

AN ECONOMIC LAND USE ANALYSIS OF  
SOUTH POINT DOUGLAS, WINNIPEG

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A THESIS  
PRESENTED TO  
THE FACULTY OF GRADUATE STUDIES  
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REQUIREMENTS FOR THE DEGREE  
MASTER OF CITY PLANNING

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by  
EDWARD J. S. WILL

April, 1966



## PREFACE

This study is a factual one; its purpose is three fold. Firstly, it is intended to provide a factual basis for traffic and renewal proposals in the South Point Douglas area within the scope of the Metro Development Plan. Secondly, it is expected to prove useful to industrialists, businessmen and all who are interested in the future of an important segment of the central city area. An informed and aware public is one of the essentials for the proper development of any city.

Lastly, it is hoped that this study, although it is not an economic base study in the true sense of the word, will illustrate the need for a more thorough understanding of the economic forces which are presently helping to mold the shape of our metropolitan area and the lives of the people within it. When, and only when, such a study is completed on a metropolitan-wide scale will there be the possibility of considering proposals for renewal or traffic improvements with a realistic and logical approach.

The information presented in this report has come from three basic sources. A survey of all industry within the study area was attempted by personal interview with questionnaire forms. Approximately 74% of the firms listed in the area answered at least half of the questions on the form. When those firms listed were consolidated into the total number using the same staff etc. as a criteria (many firms existing only in name and utilized a common staff etc. with other

company names), it was found that 91.6% of the firms replied to at least 50% of the questions on each form. It should be mentioned that because a firm might answer one question and not another, the total number of firms may vary throughout the report depending on the section being discussed.

All statistical information found in this study is based on this survey, unless otherwise indicated from the sources. The total numbers of firms listed, to illustrate industrial change in numbers, was taken from Henderson's Directories, 1955 and 1965, and is marked with an asterisk throughout the report.

Principal products for each type of industry have been taken from the most recent Manitoba Trade Directory. The remaining non-statistical sources can be found in the Bibliography.

## ACKNOWLEDGEMENTS

In appreciation of the assistance and cooperation which I received in carrying out this work, I would like to extend my sincere thanks to: Professor V. J. Kostka, Department of City Planning, University of Manitoba; the staff who worked with me in the Planning Division of the Metropolitan Corporation of Greater Winnipeg; Central Mortgage and Housing Corporation who provided the award of a Planning Fellowship; and my wife for her undying patience.



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## SUMMARY

In summary, it should be emphatically stated that the problems of the central city are the problems of the metropolitan area and vice versa. The decentralization of certain industrial uses from the central core to the suburbs in many cases is a movement from one political and taxation area to another and can only be dealt with efficiently on a metropolitan-wide scale. At the same time, the concentration of the unemployed etc. in the older blighted portions of the central city is a liability not only to the municipality within which this occurs, but also to the entire metropolitan region. These are only two examples of metropolitan problems, but in themselves are of such magnitude as to illustrate the dire need for examining the economics of land use patterns over the entire metropolitan area.

## POPULATION

Since the coming of the railroad to South Point Douglas in 1882, the area has become predominantly industrial (including wholesaling) and residential uses have fallen into decay. In fact, under existing conditions residential dwellings should not be located there as they are unhealthy both to the people within them and to the industry surrounding them. A need for some type of low rental accommodation, however, exists in the area as over 70% of the 1,554 persons living there earn less than \$3,000 per year. Along with this need for housing goes the accompanying

requirement for residential services which are almost non-existent at present.

One-half of the resident population was born outside of Canada and 27% have immigrated since World War II. Roughly one quarter of these people are Ukrainian and an equal portion British. The remainder is made up of various smaller ethnic groups. Approximately 35% of the population is Roman Catholic and 18% are United Church. Neither of these faiths has a church in the area. Various other religions are adhered to by many smaller groups.

#### LAND USE AND ZONING

The most predominant land use in the area is rights-of-way which occupy 35% of the land surface for roads, lanes and sidewalks. It goes without saying that this amount is both large and costly. The only other significant land use is light industry, which includes wholesaling, and occupies an estimated 20% of the land.

In terms of zoning, existing controls designate the greatest portion of the land, light industrial followed by heavy industrial and commercial business. Proposed zoning suggests Central Service, Central Commercial and Limited Industrial as the basic uses. This would permit restricted light industry, central business and services, and apartment dwellings, a pattern somewhat different than what presently prevails.

#### ECONOMIC ACTIVITY

The area is generally dominated by Wholesale Trade, Manufacturing

and Transportation, Communication and other Utilities.

In terms of employment, employees in South Point Douglas represent 10.8% of the City of Winnipeg employees and 6.5% of those in the Metro area.

Within the area itself, wholesale trade employs 31.4% of the South Point Douglas staff, Manufacturing 25.1% and Transportation 16.6%. The largest firms in terms of employees per firm are found in Public Administration, Transportation etc. and Manufacturing.

From the standpoint of payroll, Wholesale Trade, Transport etc. and Manufacturing pay out the greatest amounts 32.5%, 21.5% and 21.2% respectively, of the South Point Douglas total payroll reported. The total South Point Douglas payroll represents 11.3% of the payroll paid to employees working in the City of Winnipeg and 6.4% of the payroll paid to employees in the Metro area. Floor space is divided among these industrial divisions in much the same proportions.

#### SIGNIFICANCE OF RAIL TRackage

The so-called "transfer track" with its spurs appears to be one of the economic backbones of the area at present. It is reasonably well used with firms located along it receiving approximately 6,300 box car shipments annually. These firms, although representing only 10% of the total number of firms in the area, account for almost one-third of the study area's economic activity. It could be said that this trackage is

essential to the area at present but its importance could change considerably in the light of the complete renewal program for the area which is presently being considered.

#### LOCATIONAL FACTORS

The majority of firms presently in the area (96%) feel that it is suitable for their requirements, centrality being of key importance. Reasonable rental, building capital or operating costs were emphatically stated to be locational factors important to 80% of the firms in South Point Douglas. The proximity to banking, accounting and legal facilities, as well as the proximity to public transit, were also considered to be of major importance to about 70% of the firms. All firms associated with the grain trade gave the location of the Wheat Board and Grain Exchange as their main reason for locating in the area. Apart from the latter, reasonably priced accommodation, centrality, proximity to the downtown shopping area, and face to face contact with the public gathering at the heart of the city, appear to be the main reasons for industries locating in South Point Douglas.

#### INDUSTRIAL CHANGE

The total number of firms in the study area has decreased by 153 firms, or 18%, in the past 10 years. Of those that are there now, 55% have moved in between 1955 and 1965. This would indicate a rapid turnover in businesses in the area and suggests a trend which is occurring

in most metropolitan areas of North America. The study area is providing cheap accommodation for the birth of new industry.

The greatest portion of the decrease in number of firms is accounted for by the departure of 110 wholesale companies and 37 Community, Business and Personal Service Industries. Transportation, Communication and Other Utilities, on the other hand, have increased in total numbers by 15 firms. The greatest turnovers in firms in and out of the area is found in the Retail Trade and Services to Business Management groups. The former has lost 52 firms, while receiving 41 new firms for a net loss of 11 firms. The latter has had a net gain of 7 firms due to an outflow of 42 firms and an opposite influx of 49 firms.

Where are the firms going that are leaving the area? According to an investigation over the 10 year period, 1955 - 1965, the Downtown industrial area west of Main St. and the newer St. James industrial area have received over two-thirds of the firms whose locations could be traced. Both areas have received firms from almost every industrial classification, but almost one-half of those staying in the downtown area are Community, Business and Personal Service Industries. The strongest movement to the St. James location has been for Wholesaling and Manufacturing firms. These industrial divisions account for roughly 50% and 25% respectively, of South Point Douglas firms locating in St. James over the past 10 years. It is also interesting to note that of the 393 firms which have left the study area, during this time interval, the locations of only 152 firms or 38% could be found listed in 1965.

With regard to the future outlook of existing firms in South Point Douglas, 83.3% of the 509 firms reporting to our questionnaire stated that they wished to remain in the area, and 12.1% anticipated moving in the near future. The remainder did not comment.



## CHAPTER I

### THE METROPOLITAN SETTING

#### THE URBAN PROBLEM

In the growth of every Metropolitan area of North America, there are common basic issues which arise in heated conflict each day of the week, but transportation and the pattern of land use are at the heart of the metropolitan problem. Neither of these can be treated independently of the other and should not be. Presently, the Streets and Traffic Department of the Metropolitan Corporation of Greater Winnipeg are preparing a traffic thoroughfare plan for Metropolitan Winnipeg. This is not a simple task, particularly where new facilities must be provided in already built up areas to give better traffic movements in and out of the central business district. In the implementation of such improvements, costs play a major role in determining the type of facility, and exact location, etc., factors which must be considered while the traffic plan is being evolved against the overall background.

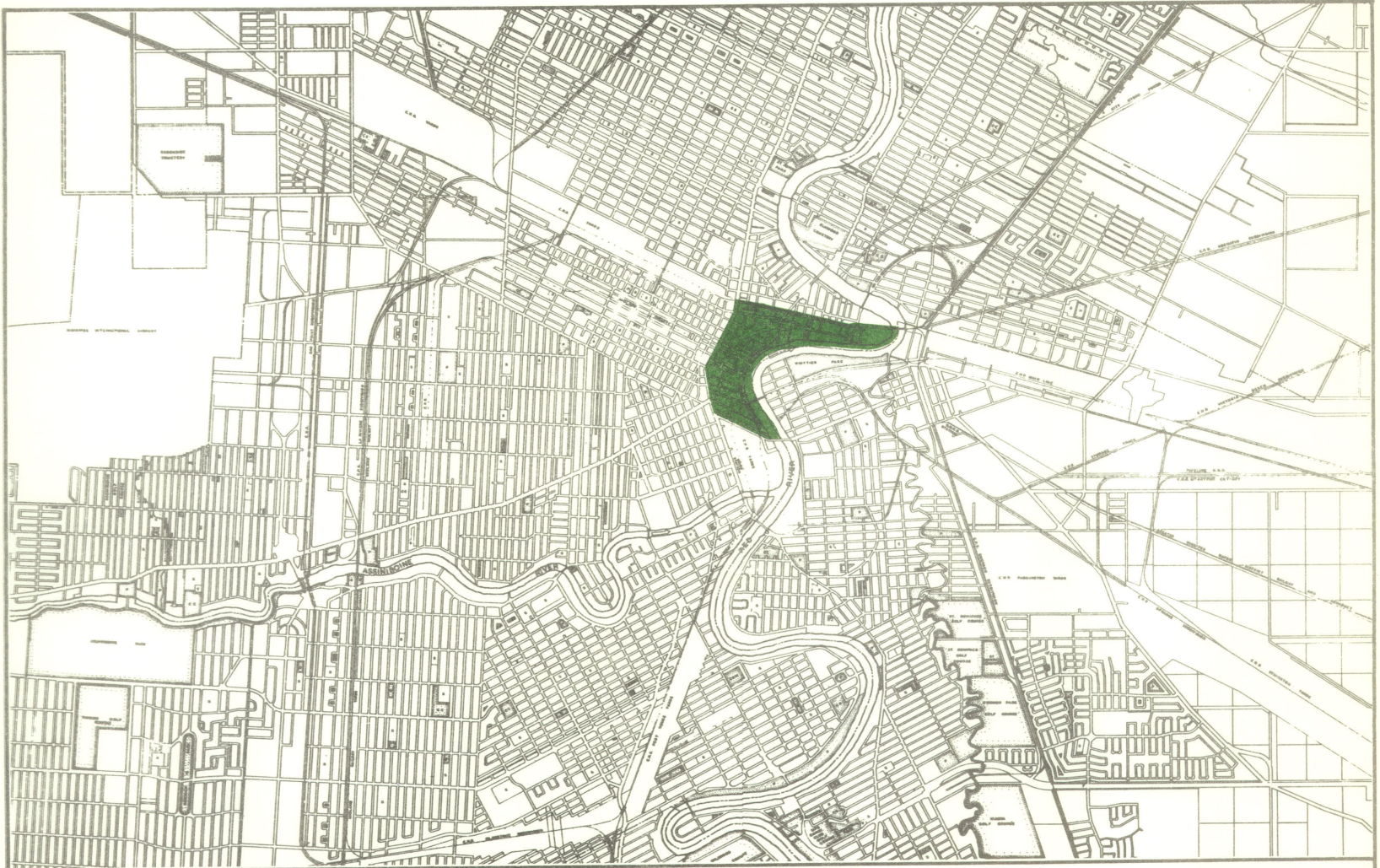
At the same time land use must be accounted for as it is the generator and recipient of the travelling vehicle and its contents. The uses at either end of the facility and along its course feel its impact as land is acquired, people move, buildings are demolished and traffic volumes increase. The important question is, therefore, if

a traffic facility is to penetrate and dissect an important part of our city where every part is important, then what influence will it have on the adjacent land uses?

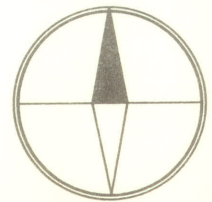
To answer this question and at the same time provide a plan of action for the future growth of the Metropolitan area, the Planning Division of the Metropolitan Corporation of Greater Winnipeg is in the process of establishing a statement of policy, in the form of a development plan designed "to secure and promote the orderly growth and economic development in the metropolitan area and additional zone or any part thereof, in the manner most advantageous to, and that will best promote those amenities that are essential to, or desirable for, the well being of, the inhabitant thereof." <sup>1</sup>.

Within the scope of this plan is the designation of future uses to be affected by the facilities provided by the traffic thoroughfare plan. It is this provision that this study is concerned with and it is a concern in the light of both the traffic plan and the development plan. The heaviest movement of traffic in any metropolitan area is the trip to and from work and shopping. It is this trip which takes us out of the surrounding residential area and into the central city core, and back again, and it is for this purpose that the greatest expenditure and optimum size facilities are required. In planning services such as these, specific critical problems arise where major buildings stand in the way or rivers must be crossed, to name a few.

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1. Metropolitan Corporation of Greater Winnipeg, Planning Division, Metropolitan Winnipeg Development Plan, Winnipeg, 1964.



**south point douglas study area**



The economics of land use then stand foremost as the prime consideration.

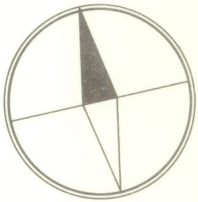
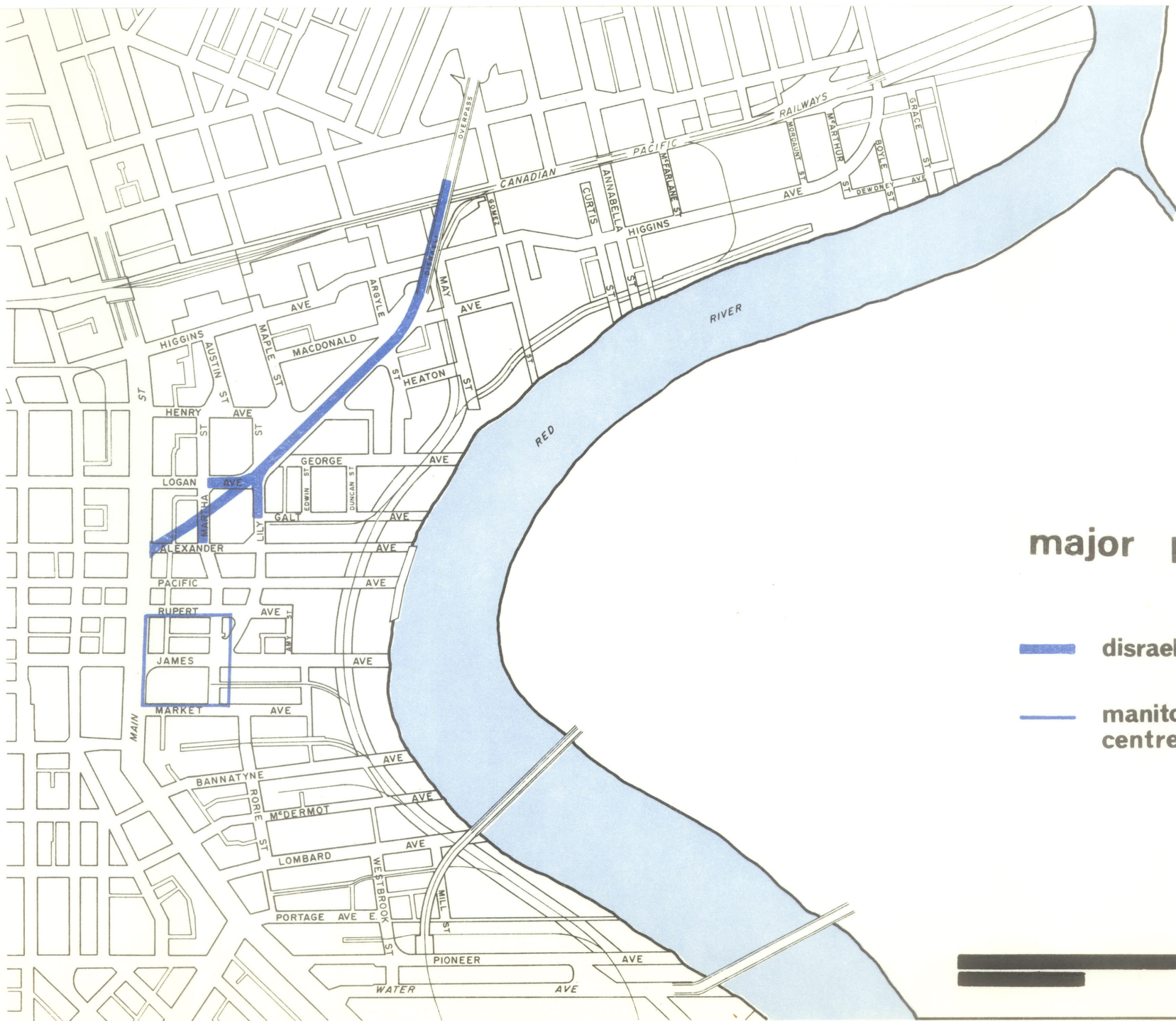
It is the intention of the study, then, to examine such an area within the urban core in which traffic proposals will have a direct and powerful affect on the future land use, and where the economics of land use are the foremost consideration. This area is shown on Plate 1 and is commonly known as South Point Douglas. The writer realizes that it is not a logical course of action to examine a particular section of a metropolitan region without first having established the broader structural framework of the workings of the Metropolitan area. However, limited amounts of time and money and the immediate need to solve the area's traffic pattern in light of the proposed Manitoba Cultural Centre within the area, have dictated the course of action. (see Plate 2)

#### THE METROPOLITAN AREA

Metropolitan areas come in varied assortments of sizes and shapes, "often with nothing more in common than conformity to the minimum standards of size and density set by the Bureau of Statistics."<sup>2</sup> Size may vary from the 10 million inhabitants of greater New York to the 65,000 people in San Angelo Metropolitan area in Texas. Cities may have grown up as one-industry towns such as Pittsburgh or Detroit, or they may have expanded as distributive centres such as Winnipeg, with its grain centre, meat packing plants and railyards.

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2. Chinitz, B., The Economics of Metropolitan Growth, Englewood Cliffs, N.J., 1964.

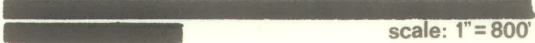




2

major projects

- disraeli freeway approaches
- manitoba cultural centre site



scale: 1" = 800'

The *raison d'être* of all metropolitan areas is specialization and trade with areas outside; they all depend on it. Another common characteristic of a metropolitan area is its high degree of self-sufficiency. No metropolitan area produces all it consumes, making it essential that trade involve imports as well as exports. However, the greater majority of metropolitan areas are capable of providing for a large percentage of their own needs. In saying this, we should remember the difference between a city and a metropolitan area. Cut off from the surrounding world, New York City today or the City of Winnipeg some-day tomorrow, would starve to death in short order, but the metropolitan area around would survive a lot longer although its diet would be somewhat limited. The metropolitan area is no longer an integrated unit of mixed uses. Supporting market gardens help to supply food from the fringe, financial and governmental complexes group at the core and industry sorts itself out by centralization or decentralization according to land costs, space available for expansion and complementary activities. These factors must not be forgotten in the preparation of plans for the development of Metropolitan Winnipeg.

This interrelationship of functions within this urban area makes it of paramount importance that land use be considered in any future traffic thoroughfare program. Speaking more specifically now, the characteristics of the uses within the study area of this report must be examined in detail, to determine whether they can survive the



deseccration of their community by increased traffic thoroughfares, or whether they could operate more efficiently elsewhere, and if so, what uses should take their place in redevelopment.

Thus, as in all metropolitan areas, the problems of the central city are the problems of the metropolitan area as well. In spite of the ever increasing importance of the suburban section, the economic well-being of all metropolitan areas is heavily dependent on the city around which it has grown. It is for this reason that we must be cautious in establishing proposals for the study area, for their impact, good or bad, will be felt throughout the metropolitan region.

### THE STUDY AREA

#### Geographic and Historical Setting <sup>3</sup>.

Let us begin our examination of the study area by establishing its geographical and historical setting. As shown on Plate 1, South Point Douglas is spread out along the Red River immediately north-east of Winnipeg's major intersection, Portage Avenue and Main Street. The study area constitutes a portion of the City of Winnipeg's older business section which is now made up, for the most part, of manufacturing, wholesaling, and second grade commercial uses.

It is part of the urban core of the main city, and as one might expect, it was among the city's first areas to be settled. This settlement took place between 1780 and 1812 and gained prominence as Colony Gardens in the hands of Captain Macdonell, the man responsible

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3. City of Winnipeg Urban Renewal and Rehabilitation Board, Urban Redevelopment Study Number 1 - South Point Douglas, Winnipeg, 1959.

for those so-called Selkirk Settlers.

Fort Douglas was built in 1812 at the foot of what are now Robert and George Avenues and was used as a Hudson's Bay Company storehouse.

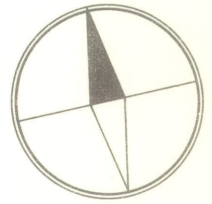
The first land to be officially allotted to the settlers was made in 1816 by Des Meurons and became known as Point Douglas. Within a few years log cabins lined the banks of the river to form the Red River settlement, the foundation of the City of Winnipeg. By 1855 the colony had its own post office, Ross House, which can still be seen at the corner of Higgins Avenue and Martha Streets.

In the next quarter century the colony grew to sizeable proportions and developed its own individuality, located in the area bounded by Main Street, Market Avenue, the Red River and the Louise Bridge. Incorporation as a hamlet took place in 1873.

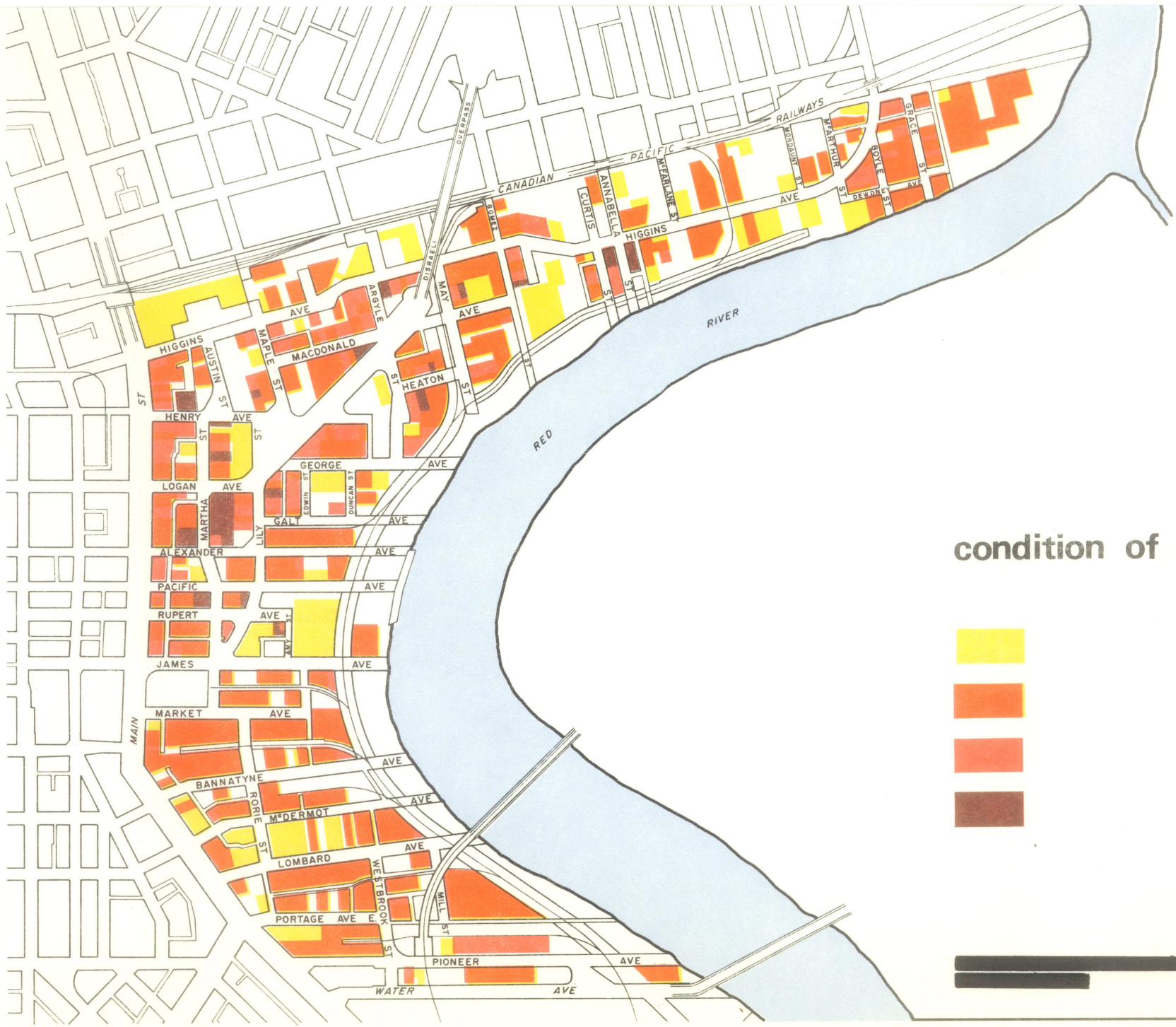
The first major factor to disrupt the growth pattern of Point Douglas was the coming of the railroad in 1882. This event brought its usual complement, in this case Ogilvie Flouring Mills and many large store houses, thus introducing a second major land use to the area. The usual pattern of results occurred as high class residential building gradually came to a halt in the area, moving to industry-free property between the Assiniboine River and Portage Avenue.

Industrial and commercial interests continued to expand along and outward from the rail lines, and as residential dwellings yielded



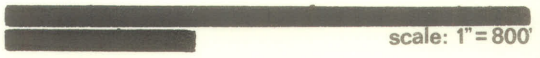


3



condition of buildings

-  good
-  fair
-  poor
-  very poor

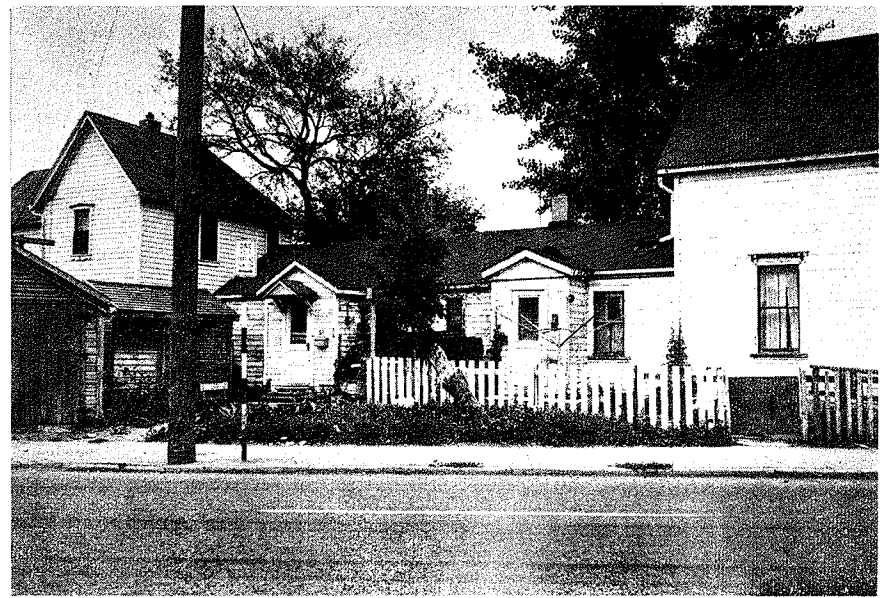
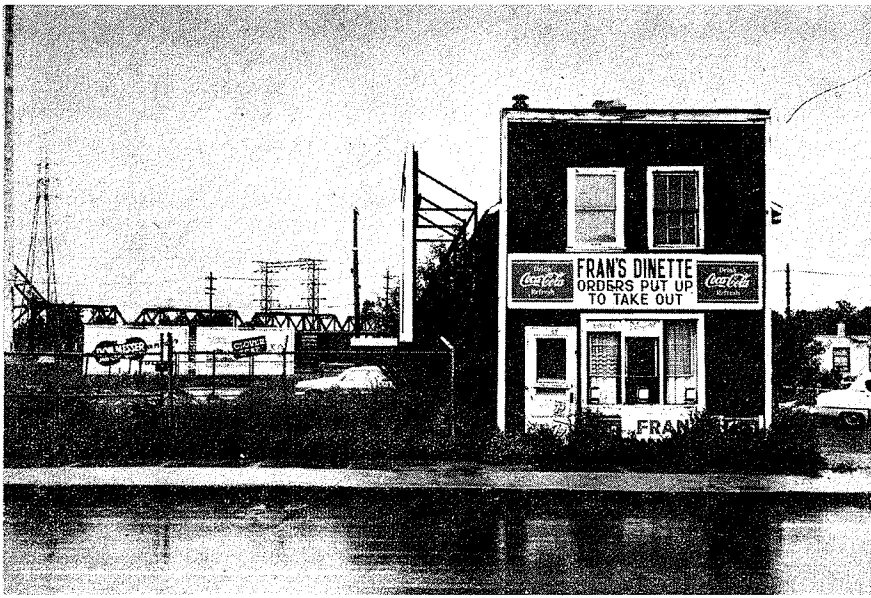
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to this new pressure. In this fashion, which has been repeated throughout the historical growth of almost every North American City, encroaching industry without controls has spelled the doom for what were strong residential neighborhoods. The healthy replacement of residential homes by suitable industry as a process of highest and best use, however, did not take place here. Many people stayed on in the area because of the shortage of housing outside it, and within the area, there was not enough time to build necessary services such as schools, parks and commercial outlets. These necessities were never built and the surviving homes were therefore undesirable and quickly fell into disrepair, as we find them today.

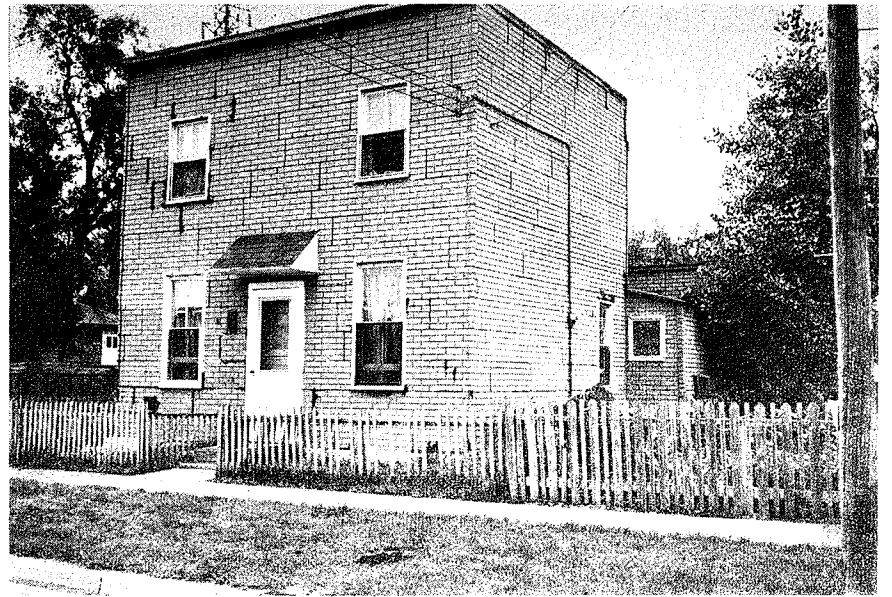
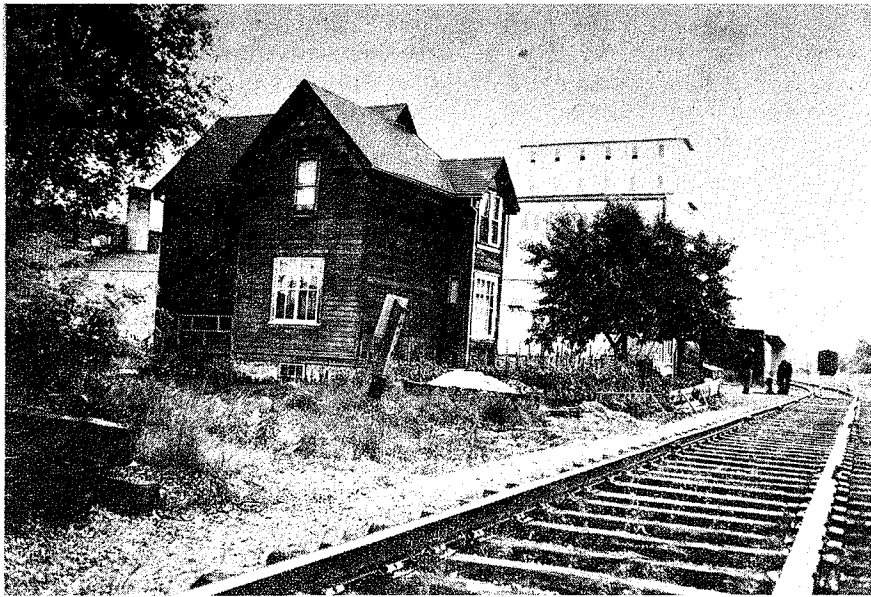
#### THE STUDY AREA TODAY

The environment which is found in this area today (see Plates 4 and 5) shows the dominance of industry, but its features are marked with decaying residential dwellings which do not have the proper amenities to survive. Because of this blight the area is seen as an inferior industrial and residential area and while there is no hope for the survival of residential uses, nor is there any encouragement for the revitalization of industrial enterprises. Buildings of every type are showing their age and are not being replaced by modern structures. (see Plate 3)

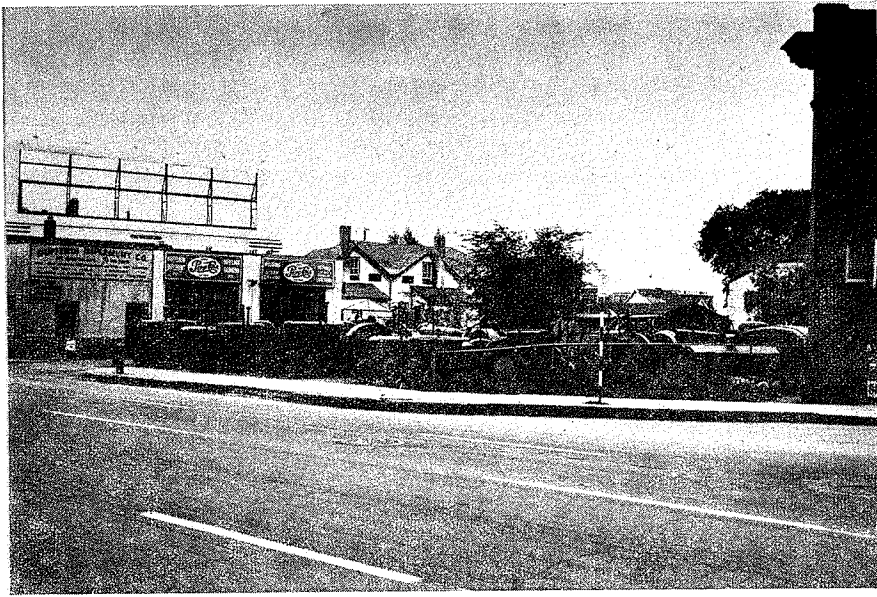
It is evident, as shown in later sections, that firms are moving out of the central area to suburban locations. This trend is found in



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most major urban centres when structures in older areas, such as South Point Douglas, have not been replaced and company growth is restricted to the size and shape of the old buildings. Further expansion would be difficult and expensive. When a firm grows to a size where it becomes more economical to provide its own transportation needs than to rely on outside facilities, the problem of traffic congestion and lack of parking and loading space may become acute. Therefore, the greater availability of open sites is probably the most important single factor which causes this movement to the suburbs.

If this movement has been continuing for sometime, it will be found, particularly with manufacturing, that firms in the urban centre of a metropolitan area are smaller in size than those located on the periphery. This is no accident.

The size and shape of the older buildings of South Point Douglas provide cheap accommodation for the small company whose future is still uncertain. At the same time, however, older firms which occupy buildings which were designed for their function still remain in the area. The question is for how long.

#### THE QUESTION

As the central core of our city grows older and more congested, the cost of modernizing obsolescent structure increases until it is cheaper to build elsewhere on open suburban land rather than to modify existing structures. Suburban industrial complexes develop on their own

accord and in most cases are able to provide sufficient services to attract even new industry, a characteristic once exclusive only to the urban centre. Suburban locations are therefore attracting new industry and industry which has been forced to move from the central core because of space limitations and congestion. What then is left behind in the wake of this movement to the suburbs and what should be done with the area in future? The answer to the first question will be found in the following chapter, and as mentioned in a preceding section, the intention is to provide a sound basis for answering the second question. These facts are presented in view of the Metropolitan traffic plan, thoroughfare plan, Manitoba Cultural Centre proposals and the City of Winnipeg's Urban Renewal Scheme for the area.

## CHAPTER II

## THE STUDY AREA ENVIRONMENT

POPULATION 4.

## Decline

Only .34% of the Metropolitan Winnipeg population lived within the study area at the time of the 1961 census, and this amount has been the result of a steady decrease in numbers over the years as industry continues to replace residential uses. This decrease is illustrated in the following table:

TABLE 1

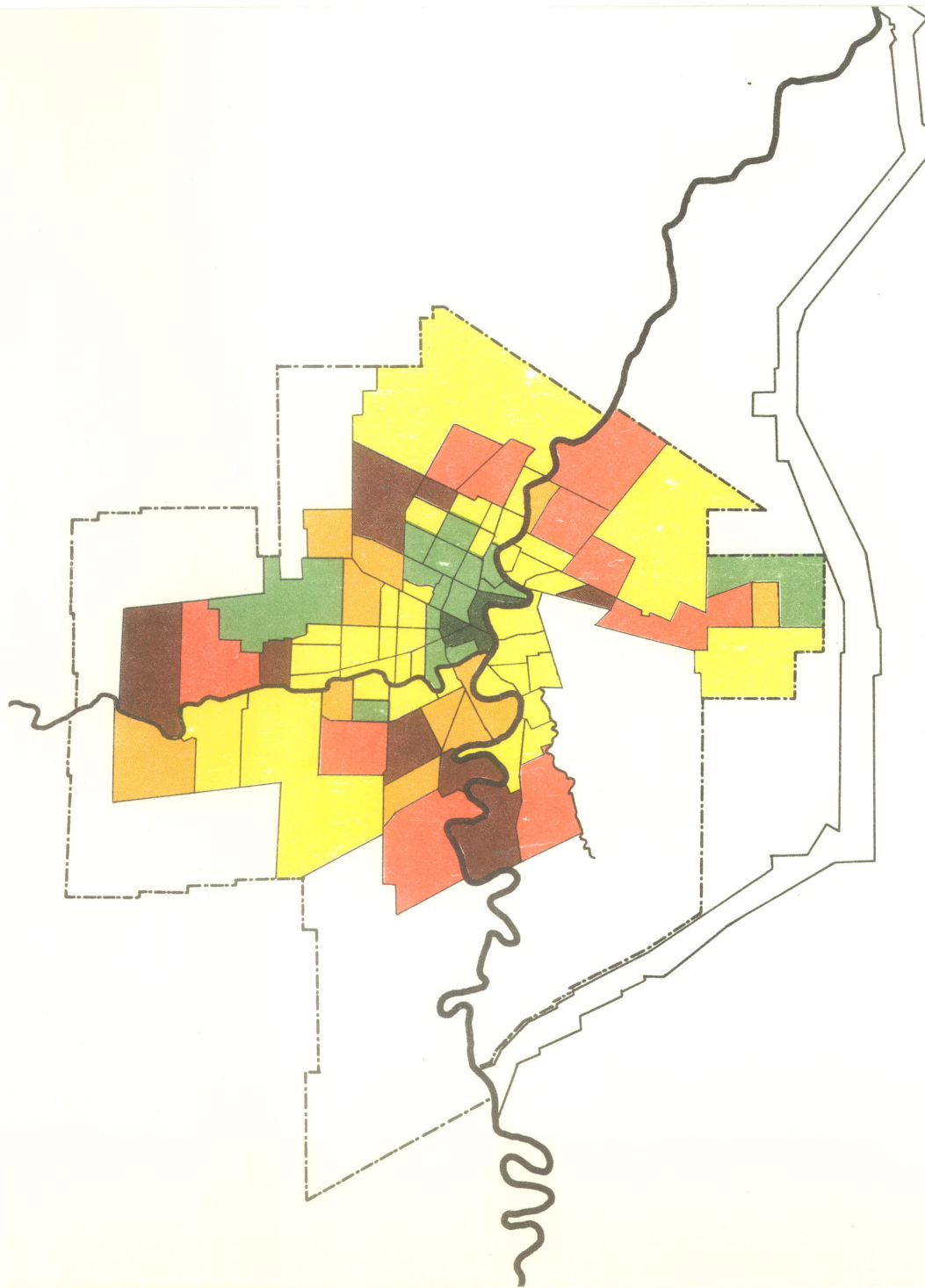
## SOUTH POINT DOUGLAS POPULATION CHANGE

Year	Population	Population Decrease	% Decrease	% of Metro Total
1941	3,210			1.1%
1951	2,738	472	14.7%	.8%
1956	2,620	118	4.3%	.6%
1961	1,554	1,066	40.7%	.3%

The decreasing population in the study area is typical of other mixed industrial or commercial areas in the central portion of Metropolitan Winnipeg as illustrated on Plate 6. The common factor in all of these areas is in the continued expansion of industry and commerce at the expense of residential uses. This trend is likely to continue in future as the study area in particular will accommodate proposed traffic facilities

4. Dominion Bureau of Statistics, Census of Canada, 1961, Population And Housing Characteristics By Census Tracts, Ottawa, 1963.

**population changes**  
**1951**                      **1961**



**6**





and cultural centre uses, which will require the removal of even more residential dwellings.

A steady movement of population has been taking place in and around the study area as migrants from the study area move to adjacent areas in search of low rental accommodation, and persons already in the adjacent areas continue to move outward also in search of low rental units. Future expansion of traffic facilities and industrial uses in the central area of Winnipeg will continue to increase the deficiency of low-rental housing units in the metropolitan area.<sup>5</sup>

#### SEX AND AGE GROUP

##### Structure

The population structure of the study area is characterized by an abundance of males between the age of 25 and 64. (see Figure 1) Approximately 70% of the population is male and of these 57% are in the age group mentioned, as illustrated below. The largest single group of males are between 55 and 64 years of age and are equal in number to 50% of all the females in the area.

Up to 25 years of age, there are approximately an equal number of males and females. The great difference occurs beyond this age where males outnumber from double to 5 times the number of females in every age group. This excess of males consists, for the most part, of transient workers, unemployed and retired men whose incomes necessitate their

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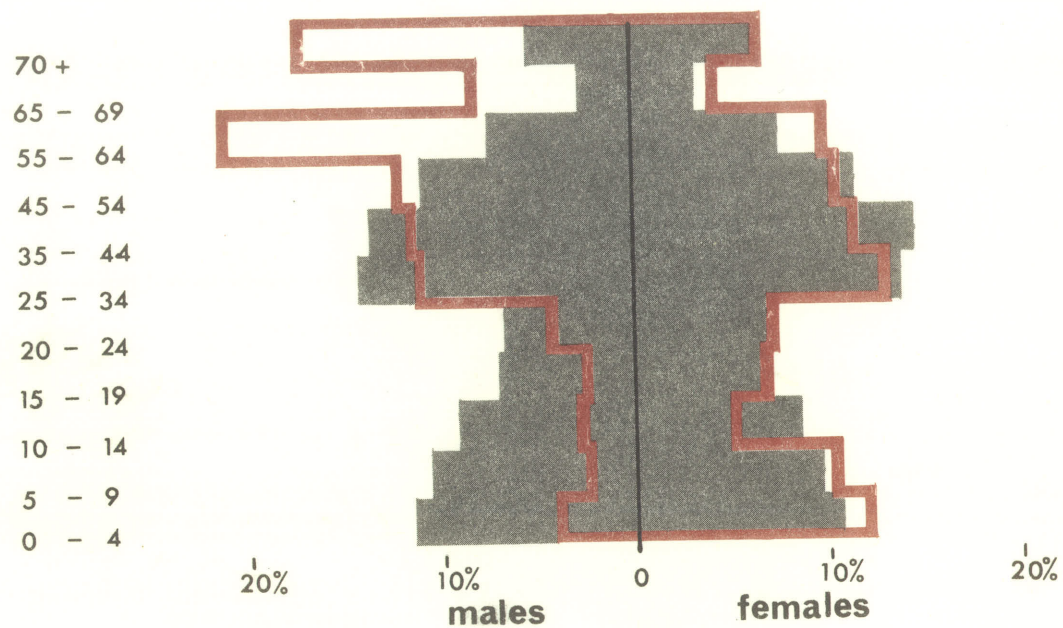
5. Metropolitan Corporation of Greater Winnipeg, Planning Division, Metropolitan Urban Renewal Study - Interim Report, Winnipeg, 1962 p. 27.

staying in this area, as it supplies a considerable amount of low cost boarding and rooming house accommodation.

The irregular sex and age group pattern of the study area is clearly illustrated by a visual comparison of the following population pyramids.

## south point douglas population structure by age & sex groups

FIGURE 1



metropolitan area

south point douglas

## MARITAL STATUS

As can be expected, the proportion of single people in the study area is higher than that in the Metropolitan Winnipeg Area. (see Table 2) However, 72.1% of the single people are over the age of 15 in South Point Douglas while only 34.3% are over 15 years of age in the metropolitan area. This is likely due to the previously mentioned excess number of males over the age of 25.

TABLE 2  
MARITAL STATUS

	South Point Douglas		Metro Winnipeg	
	Persons	% of Total Persons	Persons	% of Total Persons
Single Total	846	55.2%	233,480	49.1%
Single - 15 years and over	610 (72.1% of single)		80,119 (49% of single)	
Married	573	37.4%	226,000	47.5%
Widowed	113	7.4%	24,419	5.1%

Conversely the study area has a lower proportion of married people than the Metro total.

## BIRTH PLACE

The Dominion Bureau of Statistics (see Appendix A) indicates that

approximately one-half of the study area population was born outside of Canada, but only 27.2% of these have immigrated since World War II.

#### ETHNIC GROUP

Persons with Ukrainian and British backgrounds occupy the two largest ethnic groups in South Point Douglas with 26.2% and 25.0% of the population respectively. The remaining ethnic backgrounds are relatively small in size with the exception of other European. (see Appendix A)

#### LANGUAGE

English is spoken by almost the entire population with the exception of 5.0% who speak neither English or French and .5% who speak only French.

#### RELIGION

The Roman Catholic faith is the largest religious group in the area serving 35.1% of the population. The next largest group is the United Church of Canada with 273 persons or 17.6% and the remaining groups are smaller in number. (see Appendix A)

#### FORMAL EDUCATION

At the time of the 1961 Census, 90.2% of the population was not attending school. Of these 1,401 persons, 16.5% had received no formal education (including children under 5 years of age) and 43.1% had taken

only 1 or more years of elementary schooling. (see Appendix A)

Approximately 29.0% of the inhabitants have some high school education and only 1.8% have attended University.

#### HOUSEHOLDS AND FAMILIES

According to Dominion Bureau of Statistics' definition, there are 329 households and 222 families in South Point Douglas. The number of persons per household is 3.3, considerably lower than the Metro figure 3.6. Also lower by .2 is the number of persons per family by .1 persons.

The wage and salary income per head is \$2,708, much less than the Metro average of \$4,307.

#### LABOR FORCE (RESIDENT)

##### General

The labor force residing in the study area consists of 670 persons of which 80% are males and 20% females. Approximately 20% of the males are looking for work while 80% have a job. On the other hand, all of the female labor force with the exception of 4 women are holding down a job.

##### Class of Worker and Occupational Division

Only 6% of the male workers are self-employed, the remainder being wage earners. Female labor is divided into 78% wage earner, 20% self-employed and 2% unpaid family worker.

The largest male occupation divisions are craftsman, production process and related workers, service and recreation, and laborer, in order of size. Each of these divisions employ 20, or 26% of the males making up approximately 73% of the total male labor force. Very few females are employed in the remaining occupational divisions. (see Appendix B)

Females residing in the study area are largely employed in Service and Recreation, as craftsmen, production process and related workers and as clerks. Service and Recreation occupations alone employ almost 50% of the female labor force.

#### WAGE AND SALARY INCOME

The average male wage and salary income in the study area is lower than any other part of Metropolitan Winnipeg. Approximately 87% of the labor force make less than \$4,000 annually and 69% make less than \$3,000 annually. (see Appendix B) The average male wage and salary income was \$2,164 in 1961.

Earnings of female workers living in the study area are the lowest in Metro Winnipeg with the exception of an area between the Midland and Canadian Pacific Railways. Approximately 93% of the female labor force make less than \$3,000 per year and almost 70% make less than \$2,000.

## LAND USE

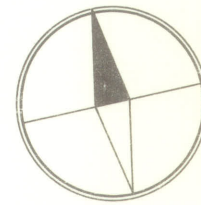
The most predominant land use in South Point Douglas is industrial. The remaining uses are not integrated in any logical coherent pattern throughout the area, but are scattered and mixed haphazardly in pockets here and there, with the exception of the Main Street commercial frontage as shown on Plate 7.

The unregulated growth of this portion of the city has resulted in this unsatisfactory mixture of land use and the blighted residential uses which have not yet been squeezed out by industry are tending to degrade the appearance of the industrial uses beside them, as shown on Plates 3, 4, and 5.

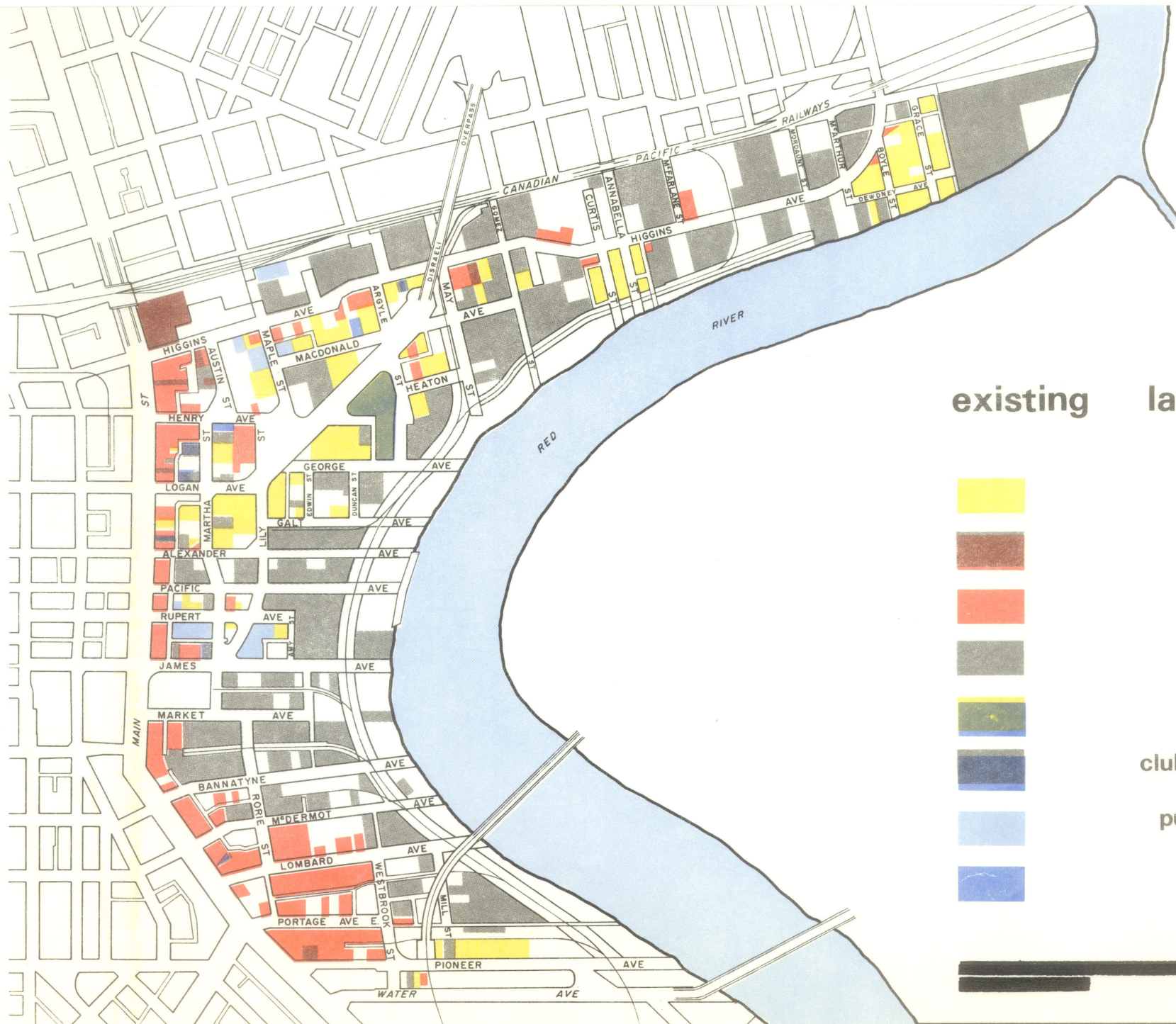
The original street pattern and more recent traffic improvements have resulted in an unusually high percentage of land used for rights-of-way as shown on Table 3. The construction of the Disraeli Freeway which dissects a portion of the area diagonally, has added more confusion to the land use pattern by splitting residential areas into even smaller pockets.

The following table summarizes the basic land use in the area and illustrates clearly the predominance of uses other than residential.








7



**existing land use**

-  residential
-  hotels
-  commercial
-  industrial
-  schools
-  clubs, lodges, etc.
-  public buildings
-  churches

 scale: 1" = 800'

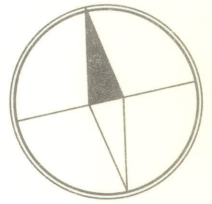


TABLE 3  
LAND USE

LAND USE CATEGORY	ACREAGE	% OF THE GROSS AREA OCCUPIED BY EACH USE
Public R.O.W. (streets, lanes and sidewalks)	91.86	35%
Residential	20.46	8%
Local Commercial	1.71	1%
General Commercial (includes offices)	24.01	9%
Light Industry (includes warehousing)	53.17	20%
Heavy Industry	15.43	6%
Parking	22.56	9%
Other	8.61	3%
Railroad R.O.W.	12.30	5%
Vacant	11.21	4%
<b>TOTAL</b>	<b>261.32 acres</b>	<b>100.0%</b>

### ZONING

The Metropolitan Corporation of Greater Winnipeg is, at the present time, the authority which administers zoning regulations for each of the member municipalities in Greater Winnipeg. Because each of the municipalities was responsible for the establishment of its own form of



8



existing zoning



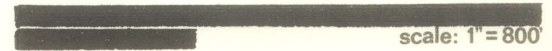
CM business district



M2 light industry



M3 heavy industry



scale: 1" = 800'

zoning prior to the formation of Metropolitan Government in 1960, regulations are not uniform throughout Metro Winnipeg. For this reason, the Metropolitan Corporation is reviewing the existing by-laws in order to establish uniform zoning and this is likely to be completed and published in the very near future under the title "The Metropolitan Winnipeg Zoning By-law."

Existing zoning for the study area as shown on Plate 8 designates the area mainly industrial with a commercial-light industrial strip along the Main Street frontage. "The Metropolitan Zoning By-law" which will soon be established by Metro in conformance with the proposed Metropolitan Winnipeg Development Plan, designates in Draft By-law No. 707, <sup>6</sup> five districts in the study area to be known as C5-C - Central Commercial; C5-S - Central Service; M2 - Limited Commercial; PR - Park Recreational; and FP - Flood Plain as shown on Plate 9.

The purpose of each of these districts is as follows:

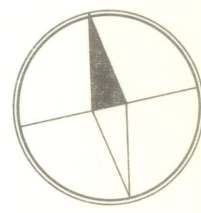
C5-S and C5-C: These districts are established to provide for the uses in the Central Business District.

C5-S provides for the personal services related to the C5-R District (C5-R district is applied to the part of the Central Business District where prime retail uses are located) or those specialized services needing a central location including apartment residential uses.

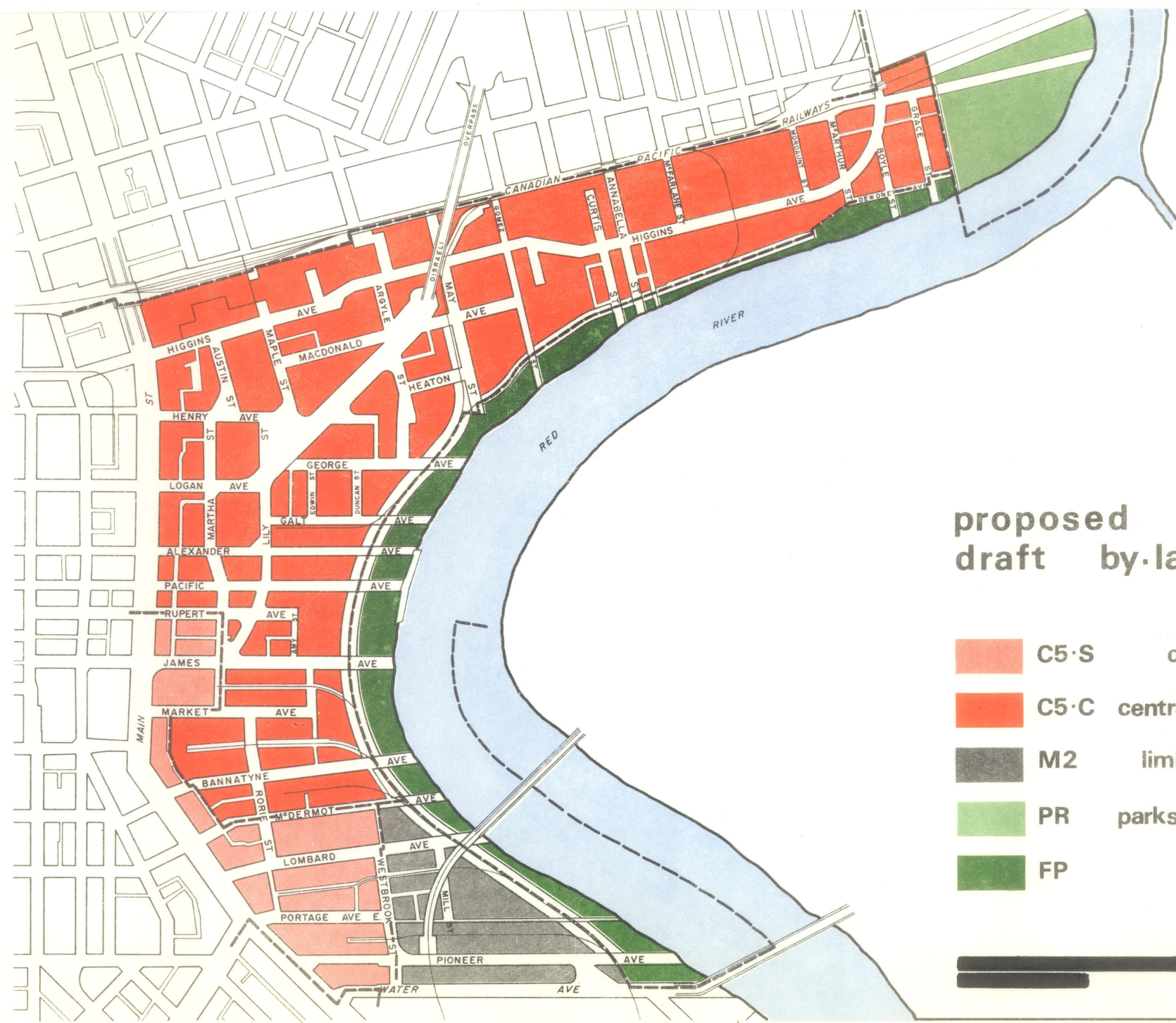
C5-C districts provide for other commercial, wholesale and

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6. Metropolitan Corporation of Greater Winnipeg, Planning Division, Draft - The Metropolitan Winnipeg Zoning By-law, Winnipeg, 1964.








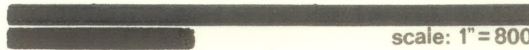


9



proposed zoning  
draft by-law 707

-  C5-S central service
-  C5-C central commercial
-  M2 limited industrial
-  PR parks-recreational
-  FP flood plain

 scale: 1" = 800'

certain light industrial uses requiring a central location, but not included in the C5-S classifications.

M2: This district is to provide for a limited range of light manufacturing and warehousing uses which carry on their operations in such a manner that no nuisance factor is created or emitted outside an enclosed building. A limited amount of outside storage is permitted providing it is enclosed within a wall or other adequate screen.

PR: This district is intended to provide for permanent open space to serve the needs of the community. The regulations in the by-law are designed to retain and encourage the use of certain large open areas for recreational purposes.

FP: These districts are designed to be applied by the Corporation to lands which lie within a primary floodway, which for the purposes of the by-law shall be construed to be a river or stream channel and the portions of the adjacent flood plain that are required to efficiently carry the flood flow of the river or stream and of which lands special regulations are necessary for the minimum protection of the public health and safety, and of land.

Generally speaking, the future use of land in the study area apart from open space is designated to be restricted light industry, central business and apartment dwellings. No provision for any type of residential units other than apartments has been made in the by-law, thus eliminating any possibility that the existing single family homes will survive as a major use in the area.

## CHAPTER III

## ECONOMIC CHARACTER OF THE AREA

INDUSTRIAL DIVERSITY

Because of its central geographic location between the Atlantic and Pacific Oceans and its position on the threshold to the Canadian prairies, Winnipeg has become an important manufacturing and distributive centre. It has helped to attract a varied industrial base which makes use of the available low cost power, a large supply of fresh water and ample transportation facilities.

Industry in Winnipeg found its origin with the advent of the railroad to Point Douglas in 1881. Since this time, Winnipeg has become the wheat capital of Canada and a major manufacturer and distributor of goods to points both east and west by way of the transcontinental highway and rail lines. The study area is part of the first industrial development to take place along the rail line (in Point Douglas) and has continued to maintain its position as an integral portion of the downtown Winnipeg industrial area,<sup>7</sup> the so-called hub of industry in the Metropolitan area.

Industries have mainly located in the study area because it provides several basic amenities which are difficult to find elsewhere. Firstly, there are those firms which have been there since the area originally developed, or soon thereafter, and have enjoyed a known location ever since. Secondly, there are those firms which desire a

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7. Metropolitan Corporation of Greater Winnipeg, Planning Division, Industrial Location in Metropolitan Winnipeg, Winnipeg, 1963.

downtown location, central to most parts of Winnipeg for distributive purposes and customer trade, and at the same time, a location which provides accommodation in a suitable building for a low cost. These amenities are available in the study area at the present time and their nature has naturally attracted the types of industry which can best use them.

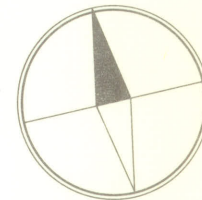
The types of industries within the area have been broken down into standard industrial classifications according to the Dominion Bureau of Statistics and are found in the following proportion within the study area. (also see Plate 10)

The nature of the classification "is one of industries and not occupations or commodities. The term 'industry' is used here in its broadest sense to include all economic activity from the primary industries such as agriculture and forestry to those concerned with the rendering of services. An industry is composed of establishments engaged in the same or similar kind of economic activity, e.g. logging camps, coal mines, clothing factories, department stores, laundries."<sup>8</sup>

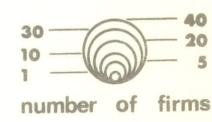
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8. Dominion Bureau of Statistics, Standard Industrial Classification Manual, Ottawa, 1960, p. 7.














10



number of firms

### industrial location

-  agriculture
-  manufacturing
-  construction
-  transportation, communication & other utilities
-  wholesale trade
-  retail trade
-  finance, insurance & real estate
-  community business & personal service
-  public administration & defence

scale: 1" = 800'

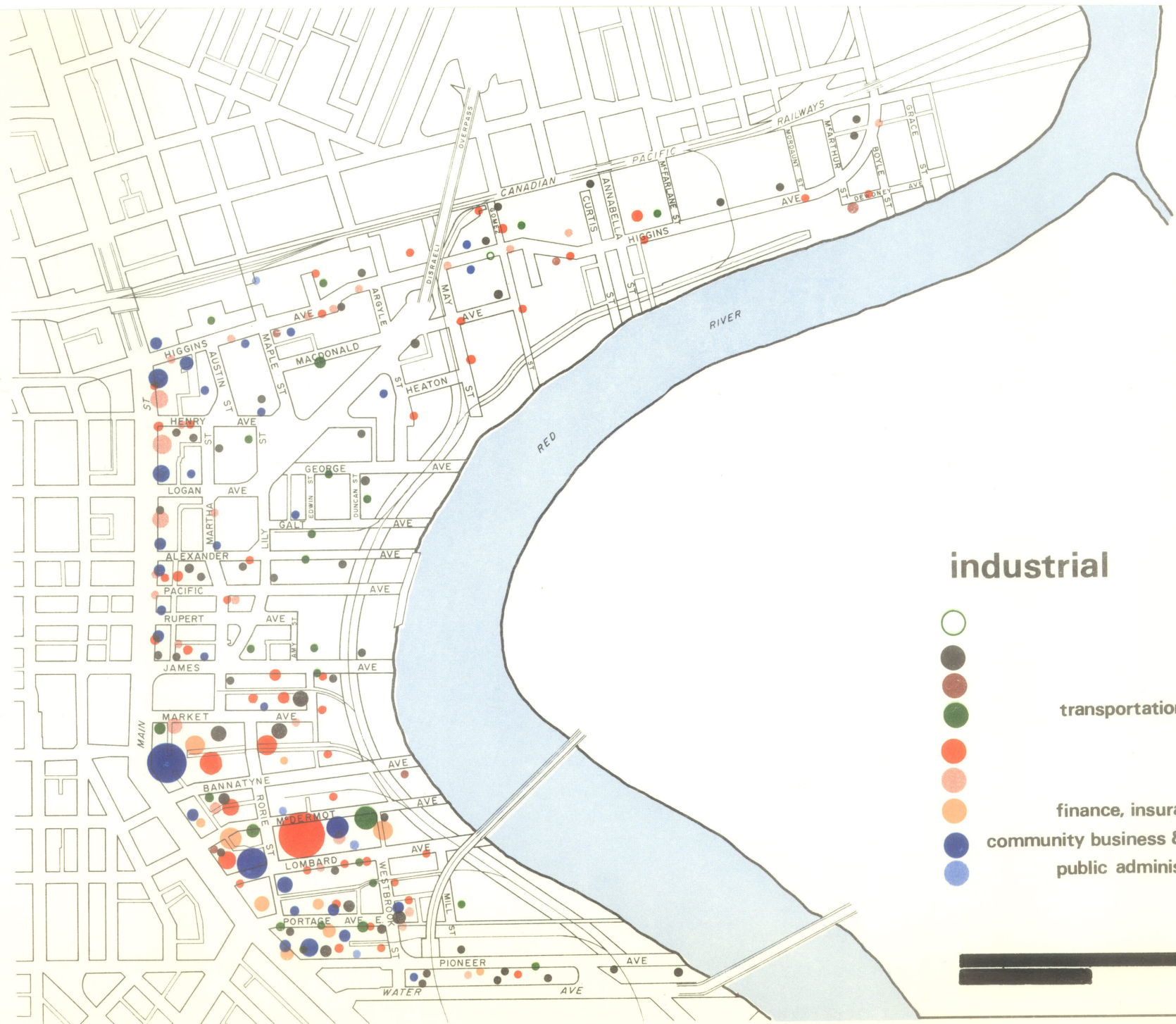




TABLE 4  
INDUSTRIAL CLASSIFICATION

	No. of Firms *	% of Total Firms
Agriculture	1	.20%
Manufacturing	81	15.80%
Construction	8	1.57%
Transportation, Communication and other utilities	40	7.89%
Trade	195	38.31%
Finance, Insurance and Real Estate	46	9.14%
Community, Business and Personal Service Industries	133	26.11%
Public Administration and Defence	5	.98%
<b>TOTAL</b>	<b>504</b>	<b>100.00%</b>

\* Based on the number reporting only.

It is evident from the above table that three groups, Manufacturing, Community etc., and Trade, contain the greatest number of firms. In fact, the three groups combined contain over 80% of the total firms within the area.

INDUSTRIAL CHANGE

## Total Number of Firms \*

The total number of firms in the South Point Douglas area dropped approximately 18.0%, or 153 firms, between 1955 and 1965. (see Appendix C for all statistics) The greatest portion of this decrease is accounted for by Trade industries which decreased by 121 firms, and 110 of these firms were Wholesale businesses. The next largest decrease occurred in Community, Business and Personal Service industries which dropped from 215 to 178 firms, a total of 37 firms. Finance, Insurance and Real Estate firms decreased by 10.

On the other hand, Transportation, Communication and Other Utilities have increased by 15 firms and Manufacturing by 2. The following table illustrates the change in total number of firms within each industrial division.

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\* These totals are derived from Henderson's Directories and are not representative of the number which reported to our questionnaire.

TABLE 5  
INDUSTRIAL CHANGE BY DIVISION

	NO. OF FIRMS		INCREASE OR DECREASE	% OF INCREASE OR DECREASE	MOVED OUT	MOVED IN
	1955	1965				
1 Agriculture	1	1	--	--	--	--
5 Manufacturing Industries	79	81	+2	2.53%	58	60
6 Construction Industries	11	10	-1	9.09%	5	4
7 Transportation, Communication and Other Utilities	49	64	+15	30.61%	15	30
8 Trade	397	276	-121	30.47%	162	41
9 Finance, Insurance and Real Estate	75	65	-10	13.33%	28	18
10 Community, Business and Personal Service	215	178	-37	17.20%	115	78
11 Public Administra- tion	17	16	-1	5.88%	10	9
<b>TOTAL</b>	<b>844</b>	<b>691</b>	<b>-153</b>	<b>18.13%</b>	<b>393</b>	<b>240</b>

Appendix C gives a more detailed account of industrial change by industrial group. From the standpoint of industrial groups, the greatest total increases were in: Leather, Clothing, Wood, Printing, Publishing

and Allied, Storage, Communication, Services to Business Management and Federal Administration industries. The largest total decreases were experienced by: Furniture and Fixtures, Machinery, Chemical and Chemical Products, Miscellaneous Manufacturing, General Contractors, Wholesale Trade, Retail Trade, Financial Institutions, Insurance and Real Estate, Education and Related Services, Motion Picture and Recreational Services, Personal Services, Miscellaneous Services and Local Administration industries.

#### Numerical Migration

In terms of movement in and out of the area for each group (see Appendix C for complete statistics) the most significant patterns are as follows: Although 7 Clothing Manufacturers moved out from 1955 to 1965, 13 moved in, to produce a net gain of 6 firms. This situation was almost duplicated by Printing, Publishing and Allied Manufacturers where 6 moved out and 16 moved in for a net gain of 10 firms. Storage lost 7 and received 15, Communication lost only 1 and received 7.

Retail Trade and Services to Business Management are changing very little in total number, when you consider the fantastic turnover in firms which is taking place. In Retail Trade with a total of 63 firms in 1965, 52 firms have moved out and 41 firms have moved in from 1955 to 1965.

Services to Business Management has experienced a similar turnover with 42 firms moving out and 49 moving in during the 10 year period.

The greatest one way movement, however, has been in Wholesale Trade with 110 firms moving out and none moving in.

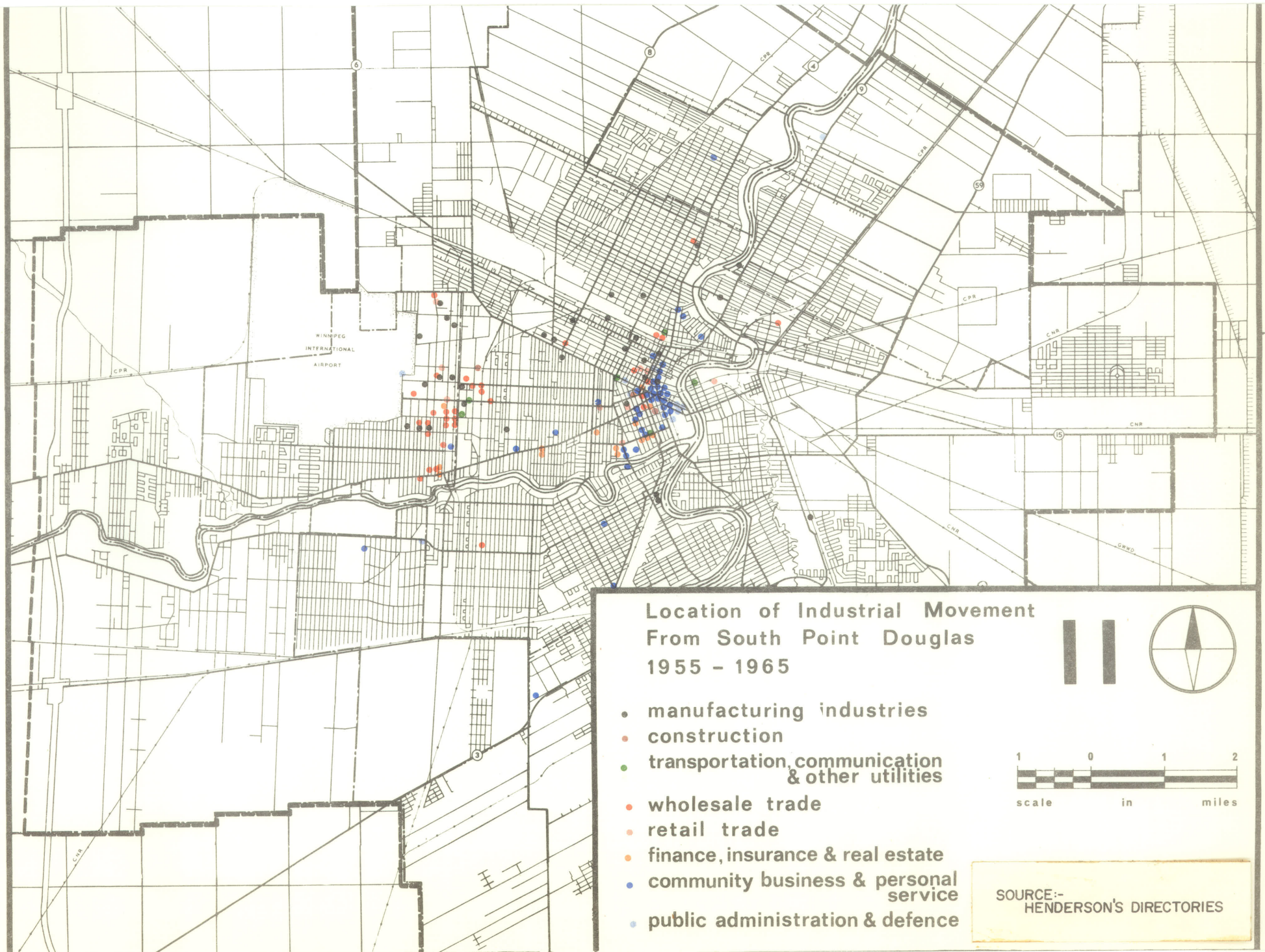
#### Location of Emigrant Industries

As shown in Table 6 and on Plate 11, the most notable specific areas to which industry from South Point Douglas has moved are the downtown and St. James industrial areas. Approximately 1/3 of the firms which could be traced are now located in the downtown area adjacent to South Point Douglas, and a similar number are found in the St. James industrial section.

TABLE 6  
LOCATION OF EMIGRANT INDUSTRIES

DIVISION	AREA						TOTAL	L.U. *
	ST. JAMES	WALL ST.	McPHILLIPS ISABEL NOTRE DAME	DOWN TOWN	JARVIS	OTHER		
Agriculture	--	--	--	--	--	--	--	--
Manufacturing	12	1	5	5	2	6	31	27
Construction	1						1	4
Transportation Etc.	2			2	1	2	7	8
Retail Trade	3			3		3	9	43
Wholesale Trade	24	1	1	7		5	38	72
Finance Etc.	3			7		5	15	13
Community Etc.	1	1		26	1	12	41	74
Public Admin.	1			7		2	10	--
<b>TOTAL</b>	<b>47</b>	<b>3</b>	<b>6</b>	<b>57</b>	<b>4</b>	<b>35</b>	<b>152</b>	<b>241</b>

\* L.U. - Location Unknown



Of those firms which have moved to St. James, roughly 1/2 are Wholesaling concerns and 1/4 are Manufacturing industries, a strong indication of the trend to suburban locations.

Another significant movement is found in the popularity of the downtown area. Here almost 50% of the firms choosing this location are in Division 10, Community, Business and Personal Service industries. Although many firms in this group have moved from South Point Douglas or have dissolved, centrality or proximity to the downtown area still appears to be a necessity for this type of operation.

Apart from these two more outstanding movements to or within Winnipeg's main industrial areas in St. James and the downtown area, (as shown on Plate 11) the industrial flow from South Point Douglas is going to many scattered locations throughout the metropolitan area. As experienced by the replies of those firms presently anticipating a move out of the study area, the new locations must be providing a more suitable environment and room for expansion as would have been found particularly in St. James, and lower cost accommodation which may exist in the downtown industrial area.

It is interesting to note that of the 393 firms which have moved from South Point Douglas between 1955 and 1965, only 3/8 of them could be located in the city directory. It is likely that many have been consolidated into larger firms and many have changed names. It is also probable that a large number have failed to survive.

LOCATIONAL FACTORS

The geographic influences of site and location within the Metro area have therefore determined the economy of the area to a great extent. To a lesser extent, and also directly related to the previous factors, reasonable rental costs, etc., the immediate proximity to such functions as banking, accounting or legal facilities and also the proximity to public transit facilities, have had an influence on the study area. The significance of locational factors are summarized in the following table.

TABLE 7  
GENERAL LOCATIONAL FACTORS \*

	FIRMS	% OF FIRMS
1. Area suited to requirements	410	96.2%
2. Proximity of banking, accounting and legal facilities	313	73.5%
3. Proximity to associated industries and supplies	214	50.2%
4. Proximity to wholesale or retail market	172	40.4%
5. Proximity of labor force	144	33.8%
6. Proximity to public transit	291	68.3%
7. Reasonable rental, building capital or operating costs	342	80.3%
8. Direct rail access to site	60	14.1%

\* Based on only those firms (reported) wishing to remain in the study area - 82.39% of the firms.



A consideration of both Tables 4 and 7 illustrates clearly why the study area has attracted the type of industry that exists there today.

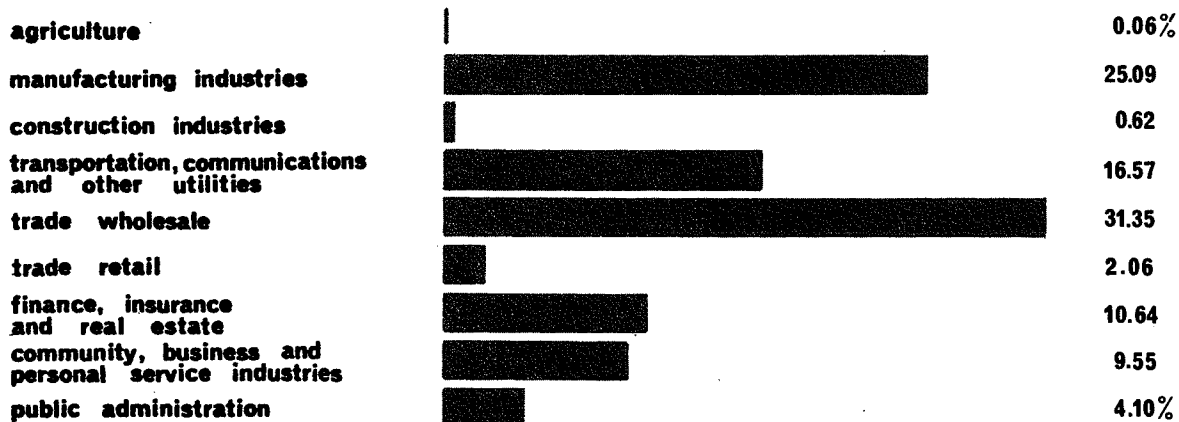
### EMPLOYMENT

#### Structure

At the time of the survey there were 11,533 employees working for the 496 firms in the area which replied to this section of the questionnaire. This represents approximately 10.80% of the City of Winnipeg employees and 6.47% of all Metropolitan Winnipeg employees. By far the greatest proportion were employed in Wholesale Trade and Manufacturing industries, which can be expected, as these classifications have the greatest number of firms in the area. Exceptions, however, are Community, Business and Personal Service industries which have 26.11% of the firms in the area but only 9.56% of the employees. Transportation, on the other hand, has only 7.89% of the firms, but 16.57% of the employees.

Figure 2 is a graphic presentation of the 1965 South Point Douglas employment distribution.

## employment distribution by industrial division



**FIGURE 2**

To give an idea of the size of the various firms in each classification in terms of staff, the average number of employees per firm per DBS classification is shown below.

TABLE 8  
STAFF SIZE BY INDUSTRIAL DIVISION

	NO. OF FIRMS	AVERAGE NO. OF EMPLOYEES
Agriculture	1	8.0
Manufacturing	81	35.7
Construction	8	9.0
Transportation	40	47.8
Trade	195	19.8
Finance	46	26.7
Community	133	8.3
Public Administration	5	92.6

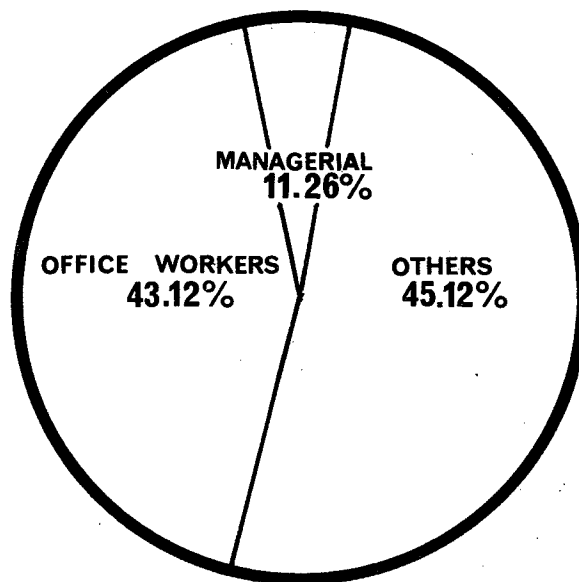
Public Administration has almost double the number of staff on each payroll of any other use in the area. Transportation, Manufacturing, and Finance rank next in staff size respectively, while Trade, Construction, Community and Agriculture have small staffs employed in their operations.

#### Staff Composition

The 11,533 employees were reported to consist of 1,299 persons in managerial positions, 4,973 involved in office work and 5,261 working

in other miscellaneous functions. This breakdown is represented graphically as a percentage of the total number of employees in the following figure.

### staff composition



**FIGURE 3**

### PAYROLL

#### Total Distribution

With only 316 of the firms reporting, a total payroll of \$36,880,667.00 was indicated. This figure represents 11.34% of the payroll paid to employees in the City of Winnipeg and 6.40% of the

Metropolitan Winnipeg payroll. As one might expect, the distribution of payroll by Dominion Bureau of Statistics industrial classification is closely similar to that of employee distribution. Trade, the largest class, pays out roughly one third of the South Point Douglas payroll, while Manufacturing and Transportation distribute approximately one fifth each.

Figure 4, below, represents graphically the distribution of payroll paid out by firms by Dominion Bureau of Statistics industrial classifications.

## distribution of earnings by industrial division

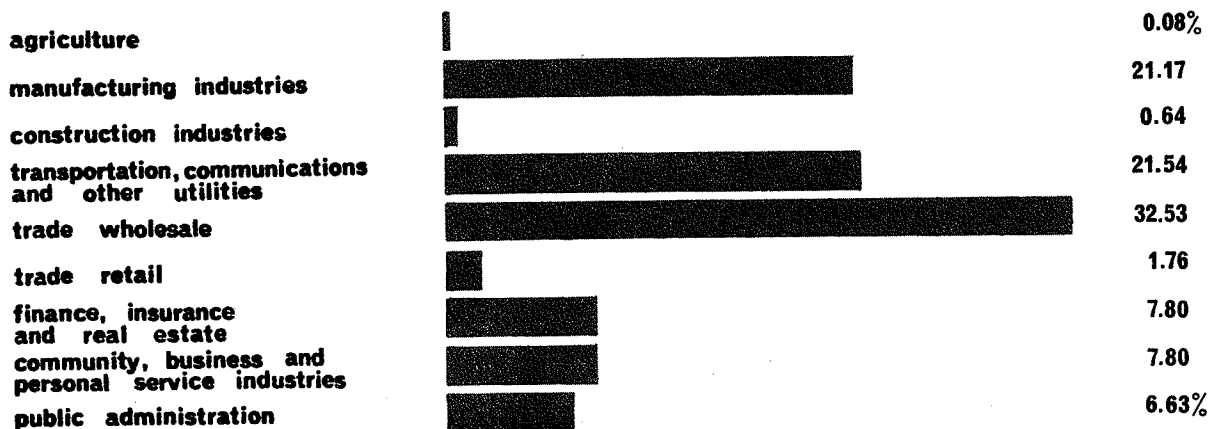


FIGURE 4

### Average Payroll Per Employee

It should be pointed out that in this sub-section, the average income per employee figures are not exact figures, as a significantly different number of firms replied to the employee and payroll sections of the questionnaire. The figures can, however, be used to illustrate what wages are paid by each use relative to the others.

Figure 5 below illustrates the relative average payroll per employee by industrial division.

## average earnings per employee by industrial division










agriculture		\$3,900
manufacturing industries		\$2,745
construction industries		\$4,259
transportation, communications and other utilities		\$4,222
trade wholesale		\$3,435
trade retail		\$3,132
finance, insurance and real estate		\$2,385
community, business and personal service industries		\$2,678
public administration		\$5,379

FIGURE 5



Figure 5 shows the great range in wages paid by each use, particularly between Community and Public Administration. The position of Finance can be disregarded to a certain extent because a great number of firms in this classification refused to answer the payroll section of the questionnaire.

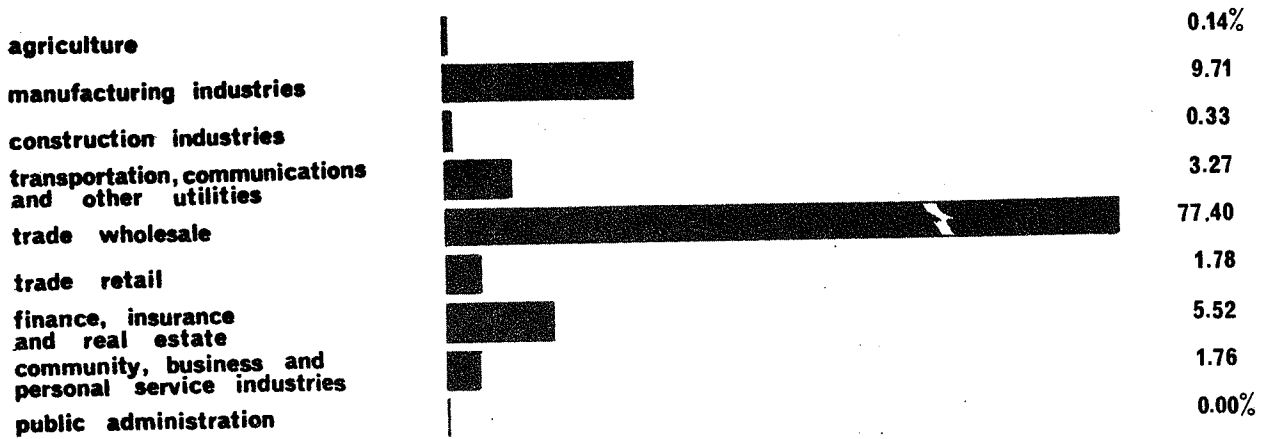
#### GROSS VALUE OF GOODS OR SERVICES

In many cases, firms were reluctant to give information regarding their gross value of goods or services sold, and as a result only 51.1% of the firms replied to this section. Gross value of goods or services for the purpose of this study is defined as the total value of goods sold or handled and total value of services rendered from that particular location in the study area during the past year. The total reported by roughly 50% of the firms was \$656,840,299.00.

#### Distribution

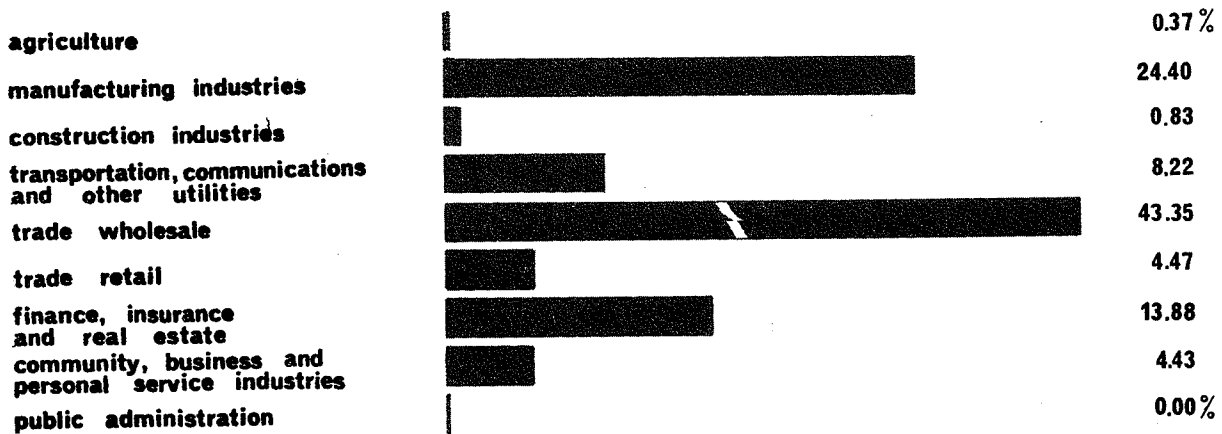
Because of the great volume of business handled by grain companies and the nature of their operation being a clearing house operation for grain shipments to the east and west, two percentage totals for each Dominion Bureau of Statistics classification have been shown below, one with grain companies included, the other without.

# gross sales or service distribution by industrial division (including grain)



A

(excluding grain)



B

FIGURE 6



As one can see, Trade ranks first and foremost in terms of gross sales and services in both cases illustrated.

When grain firms are included, Trade represents over 75% of the total and the remaining industrial classifications appear rather insignificant with the exception of Manufacturing and Finance. These proportions are so overwhelming that a better representative distribution of gross values for the majority of uses is illustrated in figure 6B above. The latter figure shows Trade which is largely Wholesale as doing almost 50% of the business in the area and Manufacturing approximately 25%, the two combined being 75%. Agriculture and Construction are relatively insignificant as can be expected, their not being downtown uses.

In terms of the relationship between gross sales and services and total number of firms, the heart of the study area, north of Market Ave., is comprised of Trade and Manufacturing as major industries, and Transportation and Finance as minor industries. Financial firms, as is the case with the grain firms, are concentrated south of Market Ave. in the so-called Financial District and are generally not found north of Market Ave.

#### FLOOR SPACE

Approximately 423 of the 556 firms in the study area provided floor space information for the study. (see Appendix C) As a result, the total floor space figure compiled will not be an accurate account

of what is contained within South Point Douglas, but the portions utilized by each Dominion Bureau of Statistics use relative to one another will give an indication of which use requires more or less floor space than another.

Figure 7 below illustrates the proportion of floor space areas occupied by each Dominion Bureau of Statistics use.

## floor space distribution by industrial division

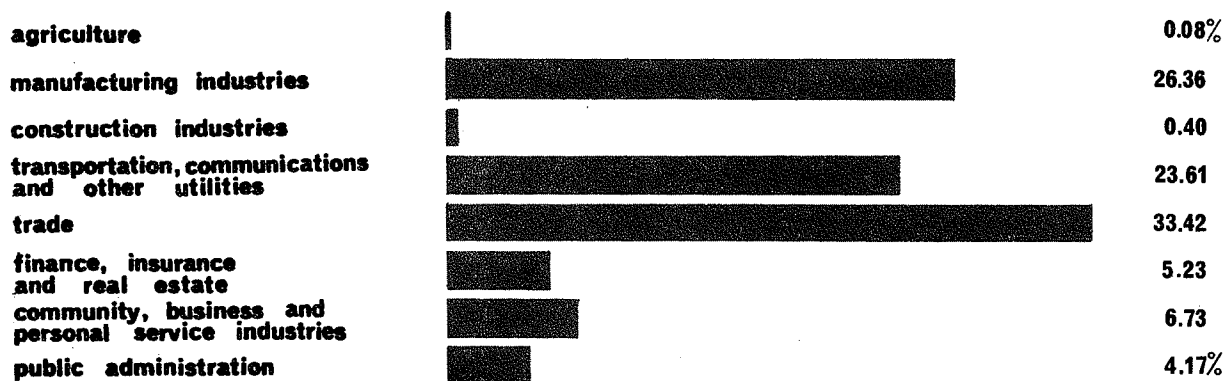


FIGURE 7

It can be seen from Figure 7 that Trade, Manufacturing and Transport occupy a significantly greater amount of floor space in the study area than any of the other uses. This is logical, however, as all three of these classifications are involved in the handling of bulk products which require storage and movement space. The remaining industries with the exception of Agriculture and Construction, of which there are few firms, are more of the service industry variety involving more office functions than storage space for products.

#### DISTRIBUTION OF FIRMS BY SIZE

##### By Employment

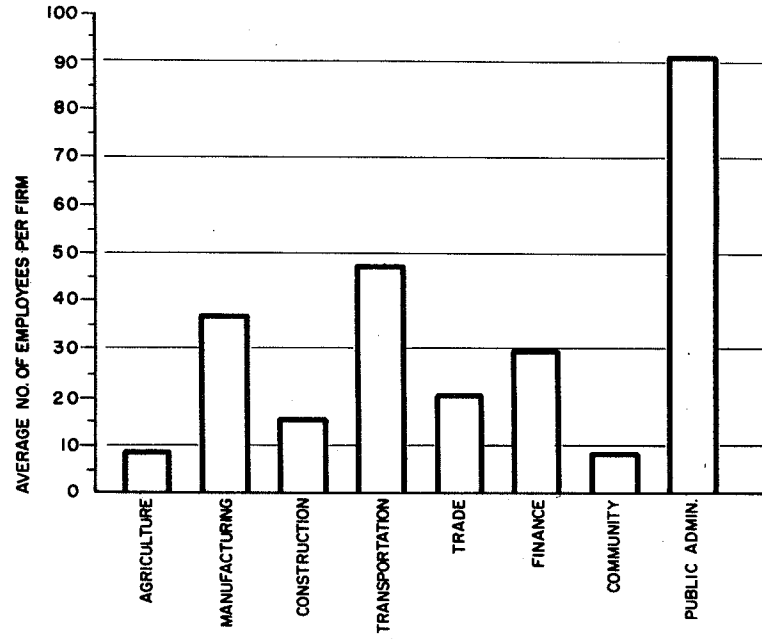
In the following analysis, more emphasis should be placed on relative sizes rather than on absolute numbers because of varying responses to each section of the questionnaire form.

As illustrated on Plate 12A the average firm size in terms of employment varies greatly. Public Administration firms are almost double the size of the next largest industrial division, Transportation. Manufacturing, Transportation and Finance etc. make up the group of medium size firms with an average of 30 to 50 employees per firm. The smallest firms can be found in Agriculture, Construction, Trade and Community etc. There is no industrial division which averages fewer than 5 employees per firm.

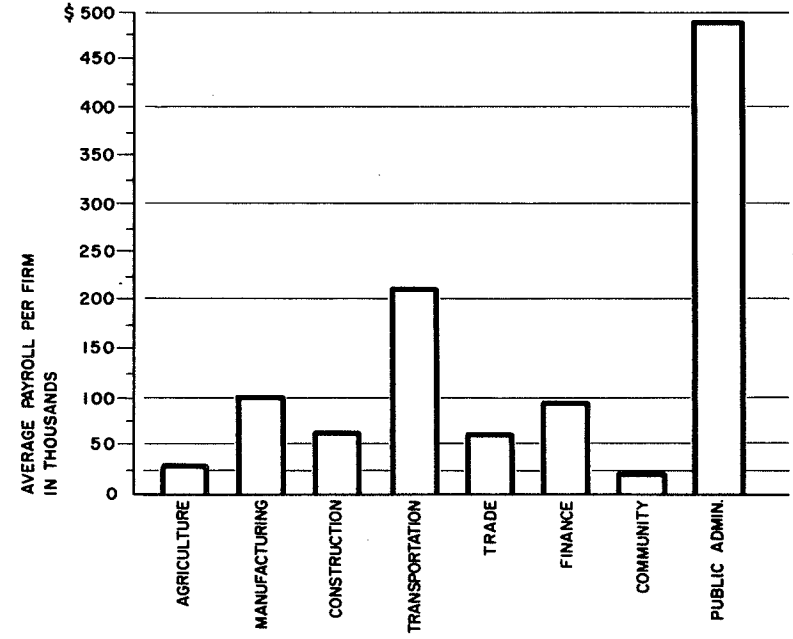
##### By Payroll

In terms of average payroll per firm, Public Administration

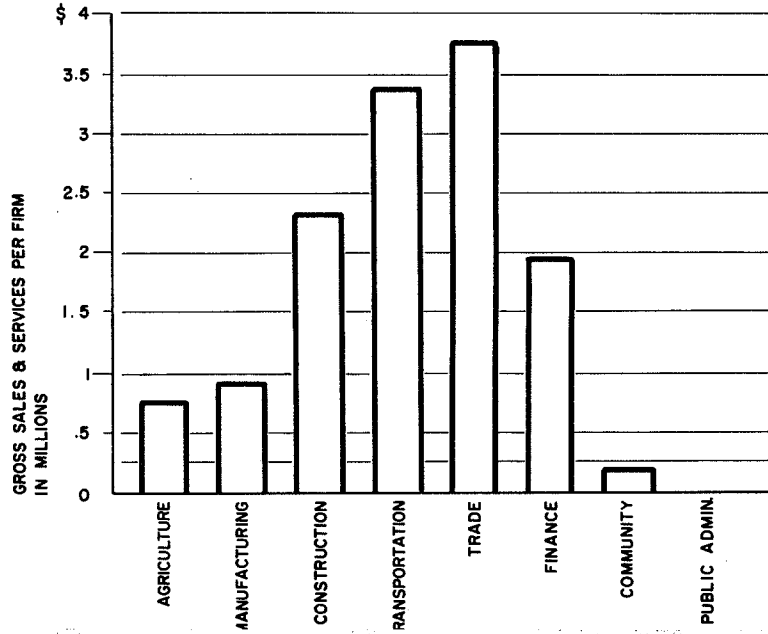
### A. SIZE OF FIRMS BY EMPLOYMENT



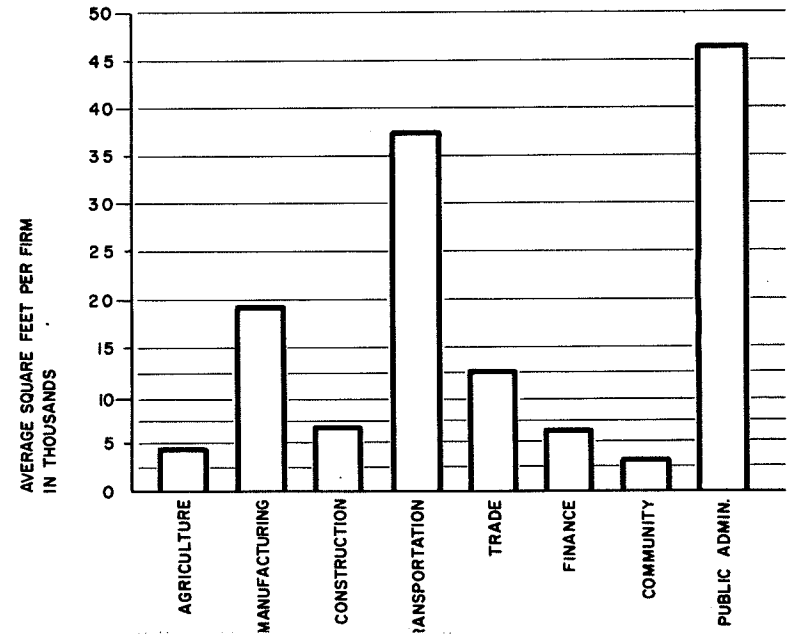
### B. SIZE OF FIRMS BY PAYROLL



### C. SIZE OF FIRMS BY GROSS SALES & SERVICES



### D. FLOOR SPACE



again ranks highest and in similar proportions to the next division, Transportation, as was recorded by employment in the preceding paragraph. (see Plate 12B)

All remaining industrial divisions, however, fall into a somewhat smaller category averaging less than \$100,000.00 per firm in each, approximately one-half or less than Transportation.

#### By Gross Sales and Services

This comparison (see 12C) shows a heavier concentration of firms in the highest group than were in A and B. Public Administration cannot be considered in this analysis, because of the difficulty of placing a monetary value on the services rendered. Transportation and Trade firms appear to be conducting the highest value of sales or services while Construction and Finance fall into a somewhat medium category. The remaining industrial division places a value of less than 1 million dollars on the averaged activities of each of their firms.

#### By Floor Space

Both Public Administration and Transportation firms occupy the greatest average quantities of floor space with approximately 35 to 50 thousand square feet per firm. (see 12D) Next, with less than one-half the average floor space of the latter group, come both Manufacturing and Trade firms which could be considered medium sized firms in terms of floor space. All remaining industrial divisions constitute the smallest space group with an average of 7.5 thousand or less square feet per firm.

LOCATIONAL PERMANENCE

## Length of Time on Site

In order to measure, with a reasonable degree of accuracy, the stability of the area, firms were asked how long they had been located on their present site and if they anticipated moving in the near future. The following table summarizes the length of time on site by industrial division.

## LENGTH OF TIME ON SITE BY DOMINION BUREAU OF STATISTICS USE

USE	TOTAL NO. OF FIRMS	TIME ON SITE IN YEARS													
		0 - 1 years		1.1 - 2 years		2.1 - 5 years		5.1 - 10 years		10.1 - 20 years		20.1 - 35 years		35+ years	
		FIRMS	% OF TOTAL	FIRMS	% OF TOTAL	FIRMS	% OF TOTAL	FIRMS	% OF TOTAL	FIRMS	% OF TOTAL	FIRMS	% OF TOTAL	FIRMS	% OF TOTAL
Agriculture	1									1	100%				
Manufacturing	80	4	5.0%	11	13.7%	19	23.7%	16	20.1%	15	18.7%	6	7.5%	9	11.2
Construction	8	2	25.0%			2	25.0%	1	12.5%	2	25.0%			1	12.5
Transportation	42	2	4.8%	3	7.1%	6	14.3%	13	31.0%	2	4.8%	2	4.8%	14	33.3
Trade	178	11	6.2%	9	5.1%	26	14.6%	32	18.0%	29	16.3%	24	13.4%	47	26.4
Finance etc.	43	7	16.3%			9	20.9%	7	16.3%	7	16.3%	5	11.6%	8	18.6
Community etc.	128	19	14.8%	11	8.6%	37	28.9%	20	15.6%	17	13.3%	8	6.2%	16	12.5
Public Admin.	5									1	20.0%	1	20.0%	3	60.0
<b>TOTAL</b>	<b>485</b>	<b>45</b>	<b>9.3%</b>	<b>34</b>	<b>7.0%</b>	<b>99</b>	<b>20.4%</b>	<b>89</b>	<b>18.4%</b>	<b>74</b>	<b>15.3%</b>	<b>46</b>	<b>9.4%</b>	<b>98</b>	<b>20.2</b>
<b>CUMULATIVE TOTAL</b>		<b>45</b>	<b>9.3%</b>	<b>79</b>	<b>16.3%</b>	<b>178</b>	<b>36.7%</b>	<b>267</b>	<b>55.1%</b>	<b>341</b>	<b>70.4%</b>	<b>387</b>	<b>79.8%</b>	<b>485</b>	<b>100.0</b>

Generally speaking, the study area appears to have a large portion of firms, approximately 55% of which have located there in the past 10 years. (see Figure 8) During the earlier 10 year period 1945 - 1955, a relatively small proportion of firms, 15.3%, located there and the remaining 30% have been in South Point Douglas for over 20 years. Approximately 2/3 of the latter group moved in prior to 1930.

This cross section of years on a site, which is illustrated graphically below, shows that many firms are still being attracted to the study area; it is probable that the 0 - 10 year group will continue to maintain its high portion of firms in view of the low cost accommodation the area provides for new firms with little to invest in their infant stages of growth. Areas such as South Point Douglas can provide the necessary amenities, such as low cost accommodation, centrality, proximity to the central shopping area and good public transit facilities, for firms until they have reached proportions when they may choose to move to a more expansive location in the suburbs, or invest sufficient funds to expand in the study area, in order to retain their close contact with the activity of the downtown area.



## length of time on site



**FIGURE 8**

### Future Location Outlook

Of the 509 firms who replied to our questionnaire form, 424 or 83.3% expressed the opinion that they wished to remain at their present location, 12.1% or 62 firms anticipated moving and 20 firms said nothing.

In terms of Dominion Bureau of Statistics use, all classifications indicate they are relatively satisfied with existing sites as shown on Table 8.

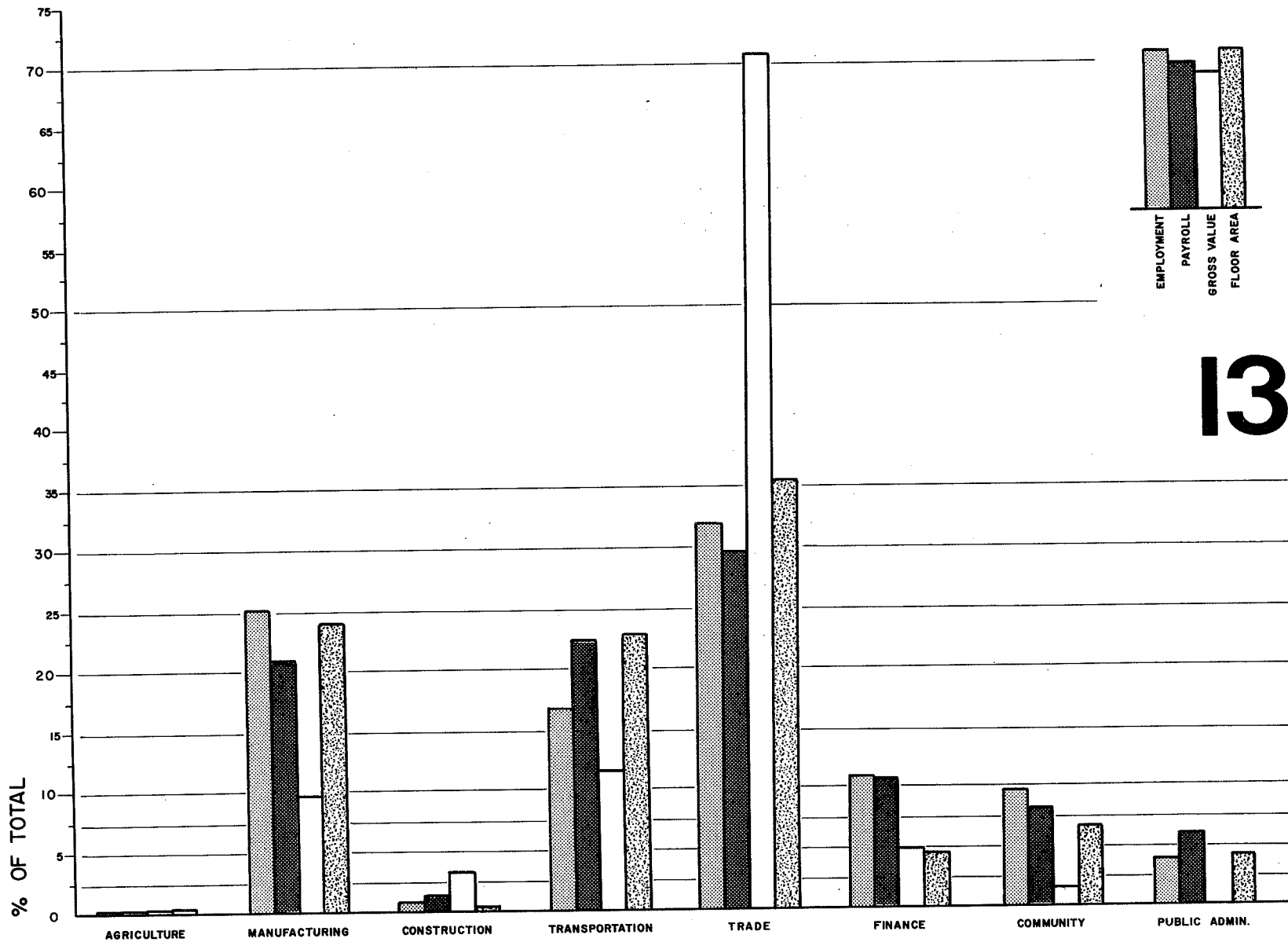
TABLE 10  
FUTURE LOCATION OUTLOOK

USE	NO. OF FIRMS	% STAY	% MOVE	% NOTHING
Agriculture	1	100%	--	--
Manufacturing	79	91.1%	8.9%	--
Construction	8	87.5%	12.5%	--
Transportation	44	79.6%	13.6%	6.8%
Trade	189	85.7%	10.1%	4.2%
Finance	46	82.6%	15.2%	2.2%
Community	134	78.8%	15.2%	6.0%
Public Administration	10	80.0%	20.0%	--

Of the major industrial uses represented in the area, Trade and Manufacturing have a slightly higher proportion of firms wishing to remain. This appears logical as these classifications can best utilize this area's amenities: central location, low-cost accommodation and ease of transport.

#### SUMMARY

As shown on Plate 13, the concentration of industrial uses in Trade in the study area is much greater than in any other use in terms of number of firms, employment, payroll, gross sales or services and



13

ECONOMIC ACTIVITY BY INDUSTRIAL DIVISION

\* D.B.S. STANDARD INDUSTRIAL CLASSIFICATION

floor space. It should be pointed out, however, that the gross sales or services figure is somewhat misleading as it represents, to a great extent, the volume of business done in the grain trade which is carried on across the prairie provinces and not in the study area.

Next in importance to Trade is the Manufacturing industries, followed by Transportation, which is a natural phenomenon as it serves the already mentioned major industries. Community Services has a large number of small agencies in the area but represents much less in monetary figures.



Finance accounts for roughly 10% of the area's economic activity, making it of major importance also. The Finance reply to gross sales or services was much lower than other uses and therefore should be disregarded for comparative purposes.

Public Administration and Construction uses are of minor importance to the area, in that order, and Agricultural uses are insignificant.



14

firms  
receiving direct  
rail shipments

-  rail trackage
-  r.t.a. - firms receiving trackage

 scale: 1" = 800'

## CHAPTER IV

## IMPORTANCE OF RAIL TRACKAGE TO THE AREA

GENERAL

Rail trackage, particularly the line known as the transfer track and its spurs, appears to be one of the backbones of this important industrial area and may hold the key to determining the future land use. The relative importance of this rail line to the area serviced is therefore examined in the following paragraphs in order to determine whether or not its removal for the purpose of thoroughfare planning in the area would be feasible from an economic standpoint.

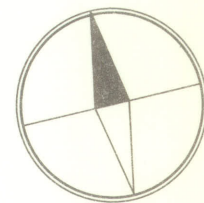
For the purposes of this study, the entire South Point Douglas area will be known as the S.P.D. and those firms receiving direct rail shipments will be termed the R.T.A. These are shown on Plate 14.

RAIL USAGE

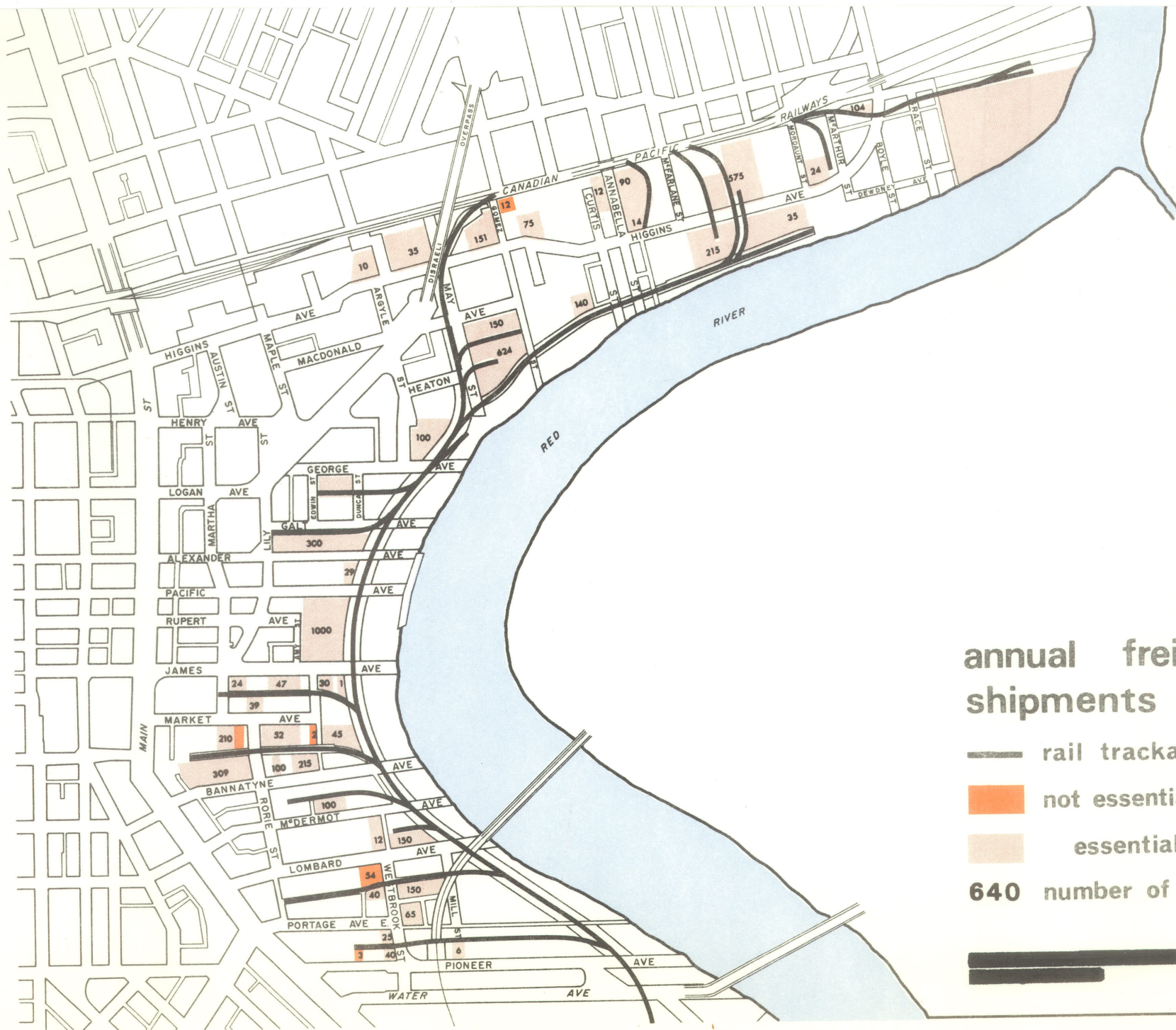
Approximately 58, or 10%, of the firms in the S.P.D. stated that they received rail goods directly (R.T.A. firms). Of these, 51 firms or 86.2% indicated that direct access to rail trackage was essential, as shown on Plate 15.

In terms of box car shipments, 6,315 box cars are received by the R.T.A. firms annually. Only 71 of these are received by firms claiming that rail trackage is not essential to their operation. (see Plate 15) In actual goods delivered to the site, 26 of the 54 firms answering this section reported that over 50% of their goods were





15



### annual freight car shipments

- rail trackage
- orange square not essential to operation
- light orange square essential to operation
- 640 number of cars received



scale: 1" = 800'

delivered to the site by rail. The following table summarizes the percentage of goods received by the 54 R.T.A. firms answering.

TABLE 11  
PERCENTAGE OF GOODS RECEIVED BY R.T.A. FIRMS

	0-9.9%	10-24.9%	25-49.9%	50-74.9%	75-100%
No. of Firms	5	11	12	13	13
% of Total 54 Firms	9.3%	20.49%	22.2%	24.19%	24.1%
Cumulative Total No. of Firms	5	16	28	41	54
Cumulative % of Total No. of Firms	9.3%	29.6%	51.8%	76.0%	100.0%

From the total number of box cars delivered each year, the number of firms requiring rail trackage for their operation, and the percentage of goods delivered by rail, it is apparent that the transfer track and its spurs are considerably well used and are of major importance in supplying life blood to the industries of the area.

These factors clearly demonstrate the need for such railway facilities. Removal of the lines would force R.T.A. firms to look elsewhere for suitable alternative locations, conceivably outside of the City of Winnipeg. Thus, not only might industry be lost from the area, but the industries themselves could suffer loss of certain



amenities essential to their operation.

Although existing R.T.A. industry depends heavily on rail trackage, it may not be necessarily true that the magnitude of this industry is sufficiently important to both the City of Winnipeg and the Metropolitan Area to warrant too great concern about the removal of the transfer track. The following paragraphs, therefore, examine the various characteristics of this industry (R.T.A. firms) and illustrate its relative importance to the urban area.

#### IMPORTANCE OF R.T.A. INDUSTRY TO THE METRO AREA

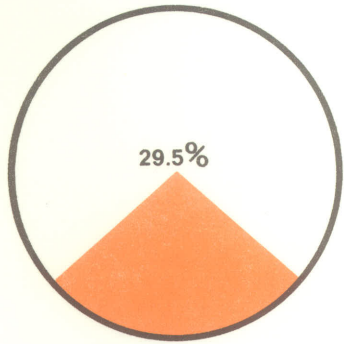
Employment (Approximately 100% reply)

In terms of employees, the 58 R.T.A. firms employ 3,414 persons. This figure represents 29.5% of the total employees in the S.P.D., 3.2% of the total wage earners in the City of Winnipeg and 1.9% of those in Metropolitan Winnipeg, as shown in the table below and illustrated on Plate 16.

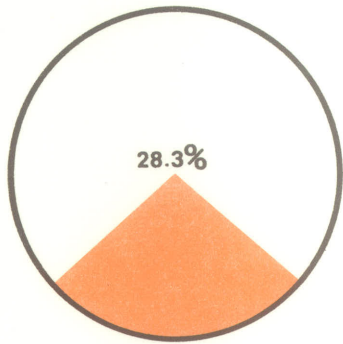
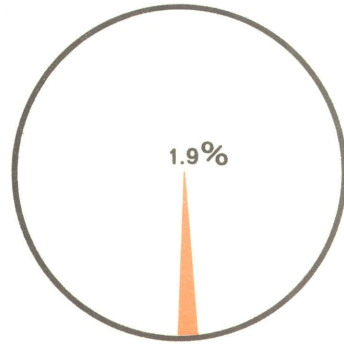
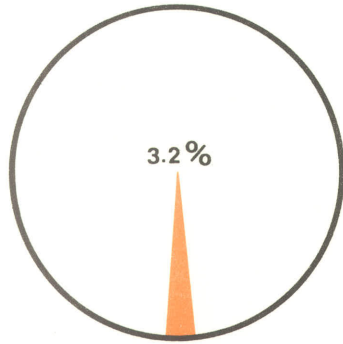
TABLE 12

#### RELATIVE POSITION OF R.T.A. EMPLOYMENT

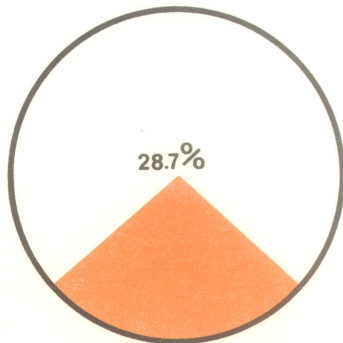
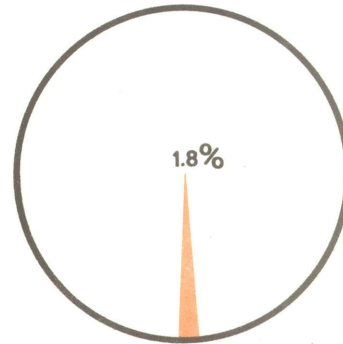
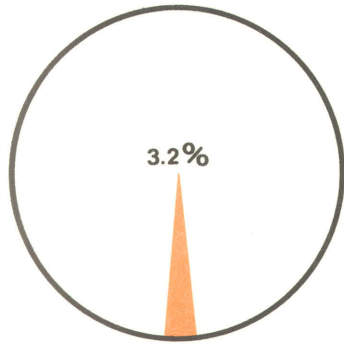
AREA	EMPLOYEES	R.T.A. EMPLOYEES (as a % of)
R.T.A.	3,414	100%
S.P.D.	11,557	29.5%
CITY OF WINNIPEG	106,766	3.2%
METRO WINNIPEG	178,219	1.9%



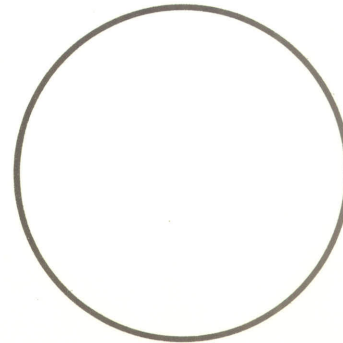
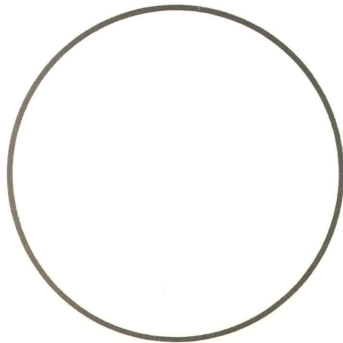
**EMPLOYMENT**



**PAYROLL**



**GROSS SALES**



**relative importance of  
firms receiving trackage  
in south point douglas**



The following table illustrates the employment structure in the R.T.A. firms and the percentage each type is of the total employment in the S.P.D.

TABLE 13  
R.T.A. EMPLOYMENT STRUCTURE

TYPE OF EMPLOYEE	NO. OF EMPLOYEES	% OF SOUTH POINT DOUGLAS AREA TOTAL
Managerial	251	18.0%
Office	971	19.2%
Others	2,192	41.3%
Total	3,414	29.5%

Payroll (39 out of 58 firms replying)

R.T.A. firms reported a total payroll of \$10,442,412.00 annually which represents 28.3% of the S.P.D. total, 3.21% of the City of Winnipeg total and 1.81% of the Metro Winnipeg total, as illustrated on Plate 16. The following table summarizes the relative position of the R.T.A. firms in terms of payroll.

TABLE 14  
RELATIVE POSITION OF R.T.A. PAYROLL

AREA	PAYROLL	R.T.A. PAYROLL (as a % of)
R.T.A.	\$ 10,442,712	100.0%
S.P.D.	36,880,667	28.3%
City of Winnipeg	325,219,914	3.2%
Metro Winnipeg	576,630,417	1.8%

A comparison of the figures presented in Tables 13 and 14 shows an obvious similarity between the relative positions of employment and payroll to the larger urban area. Both of these factors occupy considerably large portions of the City of Winnipeg and Metro totals and the disruption of this industry by the removal of the transfer track could have a significantly harmful effect on the economy of urban Winnipeg and in particular on the Downtown Winnipeg area.

**Gross Sales or Services Sold (45 out of 57 firms replying)**

Again, as with both employment and payroll, the R.T.A. firms represent a large and similar proportion of the South Point Douglas area gross sales or services sold. R.T.A. firms reported a gross figure of \$188,597,282.00 which represents 28.7% of the South Point Douglas

gross total. (see Plate 16) Unfortunately, because of the lack of information, a comparison cannot be made with the City of Winnipeg and Metro figures. The consistent proportions between employment, payroll, and gross sales, however, lead us to believe that gross sales or services sold for R.T.A. firms would hold an equally impressive portion of the larger area totals.

#### Floor Space (54 out of 58 firms replying)

In terms of floor area, R.T.A. firms contain 3,202,810 square feet of floor space, 54.5% of the South Point Douglas floor area of 5,874,588 square feet. This figure, although significant in that it represents such a large portion of the South Point Douglas floor space, must not be over-estimated as it is logical that firms using rail track-age will have large amounts of storage space.

#### LOCATIONAL FACTORS

##### Length of Time on Site (56 out of 58 firms replying)

When asked how long they had been located on their present site two-thirds of the R.T.A. firms stated that they had been there over 10 years. Only 1.8% of the firms had located in the R.T.A. within the past 2 years.

These figures indicate a very old and stable industrial community apart from any increase or decrease in the number of industrial firms. The following table summarizes the replies to the length of time on site.

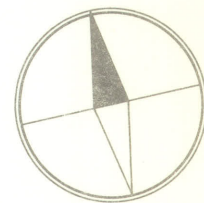
TABLE 15  
LENGTH OF TIME ON SITE - R.T.A. FIRMS

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-35	35+
Total No. of Firms	0	1	6	12	10	10	17
Firms as a % of Total	0%	1.8%	10.7%	21.4%	17.9%	30.4%	30.4%
% of Total Cumulative Total	0%	1%	7%	19%	29%	39%	56%
Firms as a Cumulative % of Total No.	0%	1.8%	12.5%	33.9%	51.8%	69.6%	100%

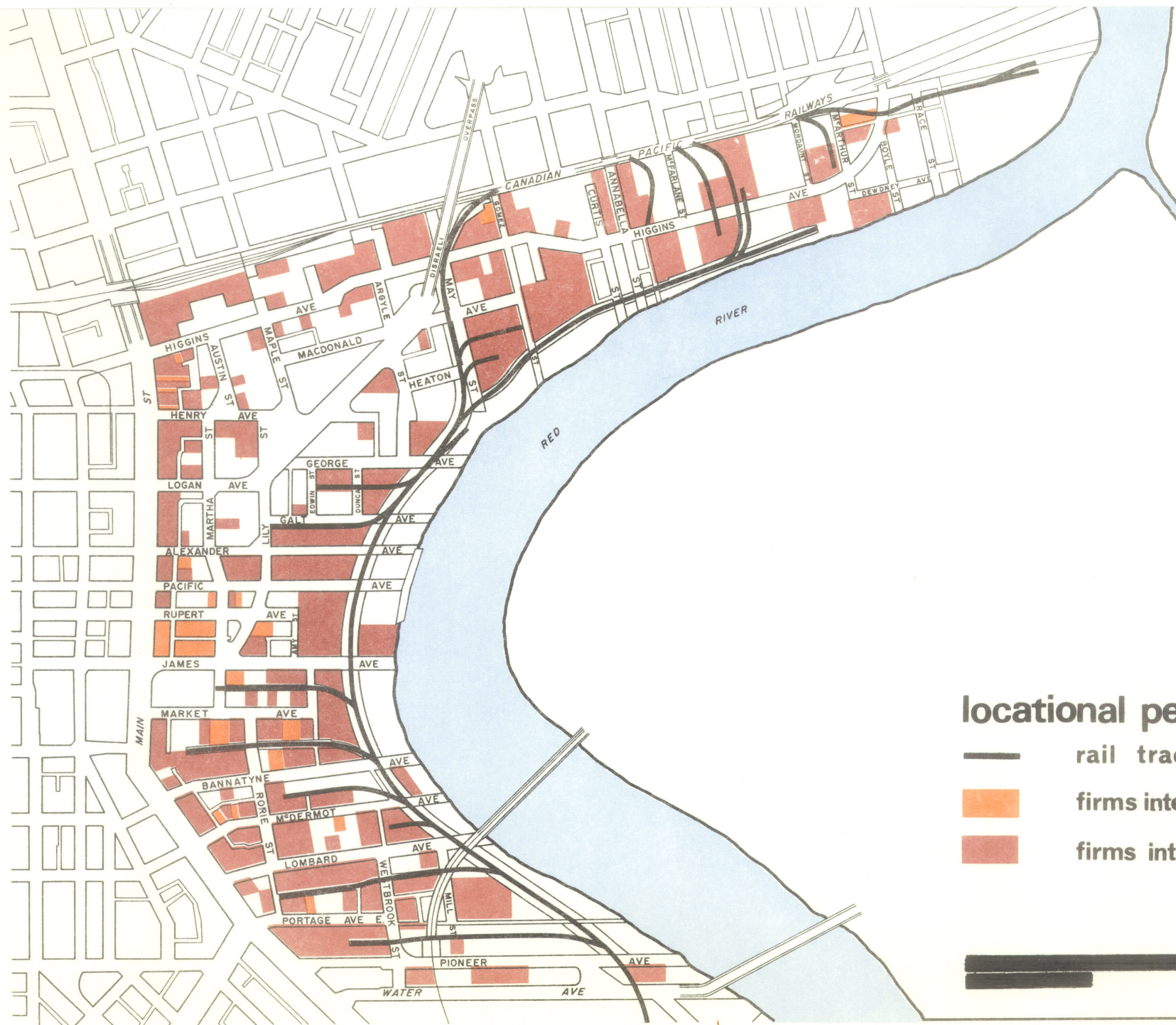
#### Locational Permanence - R.T.A. Firms

Of the 57 R.T.A. firms answering this section of the questionnaire, 91.2% or 52 firms plan to stay at their present location and only 8.8% or 5 firms anticipate moving from the area as shown on Plate 17. This gives a general indication that both the area and the facilities utilized by the firms, at present, are satisfactory and will remain so in the foreseeable future.




The following factors were found to be significant to R.T.A. firms wishing to remain at their present location.



17



**locational permanence**

-  rail trackage
-  firms intending to leave
-  firms intending to stay

 scale: 1" = 800'

TABLE 16

## PRINCIPAL LOCATIONAL FACTORS FOR R.T.A. FIRMS WISHING TO REMAIN

	FIRMS	% OF FIRMS
1. Area suited to requirements	52	100.0%
2. Proximity of banking, accounting & legal	35	67.3%
3. Proximity to associated industries & suppliers	29	55.8%
4. Proximity to wholesale or retail market	34	65.4%
5. Proximity of labor force	38	73.1%
6. Proximity to public transit	42	80.8%
7. Reasonable rental, building capital or operating costs	46	88.5%
8. Direct rail access to site	50	96.2%
9. Foreseeable change in 8 due to future development of rail containerization	5	9.6%

As can be seen from the above table all of the factors listed with the exception of Number 9 were significant to the operation of at least 55% of the R.T.A. firms intending to remain at the present site. The area was found to be unanimously suitable to these firms and direct rail access was acclaimed by 96.2% of the firms as being significant to their operation.

The suitability of the area is further substantiated by the fact that 46 R.T.A. firms (88.5%) indicated that reasonable rental, building



capital or operating costs was a factor significant to their remaining on existing sites. Eight firms felt so strongly about the suitability of the area that they stated, in a space provided for additional comments on the questionnaire, that their location and the facilities in South Point Douglas were ideally suited to their business.

The following factors were found to be significant to R.T.A firms anticipating moving out of the South Point Douglas area.

TABLE 17  
PRINCIPAL LOCATIONAL FACTORS FOR R.T.A. FIRMS MOVING

	FIRMS	% OF FIRMS
1. Area unsuited to requirements	2	40%
2. Lack of proximity to banking, accounting, etc.	0	--
3. Lack of proximity to associated industries and suppliers	0	--
4. Lack of proximity to retail or wholesale market	0	--
5. Lack of proximity to necessary labor force	0	--
6. Lack of proximity to public transit	0	--
7. High rental, building capital and operating costs	0	--
8. Lack of direct rail access to site	0	--
9. Additional Comments	3	60%

Of the 3 firms which checked Number 9, 2 stated that they were moving because of lack of expansion space and modern facilities and the third stated that they had been expropriated. Only 2 R.T.A. firms, therefore, out of the total of 57, found the area to be unsuitable.

## CHAPTER IV

### AGRICULTURE

Agriculture is not of major importance to the South Point Douglas economy. It consists of only one firm which has been located here for 10 to 20 years and employs only a small number of the study area workers.

As can be expected, payroll and gross sales are of equal proportions. Agricultural uses generally require different amenities than those found in the study area and therefore are not likely to locate here in great number.

#### CLASSIFICATION

The single Agricultural use listed in the area was categorized according to the Dominion Bureau of Statistics standard industrial classification, 1960, as being in Division 1, Major Group 4 - Services Incidental to Agriculture, which are primarily engaged in providing services to Agriculture.

#### LOCATIONAL FACTORS

Theoretically speaking, the location of a plant is determined by economic factors created by the area, its people, source of the services, and by its amenities. Because of the briefness of this study, locational factors will be limited to the following main points which in this case, have been discussed under the heading of Agriculture.

These factors have been recorded in two separate groups in

order that they may be understood more clearly, the first group being those firms wishing to remain, and the second, those anticipating a move away from the area. In the case of Agriculture, the single firm replied that it wished to stay, and thus only one group of factors was recorded.

TABLE 18  
PRINCIPAL LOCATIONAL FACTORS FOR  
AGRICULTURE FIRMS WISHING TO REMAIN

	NO. OF FIRMS	% OF TOTAL
1. Area suited to requirements	1	100%
2. Proximity of banking, accounting and legal	1	100%
3. Proximity to associated industries and suppliers		
4. Proximity to wholesale or retail market	1	100%
5. Proximity to labor force		
6. Proximity to public transit		
7. Reasonable rental, building capital or operating costs	1	100%
8. Direct rail access to site		
9. Foreseeable change in 8 due to future development of rail containerization.		

It is evident, because only one firm in this industrial division is represented, that no hard and fast rule which would determine the reason for locating Agricultural uses in the area can be established from the above figures. However, if the fact that this operation is confined within a building, needs little or no access to the passing public except by vehicle, and does not require exterior displays of any sort to attract business, it could be stated that those factors listed in Table 18 were definitely favorable and influential in determining the location of such an industry in the study area. Centrality and low cost accommodation are definitely desirable and available in this area from the distributive point of view. Labor force is easily drawn from all parts of the Metropolitan area because of centrality, and rail access is of no concern as products handled are transported from local sources by truck.

#### EMPLOYMENT

A total of 8 persons are employed in Agriculture, a lower number than in any other use in the area, making up only .06% of the total. Agriculture also ranks last in firm size according to average number of employees per firm.

#### PAYROLL

The payroll paid to Agriculture employees represents only .08% of the area's total, the lowest total payroll of all uses in South Point

Douglas. In terms of wages per employee, however, Agriculture pays an average income of \$3,900 which ranks third from the highest compared to other uses.

#### GROSS SALES OR SERVICES

As can be expected by the payroll and number of employees, the total gross sales or services sold by Agriculture is the lowest for all uses with only .15% of the total gross. However, Agriculture ranks third in average gross sales per firm.

#### FLOOR AREA

Agriculture ranks last in size by total floor area with only .1% of the total floor space in the area and second last in size by average floor area per firm with 4,500 square feet.

#### PRINCIPAL PRODUCTS

Eggs, poultry.

#### INDUSTRIAL CHANGE

There has been no change in the number of Agricultural firms over the 10 year period of 1955 to 1965.

CHAPTER VI  
MANUFACTURING

The Manufacturing industries reported in the South Point Douglas area constitute approximately 32% of the 255 various manufacturers in the downtown Winnipeg industrial area. They also represent a large portion, approximately 16% of all the industrial firms in the South Point Douglas area and provide jobs for roughly one quarter of the total number of employees working there. As is the case with the entire downtown industrial area,<sup>9</sup> the greatest number of firms are involved in the clothing, printing, publishing and allied industries, and to a lesser extent, food and beverage industries and metal fabricating.

CLASSIFICATIONS

Manufacturing firms were categorized according to the Dominion Bureau of Statistics standard industrial classifications. The following major groups were recorded. In some cases where one firm is involved in several different operations, it may be recorded as more than one use.

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9. Metropolitan Corporation of Greater Winnipeg, Planning Division, Industrial Location in Metropolitan Winnipeg, Winnipeg, 1963.

TABLE 19

## MANUFACTURING CLASSIFICATIONS

GROUP NUMBER	MAJOR GROUP	NO. OF FIRMS	% OF TOTAL
1	Food and Beverage industries	11	13.6%
4	Leather industries	5	6.2%
5	Textile industries	4	4.9%
6	Knitting Mills	1	1.2%
7	Clothing industries	13	16.1%
8	Wood industries	3	3.7%
9	Furniture and Fixture industries	2	2.5%
10	Paper and allied industries	2	2.5%
11	Printing, Publishing and allied industries	14	17.3%
13	Metal Fabricating industries (except machinery and transportation equipment industries)	9	11.1%
14	Machinery industries (except electrical machinery)	2	2.5%
15	Transportation Equipment industries	1	1.2%
16	Electrical Products industries	3	3.7%
17	Non-Metallic Mineral Products industries	2	2.5%
19	Chemical and Chemical Products industries	3	3.7%
20	Miscellaneous Manufacturing industries	6	7.4%



### LOCATIONAL FACTORS

Economic factors created by the area, sources of its services and by its amenities, usually dictate the location of industry. Old and new industry, however, cannot be judged by the same measure to determine the influence of the locational factors. New industry moving into a particular area may have had definite economic reasons for locating there at that time. Over the years, these reasons or locational factors may lose some of their significance and the industry already firmly established in the market may no longer consider its location to be of major importance.

#### Relative Importance of Locational Factors

In order to study the importance of locational factors to manufacturing industries, each firm was asked to check which of the following factors were significant to their operation. To give a more accurate measurement, these factors were recorded in two groups: A - for those firms wishing to remain in the study area, B - for those firms contemplating a move from the area. From a total of 79 firms, 72 or 91.1% wish to remain while 7 were anticipating a move.

TABLE 20

A. PRINCIPAL LOCATIONAL FACTORS FOR  
MANUFACTURING FIRMS WISHING TO REMAIN

	FIRMS	% OF FIRMS
1. Area suited to requirements	71	97.3%
2. Proximity of banking, accounting and legal	55	75.3%
3. Proximity of associated industries and suppliers	52	71.2%
4. Proximity to wholesale or retail market	40	54.8%
5. Proximity of labor force	41	56.2%
6. Proximity to public transit	61	83.6%
7. Reasonable rental, building capital or operating costs	62	84.9%
8. Direct rail access to site	17	23.3%
9. Foreseeable change in 8 due to future development of rail containerization	1	1.4%

It is evident from Table 20 that all of these factors with the possible exception of 8 and 9 are relatively important to at least 50% of these firms. Factor No. 1 which includes centrality in its definition, is almost unanimously significant to all of the manufacturing firms, indicating that the study area location, relative to the metro area, is almost ideal for this type of use. The 84.9% reply to No. 7 indicates that the type of accommodation available in the study area is favorable

to most manufacturers from an economic standpoint. The immediate proximity of labor supply appears to be of importance, but not nearly as great as the proximity to public transit. Public transit is close at hand to the area and by the ease with which it delivers a constant supply of labor to the area each day from various parts of Greater Winnipeg, it decreases the importance of having employees living within the area itself.

The proximity of banking, accounting and legal facilities, and the proximity of associated industries and suppliers, are indicated to be of more importance than the proximity of wholesale or retail markets.

The 17 manufacturing firms, claiming that direct rail access was important to them, represent all of the manufacturing firms in the area which actually receive direct rail access. Direct rail access is therefore important to only those manufacturers which are presently receiving it.

TABLE 21

B. PRINCIPAL LOCATIONAL FACTORS FOR  
MANUFACTURING FIRMS ANTICIPATING TO MOVE

	FIRMS	% OF FIRMS
1. Area unsuited to requirements	3	42.8%
2. Lack of proximity to banking, accounting & legal	--	--
3. Lack of proximity to associated industries and suppliers	--	--
4. Lack of proximity to retail or wholesale market	--	--
5. Lack of proximity to necessary labor force	--	--
6. Lack of proximity to public transit	--	--
7. High rental, building capital & operating costs	2	28.6%
8. Lack of direct rail access to site	--	--

EMPLOYMENT

Distribution

As mentioned in preceeding sections, Manufacturing employs approximately 1/4 of the study area employment and ranks third in average number of employees per firm.

The following table illustrates the distribution of employment by major Manufacturing group.

TABLE 22

## DISTRIBUTION OF EMPLOYMENT BY MAJOR MANUFACTURING GROUP

GROUP NO.	INDUSTRIAL DESCRIPTION	TOTAL NO. OF FIRMS	NO. OF EMPLOYEES	% OF TOTAL NO. OF EMPLOYEES	AV. NO. OF EMPLOYEES PER FIRM
1	Food & Beverage	9	394	13.3%	43.8
4	Leather	6	379	12.8%	63.2
5	Other Textiles	4	20	.7%	5.0
6	Knitting Mills	1	Already listed --	--	--
7	Clothing	13	1,344	45.4%	103.4
8	Wood	3	32	1.1%	10.7
9	Furniture	2	14	.5%	7.0
10	Paper & Allied	3	171	5.8%	57.0
11	Printing, Pub. & Allied	14	210	7.1%	15.0
13	Metal Fabricating	9	134	5.5%	14.9
14	Machinery	2	61	2.1%	30.5
15	Transportation Equipment	1	5	.2%	5.0
16	Electrical Products	3	36	1.2%	12.0
17	Non-Metallic Mineral Products	1	15	0.5%	15.0
19	Chemical & Chemical Products	3	89	3.0%	29.7
20	Misc. Manufacturing	7	55	1.8%	7.9

Table 22 reveals a dominant concentration of Manufacturing employment in the clothing industries. The second largest group (see Plate 18A) contains food and beverage and leather industries with only 12 or 14% of the total Manufacturing employment each. The three industrial groups combined, however, account for over 70.0% of the total.

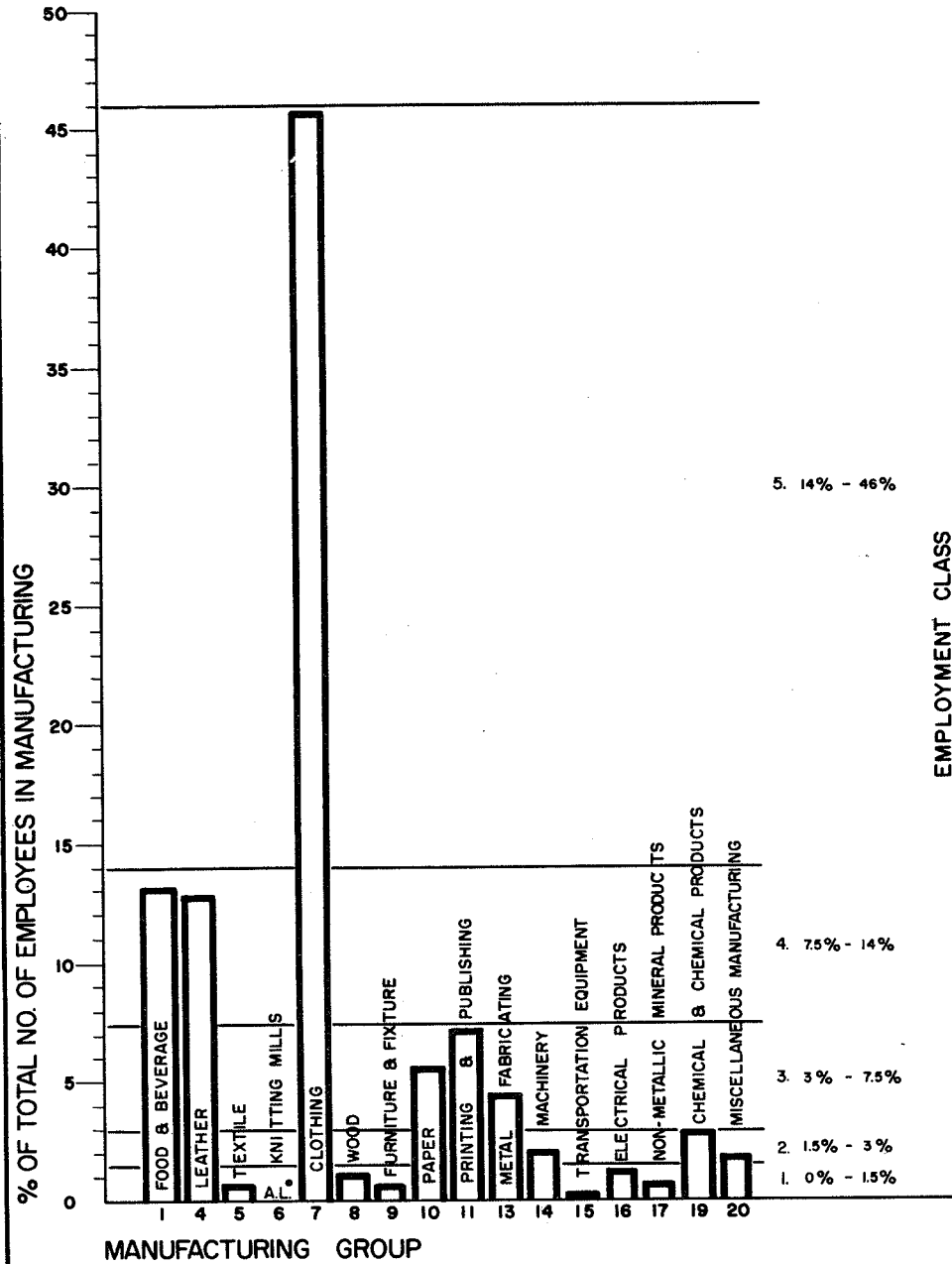
The remaining 29% of the employment is generally distributed amongst 3 group sizes: Paper and allied industries, printing, publishing and allied industries and metal fabricating industries constitute the third largest employment group with 3.0% to 7.5% of the employees in each; the remaining 2 employment groups contain over 50% of the major Manufacturing groups reported, with .2% to 3.0% of the total Manufacturing employment in each, yet only employ 11.1% of the total Manufacturing employment.

#### Staff Size By Major Group

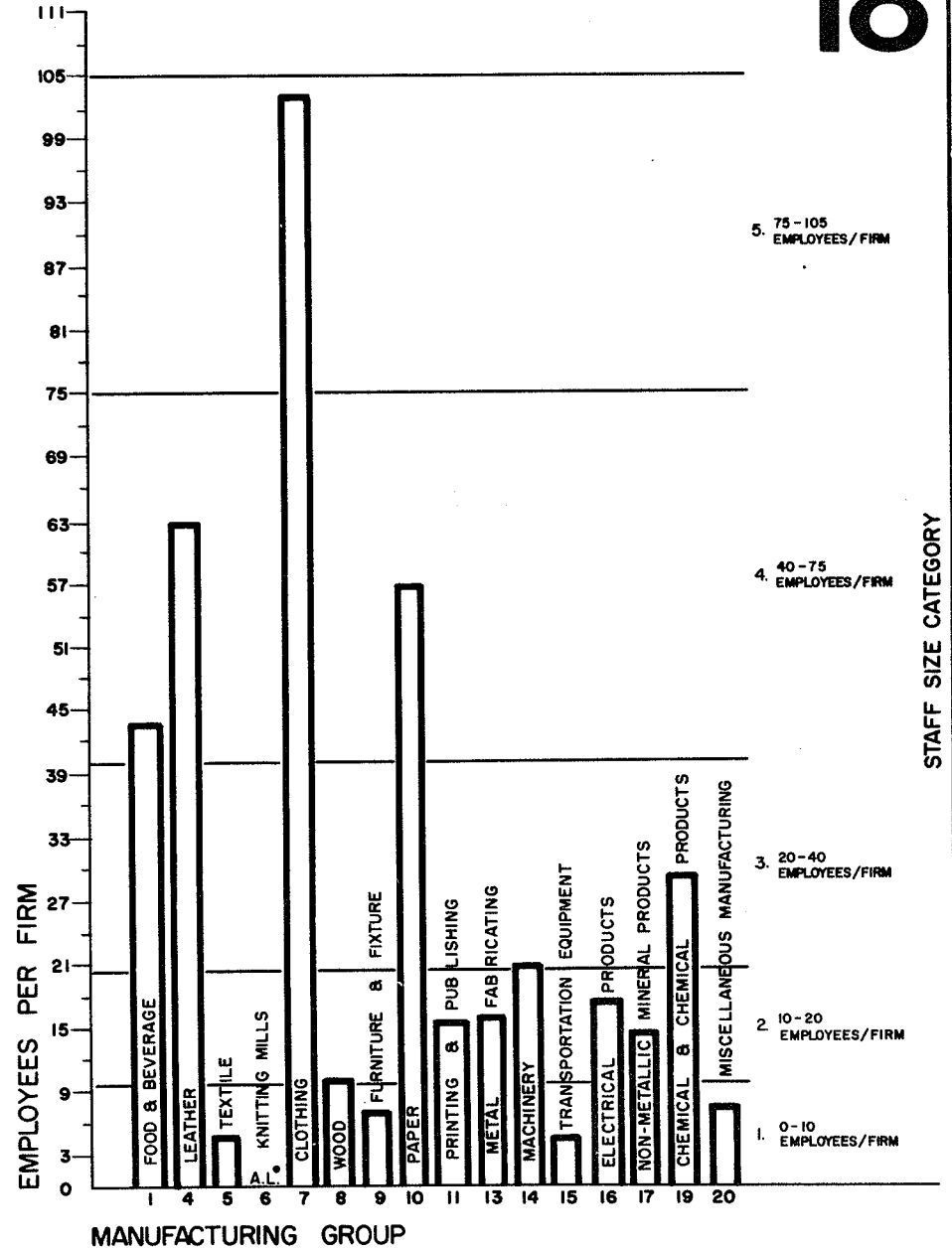
As shown by Table 22 and Plate 18B, clothing industries also dominate in terms of the average number of employees per firm. Food and beverage, and leather industries have the second largest staffs by average number of employees per firm as well as by total employment. Paper and allied industries are also included in the 40-75 employee per firm size categories. Machinery, chemical and chemical products industries average 20 to 40 employees per firm.

The remaining 10 major Manufacturing groups all average below 20 employees per firm, while furniture and transportation equipment

## A. TOTAL EMPLOYMENT



## B. EMPLOYEES PER MAJOR GROUP FIRM



employ an average of fewer than 10 persons per firm.

There are 30 firms in the 10 - 30 employees per firm category, 18 firms in the 40 - 75; 14 in the 0 - 10; 5 in the 20 - 40 and 1 in the 75 to 105 employees per firm category.

#### FLOOR SPACE

Manufacturing industries occupy 1,457,167 square feet of floor space, second only to Trade in total area reported.

With 69 firms reporting, Manufacturing firms averaged 21,118 square feet.

#### INDUSTRIAL CHANGE

Manufacturing has experienced a small gain of 2.5% or 2 firms over the 1955 to 1965 period. This gain is unusual in the sense that Manufacturing firms are being lost in absolute numbers to the suburbs in the majority of other cities. It is also an exception rather than the rule in that all other industrial divisions in the study area, with the exception of Transport, etc., have had a decrease in total numbers.

The increase has been focused around two inter-associated groups. The first group consists basically of leather, knitting mills and clothing industries. Paper and allied industries and printing and publishing constitute the second group. It is likely that complimentary industrial activities have helped maintain these groups. Other Manufacturing types have either decreased in number or remained the same,



with the exception of wood industries. Wood industries have risen from nothing in 1955 to 4 firms in 1965. The greatest drop in absolute numbers was experienced by machinery industries.

For complete statistics on industrial change in Manufacturing, see Appendix C.

### MAJOR GROUPS

#### 1. Food and Beverage Industries

##### Principal Products

Fish and fish products, fishing equipment, vinegars, breakfast cereals, animal feeds, candies, baking and jelly powders, tea, coffee, peanut butter, malt, malt sprouts, grain screenings, spices, extracts, food products.

##### Number of Firms \*

1955 - 10

1965 - 10

Decrease or increase, 1955 - 1965: 0 firms or 00.0%

##### Employment

1965 - 394 (9 firms)

Average number of employees per firm - 43.8

---

\* Number listed (not necessarily reporting). An asterisk will be found throughout the study to indicate this, but will not be foot-noted.

### Payroll

1965 - \$1,319,000 (6 firms)

Average payroll per firm - \$219,833.3

### Floor Space

Total floor space - 596,220 square feet (9 firms)

Average No. of square feet per firm - 66,247 square feet.

### Principal Locational Factors

All 9 firms wished to remain at their present locations. The following factors were significant to their operation:

1. Area suited to requirements	9	firms	or	100.0%
2. Proximity of banking, accounting & legal	7	"	"	77.8%
3. Proximity to associated industries and suppliers	6	"	"	66.7%
4. Proximity to wholesale or retail market	5	"	"	55.5%
5. Proximity to labor force	7	"	"	77.8%
6. Proximity to public transit	9	"	"	100.0%
7. Reasonable rental, building capital or operating costs	8	"	"	88.9%
8. Direct rail access to site	4	"	"	44.4%
9. Foreseeable change in 8 due to future development of rail containerization	0	"	"	00.0%

## Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of firms	0	1	1		4	2	1
% of Total	0	11.1%	11.1%		44.4%	22.2%	11.1%

## Rank in Manufacturing

By total employment - 2

By employees per firm - 4

By total payroll - 2

By payroll per firm - 3

By gross sales or services - 2

By gross sales or services per firm - 1

## 4. Leather Industries

## Principal products

Mitts, gloves, gauntlets, sheepskin wannigans, miscellaneous foot-wear, belts, wallets, key cases, watch straps, wallets and miscellaneous leather goods.

## Number of firms \*

1955 - 2

1965 - 6

Decrease or increase, 1955 - 1965: +4 firms or 200%

## Employment

1965 - 379 (6 firms)

Average no. of employees per firm - 63.2

### Payroll

1965 - \$1,211,400 (6 firms)

Average payroll per firm - \$219,833.3

### Floor Space

Total Floor Space - 38,500 square feet (5 firms)

Average number of square feet per firm - 7,700 square feet

### Principal Locational Factors

Of the 6 firms reporting, 5 wished to remain at their present site and 1 anticipated moving from the area. The following factors were significant to the operation of those remaining:

1. Area suited to requirements	5 firms or	100.0%
2. Proximity of banking, accounting and legal	5 " "	100.0%
3. Proximity to associated industries and suppliers	3 " "	60.0%
4. Proximity to wholesale or retail market	2 " "	40.0%
5. Proximity to labor force	3 " "	60.0%
6. Proximity to public transit	4 " "	80.0%
7. Reasonable rental, building capital or operating costs	5 " "	100.0%
8. Direct rail access to site	0 " "	00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0 " "	00.0%

## Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of Firms	0	1	2	1	2	0	0
% of Total	0	16.7%	33.3%	16.7%	33.3%	0	0

## Rank in Manufacturing

By total employment - 3

By employees per firm - 2

By total payroll - 3

By payroll per firm - 4

By gross sales or services - 4

By gross sales or services  
per firm - 7

## 5. Other Textile Industries

## Principal Products

Tarpaulins, awnings, tents, canvass tubing, belting, aprons,  
wiper rags.

## Number of Firms \*

1955 - 5

1965 - 4

Decrease or increase 1955-1965: -1 firms or -20%.

## Employment

1965 - 20 (4 firms)

Average no. of employees per firm - 5.0

## Payroll

1965 - \$47,800 (4 firms)

Average payroll per firm - \$11,950

## Floor Space

Total floor space - 10,500 square feet (4 firms)

Average square feet per firm - 2,625 square feet.

## Principal Locational Factors

All of the 4 firms reporting planned to remain at their existing location. The following factors were considered significant to their operation:

1. Area suited to requirements	4	firms	or	100.0%
2. Proximity of banking, accounting and legal	3	"	"	75.0%
3. Proximity to associated industries and suppliers	3	"	"	75.0%
4. Proximity to wholesale or retail market	2	"	"	50.0%
5. Proximity of labor force	2	"	"	50.0%
6. Proximity to public transit	3	"	"	75.0%
7. Reasonable rental, building capital or operating costs	4	"	"	100.0%
8. Direct rail access to site	1	"	"	25.0%
9. Foreseeable change in 8 due to future development of rail containerization	0	"	"	00.0%

## Length of Time on Site

<u>YEARS</u>	<u>0-1</u>	<u>1.1-2</u>	<u>2.1-5</u>	<u>5.1-10</u>	<u>10.1-20</u>	<u>20.1-34</u>	<u>35+</u>
No. of Firms			2	2			
% of Total			50.0%	50.0%			

## Rank in Manufacturing

By total employment - 12

By employees per firm - 14

By total payroll - 13

By payroll per firm - 15

By gross sales or services - 13

By gross sales or services  
per firm - 15

## 6. Knitting Mills

## Principal Products

Mitts, gloves.

## Number of Firms \*

1955 - 0

1965 - 1

Decrease or increase 1955-1965: 1 firm or 100.0%

## Employment

already listed

## Payroll

already listed

### Floor Space

already listed

### Principal Locational Factors

This firm wished to remain on its existing site. The following factors were significant to its operation:

1. Area suited to requirements	1	firm	or	100.0%
2. Proximity of banking, accounting and legal	1	"	"	100.0%
3. Proximity to associated industries and suppliers	1	"	"	100.0%
4. Proximity to wholesale or retail market	1	"	"	100.0%
5. Proximity to labor force	0	"	"	00.0%
6. Proximity to public transit	1	"	"	100.0%
7. Reasonable rental, building capital or operating costs	1	"	"	100.0%
8. Direct rail access to site	0	"	"	00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0	"	"	00.0%

### Length of Time on Site

1.1 - 2 years

### Rank in Manufacturing

already listed



## 7. Clothing Industries

### Principal Products

Sportswear, jeans, parkas, work pants, blouses, windbreakers, nylon vest work jackets, overalls, shirts, slacks, children's wear, curling sweaters, sweaters, knitted trims for sportswear trade, caps, headwear.

### Number of Firms \*

1955 - 9

1965 - 13

Decrease or increase 1955-1965: +6 firms or +66.7%

### Employment

1965 - 1,344 (13 firms)

Average no. of employees per firm - 103.4

### Payroll

1965 - \$3,331,400 (13 firms)

Average payroll per firm - \$370,155.5

### Floor Space

Total floor space - 329,538 square feet (12 firms)

Average square feet per firm - 27,461 square feet.

### Principal Locational Factors

Of the 13 firms answering this section, 10 wished to remain at their present location and 3 anticipated moving. The following locational factors were of significance to those staying:

1. Area suited to requirements	9 firms or 90.0%
2. Proximity of banking, accounting and legal	7 " " 70.0%
3. Proximity to associated industries and suppliers	8 " " 80.0%
4. Proximity to wholesale or retail market	4 " " 40.0%
5. Proximity of labor force	7 " " 70.0%
6. Proximity to public transit	9 " " 90.0%
7. Reasonable rental, building capital or operating costs	8 " " 80.0%
8. Direct rail access to site	0 " " 00.0%
9. Foreseeable change in 8 due to future development of rail containerization	2 " " 20.0%

Of the 3 firms anticipating a move, one stated that rental costs were high and the 2 remaining firms were moving because their existing buildings were unsuitable for expansion purposes.

## Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of Firms	1	5	5	5	2		
% of Total	7.7%	38.5%	38.5%	38.5%	15.4%		

## Rank in Manufacturing

By total employment - 1

By employment per firm - 1

By total payroll - 1

By payroll per firm - 2

By gross sales or services - 1

By gross sales or services  
per firm - 3

## 8. Wood Industries

## Principal Products

Custom industrial and commercial doors, lumber, building materials, windows, hardware, mouldings, asphalt products.

## Number of Firms \*

1955 - 0

1965 - 4

Decrease or increase 1955-1965: 4 firms or 100.0%

## Employment

1965 - 32 (3firms)

Average no. of employees per firm - 10.7

### Payroll

1965 - \$136,900 (2 firms)

Average payroll per firm - \$68,450

### Floor Space

Total floor space - 9,956 square feet (3 firms)

Average floor space per firm - 3,319 square feet.

### Principal Locational Factors

Of the 3 firms in this category, 2 wished to remain at their present locale and one anticipated a move from the area. The remaining firms found the following locational factors significant:

1. Area suited to requirements	2	firms	or	100.0%
2. Proximity of banking, accounting and legal	2	"	"	100.0%
3. Proximity to associated industries and suppliers	1	"	"	50.0%
4. Proximity to wholesale or retail market	1	"	"	50.0%
5. Proximity to labor force	1	"	"	50.0%
6. Proximity to public transit	1	"	"	50.0%
7. Reasonable rental, building capital or operating costs	2	"	"	100.0%
8. Direct rail access to site	0	"	"	00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0	"	"	00.0%

The single firm wishing to relocate elsewhere stated that both the area and the building were unsuitable for their requirements.

Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of Firms		1		1		1	
% of Total		33.3%		33.3%		33.3%	

Rank in Manufacturing

By total employment - 11	By employment per firm - 11
By total payroll - 10	By payroll per firm - 9
By gross sales or services - 8	By gross sales or services per firm - 6

9. Furniture & Fixture Industries

Principal Products

Wood cabinets, portable floor lamps, table lamps, ash trays, electroplating.

Number of Firms \*

1955 - 6

1965 - 2

Decrease or increase 1955-1965: -4 firms or -66.7%

Employment

1965 - 14 (2 firms)

Average no. of employees per firm - 7.0

## Payroll

1965 - \$38,800 (2 firms)

Average payroll per firm - \$19,400.00

## Floor Space

Total Floor Area - 9,300 square feet (2 firms)

Average floor space per firm - 4,650 square feet

## Principal Locational Factors

Both firms wish to remain at existing location because of the

following factors:

1. Area suited to requirements	1	firm	or	50.0%
2. Proximity of banking, accounting and legal	2	"	"	100.0%
3. Proximity of associated industries and suppliers	2	"	"	100.0%
4. Proximity to wholesale or retail market	2	"	"	100.0%
5. Proximity to labor force	1	"	"	50.0%
6. Proximity to public transit	2	"	"	100.0%
7. Reasonable rental, building capital or operation costs	2	"	"	100.0%
8. Direct rail access to site	0	"	"	00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0	"	"	00.0%

## Length of Time on Site

<u>YEARS</u>	<u>0-1</u>	<u>1.1-2</u>	<u>2.1-5</u>	<u>5.1-10</u>	<u>10.1-20</u>	<u>20.1-34</u>	<u>35+</u>
No. of Firms	1				1		
% of Total	50.0%				50.0%		

## Rank in Manufacturing

By total employment - 14

By employment per firm - 13

By total gross sales or  
services - 12By gross sales or services  
per firm - 12

By total payroll - 14

By payroll per firm - 14

## 10. Paper and Allied Industries

## Principal Products

Paper bags, plaster figures, souvenirs, advertising specialties,  
labels, tags, seals, nameplates, decorative trim, displays, transfers,  
decals, instrument panels.

## Number of Firms \*

1955 - 1

1965 - 3

Decrease or increase 1955-1965: +2 firms or +200%

## Employment

1965 - 171 (3 firms)

Average no. of employees per firm - 57

## Payroll

1965 - \$434,200 (1 firm)

Average Payroll per firm - \$434,200

## Floor Space

Total Floor area - 120,000 square feet (2 firms)

Average floor area per firm - 60,000 square feet

## Principal Locational Factors

All 3 firms wish to remain on their existing sites and considered the factors listed below significant to their operation to the following extent:

1. Area suited to requirements	3	firms	or	100.0%
2. Proximity of banking, accounting and legal	3	"	"	100.0%
3. Proximity to associated industries and suppliers	3	"	"	100.0%
4. Proximity to wholesale or retail market	2	"	"	66.7%
5. Proximity to labor force	2	"	"	66.7%
6. Proximity to public transit	3	"	"	100.0%
7. Reasonable rental, building capital or operating costs	3	"	"	100.0%
8. Direct rail access to site	1	"	"	33.3%
9. Foreseeable change in 8 due to future development of rail containerization	1	"	"	33.3%



## Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of Firms			1		1		1
% of Total			33.3%		33.3%		33.3%

## Rank in Manufacturing

By total employment - 5

By employment per firm - 3

By total payroll - 4

By payroll per firm - 1

By total gross sales or  
services - 4By gross sales or services  
per firm - 2

## 11. Printing, Publishing and Allied Industries

## Principal Products

Greeting cards, commercial printing and multigraphing, offset press, art work, photoengraving plates, offset negatives and plates, multilith offset printing, direct mail advertising services, display advertising, stationery, book binding, looseleaf forms and binders, silk screening, die cutting, paper boxes.

## Number of Firms \*

1955 - 8

1965 - 18

Decrease or increase 1955-1965: +10 firms or +125.0%

## Employment

1965 - 210 (9 firms)

Average no. of employees per firm - 16.1

## Payroll

1965 - \$357,590

Average payroll per firm - \$44,698.7

## Floor Space

Total floor area - 135,604 square feet (15 firms)

Average floor area per firm - 9,040 square feet

## Principal Locational Factors

Two of the firms stated that they were anticipating a move from the area, 11 favored their present site and one firm did not reply to this section of the questionnaire. Those remaining found the following locational factors significant to their operation:

1. Area suited to requirements	10 firms or 90.9%
2. Proximity of banking, accounting and legal	7 " " 63.6%
3. Proximity to associated industries and suppliers	6 " " 54.5%
4. Proximity to wholesale or retail market	6 " " 54.5%
5. Proximity to labor force	3 " " 27.3%
6. Proximity to public transit	8 " " 72.7%
7. Reasonable rental, building capital or operating costs	9 " " 81.8%
8. Direct rail access to site	2 " " 18.2%
9. Foreseeable change in 8 due to future development of rail containerization	0 " " 00.0%

### Length of Time on Site

Of the two firms intending to move from the area, 1 stated the area was unsuitable, both reported that rental, building capital or operating costs were too high and 1 had an additional miscellaneous reason.

<u>YEARS</u>	<u>0-1</u>	<u>1.1-2</u>	<u>2.1-5</u>	<u>5.1-10</u>	<u>10.1-20</u>	<u>20.1-34</u>	<u>35+</u>
No. of Firms	1	2	2	3	2	1	2
% of Total	7.7%	15.4%	15.4%	23.1%	15.4%	7.7%	15.4%

### Rank in Manufacturing

By total employment - 4

By employment per firm - 9

By total payroll - 6

By payroll per firm - 11

By total gross sales or  
services - 3

By gross sales or services  
per firm - 9

### 13. Metal Fabricating Industries (excluding machinery and transportation equipment industries)

#### Principal Products

Metal culverts, drainage structures, gates, steel buildings, asbestos bonded sewer pipe, well curbing, highway guardrails, steel piling, grating, retaining walls, bridge materials, sluice gates, custom, industrial and commercial doors, combination baths, galvanized boilers, airtight heaters, metal stampings, metal pails, heating pipes, roof jacks, sanitary closets, seater rings, funnels, house tanks,

vacuum washers, automatic draft regulators, miscellaneous cans, poultry founts, utility water carriers, mink ranch equipment, bronze gear pumps, rubber impellers and rollers, centrifugal.

Number of Firms \*

1955 - 4

1965 - 9

Decrease or increase 1955-1965: +5 firms or +225.0%

Employment

1956 - 134 (8 firms)

Average no. of employees per firm - 16.7

Payroll

1965 - \$394,200 (5 firms)

Average payroll per firm - \$78,840.00

Floor Space

Total Floor area - 70,040 square feet (5 firms)

Average floor area per firm - 14,008 square feet

Principal Locational Factors

All of the firms answering this section stated that they planned to remain at their present location. The factors listed below were considered significant to the operation of these firms to the following extent:

1. Area suited to requirements	9 firms or 100.0%
2. Proximity of banking, accounting and legal	6 " " 66.7%
3. Proximity to associated industries and suppliers	7 " " 77.8%
4. Proximity to wholesale or retail market	6 " " 66.7%
5. Proximity to labor force	6 " " 66.7%
6. Proximity to public transit	6 " " 66.7%
7. Reasonable rental, building capital or operating costs	6 " " 66.7%
8. Direct rail access to site	4 " " 44.4%
9. Foreseeable change in 8 due to future development of rail containerization	0 " " 00.0%

Length of Time on Site (8 firms)

<u>YEARS</u>	<u>0-1</u>	<u>1.1-2</u>	<u>2.1-5</u>	<u>5.1-10</u>	<u>10.1-20</u>	<u>20.1-34</u>	<u>35+</u>
No. of Firms	2	1	2			2	1
% of Total	25.0%	12.5%	25.0%			25.0%	12.5%

Rank in Manufacturing

By total employment - 6

By employment per firm - 8

By total payroll - 5

By payroll per firm - 8

By total gross sales or services - 9

By gross sales or services per firm - 8

#### 14. Machinery Industries (excluding electrical machinery)

##### Principal Products

Gear pumps, rubber impellers and pumps, portable pumps, tractor tire filling kits.

##### Number of Firms \*

1955 - 9

1965 - 2

Decrease or increase 1955-1965: -7 firms or -77.8%

##### Employment

1965 - 61 (2 firms)

Average no. of employees per firm - 30.5

##### Payroll

1965 - \$260,160 (2 firms)

Average payroll per firm - \$130,080

##### Floor Space

Total floor area - 14,969 square feet (2 firms)

Average floor area per firm - 7,485 square feet

##### Principal Locational Factors

Both firms planned to remain at their present location and found the following factors significant to their operation:

1. Area suited to requirements	2	firms	or	100.0%
2. Proximity of banking, accounting and legal	1	"	"	50.0%
3. Proximity to associated industries and suppliers	2	"	"	100.0%
4. Proximity to wholesale or retail market	1	"	"	50.0%
5. Proximity to labor force	1	"	"	50.0%
6. Proximity to public transit	1	"	"	50.0%
7. Reasonable rental, building capital or operating costs	2	"	"	100.0%
8. Direct rail access to site	0	"	"	00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0	"	"	00.0%

#### Length of Time on Site

Both firms have been on their present sites from 10 to 20 years.

#### Rank in Manufacturing

By total employment - 8	By employment per firm - 6
By total payroll - 7	By payroll per firm - 6
By total gross sales or services - 7	By gross sales or services per firm - 5

#### 15. Transportation Equipment Industries

##### Principal Products

Outboard motors - sales and rentals

## Number of Firms \*

1955 - 1

1965 - 1

Decrease or increase: 1955-1965: 0 firms or 00.0%

## Employment

1965 - 5 (1 firm)

Average no. of employees per firm - 5.0

## Payroll

cannot be listed \*

## Floor Space

Total floor area - 3,300 square feet (1 firm)

Average floor area per firm - 3,300 square feet

## Principal Locational Factors

This single firm intends to remain in the study area and found the following factors significant to its operation:

1. Area suited to requirements	1	firm	or	100.0%
2. Proximity of banking, accounting and legal	1	"	"	100.0%
3. Proximity to associated industries and suppliers	1	"	"	100.0%
4. Proximity to wholesale or retail market	1	"	"	100.0%

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 \* Information for single firms cannot be disclosed.



5. Proximity to labor force	1	firm	or	100.0%
6. Proximity to public transit	1	"	"	100.0%
7. Reasonable rental, building capital or operating costs	1	"	"	100.0%
8. Direct rail access to site	0	"	"	00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0	"	"	00.0%

#### Length of Time on Site

This firm has been located on its present site for 2 to 5 years.

#### Rank in Manufacturing

By total employment - 15	By employment per firm - 15
By total payroll - 15	By payroll per firm - 13
By total gross sales or services - 15	By gross sales or services per firm - 13

#### 16. Electrical Products Industries

##### Principal Products

Fire and burglar alarms, remote industrial music equipment and controls.

##### Number of Firms \*

1955 - 5

1965 - 3

Decrease or increase 1955-1965: -2 firms or -40.0%

**Employment**

1965 - 36 (2 firms)

Average number of employees per firm - 18.0

**Payroll**

1965 - \$168,000 (2 firms)

Average payroll per firm - \$84,000

**Floor Space**

Total floor area - 7,600 square feet (2 firms)

Average square feet per firm - 3,800 square feet.

**Principal Locational Factors**

All 3 firms wished to remain at their present locations. Locational factors were important to their location to the following extent:

1. Area suited to requirements	3	firms	or	100.0%
2. Proximity of banking, accounting and legal	2	"	"	66.7%
3. Proximity to associated industries and suppliers	2	"	"	66.7%
4. Proximity to wholesale or retail market	0	"	"	00.0%
5. Proximity to labor force	0	"	"	00.0%
6. Proximity to public transit	2	"	"	66.7%
7. Reasonable rental, building capital or operating costs	3	"	"	100.0%

8. Direct rail access to site	0 firms of 00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0 " " 00.0%

## Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of firms	1	1			1		
% of Total	33.3%	33.3%			33.3%		

## Rank in Manufacturing

By total employment - 10	By employment per firm - 7
By total payroll - 9	By payroll per firm - 7
By total gross sales or services - 10	By gross sales or services per firm - 11

## 17. Non-Metallic Mineral Products

## Principal Products

Brake linings, clutch facings, brake fluids, all friction material, brake and clutch parts.

## Number of Firms \*

1955 - 0

1965 - 1

Decrease or increase 1955-1965: +1 or +100.0%

Employment

1965 - 15

Average no. of employees per firm - 15.0

Payroll

cannot be listed \*

Floor Space

Total floor area - already listed

Average square feet per firm - already listed

Principal Locational Factors

This firm intends to remain in the area and has stated the following factors to be of significance to its operation:

- |   |   |      |    |        |
|---|---|------|----|--------|
| 1. Area suited to requirements                    | 1 | firm | or | 100.0% |
| 2. Proximity to accounting, banking,<br>and legal | 1 | "    | "  | 100.0% |
| 4. Proximity to wholesale or retail<br>market     | 1 | "    | "  | 100.0% |

Length of Time on Site

5 to 10 years

Rank in Manufacturing

By total employment - 13

By employment per firm - 10

By total payroll - 12

By payroll per firm - 10

By total gross sales or  
services - 11

By gross sales or services  
per firm - 10

-----

\* Information for single firms cannot be disclosed.

## 19. Chemical and Chemical Products

## Principal Products

Custom made plastic boxes, labels, displays, sheet protectors, silk screening, plastic letters, advertising novelties, boiler compounds, conditioners, descaling compounds, meat processing chemicals, rust preventatives, spices, medicines, toilet articles, soap, stock and poultry feeds, disinfectants, insecticides.

## Number of Firms \*

1955 - 7

1965 - 3

Decrease or increase 1955-1965: -4 firms or -57.4%

## Employment

1965 - 89 (3 firms)

Average no. of employees per firm - 29.7

## Payroll

1965 - \$242,200 (2 firms)

Average payroll per firm - \$121,100

## Floor Space

Total floor area - 92,500 square feet (3 firms)

Average floor area per firm - 30,833 square feet

## Principal Locational Factors

All of the 3 firms reporting planned to remain at their present location. The following factors were found to be significant to their operation:

1. Area suited to requirements	3	firms	or	100.0%
2. Proximity of banking, accounting, and legal	2	"	"	66.7%
3. Proximity to associated industries and suppliers	1	"	"	33.3%
4. Proximity to wholesale or retail market	2	"	"	66.7%
5. Proximity to labor force	2	"	"	66.7%
6. Proximity to public transit	3	"	"	100.0%
7. Reasonable rental, building capital or operating costs	3	"	"	100.0%
8. Direct rail access to site	2	"	"	66.7%
9. Foreseeable change in 8 due to future development of rail containerization	1	"	"	33.3%

## Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of Firms			2				1
% of Total			66.7%				33.3%

## Rank in Manufacturing

By total employment - 7

By employment per firm - 5

By total payroll - 8

By payroll per firm - 5

By total gross sales or  
services - 6By gross sales or services  
per firm - 4

## 20. Miscellaneous Manufacturing Industries

## Principal Products

Brooms, waxes, industrial and home cleaning supplies and brushes,  
display advertising novelties, exhibition booths, outdoor and window  
display backgrounds and properties, decorator's supplies and dentures.

## Number of Firms \*

1955 - 8

1965 - 7

Decrease or increase 1955-1965: -1 firm or -12.5%

## Employment

1965 - 55 (7 firms)

Average number of employees per firm - 7.8

## Payroll

1965 - \$122,180 (4 firms)

Average payroll per firm - \$30,545.0

### Floor Space

Total Floor area - 19,140 square feet (4 firms)

Average floor area per firm - 4,785 square feet

### Principal Locational Factors

Five of the six firms replying to this portion of the questionnaire wished to remain at their present location and one anticipated moving. The remaining firms answered as follows to the significance of locational factors:

1. Area suited to requirements	5	firms	or	100.0%
2. Proximity of banking, accounting, and legal	3	"	"	60.0%
3. Proximity to associated industries and suppliers	4	"	"	80.0%
4. Proximity to wholesale and retail market	3	"	"	60.0%
5. Proximity to labor force	2	"	"	40.0%
6. Proximity to public transit	4	"	"	80.0%
7. Reasonable rental, building capital or operating costs	4	"	"	80.0%
8. Direct rail access to site	0	"	"	00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0	"	"	00.0%

The single firm anticipating a move from the area stated that the building was unsuited to its requirements.



## Length of Time on Site

<u>YEARS</u>	<u>0-1</u>	<u>1.1-2</u>	<u>2.1-5</u>	<u>5.1-10</u>	<u>10.1-20</u>	<u>20.1-34</u>	<u>35+</u>
No. of Firms	1	1	2	1	1		
% of Total	16.7%	16.7%	33.3%	16.7%	16.7%		

## Rank in Manufacturing

By total employment - 9

By employment per firm - 12

By total payroll - 11

By payroll per firm - 12

By total gross sales or  
services - 14By gross sales or services  
per firm - 14

CHAPTER VII  
CONSTRUCTION

Construction industries represent a relatively small portion of the economic activity in South Point Douglas. The 8 firms reporting in the area account for only 1% of the employment. Because of the need for relatively large quantities of inexpensive land for storage, construction uses are seldom found in central areas such as South Point Douglas. Speciality construction firms, such as electrical and heating installation contractors, however, are more common to older central areas as their operation and storage facilities can usually be contained within a building. For this purpose, a new building is not essential, and because of this fact several such uses can be found in the older buildings in South Point Douglas.

CLASSIFICATIONS

The Dominion Bureau of Statistics standard Industrial Classification's manual provided the following major construction groups:

TABLE 23

CONSTRUCTION CLASSIFICATIONS

GROUP NUMBER	MAJOR GROUP	NO. OF FIRMS	% OF TOTAL
1	General Contractor	2	25%
2	Special Trade Contractors	6	75%

LOCATIONAL FACTORS

Specialty construction firms which make up the greatest part of this industrial division provide service to the entire metropolitan region. Because this service is not of a local nature confined to a single district within the Metro area, the location of such firms central to the entire market is of importance. This factor, and the significance of other related locational factors, is evident from the questionnaire replies which these firms made.

## Relative Importance of Locational Factors

Replies to these factors were recorded in two groups:

A. for those wishing to remain on their present site, and

B. for those firms anticipating moving out of the area. In this case, 7 firms wished to remain and 1 intended to move.

TABLE 24

A. PRINCIPAL LOCATIONAL FACTORS FOR  
CONSTRUCTION FIRMS WISHING TO REMAIN

	No. of firms	% of firms
1. Area suited to requirements	6	85.7%
2. Proximity of banking, accounting & legal	5	71.4%
3. Proximity of associated industries and suppliers	7	100.0%

	No. of firms	% of firms
4. Proximity to wholesale or retail market	6	85.7%
5. Proximity to labor force	6	85.7%
6. Proximity to public transit	6	85.7%
7. Reasonable rental, building capital or operating costs	6	85.7%
8. Direct rail access to site		
9. Future change in 8 due to future development of rail containerization		

As shown by Table 24, a large percentage of the firms considered each of the first 7 factors to be of significance to their operation. However, the proximity of associated industries and suppliers received a unanimous vote of importance from all concerned. Rail facilities are obviously not necessary for their operations.

B. The single firm anticipating a move from South Point Douglas was a special trade contractor and he stated that the area was unsuitable for his requirements because he could not find enough additional space for expansion purposes. He mentioned that all other factors were favorable to his company but a shortage of space was forcing him to locate elsewhere.

It would appear, therefore, that South Point Douglas has the amenities desired by specialty contractors but may lack the necessary

space for larger companies wishing to expand.

### EMPLOYMENT

Construction employs 124 persons which is broken down as follows:

TABLE 25

#### DISTRIBUTION OF EMPLOYMENT BY MAJOR CONSTRUCTION GROUP

GROUP NO.	INDUSTRIAL DESCRIPTION	TOTAL NO. OF FIRMS	NO. OF EMPLOYEES	% OF TOTAL NO. OF EMPLOYEES	AVERAGE NO. OF EMPLOYEES PER FIRM
1	General Contractor	2	63	.5%	31.5
2	Special Trade Contractor	6	61	.5%	10.1

From Table 25 an equal distribution of employment between the two groups is evident. The average number of employees per firm, however, is 3 times as great for general contractors as is for special trade contractors.

### FLOOR SPACE

Construction ranked second last in terms of total floor space with 54,871 square feet. It averaged 6,859 square feet per firm.

INDUSTRIAL CHANGE

The number of construction firms in the study area has remained fairly constant over the 1955-1965 period, with a decrease of one firm. A logical trend, however, sees general contractors decreasing by almost 50% (see Appendix C) while special trade contractors have increased by an equal percentage. It is likely that such movements will continue in future as specialized uses concentrate more and more in the downtown area where they can most easily reach all parts of the metropolitan area.

MAJOR GROUPS

## 1. General Contractors

Principal Products

no products listed

Number of Firms \*

1955 - 7

1965 - 4

Increase or Decrease 1955-1965: -3 firms or -42.9%

Employment

1965 - 63 (2 firms)

Average No. of employees per firm - 31.5

Payroll

1965 - \$250,200 (1 firm)

Average payroll per firm - \$250,200

### Floor Space

Total floor area - 100 square feet (1 firm)

Average floor area - 100 square feet per firm

### Principal Locational Factors

Both firms wished to remain on their present sites and answered as follows to the significance of locational factors:

1. Area suited to requirements	2	firms	or	100.0%
2. Proximity of banking, accounting and legal	1	"	"	50.0%
3. Proximity to associated industries and suppliers	2	"	"	100.0%
4. Proximity to wholesale or retail market	2	"	"	100.0%
5. Proximity of labor force	1	"	"	50.0%
6. Proximity to public transit	1	"	"	50.0%
7. Reasonable rental, building capital or operating costs	1	"	"	50.0%
8. Direct rail access to site	0	"	"	00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0	"	"	00.0%

### Length of Time on Site

<u>YEARS</u>	<u>0-1</u>	<u>1.1-2</u>	<u>2.1-5</u>	<u>5.1-10</u>	<u>10.1-20</u>	<u>20.1-34</u>	<u>35+</u>
No. of firms			1	1			
% of Total			50.0%	50.0%			

## Rank in Construction

By total employment - 1

By employment per firm - 1

By total payroll - 2

By payroll per firm - 1

By total gross sales or  
services - 1By gross sales or services  
per firm - 1

## 2. Special Trade Contractors

## Principal Products

Fluorescent and incandescent lamps, registers, grills, diffusion and air conditioning outlets, air filtration equipment, ventilation fans, heating and oil burning equipment, building products.

## Number of Firms \*

1955 - 4

1965 - 6

Decrease or increase 1955-1965: +2 firms or +50.0%

## Employment

1965 - 61 (6 firms)

Average no. of employees per firm - 10.2

## Payroll

1965 - \$259,812 (6 firms)

Average payroll per firm - \$43,302



### Floor Space

Total floor area - 21,944 square feet (6 firms)

Average floor area per firm - 3,657 square feet

### Principal Locational Factors

Five of the six firms recorded in this group wished to remain at existing locations and one anticipated moving. The significance of locational factors was reported as follows for those firms wishing to remain:

1. Area suited to requirements	4 firms or 80.0%
2. Proximity to banking, accounting and legal	4 " " 80.0%
3. Proximity to associated industries and suppliers	5 " " 100.0%
4. Proximity to wholesale or retail market	4 " " 80.0%
5. Proximity of labor force	5 " " 100.0%
6. Proximity to public transit	5 " " 100.0%
7. Reasonable, rental, building capital or operating costs	5 " " 100.0%
8. Direct rail access to site	
9. Foreseeable change in 8 due to future development of rail containerization	

### Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of Firms	2		1		2		1
% of Total	33.3%		16.7%		33.3%		16.7%

**Rank in Construction**

By total employment - 2

By employment per firm - 2

By total payroll - 1

By payroll per firm - 2

By total gross sales or  
services - 2By gross sales or services  
per firm - 2

## CHAPTER VIII

## TRANSPORTATION, COMMUNICATION AND OTHER UTILITIES

This industrial classification, for the sake of brevity to be called Transport etc., accounts for a sizable portion of the economic activity in South Point Douglas. Representing the several railways which penetrate the area, trucking firms, storage facilities and various utilities located there, this division constitutes roughly 8% of the area's firms.

Transport etc. provides the essential life line for the area, carrying the flow of goods to and from the many distributive wholesale and manufacturing firms. The movement of goods handled by the transport firms is primarily into and out of the Metro area economy and not on a local basis. Transport etc. provided the initial seed which gave birth to this industrial area with the coming of the railway in 1882. The expanded use of these rail facilities and the additional transition to trucking has stabilized this industrial division with the study area to the point where it now employs approximately 17% of the South Point Douglas labor force (non-resident).

CLASSIFICATIONS

This industrial division was categorized by the Dominion Bureau of Statistics standard industrial classification as follows:

TABLE 26

## TRANSPORTATION, COMMUNICATION AND OTHER UTILITIES CLASSIFICATIONS

GROUP NUMBER	MAJOR GROUP	NO. OF FIRMS	% OF TOTAL
1	Transportation	23	56.0%
2	Storage	12	29.3%
3	Communication	4	9.8%
4	Electric Power, Gas & Water Utilities	2	4.9%

LOCATIONAL FACTORS

Transportation firms and storage facilities which make up the greatest part of this industrial division are naturally found together for economic reasons. In other words, storage facilities locate at transport terminus points. History has made Point Douglas the first settlement in the Metro area, to which the railroad was built, and in doing so, determined the location of storage facilities and associated uses. Time has not changed this situation to a great extent, only expanded it along the rail lines west of Main Street and elsewhere. Time however, has aged the buildings originally constructed here and has also brought about many variations in land values.

To measure the present day attitude toward existing facilities, these firms were asked to state the significance of the following factors

to their operation. The replies were recorded in two groups for accuracy's sake. A. those firms wishing to remain on their present site and, B. those anticipating a move out of the area. Of the 40 firms answering this section, 35 wished to remain and 5 intended moving.

TABLE 27

A. PRINCIPAL LOCATIONAL FACTORS FOR  
THOSE FIRMS WISHING TO REMAIN

1. Area suited to requirements	30 firms or 85.7%
2. Proximity of banking, account. and legal	23 " " 65.7%
3. Proximity of associated industries and suppliers	14 " " 40.0%
4. Proximity to wholesale and retail market	11 " " 31.4%
5. Proximity of labor force	12 " " 34.3%
6. Proximity to public transit	23 " " 65.7%
7. Reasonable rental, building capital or operating costs	29 " " 82.9%
8. Direct rail access to site	7 " " 20.0%
9. Foreseeable change in 8 due to future development of rail containerization	0 " " 00.0%

From Table 27 it is evident that Transport etc. industries attach a high degree of importance to the suitability of the area (ie centrality) and also to reasonable rental, building capital or operating costs. The

proximity to banking, etc. and to public transit appears to be significantly important also but to a lesser extent. Direct rail access appears to be a concern to only 20% of these industries.

TABLE 28

B. PRINCIPAL LOCATIONAL FACTORS FOR TRANSPORT ETC.  
FIRMS ANTICIPATING TO MOVE

1. Area unsuited to requirements	1 firm	or	20.0%
2. Lack of proximity to banking, accounting and legal	0 "	"	00.0%
3. Lack of proximity to associated industries and suppliers	1 "	"	20.0%
4. Lack of proximity to retail or wholesale market	0 "	"	00.0%
5. Lack of proximity to necessary labor force	1 "	"	20.0%
6. Lack of proximity to public transit	0 "	"	00.0%
7. High rental, building capital or operating costs	4 "	"	80.0%
8. Lack of direct rail access to site	0 "	"	00.0%

High rental costs etc. appears to be the main reason for which these firms wish to move out of the area.

EMPLOYMENT

Transport etc. is the third largest employer in South Point Douglas with 16.7% of the workers, and ranks second highest in terms

of average number of employees per firm.

The following table illustrates the distribution of Transport etc. employment by major Transport etc. groups:

TABLE 29

DISTRIBUTION OF EMPLOYMENT BY MAJOR TRANSPORTATION,  
COMMUNICATION AND OTHER UTILITIES GROUP

GROUP NO.	INDUSTRIAL DESCRIPTION	TOTAL NO. OF FIRMS	NO. OF EMPLOYEES	% OF TOTAL NO. OF EMPLOYEES	AVERAGE NO. OF EMPLOYEES PER FIRM
1.	Transportation	23	1,146	59.0%	49.8
2.	Storage	12	270	13.9%	24.5
3.	Communication	4	411	21.2%	137.0
4.	Electric Power Gas & Water Utilities	2	115	5.9%	38.3

Table 29 shows a heavy concentration of employment in the Transportation group. The next largest group is Communication with less than half the total of the first group.

Communication industries average a much greater number of employees per firm than any other group listed. In fact, its staff size averages more than  $2\frac{1}{2}$  times the others. Transportation and Communication together make up over 80.0% of the division's employment.

FLOOR SPACE

Transport etc. reported a total floor space of 1,272,494 square feet, the third greatest area per use in South Point Douglas. This averaged approximately 37,426 square feet per firm, second only to Public Administration.

INDUSTRIAL CHANGE

This industrial division has experienced a major growth over the past 10 years of approximately 30%. This represents an absolute increase of 15 firms in the 10 year period, to give a total of 64 firms in 1965.

This division, along with Manufacturing industries which had only 2½% growth, are the only two categories to gain in number of firms from 1955 to 1965. One could say that manufacturing firms have remained constant and Transport etc. have grown tremendously in view of the shift to the suburbs of other industry.

MAJOR GROUPS

## 1. Transportation

## Principal Products

Rolling stock, freight and passenger rail service, air and steamship service, truck transport service.

## Number of Firms \*

1955 - 28

1965 - 30

Decrease or increase, 1955-1965: +2 firms or 7.14%



### Employment

1965 - 1,962 (23 firms)

Average no. of employees per firm - 49.8

### Payroll

1965 - \$5,981,456 (19 firms)

Average payroll per firm - \$314,813.5

### Floor Space

Total floor area - 276,725 square feet (16 firms)

Average floor area per firm - 17,295 square feet

### Principal Locational Factors

Of the 23 firms recorded, 22 wished to remain at their present sites and only one anticipated moving. The significance of locational factors for these firms is as follows:

1. Area suited to requirements	20 firms or 90.9%
2. Proximity to banking, accounting and legal	17 " " 77.3%
3. Proximity to associated industries and suppliers	9 " " 40.9%
4. Proximity to wholesale or retail markets	5 " " 22.7%
5. Proximity of labor force	6 " " 27.3%
6. Proximity to public transit	15 " " 68.2%
7. Reasonable rental, building capital or operating costs	21 " " 95.4%

8. Direct rail access to site 1 firm or 4.5%
9. Foreseeable change in 8 due to future development of rail containerization 0 " "00.0%

The single firm intending to move stated that high rental, etc. costs were the reason for its wishing to leave.

#### Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of Firms	1	1	3	6	2	1	8
% of Total	4.5%	4.5%	13.6%	27.3%	9.0%	4.5%	36.4%

#### Rank in Transportation, Communication & Other Utilities

- By total employment - 1                      By employment per firm - 3
- By total payroll - 1                              By payroll per firm - 2
- By total gross sales or services - 1                      By gross sales or services per firm - 1

#### 2. Storage

##### Principal Products

Radios, televisions, reffridgerators, stoves, washers and parts, dryers, electronic suppliers, meat products, tires, tubes and batteries, chrome kitchen furniture, display fixtures, restaurant hotel furniture, hat and coat racks.

Number of Firms \*

1955 - 13

1965 - 21

Decrease or increase 1955-1965: +8 firms or +61.53%

Employment

1965 - 270 (11 firms)

Average No. of employees per firm - 24.5

Payroll

1965 - \$375,766

Average payroll per firm - \$46,970.7

Floor Space

Total floor area - 844,419 square feet (14 firms)

Average floor area per firm - 60,316 square feet

Principal Locational Factors

Nine of the 11 firms answering this section wished to remain at their present location and 2 anticipated a move out of the area. The following importance was given to locational factors by those firms wishing to remain.

- |   |                  |
|---|------------------|
| 1. Area suited to requirements                | 7 firms or 77.8% |
| 2. Proximity of banking, accounting and legal | 4 " " 44.4%      |

3. Proximity to associated industries and suppliers	4 firms or 44.4%
4. Proximity to wholesale or retail market	6 " " 66.7%
5. Proximity of labor force	5 " " 55.5%
6. Proximity to public transit	6 " " 66.7%
7. Reasonable rental, building capital or operating costs	7 " " 77.8%
8. Direct rail access to site	5 " " 55.5%
9. Foreseeable change in 8 due to future development of rail containerization	0 " " 00.0%

The two firms anticipating a move gave the following factors as reasons for their move.

1. Area unsuited to requirements	1 firm or 50.0%
3. Lack of proximity to associated industries and suppliers	1 " " 50.0%
5. Lack of proximity to necessary labor force	1 " " 50.0%
7. High rental, building capital and operating costs	1 " " 50.0%

One of these firms also stated that the building presently occupied was unsuitable for expansion purposes.

#### Length of Time on Site

<u>YEARS</u>	<u>0-1</u>	<u>1.1-2</u>	<u>2.1-5</u>	<u>5.1-10</u>	<u>10.1-20</u>	<u>20.1-34</u>	<u>35+</u>
No. of firms			1	5		1	4
% of total			9.1%	45.4%		9.1%	36.4%

Rank in Transportation, Communication & Other Utilities

By total employment - 3

By employment per firm - 4

By total payroll - 4

By payroll per firm - 4

By total gross sales or  
services - 2

By gross sales or services  
per firm - 3

3. Communication

Principal Products

Leased lines, teletype and T.W.X., mobile telephones and radios.

Number of Firms \*

1955 - 3

1965 - 9

Decrease or increase 1955-1965: +6 firms or +200.0%

Employment

1965 - 411 (3 firms)

Average employees per firm - 137

Payroll

1965 - 1,629,200 (4 firms)

Average payroll per firm - \$40,730

Floor Space

Total floor area - 75,350 square feet (2 firms)

Average floor area per firm - 37,675 square feet.

## Principal Locational Factors

One-half of the 4 firms listed in this group anticipated moving from the study area. Locational factors were given the following significance firstly by firms wishing to remain:

1. Area suited to requirements	1	firm	or	50.0%
2. Proximity to banking, accounting and legal	2	"	"	100.0%
3. Proximity to associated industries and suppliers	0	"	"	00.0%
4. Proximity to wholesale or retail market	0	"	"	00.0%
5. Proximity of labor force	1	"	"	50.0%
6. Proximity to public transit	2	"	"	100.0%
7. Reasonable rental, building capital or operating costs	1	"	"	50.0%
8. Direct rail access to site	0	"	"	00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0	"	"	00.0%

The following factor was found significant to those firms anticipating a move:

High rental, building capital or operating costs	2	firms	or	100.0%
--	---	-------	----	--------

## Length of Time on Site

<u>YEARS</u>	<u>0-1</u>	<u>1.1-2</u>	<u>2.1-5</u>	<u>5.1-10</u>	<u>10.1-20</u>	<u>20.1-34</u>	<u>35+</u>
No. of Firms		1	1	1			1
% of Total		25.0%	25.0%	25.0%			25.0%

## Rank in Transportation, Communication &amp; Other Utilities

By total employment - 2

By employment per firm - 1

By total payroll - 2

By payroll per firm - 1

By total gross sales or  
services - 4By gross sales or services  
per firm - 4

## 4. Electric Power, Gas and Water Utilities

## Principal Products

Steam, heat, water

## Number of Firms \*

1955 - 5

1965 - 4

Decrease or increase 1955-1965: -1 firm or -20.0%

## Employment

1965 - 115 (2 firms)

Average employees per firm - 57.5

## Payroll

1965 - \$497,000

Average payroll per firm - \$248,500.0

## Floor Space

Total floor area - 108,827 square feet (3 firms)

Average floor area per firm - 36,276 square feet

## Principal Locational Factors

Both firms listed wished to remain at their present locations and answered as follows as to the significance of locational factors:

1. Area suited to requirements	2 firms or 100.0%
3. Proximity to associated industries and suppliers	1 " " 50.0%
8. Direct rail access to site	1 " " 50.0%

## Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of Firms							2
% of Total							100.0%

## Rank in Transportation, Communication &amp; Other Utilities

By total employment - 4	By employment per firm - 2
By total payroll - 3	By payroll per firm - 2
By total gross sales or services - 3	By gross sales or services per firm - 2



## CHAPTER IX

## TRADE

Trade, both retail and wholesale, is being affected by the movement of firms to suburban locations. The obsolete structures, new traffic facilities, and the horizontal layout demands of modern goods - handling methods, have been forces which have compelled almost one-third of Trade enterprises to leave the area from 1955 to 1965. In spite of this shift, Trade still represents the largest form of economic activity in South Point Douglas in terms of total reported employment, payroll and gross sales. (see Plate 13) Over 90% in each case can be accredited to wholesale trade. Wholesale firms within the area serve a much larger and far reaching market area than do retail uses. The retail group is more local in nature, providing many of Metro Winnipeg's pawn shops, second hand clothing and jewelry stores and specialty confection and meat outlets which cater largely to the predominant ethnic groups in and adjacent to the study area. To put it bluntly, these retail uses are filling a definite need but at the same time, in no way resemble the superior business section along Portage Avenue and environs.

CLASSIFICATIONS

This industrial division was categorized by the Dominion Bureau of Statistics standard classifications as follows. The information provided on firms was a result of a survey of the area.

## TRADE CLASSIFICATIONS

GROUP NUMBER	MAJOR GROUP	NO. OF FIRMS	% OF TOTAL
1	Wholesale	137	71.8%
2	Retail	54	28.2%

LOCATIONAL FACTORS

Because of the predominance of wholesale trade within this industrial division, and the significantly different type of operation it is to retail trade, it was decided that to list the importance of their combined locational factors would be worthless. Locational factors are therefore listed under separate headings in the major group section.

EMPLOYMENT

Trade employs approximately one-third of the study area employees, the largest single division in South Point Douglas. On the average, each firm employs 19.76 persons, a very moderate number, which gives some indication of the size of the firms.

The following table illustrates the **distribution** of Trade employment between wholesale and retail.

TABLE 31

## DISTRIBUTION OF EMPLOYMENT BY MAJOR TRADE GROUP

GROUP NO.	INDUSTRIAL DESCRIPTION	TOTAL NO. OF FIRMS	NO. OF EMPLOYEES	% OF TOTAL NO. OF EMPLOYEES	AVERAGE NO. OF EMPLOYEES PER FIRM
1	Wholesale Trade	132	3,438	93.0%	26.0
2	Retail Trade	49	254	7.0%	5.3

Table 31 indicates that the greater number of employees working for Trade in South Point Douglas is actually employed by wholesale trade. When retail and wholesale employment are separated, it is apparent that the small size of the retail operations is the factor which reduces the overall average number of employees per firm for trade.

FLOOR SPACE

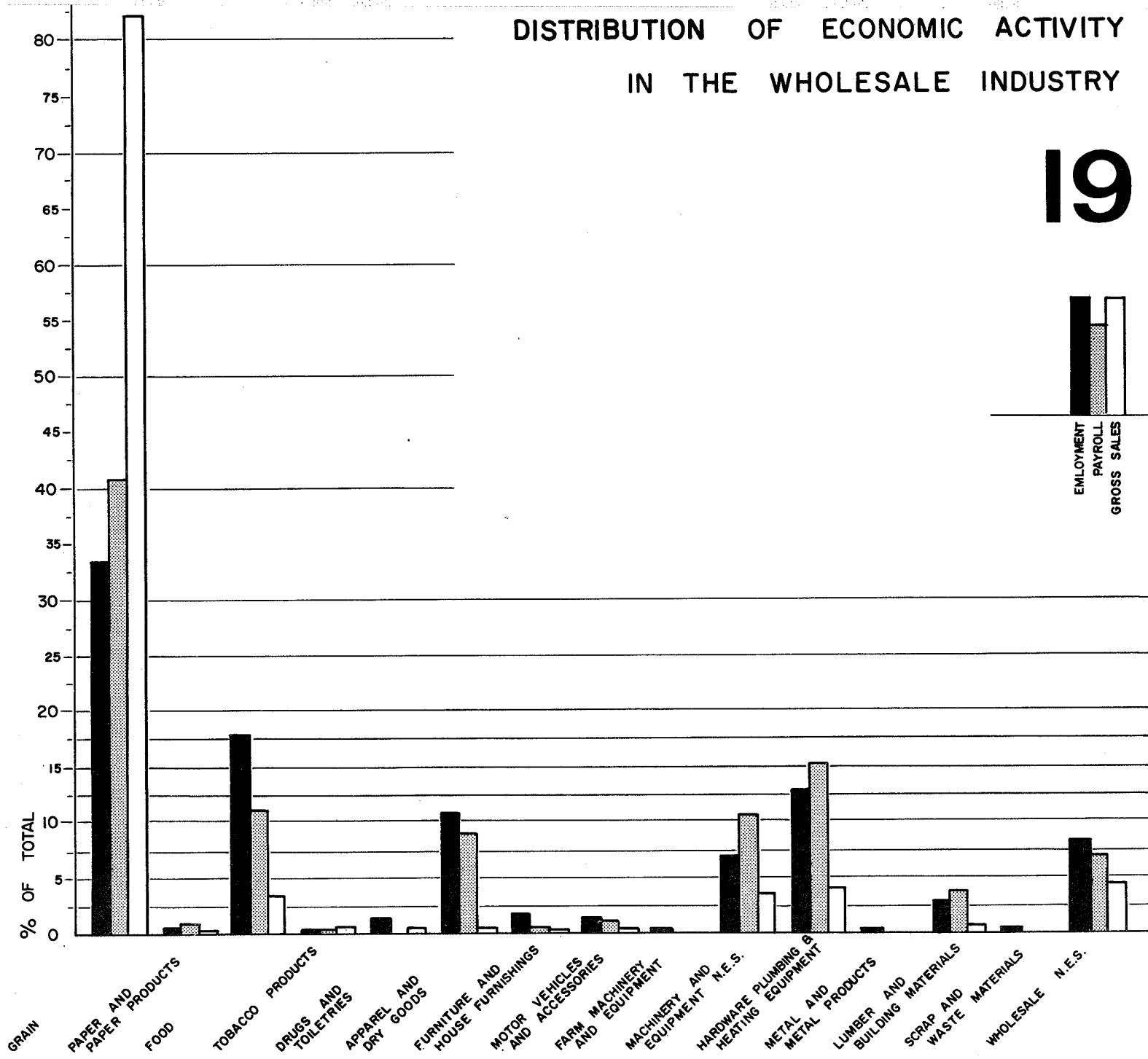
Trade also reported the greatest quantity of floor space, a total figure of 1,982,648 square feet with only 155 of the firms replying. This made an average of 12,791 square feet per firm.

INDUSTRIAL CHANGE

Trade enterprises have indicated a definite drop in number over the past 10 years. In 1955, Trade constituted 397 firms, 121 more than

# DISTRIBUTION OF ECONOMIC ACTIVITY IN THE WHOLESALE INDUSTRY

# 19



the 276 firms which are listed in 1965. This represents a decrease of approximately 30.5% over the ten year period or a loss of 12 firms per year.

#### MAJOR GROUPS

##### 1. Wholesale Trade

Because of the magnitude of this group it was deemed necessary to provide a further breakdown of figures in order to establish the exact characteristics and nature of the group. This breakdown is found in Table 32 and is shown graphically on Plate 19 by giving the representative quantities for employment, payroll, gross sales or services and floor space according to individual wholesale use index.

## DISTRIBUTION OF WHOLESALE ACTIVITY

INDEX NUMBER	DESCRIPTION	EMPLOYMENT	% OF TOTAL	PAYROLL	% OF TOTAL	GROSS SALES ETC.	% OF TOTAL	FLOOR SPACE	% OF TOTAL
604	Grain	1,224	33.31%	4,817,296	40.98%	402,843,000	82.20%	145,154	8.19%
611	Paper & Paper Products	36	.97%	75,000	.64%	1,700,000	.35%	56,286	3.18%
614	Food	661	17.98%	1,361,080	11.58%	18,225,705	3.72%	298,573	16.86%
615	Tobacco Products	2	.06%	6,500	.06%	400,000	.08%	1,500	.08%
616	Drugs & Toiletries	50	1.37%			400,000	.08%	35,000	1.98%
617	Apparel & Dry Goods	390	10.62%	1,056,000	8.98%	3,375,000	.69%	74,460	4.20%
618	Furniture & House Furnish.	71	1.93%	66,536	.57%	500,000	.10%	69,000	3.90%
619	Motor Vehicles & Access.	50	1.37%	156,000	1.33%	750,000	.15%	21,000	1.19%
622	Farm Machinery & Equipment	6	.16%					2,100	47.12%
623	Machinery & Equipment N.E.S.	265	7.21%	1,219,178	10.37%	15,110,176	3.08%	185,380	10.47%
624	Hardware, Plumbing & Heat Equipment	512	13.93%	1,820,000	15.49%	20,110,000	4.10%	480,680	27.15%
625	Metal & Metal Products	4	.10%					650	.04%
626	Lumber & Building Materials	84	2.28%	336,000	2.86%	3,913,000	.80%	90,332	5.10%
627	Scrap & Waste Materials	2	.06%						
629	Wholesales N.E.S.	318	8.65%	839,346	7.14%	22,765,577	4.65%	310,621	17.54%
<b>TOTAL</b>		<b>3,675</b>	<b>100.00%</b>	<b>11,752,936</b>	<b>100.00%</b>	<b>490,092,458</b>	<b>100.00%</b>	<b>1,770,736</b>	<b>100.00%</b>

These figures clearly illustrate the great concentration of wholesale economic activity in grain, food, apparel and dry goods, machinery and equipment and hardware, plumbing and heating equipment enterprises. These classifications combine to form roughly 85% of the area's wholesale activity which in turn represents the largest single group of activities in South Point Douglas. This fact should be remembered when considering the following data on general wholesaling.

#### Principal Products

Flour, various seeds, oil, seed, grain products, canned meats, peas, wild rice spices, cereals, corn starch, corn oil, jams, jellies, coal, wearing supplies, animal and poultry feeds, fertilizers, agricultural chemicals, rodenticides, soup mixes, powdered drink mixes, icing mixes, binder and baler twine, aluminum siding and roofing, farm supplies, sprayers, and parts, office furniture and supplies, printing, coarse paper, plastic cups, tape, paper products, groceries, syrups, peanut butter, pickles, waxes, cleaners, tobacco, drugs, dairy products, fresh fruit, jewelry, cooking pots, soap, shoes, threads, zippers, needles, shoe dressings and dyes, shoe repair, machinery, shoe supplies, all purpose adhesives, canvaas, textiles, mattresses, woolen products, floor covering, seat covers, mens clothing, household furniture, furs, hosiery, baby supplies, building materials, car accessories, ceramics, steel safes, stationery, machinery supplies for needle industry, laundry and dry cleaning equipment, disenfectants, compressors and pumps, various

chemical products, plumbing and heating systems and equipment, sporting goods, abrasives, veterinary supplies, rubber products, mink raising equipment, laboratory equipment, safety and fire fighting equipment, natural gas, air and liquids, water purification equipment.

Number of Firms \*

1955 - 323

1965 - 213

Decrease or Increase 1955-1965: -110 firms or -34.05%

Employment

1965 - 3,438 (132 firms reporting)

Average no. of employees per firm - 26.0

The following table and Figure 9 illustrate both the relative size of firms in each wholesale category and also the concentration of firms in the lower average employee per firm group. Approximately 60% of wholesale trades have only 0 - 10 employees.

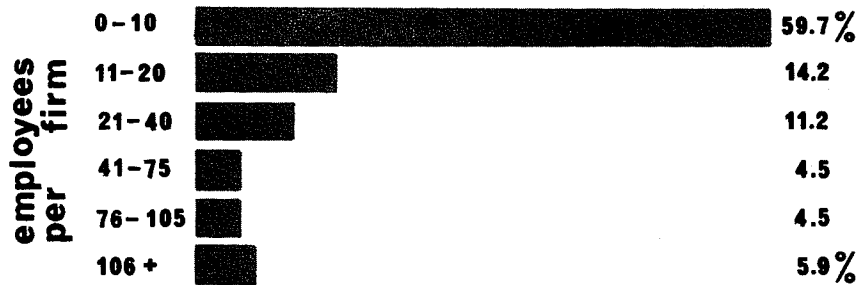


TABLE 33

## SIZE OF WHOLESALE FIRMS BY EMPLOYMENT

EMPLOYEES PER FIRM		NO. OF FIRMS												% OF TOTAL	
0-10	27	7	1	8	2	1	7	1	2	1	2	21	80	59.7%	
11-20	6	1	4	1			3			1		3	19	14.2%	
21-40	5	1	1				1	1		2		4	15	11.2%	
41-75			1	1	1	1			1			1	6	4.5%	
76-105	3		1					2					6	4.5%	
106 +	3		2	1					2				8	5.9%	
													100.0%		
Grain															
Paper & Paper															
Products															
Food															
Tobacco Prod.															
Drugs & Tol.															
Apparel & Dry															
Goods															
Furn. & H.H.															
Motor Veh.															
Farm Mach.															
Mach. & Equip.															
Hardware															
Metal & Prod.															
Lumber & Bldg.															
Scrap															
Wholesale															
N.E.S.															

## size of wholesale firms by employment



**FIGURE 9**

### Payroll

1965 - \$10,300,267 (75 firms reporting)

Average payroll per firm - \$137,336.9

### Floor Space

Total floor area - 1,706,211 square feet (105 firms)

Average floor area per firm - 16,250 square feet

### Principal Locational Factors

Approximately 87% of the wholesaling firms wished to remain in the area, a total of 120 enterprises, while 11 anticipated a move in the near future. The firms wishing to remain attributed the following degree

of importance of locational factors to their operation:

Principal Locational Factors for Firms Remaining

1. Area suited to requirements	119 firms or 98.3%
2. Proximity to banking, accounting, and legal	94 " " 77.7%
3. Proximity to associated industries and suppliers	73 " " 60.3%
4. Proximity to wholesale or retail market	53 " " 43.8%
5. Proximity of labor force	41 " " 33.9%
6. Proximity to public transit	80 " " 66.1%
7. Reasonable rental, building capital or operating costs	99 " " 81.8%
8. Direct rail access to site	29 " " 24.0%
9. Foreseeable change in 8 due to future development of rail containerization	4 " " 3.2%

The preceding factors indicate wholesalers have a strong preference for the South Point Douglas area, centrality being the major factor. Reasonably priced accommodation also ranks as a prime locational factor with proximity to banking, accounting and legal facilities a highly regarded amenity. Proximity to public transit and associated industries and suppliers was regarded by over 60% of the firms as being of major importance. Because of the tendency of those replying to the questionnaire to over-answer each of these questions, the first two factors may be stated as the critical locational factors in this case.

The following response was given by those firms anticipating a move from the area:

Principal Locational Factors for Firms Anticipating Moving

1. Area unsuited to requirements	5 firms or 45.4%
2. Lack of proximity to banking, accounting and legal	0 " " 00.0%
3. Lack of proximity to associated industries and suppliers	
4. Lack of proximity to retail or wholesale market	0 " " 00.0%
5. Lack of proximity to necessary labor force	0 " " 00.0%
6. Lack of proximity to public transit	0 " " 00.0%
7. High rental, building capital & operating costs	1 " " 9.1%
8. Lack of direct rail access to site	1 " " 9.1%

Although fewer than 50% of those firms wishing to leave the area answered No. 1, the unsuitability of the area appears to be the dominant factor. However, in a space designated for additional comments on the questionnaire form, 7 of the 11 firms anticipating a move stated that their present buildings were unsuitable to their requirements and that expansion was economically impossible because of this.

Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of Firms	6	7	15	26	20	19	36
% of Total	4.6%	5.4%	11.6%	20.1%	15.5%	14.7%	27.9%

## Rank in Trade (out of 2 groups)

By total employment - 1	By employment per firm - 1
By total payroll - 1	By payroll per firm - 1
By total gross sales or services - 1	By gross sales or services per firm - 1

## 2. Retail Trade

## Principal Products

Groceries, meats, bakery goods, confectionery, automotive parts, cars, truck and wagon bodies, utility trailers, men's clothing, textiles, mattresses, bedding and household staples, floor covering, household furniture, yarn goods, asphalt, tiles, chrome mouldings, drugs and sundries, novelties, jewelry, hardware, sporting goods, electrical appliances, footwear, building supplies, heating and plumbing supplies, custom sportswear.

## Number of Firms \*

1955 - 74

1965 - 63

Decrease or increase, 1955-1965: -11 firms or -14.86%

## Employment

1965 - 259 (49 firms)

Average no. of employees per firm - 5.3

## Payroll

1965 - \$807,874 (25 firms)

Average payroll per firm - \$32,315.0

## Floor Space

Total floor area - 141,149 square feet (46 firms)

Average floor area per firm - 3,068 square feet

## Principal Locational Factors

The intention to move from the area was shared by 6 of the 51 firms answering this section. The remaining 45 intended to remain in the area. The following factors were significant to the location of those firms wishing to remain:

1. Area suited to requirements	42 firms or 93.3%
2. Proximity of banking, accounting and legal	27 " " 60.0%
3. Proximity to associated industries and suppliers	18 " " 40.0%
4. Proximity to wholesale or retail market	27 " " 60.0%
5. Proximity of labor force	12 " " 26.7%
6. Proximity to public transit	25 " " 55.5%
7. Reasonable rental, building capital or operating costs	35 " " 77.8%
8. Direct rail access to site	0 " " 00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0 " " 00.0%

A strong preference for the area is indicated above, centrality being a prime concern. Reasonably priced accommodation, here again, is said to be of major importance to the retail trade. Proximity to banking etc., markets and labor force is significant to a lesser extent.

Those firms anticipating a move from the area gave the following response to locational factors:

1. Area unsuited to requirements	3 firms or 50.0%
4. Proximity to wholesale or retail market	2 " " 33.4%
7. High rental, building capital or operating costs	1 " " 16.7%

No emphasis was placed on proximity or lack of banking, accounting etc., associated industries and suppliers, labor force, public transit or rail access to the site.

Along with the above factors, 2 firms gave expropriation for the proposed Manitoba Cultural centre and 1 firm gave lack of access as their reasons for moving.

#### Length of Time on Site

<u>YEARS</u>	<u>0-1</u>	<u>1.1-2</u>	<u>2.1-5</u>	<u>5.1-10</u>	<u>10.1-20</u>	<u>20.1-34</u>	<u>35+</u>
No. of Firms	5	2	10	8	10	5	10
% of Total	10.0%	4.0%	20.0%	16.0%	20.0%	10.0%	20.0%

## Rank in Trade (out of 2 groups)

By total employment - 2

By employment per firm - 2

By total payroll - 2

By payroll per firm - 2

By total gross sales or  
services - 2By gross sales or services  
per firm - 2



## CHAPTER X

## FINANCE, INSURANCE &amp; REAL ESTATE

The firms of this division are concentrated in an area between Portage Avenue East and Market Avenue (see Plate 10) which constitutes a portion of Metropolitan Winnipeg's financial district. Although in recent years there has been a considerable number of such uses locating in the Broadway area, the older district has remained stable and is likely to exist for some years to come

Functions such as Finance etc. are seldom attracted to suburban locations, as are Manufacturing and Wholesaling. The permanency of financial institutions etc. in the central area is well summarized in the following quotation: Finance etc. are functions, "increasingly important in the twentieth century society, in which both inputs and outputs are even more heterogeneous and unstandardized, rapid communication and face to face contacts even more important than for the exotic manufacturing industries." <sup>10</sup>. It is these "highly specialized areas of finance, business services and central office administration, whose inputs are skill or knowledge or information, whose outputs are not goods but service, or advice or decisions - which are filling more and more of the central cities of most urban areas, and are becoming the primary function of the core of the city, the city's central business district." <sup>11</sup>.

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10. Chinitz, B., Op. cit., P. 26

11. Ibid., P. 26

The economic survey indicated Finance etc. constituted roughly 10% of the economic activity in the study area. An evaluation of this figure indicates it to be unreasonably low in proportion to replies from other industrial divisions. This is due, for the most part, to a low percentage reply to the questionnaire by firms in Finance etc.

### CLASSIFICATIONS

Finance, Insurance and Real Estate firms were categorized according to the Dominion Bureau of Statistics industries classification manual as follows:

TABLE 34

#### FINANCE, INSURANCE AND REAL ESTATE CLASSIFICATIONS

GROUP NUMBER	MAJOR GROUP	NO. OF FIRMS	% OF TOTAL
1	Financial Institutions	27	58.7%
2	Insurance & Real Estate Industries	19	41.3%

### LOCATIONAL FACTORS

Industrial uses such as those listed above are and will, for some time, be found grouped together in the central portion of the urban area. It is here that they can be most easily reached by the individual seeking advice from every corner of the metropolitan area, and it is here,

next to the pulse of commerce, that they can best provide immediate face to face decisions for big business. Besides this external relationship, the complementary exchange of services between themselves brings them closer together. These highly specialized services require centrality to perform their functions most efficiently and therefore will continue to make up a very recognizable sector of the urban core.

#### Relative Importance of Locational Factors

Forty-five of the 65 financial, insurance and real estate firms in the study area answered this section of our questionnaire. Thirty-eight firms indicated that they wished to remain on existing sites and found the following factors significant to their operation:

TABLE 35

#### PRINCIPAL LOCATIONAL FACTORS FOR FINANCE, ETC. FIRMS WISHING TO REMAIN

1. Area suited to requirements	36 firms or 94.7%
2. Proximity of banking, accounting and legal	30 " " 78.9%
3. Proximity of associated industries and suppliers	17 " " 44.7%
4. Proximity to wholesale or retail market	9 " " 23.7%
5. Proximity of labor force	11 " " 28.9%
6. Proximity to public transit	27 " " 71.0%
7. Reasonable rental, building capital or operating costs	22 " " 57.9%

8. Direct rail access to site	1 firm or	2.6%
9. Foreseeable change in 8 due to future development of rail containerization	0 " "	00.0%

---

Table 35 illustrates a strong satisfaction with the location as well as the close proximity of other banking, accounting and legal facilities. These are the prime factors necessary for the business, communications and transactions which these firms make daily. A strong response to public transit reveals that finance etc. personnel depend heavily on public transit facilities for that trip to and from work and possibly for inner central core business contacts.

The following factors were pointed out by firms anticipating a move from the area, to be of significance to their operation:

1. Area unsuited to requirements	1 firm or	14.3%
3. Lack of proximity to associated industries and suppliers	2 " "	28.6%

The remaining firms gave no reasons for moving.

#### EMPLOYMENT

Finance etc. employs approximately 10% of the employees working for firms in the area. Each firm has an average of 27 employees.

The following table illustrates the distribution of employment by Finance etc. major group.

TABLE 36

## DISTRIBUTION OF EMPLOYMENT BY MAJOR FINANCE ETC. GROUP

GROUP NO.	INDUSTRIAL DESCRIPTION	TOTAL NO. OF FIRMS	NO. OF EMPLOYEES	% OF TOTAL NO. OF EMPLOYEES	AVERAGE NO. OF EMPLOYEES PER FIRM
1	Financial Institutions	26	871	65.8%	33.5
2	Insurance & Real Estate Industries	19	453	34.2%	23.8

As shown in Table 36 Financial Institutions have almost doubled the number of employees that Insurance etc. has in spite of the fact that Insurance etc. has 73% as many firms. This difference is illustrated in the fact that the average Insurance etc. firm is 2/3 the size of Financial Institutions in terms of employment.

FLOOR SPACE

Finance, Insurance and Real Estate firms occupied the fifth largest amount of floor space of the 8 main divisions, (see Appendix C). For 41 firms replying, a total of 288,500 square feet was recorded, giving an average of 7,037 square feet per firm. Over two-thirds of the space, however, can be attributed to Financial Institutions. Financial Institutions on the average, occupied approximately 60% more

floor space per firm than did Insurance and Real Estate Industries.

### INDUSTRIAL CHANGE

A decrease of approximately 13% in the total number of firms in this division has occurred over the 10 year period between 1955 and 1965. The drop is constituted by similar reduction of 5 firms in both Financial Institutions and Insurance and Real Estate Industries. (See Appendix C)

### MAJOR GROUPS

#### 1. Financial Institutions

Principal Products

not applicable

Number of Firms \*

1955 - 37

1965 - 32

Decrease or increase 1955-1965: -5 firms or -13.5%

Employment

1965 - 871 (26 firms)

Average no. of employees per firm - 33.5

Payroll

1965 - \$2,381,099 (15 firms)

Average payroll per firm - \$158,739.9

### Floor Space

Total floor area - 200,070 square feet (24 firms)

Average floor area per firm - 8,336 square feet

### Principal Locational Factors

Of the 26 firms answering this section, 22 indicated they wished to remain in the area and the 4 others anticipated moving in the near future. Those remaining responded as follows to the importance of locational factors to their operation:

1. Area suited to requirements	21 firms or 95.4%
2. Proximity of banking, accounting and legal	18 " " 81.8%
3. Proximity to associated industries and suppliers	9 " " 40.9%
4. Proximity to wholesale or retail market	5 " " 22.7%
5. Proximity of labor force	6 " " 27.3%
6. Proximity to public transit	14 " " 63.6%
7. Reasonable rental, building capital or operating costs	11 " " 50.0%
8. Direct rail access to site	0 " " 00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0 " " 00.0%

Of the 4 firms moving from the area, 1 firm stated the area to be unsuitable and another firm that the proximity of associated industries and suppliers was bad.

## Length of Time on Site

<u>YEARS</u>	<u>0-1</u>	<u>1.1-2</u>	<u>2.1-5</u>	<u>5.1-10</u>	<u>10.1-20</u>	<u>20.1-34</u>	<u>35+</u>
No. of Firms	5		7	1	3	3	5
% of Total	20.8%		29.2%	4.2%	12.5%	12.5%	20.8%

## Rank in Finance, Insurance and Real Estate

By total employment - 1	By employment per firm - 1
By total payroll - 1	By payroll per firm - 1
By gross sales or services - 2	By gross sales or services per firm - 2

## 2. Insurance and Real Estate Industries

## Principal Products

not applicable

## Number of Firms \*

1955 - 38

1965 - 33

Decrease or increase, 1955-1965: -5 firms or -13.2%

## Employment

1965 - 453 (19 firms)

Average no. of employees per firm - 23.8



## Payroll

1965 - \$2,381,099 (13 firms)

Average payroll per firm - \$146,081.4

## Floor Space

Total floor area - 88,430 square feet (17 firms)

Average floor area per firm - 5,202 square feet

## Principal Locational Factors

All of the 19 firms, with the exception of two, felt they wished to remain in the area, and gave the following significance to locational factors:

1. Area suited to requirements	14 firms or 93.3%
2. Proximity of banking, accounting and legal	12 " " 80.0%
3. Proximity to associated industries and suppliers	7 " " 46.7%
4. Proximity to wholesale or retail market	3 " " 20.0%
5. Proximity to labor force	7 " " 46.7%
6. Proximity to public transit	13 " " 86.7%
7. Reasonable rental, building capital or operating costs	9 " " 60.0%
8. Direct rail access to site	1 " " 6.7%
9. Foreseeable change in 8 due to future development of rail containerization	0 " " 00.0%

One of the two firms anticipating a move from the area stated that the lack of proximity of associated industries and suppliers was a factor contributing to their move.

Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of Firms	2		3	5	3	2	3
% of Total	11.1%		16.7%	27.8%	16.7%	11.1%	16.7%

Rank in Finance, Insurance & Real Estate

By total employment - 2

By employment per firm - 2

By total payroll - 2

By payroll per firm - 2

By total gross sales or  
services - 1

By gross sales or services  
per firm - 1

## CHAPTER XI

## COMMUNITY, BUSINESS AND PERSONAL SERVICE

Many Community, Business and Personal Service Industries are closely associated with Finance, Insurance and Real Estate firms and for this reason are found in close proximity to them. (see Plate 10) This group consists mainly of legal and accounting firms, professional associations, chambers of commerce and advertising services. To service the daytime population produced by these two divisions, personal service industry such as restaurants and barber shops can be found in and around these uses.

CLASSIFICATIONS

The entire industrial division (Community etc.) has 134 firms, second only to trade and almost equal in number to the 137 wholesale trade firms. In spite of the small size of each operation, however, Community etc. employs only 10% of the employees working for study area firms.

## COMMUNITY, BUSINESS AND PERSONAL SERVICE CLASSIFICATIONS

GROUP NO.	MAJOR GROUP	NO. OF FIRMS *	% OF TOTAL
1	Education and Related Services	1	.8%
2	Health & Welfare Services	3	2.3%
3	Religious Organizations	3	2.3%
4	Motion Picture & Recreational Services	6	4.5%
5	Services to Business Management	49	36.8%
6	Personal Services	47	35.3%
7	Miscellaneous Services	24	18.0%

As Table 37 indicates, this division is heavily dominated by Groups 5, 6 and 7. In fact they make up 90.1% of the firms.

LOCATIONAL FACTORS

Approximately 52% of the existing Community etc. firms have moved into the area in the past 5 years. At the same time there has been a decrease in the absolute number of firms in this category of 17% or 37 firms (215 - 178 firms). In spite of this outward movement of firms, Community etc. has had more firms move into the area than any other category. For this reason, one might assume that the great quantity of

low-priced office space available in the southern portion of the study area is being utilized for newly formed companies which later seek out more elaborate facilities when their financial situation permits. It is also probable that a portion of these small firms are unsuccessful.

#### Relative Importance of Locational Factors

Because of the great importance of locational factors to these industries, almost all firms answering the questionnaire replied to this section. One hundred and six firms wished to remain in the area and 20 anticipated a move in the near future. Those remaining gave the following importance to locational factors:

TABLE 38

#### PRINCIPAL LOCATIONAL FACTORS FOR COMMUNITY, BUSINESS AND PERSONAL SERVICE INDUSTRIES WISHING TO REMAIN

1. Area suited to requirements	106 firms or 100.0%
2. Proximity of banking, accounting and legal	80 " " 75.5%
3. Proximity of associated industries and suppliers	37 " " 34.9%
4. Proximity to wholesale or retail market	25 " " 23.6%
5. Proximity of labor force	25 " " 23.6%
6. Proximity to public transit	45 " " 70.7%
7. Reasonable rental, building capital or operating costs	81 " " 76.4%
8. Direct rail access to site	0 " " 00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0 " " 00.0%

The preceding table clearly indicates the favorability of the area to those firms wishing to remain in it. Other major locational factors appear to be the proximity of banking, accounting and legal services, proximity to public transit and the reasonable rental etc. costs. The remaining factors are obviously of much less importance and rail access is of no consideration whatsoever.

The following factors give an indication of why 20 firms are anticipating a move from the area.

TABLE 39

PRINCIPAL LOCATIONAL FACTORS FOR COMMUNITY, BUSINESS  
AND PERSONAL SERVICE INDUSTRIES ANTICIPATING TO MOVE

1. Area unsuited to requirements	8 firms or 40.0%
2. Lack of proximity to banking, accounting and legal	1 " " 5.0%
3. Lack of proximity to associated industries and suppliers	3 " " 15.0%
4. Lack of proximity to retail or wholesale market	1 " " 5.0%
5. Lack of proximity to necessary labor force	1 " " 5.0%
6. Lack of proximity to public transit	1 " " 5.0%
7. High rental, building capital and operating costs	4 " " 20.0%

The unsuitability of the area, and to a lesser extent, high rental, building capital and operating costs, appear to be the main factors unfavorable to these firms.

### EMPLOYMENT

#### Distribution

Community etc. employs approximately 10% of the study area employment and ranks fifth out of 9 industrial classifications in terms of total persons employed. The average firm size from the employment aspect is relatively small with an average of only 8.6 persons per firm.

The following table illustrates the distribution of employment by major Community etc. group.

TABLE 40

DISTRIBUTION OF EMPLOYMENT BY MAJOR COMMUNITY,  
BUSINESS AND PERSONAL SERVICE GROUP

GROUP NO.	INDUSTRIAL DESCRIPTION	TOTAL NO. OF FIRMS	NO. OF EMPLOYEES	% OF TOTAL NO. OF EMPLOYEES	AVERAGE NO. OF EMPLOYEES PER FIRM
1	Education & Related	1	9	0.8%	9
2	Health & Welfare	3	16	1.4%	5.3
3	Religious Organizations	3	78	6.9%	26.0
4	Motion Picture & Recreational Services	6	52	4.6%	8.7
5	Service to Business Management	51	416	36.9%	8.1
6	Personal Service	41	270	23.9%	6.6
7	Miscellaneous Services	26	287	25.4%	11.0

From the above table it is evident that the heavy concentration of firms in Groups 5, 6 and 7 employs an equally high percentage of the total employment, 86.2%. Religious organizations, which are next in significance, rank far below any of the larger groups with only 6.9%.

#### Staff Size by Major Group

The largest service firms, however, in terms of employment, are found in the religious organizations with an average of 26 persons, more than double any other service industry average. Table 40 illustrates the relative size of firms in this industrial division.

#### FLOOR SPACE

Community, Business and Personal Service Industries occupy the fourth largest quantity of floor space of the 8 industrial divisions in the South Point Douglas area. A total of 372,257 square feet reported by 110 firms gives an average of 3,384 square feet per firm. This average makes these firms the smallest of the divisions in terms of floor space. The comparative breakdown of floor space used into major groups indicates that Personal Services occupy almost 50% of the total floor area. (see Appendix C)

#### INDUSTRIAL CHANGE

There has been a drop in the number of Community etc. firms over the last 10 years of approximately 17%. This leaves a total of 178 firms existing in 1965. This decrease has been experienced by all major groups



in this division with the exception of health and welfare, and services to business management.

Those groups decreasing in number are largely services which are directly associated with the population of the area. Because the area population is decreasing (more land for traffic improvements, etc.) these services naturally diminish in proportion.

#### MAJOR GROUPS

##### 1. Education and Related Services

###### Principal Products

not applicable

###### Number of Firms \*

1955 - 5

1965 - 1

Decrease or increase 1955-1965: -4 firms or -80.0%

###### Employment

1965 - 9 (1 firm)

###### Payroll

not stated

###### Floor Space

Total floor space - 10,500 square feet (1 firm)

### Principal Locational Factors

This firm, a school in this case, found the area suitable to its requirements.

### Length of Time on Site

This school has been located there for 14 years.

### 2. Health and Welfare Services

#### Principal Products

not applicable

#### Number of Firms \*

1955 - 2

1965 - 4

Decrease or increase 1955-1965: +2 firms or +100.0%

#### Employment

1965 - 16 (3 firms)

Average no. of employees per firm - 5.3

#### Payroll

1965 - \$76,144 (2 firms)

Average payroll per firm - \$38,072

#### Floor Space

Total floor area - 3,115 square feet (3 firms)

Average floor area per firm - 1,038 square feet

## Principal Locational Factors

All 3 of the firms answering this section of our questionnaire stated they wished to remain in the study area and gave the following significance to locational factors:

1. Area suited to requirements	3	firms	or	100.0%
2. Proximity of banking, accounting and legal	2	"	"	66.7%
3. Proximity to associated industries and suppliers	1	"	"	33.4%
4. Proximity to wholesale or retail markets	0	"	"	00.0%
5. Proximity to labor force	0	"	"	00.0%
6. Proximity to public transit	2	"	"	66.7%
7. Reasonable rental, building capital or operating costs	2	"	"	66.7%
8. Direct rail access to site	0	"	"	00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0	"	"	00.0%

## Length of Time on Site

<u>YEARS</u>	<u>0-1</u>	<u>1.1-2</u>	<u>2.1-5</u>	<u>5.1-10</u>	<u>10.1-20</u>	<u>20.1-34</u>	<u>35+</u>
No. of Firms	1	1	1				
% of Total	33.3%	33.3%	33.3%				

## Rank in Community, Business &amp; Personal Services

By total employment - 6	By employment per firm - 7
By total payroll - 6	By payroll per firm - 5
By gross sales or services - not applicable	By gross sales or services per firm - not applicable

## 3. Religious Organizations

## Principal Products

not applicable

## Number of Firms \*

1955 - 6

1965 - 4

Decrease or increase, 1955-1965: -2 firms or -33.3%

## Employment

1965 - 78 (3 firms)

Average no. of employees per firm - 26

## Payroll

1965 - 141,756 (3 firms)

Average payroll per firm - \$47,252.0

## Floor Space

Total floor area - 80,528 square feet (4 firms)

Average floor area per firm - 20,132 square feet

## Principal Locational Factors

All 3 of the firms answering this section of the questionnaire wished to remain in the area. They gave the following significance to locational factors:

1. Area suited to requirements	3	firms	or	100.0%
2. Proximity of banking, accounting and legal	2	"	"	66.7%
3. Proximity to associated industries and suppliers	2	"	"	66.7%
4. Proximity to wholesale or retail market	1	"	"	33.3%
5. Proximity of labor force	1	"	"	33.3%
6. Proximity to public transit	2	"	"	66.7%
7. Reasonable rental, building capital or operating costs	2	"	"	66.7%
8. Direct rail access to site	0	"	"	00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0	"	"	00.0%

## Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of Firms				1		1	1
% of Total				33.3%		33.3%	33.3%

## Rank in Community, Business and Personal Services

By total employment - 4	By employment per firm - 1
By total payroll - 4	By payroll per firm - 3
By total gross sales or services - 5	By gross sales or services per firm - 2

## 4. Motion Picture and Recreational Services

## Principal Products

not applicable

## Number of Firms \*

1955 - 20

1965 - 8

Decrease or increase 1955-1965: -12 firms or -60.0%

## Employment

1965 - 52 (6 firms)

Average no. of employees per firm - 8.7

## Payroll

1965 - \$120,000 (1 firm)

## Floor Space

Total floor area - 4,420 square feet (4 firms)

Average floor area per firm - 1,105 square feet.

## Principal Locational Factors

Of the 6 firms replying to this section, 5 wished to remain in the study area and 1 anticipated moving. The following factors were found significant to the operation of those firms wishing to remain:

1. Area suited to requirements	5 firms or 100.0%
2. Proximity of banking, accounting and legal	2 " " 40.0%
3. Proximity of associated industries and suppliers	1 " " 20.0%
4. Proximity to wholesale or retail market	1 " " 20.0%
5. Proximity of labor force	1 " " 20.0%
6. Proximity to public transit	1 " " 20.0%
7. Reasonable rental, building capital or operating costs	3 " " 60.0%
8. Direct rail access to site	0 " " 00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0 " " 00.0%

The single firm wishing to move stated that the area was unsuitable for its requirements.

## Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of Firms	2		2	2			
% of Total	33.3%		33.3%	33.3%			

## Rank in Community, Business and Personal Service

By total employment - 5	By employment per firm - 4
By total payroll - 5	By payroll per firm - 1
By total gross sales or services - 4	By gross sales or services per firm - 4

## 5. Services to Business Management

## Principal Products

not applicable

## Number of Firms \*

1955 - 63

1965 - 70

Decrease or increase 1955-1965: +7 firms or +11.1%

## Employment

1965 - 416 (51 firms)

Average no. of employees per firm - 8.1

## Payroll

1965 - \$1,533,721 (37 firms)

Average payroll per firm - \$41,451.9

## Floor Space

Total floor area - 72,378 square feet (42 firms)

Average floor area per firm - 1,723 square feet



## Principal Locational Factors

Nine of the 51 firms replying to this section were intending to move from the area. Those remaining gave the following response to the significance of locational factors.

1. Area suited to requirements	41 firms or 97.6%
2. Proximity of banking, accounting and legal	35 " " 83.3%
3. Proximity to associated industries and suppliers	15 " " 35.7%
4. Proximity to wholesale or retail market	6 " " 14.3%
5. Proximity to labor force	6 " " 14.3%
6. Proximity to public transit	28 " " 66.7%
7. Reasonable rental, building capital or operating costs	34 " " 80.9%
8. Direct rail access to site	0 " " 00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0 " " 00.0%

The 9 firms anticipating moving from the area gave location factors the following importance:

1. Area unsuited to requirements	5 firms or 55.5%
2. Lack of proximity to banking, accounting and legal	1 " " 11.1%
3. Lack of proximity to associated industries and suppliers	3 " " 33.3%
4. Lack of proximity to retail or wholesale market	0 " " 00.0%

5. Lack of proximity to retail or wholesale market	0 firms or 00.0%
6. Lack of proximity to public transit	0 " " 00.0%
7. High rental, building capital and operating costs	2 " " 22.2%
8. Lack of direct rail access to site	0 " " 00.0%

## Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of Firms	9	5	15	6	8	1	7
% of Total	17.6%	9.8%	29.4%	11.8%	15.7%	2.0%	13.7%

## Rank in Community, Business and Personal Service

By total employment - 1

By employment per firm - 5

By total payroll - 1

By payroll per firm - 4

By total gross sales or services - 2

By gross sales or services per firm - 3

## 6. Personal Services

## Principal Products

not applicable

## Number of Firms \*

1955 - 77

1965 - 56

Decrease or increase 1955-1965: -21 firms or -27.3%

### Employment

1965 - 270 (41 firms)

Average no. of employees per firm - 6.6

### Payroll

1965 - \$381,316 (25 firms)

Average payroll per firm - \$15,252.0

### Floor Space

Total floor area - 150,906.0 square feet (38 firms)

Average square feet per firm - 3,971 square feet

### Principal Locational Factors

Of the 37 firms answering to this section of the questionnaire, 33 intended to remain in the area while 4 anticipated moving. The following locational factors were given importance by remaining firms to this extent:

1. Area suitable to requirements	32 firms or 97.0%
2. Proximity of banking, accounting and legal	21 " " 63.6%
3. Proximity of associated industries and suppliers	12 " " 36.4%
4. Proximity to wholesale or retail market	17 " " 51.5%
5. Proximity to labor force	13 " " 39.4%
6. Proximity to public transit	26 " " 78.8%

7. Reasonable rental, building capital or operating costs	25 firms or 75.7%
8. Direct rail access to site	0 " " 00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0 " " 00.0%

The 4 firms anticipating a move from the study area gave the following significance to locational factors:

1. Area unsuitable to requirements	1 firm or 25.0%
4. Lack of proximity to wholesale or retail market	1 " " 25.0%
7. High rental, building capital or operating costs	1 " " 25.0%

#### Length of Time on Site

YEARS	0-1	1.1-2	2.1-5	5.1-10	10.1-20	20.1-34	35+
No. of Firms	6	2	10	5	6	5	5
% of Total	15.4%	5.1%	25.6%	12.8%	15.4%	12.8%	12.8%

#### Rank in Community, Business and Personal Service

By total employment - 3	By employment per firm - 6
By total payroll - 3	By payroll per firm - 6
By total gross sales - 3	By gross sales or services per firm - 5

## 7. Miscellaneous Services

### Principal Products

not applicable

### Number of Firms \*

1955 - 42

1965 - 35

Decrease or increase, 1955-1965: -7 firms or -16.7%

### Employment

1965 - 287 (26 firms)

Average no. of employees per firm - 26

### Payroll

1965 - 824,620 (16 firms)

Average payroll per firm - \$51,538

### Floor Space

Total floor area - 50,410 square feet (18 firms)

Average floor area per firm - 2,801 square feet

### Principal Locational Factors

Of the 21 firms answering this section, 18 indicated they wished to remain at their present site and 3 anticipated moving from the area. The following significance was given to locational factors by firms wishing to remain:

1. Area suited to requirements	17 firms or 94.4%
2. Proximity of banking, accounting and legal	13 " " 72.2%
3. Proximity of associated industries and suppliers	6 " " 33.3%
4. Proximity to wholesale or retail market	2 " " 11.1%
5. Proximity to labor force	4 " " 22.2%
6. Proximity to public transit	11 " " 61.1%
7. Reasonable rental, building capital or operating costs	13 " " 72.2%
8. Direct rail access to site	0 " " 00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0 " " 00.0%

The 3 firms anticipating a move from the area did not respond to the locational factors we listed in the questionnaire.

#### Length of Time on Site

<u>YEARS</u>	<u>0-1</u>	<u>1.1-2</u>	<u>2.1-5</u>	<u>5.1-10</u>	<u>10.1-20</u>	<u>20.1-34</u>	<u>35+</u>
No. of Firms	1	3	8	3	2	1	3
	4.8%	14.3%	38.1%	14.3%	9.5%	4.8%	14.3%

#### Rank in Community, Business and Personal Services

By total employment - 2	By employment per firm - 2
By total payroll - 2	By payroll per firm - 2
By total gross sales or services - 1	By gross sales or services per firm - 1

CHAPTER XII  
PUBLIC ADMINISTRATION

The only type of Public Administration reporting to the questionnaire was Federal Administration. Administrative uses such as this are commonly found in the central core areas of most of our large cities. In Winnipeg's case, a portion of the Federal function in this area takes on a more specialized aspect because of its close association with grain marketing and its connection with the railway.

Although only 5 branches of Federal Administration replied, they constituted a relatively large portion of the employment and payroll statistics for the area.

CLASSIFICATIONS

As mentioned the single major group reporting was:

Group Number 1 - Federal Administration.

LOCATIONAL FACTORS

All 5 of the Federal Administrative services replied to this section, 4 of which intended to remain in the study area and 1 of which anticipated moving. Those remaining replied as follows to the significance of locational factors.

TABLE 41

**PRINCIPAL LOCATIONAL FACTORS FOR FEDERAL ADMINISTRATION  
SERVICES WISHING TO REMAIN**

1. Area suited to requirements	4	firms	or	100.0%
2. Proximity of banking, accounting and legal	2	"	"	50.0%
3. Proximity to associated industries and suppliers	1	"	"	25.0%
4. Proximity to wholesale or retail market	1	"	"	25.0%
5. Proximity to labor force	3	"	"	75.0%
6. Proximity to public transit	4	"	"	100.0%
7. Reasonable rental, building capital or operating costs	0	"	"	00.0%
8. Direct rail access to site	0	"	"	00.0%
9. Foreseeable change in 8 due to future development of rail containerization	0	"	"	00.0%

The suitability of the area as shown in Table 41 is unanimously favorable, as is the proximity to public transit. Thus, centrality of location and easy access by public transit for employees and persons seeking federal assistance are given paramount importance to this operation. The proximity of office workers is also a factor of significance.

**EMPLOYMENT**

A total of 455 persons are employed by this major group with 5



firms reporting, giving an average of 91.0 employees per firm. This average is the highest for any major group in South Point Douglas.

#### PAYROLL

Public Federal Administration ranks 6th out of 9 major divisions, in terms of total payroll, with a total of \$2,450,420.0. An average of \$490,084 per firm ranks Federal Administration as first in average payroll per firm by industrial division.

#### GROSS SALES OR SERVICES

not applicable

#### FLOOR SPACE

Public Administration (Federal) occupies 230,440 square feet of floor area (5 firms reporting) giving an average of 46,088 square feet per firm.

#### LENGTH OF TIME ON SITE (4 firms reporting)

<u>YEARS</u>	<u>0-1</u>	<u>1.1-2</u>	<u>2.1-5</u>	<u>5.1-10</u>	<u>10.1-20</u>	<u>20.1-34</u>	<u>35+</u>
No. of Firms					1	1	2
% of Total					25.0%	25.0%	50.0%

#### INDUSTRIAL CHANGE

There has been no significant change in the total number of Federal Administrative activities in the study area over the past 10 years (1955-1965).

## CHAPTER XIII

## CONCLUSIONS

The movement of approximately 18.0% of the firms out of the South Point Douglas area over the 1955-1965 period does not necessarily indicate the area is industrially unsound. Many firms have been forced to move from the area in search of space for expansion purposes, while other firms have grown in size, taking over space once occupied by smaller firms. The clothing industry is just one example of this phenomenon.

The physical obsolescence of some industrial buildings and facilities has also contributed to the movement of firms to either suburban locations or other more suitable low cost accommodation in the central area. Traffic improvements in the area have also helped to reduce the number of firms directly or indirectly by making truck traffic movement more difficult within the area, although providing easier access to the vicinity itself. In some cases, the one way street pattern, recently introduced, has harmfully affected several industrial firms. In other instances, the new street pattern has hindered loading and unloading activities. The importance of these factors may be reduced, however, when the ultimate traffic plan for the area is implemented.

Objections to the area environment itself have been brought forth by some firms intending to move, but for the large part, this opinion has been maintained by only a small percentage of the total number of firms.

What is true of other cities appears to be true of the Winnipeg and South Point Douglas areas. Enterprises which rely on face to face contact in business operations, and enterprises which require a low cost labor supply in close proximity, tend to prosper in central city locations if both of these conditions are satisfied. The proximity of the study area to the central business district helps to complement the first group of industries, while the areas to the north and northwest supply a labor force assisted by good public transit facilities, to satisfy the second requirement.

It is evident, therefore, that the diversity of industry which exists there today will be reduced to the more specialized firms indicated.

It is true that little industrial construction has taken place in the area within recent years. If an attempt is made to remove the majority, if not all, of the dilapidated residential structures, and a serious look is given to some of the misfit industrial buildings, the groundwork will be laid to encourage private investment in the area and those firms which can best utilize a downtown location will be more liable to favor this area.

With regard to rail trackage, it is evident, from the analysis presented in this study, that the so-called transfer track and its spurs are well used to the degree that those firms receiving direct rail goods depend on it for their livelihood. This is not to say that this trackage

could not be more intensely used. Although only 10% of the firms in South Point Douglas receive goods by direct rail they account for 1/4 to 1/3 of the area's economic activity. The locational factors, that is general suitability of the area, (centrality) reasonable accommodation costs and direct rail access, which these firms gave importance to, are seldom found in this combination in any suburban location. It therefore appears that the transfer track is essential to the present economy of South Point Douglas. Its importance, however, could be altered significantly by any renewal plan for the area.

The downtown industrial area fills a definite need in the industrial development cycle. "The first two steps in an industrial firm's life cycle- establishment and primary growth very often occur downtown where a multitude of facilities and services are available to nurture the new firms. The downtown area fulfills the functions of birthplace and incubator of industrial firms more successfully than in any other area." 12.

The question then arises, how big an area do we need to set aside for such a function? Retaining the South Point Douglas area, or a part thereof, may not be necessary. Adequate accommodation of this type may be available elsewhere. This answer can only be found in a Metro wide Economic Base Study, and not in a separate study of one particular area such as this.

The need for such economic studies has been clearly illustrated

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12. City of Toronto Planning Board, Metropolitan Toronto Industrial Commission, Industrial Prospects in the City of Toronto, 1965 P. 69.

by a survey of planning agencies in the United States. "Over half said they were using an economic base study of their area in their planning efforts. . . .

These replies underline the importance attached by planning organizations to economic base studies and analysis of economic factors. Only a minimal attempt may have been interpreted in some cases as making an effort to relate commercial and industrial zoning to economic needs. It is clear that there is at least broad acknowledgement of the importance of economic analysis and the need for economic base studies in planning, even though this recognition has not always led to the making of such studies." 13.

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13. Gilmore, Donald, Developing The Little Economies, New York, 1960, P. 74.

APPENDIX A

GENERAL POPULATION CHARACTERISTICS

A. POPULATION

YEAR	POPULATION	DECREASE	% DECREASE
1941	3,210		
1951	2,738	472	- 14.7
1956	2,620	118	- 4.3 )
			) - 43.2%
1961	1,554	1,066	- 40.7 ) (1951-1961)

B. SEX AND AGE GROUP (1,554 - Total)

MALES - 1,092 (70.3%)

FEMALES - 462

0 - 4 years	43 (3.9%)	58 (12.6%)
5 - 9 "	29 (2.7%)	50 (10.8%)
10 - 14 "	31 (2.8%)	25 (5.4%)
15 - 19 "	30 (2.7%)	33 (7.1%)
20 - 24 "	48 (4.4%)	34 (7.4%)
25 - 34 "	125 (11.4%)	61 (13.2%)
35 - 44 "	129 (11.8%)	54 (11.7%)
45 - 54 "	137 (12.5%)	48 (10.4%)
55 - 64 "	235 (21.5%)	47 (10.2%)
65 - 69 "	93 (8.5%)	21 (4.5%)
70 + "	192 (17.6%)	31 (6.7%)

C. MARITAL STATUS

	(1,532)	METRO WINNIPEG (475,989)
Single total	846 (55.2%)	233,480 (49.1%)
Single, 15 years and over	610 (72.1%)	80,119 (34.3%)
Married	573 (37.4%)	226,000 (47.5%)
Widowed	113 ( 7.4%)	24,419 ( 5.1%)

D. BIRTH PLACE (1,554)

Born in Canada	829 (53.3%)
Born out of Canada	725 (46.7%)
Immigrated (1946 - 1961)	197

E. ETHNIC GROUP (1,554)

British Isles	389 (25.0%)
French	133 ( 8.6%)
German	72 ( 4.6%)
Italian	30 ( 1.9%)
Netherlands	20 ( 1.3%)
Poland	113 ( 7.3%)
Russia	22 ( 1.4%)
Scandinavian	43 ( 2.8%)
Ukrainian	407 (26.2%)
Other European	189 (12.2%)
Asiatic	98 ( 6.3%)
Other & Not Stated	38 ( 2.4%)

F. RELIGION (1,554)

Anglican Church of Canada	82 ( 5.3%)
Baptist	35 ( 2.3%)
Greek Orthodox	165 (10.6%)
Jewish	10 ( 0.6%)
Lutheran	57 ( 3.7%)
Presbyterian	67 ( 4.3%)
Roman Catholic	545 (35.1%)
Ukrainian Catholic	186 (12.0%)
United Church of Canada	273 (17.6%)
Other	134 ( 8.6%)

G. OFFICIAL LANGUAGE (1,554)

English only	1,338 (86.1%)
French only	8 ( .5%)
English & French	130 ( 8.4%)
Neither English nor French	78 ( 5.0%)

H. HIGHEST GRADE OF SCHOOLING ATTENDED (1,554)

Attending school	153 ( 9.8%)
Elementary - under 5 years	82 ( 5.3%)
- 5 years or more	36 ( 2.3%)
High School - 1 to 2 years	23 ( 1.5%)
- 3 to 5 years	10 ( .6%)
University - 1 or more years	2 ( .1%)
Not attending school	1,401 (90.2%)
None (1 - includes child under 5)	256 (16.5%)
Elementary - 1 or more years	670 (43.1%)
High School - 1 to 2 years	313 (20.1%)
"    "    - 3 to 5 years	134 ( 8.6%)
University - 1 or more years	28 ( 1.8%)

## HOUSEHOLD, FAMILY AND DWELLING CHARACTERISTICS

A. <u>HOUSEHOLDS</u> (Occupied dwellings)	329
Families	222

B. HOUSEHOLDS

## (i) By No. of Persons

1	99 (30.1%)
2-3	115 (35.0%)
4-5	58 (17.6%)
6-9	44 (13.4%)
10 or more	13 ( 3.6%)
Persons per household	3.3

## (ii) By No. of Families

0	140 (42.6%)
1	174 (52.9%)
2 or more	15 ( 4.5%)
Households with lodgers	81



C. FAMILIES

## (i) By Number of Children

0	92 (41.4%)
1 - 2	78 (35.1%)
3 - 4	41 (18.5%)
5 or more	11 ( 5.0%)

## (ii) Children in Families by Age

Under 6 years	119
6 - 14 years	114
15 - 18 years	46
19 - 24 years	29

(iii) Persons per Family	3.3
Children per family	1.4

## (iv) Families by Age of Head

Under 25 years	12 ( 5.4%)
25 - 34 years	47 (21.2%)
35 - 44 years	38 (17.1%)
45 - 54 years	48 (21.6%)
55 - 64 years	35 (15.8%)
65 - 69 years	12 ( 5.4%)
70 + years	30 (13.5%)

(v) Families with Wage Earner Heads	138
Wage and Salary Income per Head	2,708
Wage and Salary Income per Family	3,500

D. OCCUPIED DWELLINGS

(i) Single detached	--
Apartment, flats	143
Rooms per dwelling	4.4
Persons per room	.8
Crowded dwellings	--
(ii) Owner Occupied Dwellings	--
Median Value	--
Reporting a mortgage	--
Tenant occupied dwellings	249
Average contract rent	47

(iii)	Length of Occupancy		
	Less than 1 year	--	
	1 - 2 years	--	
	3 - 5 years	--	
	6 - 10 years	--	
	More than 10 years	105	
(iv)	Period of Construction		
	Before 1920	328	(100%)
	Since 1945	--	
	In need of major repair	--	
(v)	Water Supply & Sewage Disposal		
	Water from public system	316	(96.0%)
	Connection to public sewer	311	(94.5%)
	Dwellings with:		
	Furnace heating	259	(78.7%)
	Flush Toilet (exclusive use)	213	(64.7%)
	Bath or shower (exclusive use)	162	(49.2%)
	Refrigerator (mechanical)	235	(71.4%)
	Home freezer	--	
	Television	171	(52.0%)
	Passenger automobile	128	(38.9%)

APPENDIX B

CHARACTERISTICS OF THE LABOR FORCE POPULATION

A.	(i)	Population, 15 years & over	1,318 (100%)
		Males	989 ( 75.0%)
		Females	329 ( 25.0%)
	(ii)	Labor Force	670 (100%)
		Males	534 ( 79.7%)
		Females	136 ( 20.3%)

B. EMPLOYMENT STATUS

	Males		
	with a job	426 (79.8% of L.F. Males)	
	looking for work	108 (20.2% " " " " )	
	Females		
	with a job	132 (97.1% of L.F. Females)	
	looking for work	4 ( 2.9% of " " " " )	

C. CLASS OF WORKER

	Males		
	Wage earners	502 (94.0% of L.F. Males)	
	Self employed	32 ( 6.0% " " " " )	
	Unpaid family workers	-- ( 0.0% " " " " )	
	Females		
	Wage earners	106 (77.9% of L.F. Females)	
	Self employed	27 (19.9% " " " " )	
	Unpaid family workers	3 ( 2.2% " " " " )	

D. OCCUPATION DIVISION (487 - 100%)

Males

Managerial	18 ( 3.7%)
Professional & Technical	-- ( 0.0%)
Clerical	30 ( 6.2%)
Sales	19 ( 3.9%)
Service & Recreation	120 (24.6%)
Transport & Communication	35 ( 7.2%)
Primary	30 ( 6.2%)
Craftsmen, Production Process & Related Workers	126 (25.8%)
Laborers	109 (22.2%)

Females (133 - 100%)

Managerial	6 ( 4.3%)
Professional & Technical	1 ( 1.0%)
Clerical	21 (15.7%)
Sales	7 ( 5.2%)
Service & Recreation	64 (48.1%)
Transport & Communication	1 ( 1.0%)
Primary	--
Craftsmen, Production Process & Related Workers	31 (23.3%)
Laborers	2 ( 1.5%)

E. WAGE & SALARY INCOME (450 - 100.0%)

Males

Under \$1,000	98 (21.8%)	)	)
\$1,000 - 1,999	110 (24.4%)	)	68.7% )
2,000 - 2,999	101 (22.4%)	)	) 86.9%
3,000 - 3,999	82 (18.2%)	)	)
4,000 - 5,999	35 ( 7.8%)	)	)
6,000 - 9,999	12 ( 2.7%)	)	)
10,000 and over	--	)	)

Average wage & salary income \$2,164

Females (101 - 100%)

Under \$1,000	30 (29.7%)	)	)
\$1,000 - 1,999	40 (39.6%)	)	69.3% ) 93.1%
2,000 - 2,999	24 (23.7%)	)	)
3,000 - 3,999	5 ( 5.0%)	)	)
4,000 - 5,999	2 ( 2.0%)	)	)
6,000 and over	--	)	)

Average wage & salary income \$1,420

## APPENDIX C

## INDUSTRIAL CHANGE BY DIVISION

DIVISION	No. of Firms		Increase or Decrease	% of Increase or Decrease	Moved Out	Moved In
	1955	1965				
1 Agriculture	1	1	--	--	--	--
5 Manufacturing Industries	79	81	+2	2.53	58	60
6 Construction Industries	11	10	-1	9.09	5	4
7 Transportation, Communication	49	64	+15	30.61	15	30
8 Retail Trade	74	63	-11	30.47	52	41
Wholesale Trade	323	213	-110	13.33	110	--
9 Finance, Insurance & Real Estate	75	65	-10	17.20	28	18
10 Community, Business & Personal Service Industries	215	178	-37	5.88	115	78
11 Public Administration	17	16	-1	18.12	10	9
<b>TOTAL</b>	<b>844</b>	<b>691</b>	<b>-153</b>	<b>--</b>	<b>393</b>	<b>240</b>

## INDUSTRIAL CHANGE BY MAJOR GROUP

MAJOR GROUP	No. of Firms		Increase or Decrease	Moved Out	Moved In
	1955	1965			
<u>Division 1</u>					
4 Services Incidental to Agriculture	1	1	--	--	--
<u>Division 5</u>					
1 Food & Beverage Industries	10	10	--	4	4
3 Rubber Industries	1	--	-1	1	--
4 Leather Industries	2	5	+3	1	4
5 Textile Industries	5	4	-1	1	--
6 Knitting Mills	--	1	+1	--	1
7 Clothing Industries	9	15	+6	7	13
8 Wood Industries	--	4	+4	--	4
9 Furniture & Fixture Industries	6	2	-4	4	--
10 Paper & Allied Industries	1	2	+1	1	2
11 Printing, Publishing & Allied Industries	8	18	+10	6	16
12 Primary Metal Industries	1	--	-1	1	--
13 Metal Fabricating Industries	4	5	+1	3	4
14 Machinery Industries	9	2	-7	8	1
15 Transportation Equipment Industries	1	1	--	1	1
16 Electrical Products Industries	5	3	-2	5	5
17 Non-Metallic Mineral Products Industries	2	2	--	1	1
19 Chemical & Chemical Products Industries	7	3	-4	6	2
20 Miscellaneous Manufacturing Industries	8	4	-4	8	4
<u>Division 6</u>					
1 General Contractors	7	4	-3	3	--
2 Special Trade Contractors	4	6	+2	2	4
<u>Division 7</u>					
1 Transportation	28	30	+2	6	8
2 Storage	13	21	+8	7	15
3 Communication	3	9	+6	1	7
4 Electric Power, Gas & Water Utilities	5	4	-1	1	--

MAJOR GROUP	No. of Firms		Increase or Decrease	Moved Out	Moved In
	1955	1965			
<u>Division 8</u>					
1 Wholesale Trade	323	213	-110	110	--
2 Retail Trade	74	63	-11	52	41
<u>Division 9</u>					
1 Financial Institutions	37	32	-5	14	9
2 Insurance & Real Estate Industries	38	33	-5	14	9
<u>Division 10</u>					
1 Education and Related Services	5	1	-4	4	--
2 Health and Welfare Services	2	4	+2	2	4
3 Religious Organizations	6	4	-2	2	--
4 Motion Picture & Recreational Services	20	8	-12	12	--
5 Services to Business Management	63	70	+7	42	49
6 Personal Services	77	56	-21	34	13
7 Miscellaneous Services	42	35	-7	19	12
<u>Division 11</u>					
1 Federal Administration	11	15	+4	4	8
2 Provincial Administration	1	--	-1	1	--
3 Local Administration	4	--	-4	4	--
4 Other Government Offices	1	1	--	1	1

## DISTRIBUTION OF FLOOR SPACE BY INDUSTRIAL DIVISION

INDUSTRIAL DIVISION		Area	% of Total	Number	Average Area
1	Agriculture	4,500	.08	1	4,500
5	Manufacturing Industries	1,457,167	26.36	69	21,118
6	Construction Industries	22,044	.40	7	3,149
7	Transportation, Communication and Other Utilities	1,305,321	23.61	35	37,295
8	Trade	1,847,360	33.42	151	12,234
9	Finance, Insurance & Real Estate	288,500	5.23	41	7,037
10	Community, Business and Personal Service Industries	372,257	6.73	110	3,384
11	Public Administration	230,440	4.17	5	46,088
TOTAL		5,527,589	100.0	419	13,192



## DISTRIBUTION OF FLOOR SPACE BY MAJOR GROUP

MAJOR GROUP	Area (Sq. Ft.)	Number of Firms	Average Area (Sq. Ft.)
<u>Division 1</u>			
4 Services Incidental to Agriculture	4,500	1	4,500
<u>Division 5</u>			
1 Food & Beverage Industries	596,220	9	66,247
4 Leather Industries	38,500	5	7,700
5 Textile Industries	10,500	4	2,625
7 Clothing Industries	329,538	12	27,461
8 Wood Industries	9,956	3	3,319
9 Furniture & Fixture Industries	9,300	2	4,650
10 Paper & Allied Industries	120,000	2	60,000
11 Printing, Publishing & Allied Industries	135,604	15	9,040
13 Metal Fabricating Industries	70,040	5	14,008
14 Machinery Industries	14,969	2	7,485
15 Transportation Equipment Industries	3,300	1	3,300
16 Electrical Products Industries	7,600	2	3,800
19 Chemical & Chemical Products Industries	92,500	3	30,833
20 Miscellaneous Manufacturing Industries	19,140	4	4,785
<u>Division 6</u>			
1 General Contractors	100	1	100
2 Special Trade Contractors	21,944	6	3,657

MAJOR GROUP	Area (Sq. Ft.)	Number of Firms	Average Area (Sq. Ft.)
<u>Division 7</u>			
1 Transportation	276,725	16	17,295
2 Storage	844,419	14	60,316
3 Communication	75,350	2	37,675
4 Electric Power, Gas & Water Utilities	108,827	3	36,276
<u>Division 8</u>			
1 Wholesale Trade	1,706,211	105	16,250
2 Retail Trade	141,149	46	3,068
<u>Division 9</u>			
1 Financial Institutions	200,070	24	8,336
2 Insurance & Real Estate Industries	88,430	17	5,202
<u>Division 10</u>			
1 Education and Related Services	10,500	1	10,500
2 Health and Welfare Services	3,115	3	1,038
3 Religious Organizations	30,528	4	20,132
4 Motion Picture & Recreational Services	4,420	4	1,105
5 Services to Business Management	72,378	42	1,723
6 Personal Services	150,906	38	3,971
7 Miscellaneous Services	50,410	18	2,801
<u>Division 11</u>			
1 Federal Administration	230,440	5	46,088

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