8. Vaughan Residents Shopping Patterns

Survey research is an integral component of undertaking a retail market analysis. Our research has included licence plate surveys and a telephone survey of Trade Area consumers. The telephone survey provides information on Trade Area shopping patterns by store type and capture rates for the City of Vaughan. The following section summarizes the key findings of our Trade Area consumer research. The detailed statistical tables generated by these surveys can be found in Appendix B.

A telephone consumer survey of some 800 Vaughan residents was conducted to determine the existing expenditure patterns of municipal residents, establish the existing market shares being captured by City of Vaughan retail facilities, and the outflow of sales to stores located outside the City. The details of this research and the distribution of surveys through the City have been included in Appendix B.

8.1 2009 Distribution of Trade Area Residents' Expenditures

Figure 8.1 below summarizes Vaughan residents' 2009 expenditure patterns by major store category. Based on our analysis of the telephone surveys we note the following:

- In all categories Vaughan residents undertook the majority of their shopping in Vaughan. However despite the significant concentration of retail space in the City, Vaughan residents still made about one quarter of their expenditures in other municipalities. This illustrates that Vaughan functions as part of a broader GTA commercial structure and is not entirely self supporting.

- The greatest amount of outflow is taking place in the Home Furnishings and Restaurant categories, whereas much lower levels of outflow are occurring in the Supermarket and Pharmacy categories.

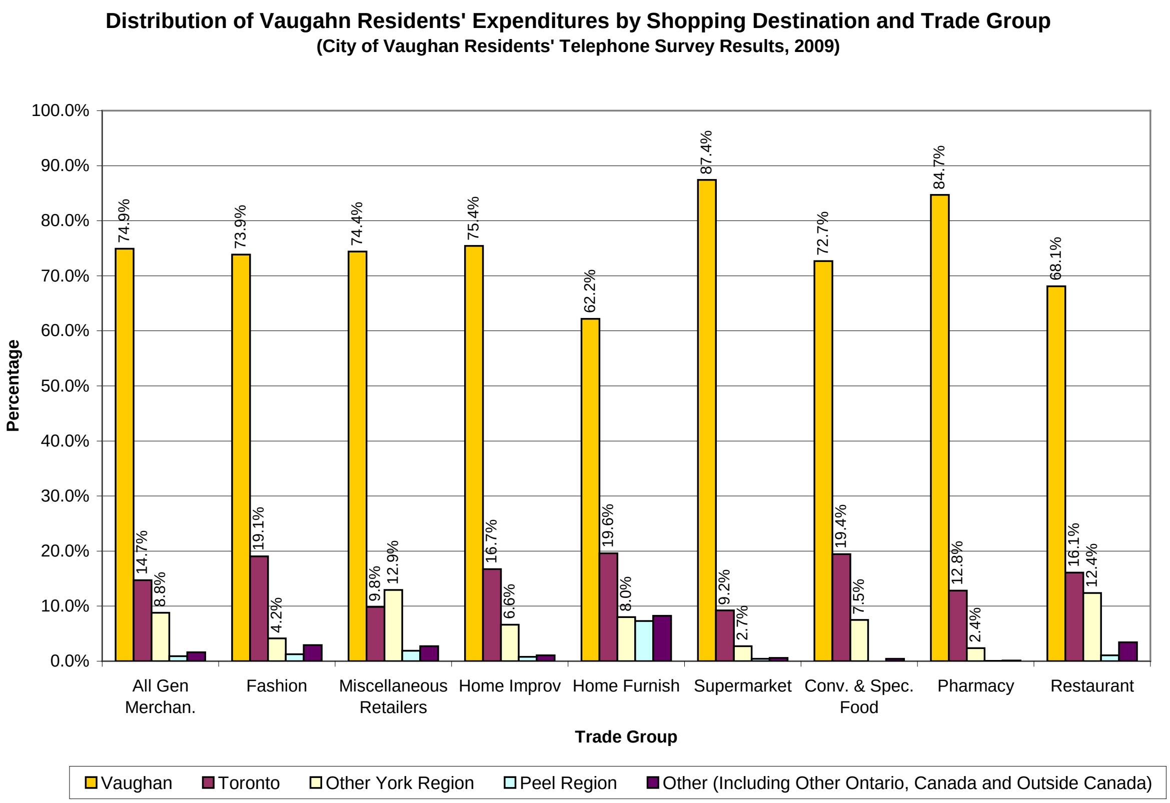
- Over 30% of Vaughan residents' Home Furnishings expenditures in 2009 were made outside of the City. Almost 20% were made at various locations throughout the City of Toronto, over 6% were made in Brampton and 5% were made at the Highway 7 and Yonge Power Center alone.

- The Highway 7 and Yonge Power Centre (Bayview Glen) captured over 6% of the Vaughan residents' expenditures in the Home Improvement Category, while another 16% were spent at the Toronto portion of the Dufferin Street and Steeles Avenue intersection.

- Of the 32% of Vaughan residents' Restaurant expenditures being made outside of the City, the largest share (16%) are being made in Toronto, while 8% are being made in Richmond Hill and 4% are being made in Markham.

In summary, much of the expenditure outflow from the City can be accounted for in Toronto, Richmond Hill, Thornhill, and Markham. The congruent nature of the street network and built form creates few barriers, physical or psychological, to discourage cross-jurisdictional shopping. In the same way that the development of the power centre largely missed the City of Toronto, the development of large scale traditional enclosed shopping centres occurred before sufficient market was available to support them in Vaughan. As a result, a considerable portion of Vaughan's outflow is destined for enclosed centres in other municipalities.

Figure 8.1



Source: urbanMetrics inc., 2009

8.1.1 Vaughan Residents' Perceptions of Vaughan Shopping Facilities

In addition to questions regarding the recent retail expenditures, telephone survey respondents were also asked a series of questions regarding their shopping habits and perceptions of Vaughan's existing retail facilities. Questions related to the types of retail formats in the City and to residents perceptions of Vaughan's Village Cores.

The question "How would you describe the following, in terms of their availability to you in the City of Vaughan: (a) Big Box Retail, (b) Enclosed Shopping Malls, (c) Convenience/Neighbourhood Scale Retailers, (d) Pedestrian Retail Areas, (e) Retail

Accessible by Transit? " was asked to better understand how residents felt about different formats of retail within the City. Respondents were asked to rank on a scale of 1 to 3 ('1' being "too many" and '3' being "not enough"). Overall the results shown in Figure 8.2 indicate that the majority of residents generally felt that there was just the right amount in each format. However, it is interesting to note that 20% of residents felt that there was too much Big Box retail and that 27% and 25% indicated that there were not enough Pedestrian Retail Areas or Retail Accessible by Transit respectively.

Figure 8.2
Availability of Existing Retail Facilities by Type in Vaughan

	Too Many	Just Right	Not Enough	Did Not Answer
Big Box Retail (such as those at Highway 7/Highway 400)	20%	69%	11%	0%
Enclosed Shopping Malls (such as Vaughan Mills or the Promenade)	6%	76%	18%	0%
Convenience/Neighbourhood Scale Retailers	9%	78%	12%	1%
Pedestrian Retail Areas (Such as Woodbridge Village or Kleinburg)	3%	67%	27%	4%
Retail Accessible by Transit	1%	71%	25%	4%

Source: urbanMetrics, 2009

Residents were asked if they had visited any of the City's pedestrian retail areas (Kleinburg, Woodbridge Village, or Yonge Street in Thornhill) in the past year (see Figure 8.3). Residents were then asked what mode of transportation they had used to get to the pedestrian retail areas (Figure 8.4). Finally they were asked about their perceptions of the areas on a scale of 1 – 10 with '1' being "does not describe at all" and '10' being "describes very well" (Figure 8.5).

Figure 8.3
Respondents Who Visited Vaughan's Pedestrian Areas in the Past Year

	Yes	No
Kleinburg	27.5%	72.5%
Woodbridge Village	23.6%	76.4%
Yonge Street in Thornhill	34.8%	65.3%

Source: urbanMetrics inc., 2009

Figure 8.4
Mode of Transportation Used to Travel to Pedestrian Retail Areas

	Car	Walk	Transit	Bike	Other
Kleinburg	96.8%	2.3%	0.9%	0.0%	0.0%
Woodbridge Village	95.2%	4.2%	0.5%	0.0%	0.0%
Yonge Street in Thornhill	91.0%	4.7%	4.0%	0.4%	0.0%

Source: urbanMetrics inc., 2009

Figure 8.5
Attributes of Pedestrian Retail Areas According to Survey Respondents Who Visited the Areas in the Past Year (Average on a scale of 1 - 10)

	Kleinburg	Woodbridge Village	Yonge Street in Thornhill
A shopping area for people like me	5.23	6.40	6.21
A good place to take visitors from out-of-town	7.38	6.51	5.59
A good place to visit in the evening	6.65	6.45	5.68
Convenient for me to visit	7.56	7.77	7.32
A good place to go for lunch or dinner	6.91	6.88	6.84
A place with good selection of goods and services	5.75	6.70	6.80

Source: urbanMetrics inc., 2009

Overall the responses of residents indicated that only about one-third of respondents had visited each of the pedestrian retail areas within the last year. Of those individuals the overwhelming majority had travelled there via car. The majority of residents who travelled to a pedestrian area by means other than a car were visiting Yonge Street in Thornhill. This is likely a result of the higher densities in the surrounding areas and the numerous transit routes that run along Yonge Street.

The results with regards to perceptions were relatively similar for all three pedestrian areas. The responses could be classified as non-extreme. None of the three areas showed very strongly as a place the respondents felt reflected their own backgrounds or personalities. This was especially true of Kleinburg, which scored an average of 5 out of 10 in terms of it being a shopping area for people like the respondent. This suggests that efforts can be made to develop stronger ties between the community and the local shopping streets. More positive responses were given, however, when asked about Kleinburg's tourism potential, both as a place to take visitors and as a place to eat. Woodbridge received the most consistent responses of the three, suggesting that it better serves the overall needs of residents.