family Res	1
759	2965	Pembina	Newdale Residential Apartments	Multi-Family Res	1
760	2979	Pembina	- Richmond Music	Music Shop	18
761	2981	Pembina	- Vincenzo Shampoo	Hair Salon	7
762	2983	Pembina	- Chiropractic Centre		10
763	2985	Pembina	- Santa Lucia Pizza		13
764	2987	Pembina	- Vacant		2
765	2989	Pembina	- MB Gov't Health & Family Serv		6
766	2989	Pembina	- MB Veterinary Medical Association		9
767	2989	Pembina	- Richmond Gospel Fellowship	Religious	5
768	2989	Pembina	- Vacant		2
769	2989	Pembina	- Vacant 3 Units		2
770	2989	Pembina	Vacant - Single Family Detached Home		2
771	2991	Pembina	Vacant - Single Family Detached Home		2
772	2993	Pembina	Vacant - Single Family Detached Home		2
773	2995	Pembina	- Video Plus	Video Rentals	18
774	2999	Pembina	- Unit A - The Comic Stop	Retail Comic Shop	18
775	2999	Pembina	- Unit B - National Farmers Union	Company Office	9
776	3000	Pembina	Lakshore Park 1 Res Apartments	Multi-Family Res	1
777	3009	Pembina	Husky Gas Station		16
778	3009	Pembina	- Krystal Klear Carwash Ltd		12
779	3009	Pembina	- Convenience Store		13
780	3021	Pembina	Winnipeg Honda	Auto Sales	11
781	3030	Pembina	Lakeshore Park II Residential Apartments	Multi-Family Res	1
782	3033	Pembina	Petro Can Gas Station		16
783	3033	Pembina	- Neighbours Jiffy Mart		13
784	3033	Pembina	- Car Wash		12
785	3040	Pembina	Chimney Ridge Residential Condominiums	Multi-Family Res	1
786	3045	Pembina	McDonald's Restaurants Of Canada Ltd		13
787	3069	Pembina	Country Knoll Estates Res Condos	Multi-Family Res	1
788	3070	Pembina	Chimney Ridge Residential Condominiums	Multi-Family Res	1
789	3073	Pembina	Country Knoll Estates Res Condos	Multi-Family Res	1
790	3077	Pembina	Country Knoll Estates Res Condos	Multi-Family Res	1
791	3080	Pembina	Chimney Ridge Residential Condominiums	Multi-Family Res	1
792	3080	Dalhousie	Winnipeg Fire Department		6
793	3081	Pembina	Country Knoll Estates Res Condos	Multi-Family Res	1
794	3085	Pembina	Country Knoll Estates Res Condos	Multi-Family Res	1
795	3086	Pembina	Shell Canada Ltd		16
796	3086	Pembina	- Circle K Food Store		13

ID#	ADDRESS		NAME OF BUSINESS ACTIVITY	BUSINESS ACTIVITY	CL
797	3086	Pembina	- Car Wash		12
798	3089	Pembina	Country Knoll Estates Res Condos	Multi-Family Res	1
799	3093	Pembina	Country Knoll Estates Res Condos	Multi-Family Res	1
800	3096	Pembina	Fort Richmond Transmissions	Auto Service	12
801	3096	Pembina	- Uhaul Depot	Truck Rental	16
802	3097	Pembina	Country Knoll Estates Res Condos		1
803	3100	Pembina	Residential Apartments	Multi-Family Res	1
804	3101	Pembina	Sentinel Self-Storage Corporation	Storage Facility Rental	7
805	3102	Pembina	Residential Condominiums	Multi-Family Res	1
806	3104	Pembina	Residential Condominiums	Multi-Family Res	1
807	3105	Pembina	Rodo's Restaurant		14
808	3106	Pembina	Residential Condominiums	Multi-Family Res	1
809	3108	Pembina	Residential Condominiums	Multi-Family Res	1
810	3109	Pembina	Comfort Inn		23
811	3110	Pembina	Residential Apartments	Multi-Family Res	1

Appendix C: Case Study Questionnaire

Department of City Planning, University of Manitoba, Office Tel. No. 474-6578

CONFIDENTIAL QUESTIONNAIRE No. __

Dear Sir or Madame:

My name is Ray Duhamel and I am a graduate student in the Department of City Planning at the University of Manitoba. At present I am gathering data for my master's thesis which is concerned with planning issues and the reasons for the location of commercial firms along Pembina Highway.

I would very much appreciate you taking the time to complete this questionnaire. Only the researcher and thesis advisor will have access to your responses. No other participating respondents or any other private individuals will have access to the information you provide. In addition, neither your name or the name of your business will be used directly in any reports, nor will it be used to identify you in any way.

The information you provide will help in ascertaining the unique nature of this commercial strip and in what ways steps can be taken to improve its social and economic viability. A final copy of my thesis will be available through the University of Manitoba library system upon completion.

Your time and co-operation is greatly appreciated. The success of this project depends upon your assistance. Thank-you very much.

Ray Duhamel

1. Kind of Business.....

2a. How long in present locationyears.....months

2b. Previous address/area of city (if applicable).....

3a. Is the building your business occupies (Please tick correct box)

Owned or Rented

3b. If the building is rented, from whom?.....

4. How extensive is the area your business serves? (Please tick correct box)

Your own neighbourhood All of Pembina Highway

All of Winnipeg All of Manitoba

Other (Specify).....

Please turn to next page...

5. How many people are employed by your firm? (Please tick correct answer)

0 1-5 6-10 11-15 16-20 Over 20

6. How many Square Feet does your business occupy? (Please tick correct box)

Less than 1000 1000-2000 2001 - 5000
 5000 - 10,000 Over 10,000 Don't Know

7a. What is your annual Rent per Square Foot? (If applicable)

Net Rent = Gross Rent = Don't know

7b. When was your lease signed

8. Is your business sales volume...

Increasing Decreasing Remaining the same

9. Are your customers...(Please tick correct box)

Regulars Mostly New comers Don't know

10. How do your customers travel to your business?

(Rank in order of preference i.e. 1 - 2 - 3 - 4)

Walk Bus Car Other (Specify).....

11a. How would you describe the physical condition of the building you occupy?

(Please tick correct box)

In need of minor repair (\$2000 or under)

In need of major repair (Over \$2000)

Good Other (specify).....

11b. Have you (or building owner) made any improvements to your building during your period of operation or during last five years, whichever is less?

(Please tick correct box)

Yes

No

Please turn to next page...

12. Below is a list of possible reasons as to why you located at your present site. Please rate each of these reasons by ticking the appropriate box in the table below.

REASONS	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT IMPORTANT
Low rent			
Suitable building/land			
Sufficient parking space			
Rush Hour Traffic			
Near to passing traffic			
Types of businesses in the area			
Good neighbourhood			
Nearby Residential Development			
Near to bus line			
Access to Downtown			
Access to Perimeter Highway			
Access to Highway 75			
Access to University of Manitoba			
Other (specify)			

13. Would you consider opening other locations in the City in addition to your existing site along Pembina Highway? (Please tick yes or no and any boxes which may have influenced your decision)

Yes, because

No, because

To remain competitive

Too much competition

Favourable market changes

Negative market changes

Change in customers

Unable to access entire market

Other (Specify).....

Other Specify).....

14a. How would you describe the general appearance of Pembina Highway? (Please tick the correct box)

Attractive

Fair

Unattractive

14b. How would you improve the appearance of Pembina Highway?

14c. Are you happy with Pembina Highway as a business location?

Yes

No

Please turn to next page...

15a. Do you plan to rent or buy more space in the near future?
(Please tick correct box)

Yes No Don't know

15b. Are you likely to change the location of your business in the near future?

Yes No Don't know

16. Do any of the following problems hinder the operation of your business.
(Please tick appropriate boxes)

PROBLEM	YES	NO
High rent		
Unattractive neighbourhood		
Location		
Unsuitable land		
Unsuitable building		
Inadequate facilities		
Competition		
Low sales volume		
Decreasing sales volume		
Lack of parking space		
Traffic congestion		
Other (Specify)		

17. What kind of location do you think would be the best for you to do your business? (Please tick correct box)

Downtown Downtown Shopping Mall (i.e. Portage Place)

Strip Mall Specialty Shopping Street (i.e. Corydon Ave)

Commercial Strip (i.e. Portage Ave - High vehicle traffic)

Small Shopping Centre (i.e. Ft. Richmond Plaza)

Large Shopping Center (i.e. Polo Park or St. Vital Mall)

Power Center (i.e. Pembina Crossing, Pembina @ Bishop Grandin)

Other (Specify).....

Please turn to next page...

18a. What business types would you like to see locate in your trade area?

Specify.....

18b. What business types do you not want to see locate in you trade area?

Specify.....

19. Please use this space and the back of this page for any additional remarks you would like to make regarding this questionnaire and the location and operation of your firm:

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