

FINAL REPORT
YARMOUTH DOWNTOWN AND WATERFRONT
REDEVELOPMENT AND REVITALIZATION PLAN

VOLUME 1
BACKGROUND AND OTHER SUPPORTING DOCUMENTATION

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EXECUTIVE SUMMARY

The Town of Yarmouth has an interesting and exciting past and it is perhaps fair to say that the Town of Yarmouth has an interesting and exciting future.

Along with the many natural physical assets, such as the beautiful harbour, Yarmouth can count among her blessings a rich and plentiful built environment. The preservation of these historic resources - both natural and manmade is the responsibility of all Yarmouthians.

Preservation includes not only individual buildings and streetscapes but also includes scale and character. This is where the blending of old and new must be done with concern and with feeling. This is where that tangible and intangible atmosphere is created that draws people to a given area to live, work, shop and play.

The proposed development plan is intended to be a flexible, dynamic and well constructed document that will meet the changing needs of the community rather than a rigid cast-in-stone type document. The challenge to the community - the Town of Yarmouth and her people - is to take the plans and ideas from concept through implementation to fact as efficiently and effectively as possible in the interests of the whole community.

Although the study, both volumes one and two, contains many recommendations, the key recommendations from volume one are as follows:

1. That a private company be immediately established to implement the proposed downtown and waterfront development plans.
2. That the equity and operating capital required by the development company be essentially provided by a cost sharing arrangement between the Province of Nova Scotia, the Town of Yarmouth and the Yarmouth Downtown Business Community.
3. That a full-time General Manager and a full-time Secretary be appointed to manage the day-to-day affairs of the company.
4. That the redevelopment and revitalization of the downtown and waterfront areas commence immediately with an initial five year plan for the first stage including phasing and prioritizing.
5. That the downtown retail, office and other space be upgraded and expanded in a co-ordinated way. This upgrading and expansion should include such facilities as:
 - a) the proposed new arena,
 - b) the proposed new YMCA,
 - c) the proposed new Courthouse,
 - d) a new downtown food store,
 - e) additional new and refurbished office space,

- f) additional new and refurbished retail space including, if possible, a new downtown department store.
6. That additional housing (low-cost, subsidized and high-cost) be located in the downtown area, especially multiple unit housing and, that the refurbishing of existing housing should continue under such programs as the Residential Rehabilitation Assistance Program.
 7. That the heritage character of Yarmouth be preserved and at the same time taken advantage of in the redevelopment and revitalization process.
 8. That additional flexibility and protection be introduced as desirable by amendments to the Zoning By-law.
 9. That a tax forgiveness program be established by the Town of Yarmouth for the downtown and waterfront areas to encourage development.
 10. That all levels of government be requested and encouraged to adopt a policy of leasing all required space in the downtown area.
 11. That considerably more emphasis be placed on job creation through renewed thrusts in both tourist and industrial development. Job creation is an essential ingredient for a growing economy.

12. That Yarmouth County be designated by the Province as a "Designated Destination Area" to enhance tourism development.
13. That the Province and Canada extend the "Industrial Incubation Program" to Yarmouth.
14. That Water Street and its accesses be upgraded substantially and that an alternate route be provided from Starrs Road via Haley Road and Argyle Street to the Waterfront.

INTRODUCTION

Downtown Renewal Consultants Ltd., which consists of Cochrane and Forsyth Architects Ltd. (Peter D. Cochrane and David R. Forsyth) and Impact Inc. (Ivan W. MacKenzie), was pleased to receive the commission from the Town of Yarmouth early in April, 1980, to carry out this study entitled "Yarmouth Downtown and Waterfront Redevelopment and Revitalization Plan".

Although the study seemed to be proceeding slowly at times, it has been finally completed not too far off schedule. The consultants have enjoyed working in Yarmouth and especially appreciate the many new friendships they have made in the course of the project. Indeed, the consultants are looking forward to the opportunity for involvement in the implementation of the proposed development plan.

The consultants especially want to sincerely thank the members of the Yarmouth Business Improvement District Committee for their patience and perseverance and, above all, for their untiring efforts and wise counsel as firstly the background and then as the plan itself gradually took shape. Thanks are due to many groups and individuals both within and without Yarmouth for the tremendous co-operation and assistance so willingly given to the consultants during the course of the study.

For the benefit of the reader, it should be noted that unless otherwise indicated historical costs are in actual dollars of the time and cost projections are in 1979 dollars unless specifically stated otherwise.

The detailed statistical and other supporting information included in the report is generally based on published local, provincial or federal data together with surveys undertaken by Downtown Renewal Consultants Ltd.

RETAIL TRADE ANALYSIS

The purpose of the foregoing review is to analyze historical data and develop trends on retail trade within the area serviced by the Yarmouth shopping facilities and to project estimates of future anticipated increases in retail sales.

The Yarmouth socio-economic profile noted that both the County, as a whole, and the Town have been characterized by slow growth over the past few decades. As Table 1 indicates the level of per capita personal disposable income (disposable income is defined as total personal income minus personal income taxes) for Yarmouth County remained low in relation to the national average over the period 1963 to 1979. Last year, the per capita personal disposable income in the County at \$3,990 was only 55.2 per cent of the Canadian figure and 80.53 per cent of the Nova Scotia figure. Over the same period, retail sales per capita grew by approximately the same proportion for Yarmouth County, Nova Scotia and Canada. The percentage of personal disposable income devoted to retail expenditures declined in 1979 for all three areas. However, the residents of Yarmouth County continued to allot a higher percentage of their personal disposable income for such spending (62.6 per cent in 1979).

The data in Table 2 demonstrate that the total retail sales for Canada (as opposed to the per capita figures) grew by 370.0 per cent from 1961 to 1979, and Nova Scotia grew by 334.4 per cent, while Yarmouth County posted a gain of 281.3 per cent.

Table 2 also provides an historical perspective on the share of personal disposable income that consumers spent on various major items. Food has consistently accounted for about one-quarter of the retail spending in Canada, Nova Scotia and the County of Yarmouth.

Clothing expenditures accounted for eight per cent of the retail consumption for Yarmouth County over the last few decades. The corresponding percentages for Nova Scotia and Canada were somewhat lower.

Spending on hardware, furniture, appliances, televisions and radios constituted six and one-half per cent of the retail sales for Yarmouth County during 1979.

The sales and servicing of automobiles plays an important role in the fabric of Yarmouth's retail sales but this facet of trade will not play a major role in revitalizing the downtown shopping district.

The Halifax data on family expenditure distribution in Table 3 confirms the relative significance of the various retail items described above. In addition, it notes that smoking and alcoholic beverage purchases accounted for 4.5 per cent of family expenditures during 1976.

Having reviewed historical data on retail sales activity, one should reflect on the potential for expansion in retail trade. Population growth in the trade area served by Yarmouth will probably continue to be rather slow in the future. A moderate degree of employment and income growth is possible should Yarmouth capitalize on the potential,

1. to increase exports and employment in the fishing and related processing industries through improving quality and placing more emphasis on products with a higher value added,
2. to increase activity in the construction, service and repair of fishing and marine vessels, and
3. to enhance the historic attraction of its downtown and waterfront so that the Town of Yarmouth can develop more as a place of tourist destination than simply as an entry/exit point.

Given such positive developments as described above, the demand for retail merchandise will also rise. A Retail Market Survey of Shoppers was conducted by the Nova Scotia Department of Municipal Affairs during the summer of 1979. A review of the survey results will shed light on possible strategies the merchants of downtown Yarmouth can adopt to gain a larger share of increasing retail sales in the Yarmouth trade area.

One unsurprising point the survey (see Table 4) revealed is that the malls attract considerably higher percentages of shoppers from outside a 5 mile radius.

Table 5 indicates that only a portion of the respondents worked, but, of those who did, a much higher proportion indicated they did not work near the malls than was the case with downtown shoppers. Hence they must have preferred to shop in the malls for reasons apart from proximity.

The Survey summarized the types of establishments available to shoppers at the downtown versus the malls of Yarmouth according to three categories:

1. first order ones which consumers would visit at least once a week,
2. second order stores which buyers would visit at least once a month, and
3. third order stores likely to be visited at least once a year.

The retail businesses were so categorized for two segments, i.e. retail trade and retail services. A breakdown indicating the types of stores included in each category appears in Exhibit A.

The summary of stores by order appears in Table 6. It shows that the malls concentrated a heavier percentage of their stores in the first and second order groups than the downtown area, particularly for the first order food and drugs and second order clothing stores. Remember that figures in Tables 2 and 3 demonstrated that expenditures on these two types of commodities formed a large share of overall retail sales and consumer expenditures. Food purchases occupied about one-quarter of retail sales, while clothing sales accounted for another eight per cent.

The percentage distribution of retail service establishments by first, second and third order type is roughly the same for the malls versus the downtown area, except that the K-Mart mall has all five of the first order mall establishments.

The Map in Exhibit B delineates the trading areas serviced by the Yarmouth downtown and mall merchants. Note that the Yarmouth malls not only overlap the downtown Yarmouth territory but also the Digby and Shelburne trading areas. It

is quite evident that the malls have attracted many customers from the downtown area as later analysis will indicate. The data in Table 7 show the population of each trading area as well as the common territory serviced by both the Yarmouth malls and the Digby mall.

The data in Table 8 indicate the place where customers interviewed at various survey locations shopped for four types of commodities. In each case, the distribution by number and percentage is shown. Almost two-thirds of the people surveyed at the Yarmouth downtown centre indicated that they shopped for groceries at the Yarmouth malls. Only 7.5 per cent of the shoppers interviewed at the Yarmouth malls indicated they bought their food in the downtown area. One could infer from these two facts that the Yarmouth malls have drawn quite a high proportion of the downtown residents who are buying groceries.

The loss of grocery shoppers to the malls is consistent with the replies to relevant questions in Table 9A, 9B and 10. The former indicated that only 1.2 per cent of the persons shopping in the downtown Yarmouth area did so because they liked the supermarket(s) there. The comparable percentage for the Yarmouth malls was 5.1 (see Table 9B). One-half of the downtown shoppers answered that that area could be improved by building new large supermarket(s). The need for such a development is, therefore, obvious.

The data in Table 8 indicate that most of the customers stay within their respective survey locations when they shop for clothing. The downtown, in fact, had a seven per cent higher

proportion of its respondents who so indicated than did the Yarmouth malls.

In the case of furniture and appliance sales, both the downtown and mall areas seemed to lose customers to the "other" area merchants.

The fourth and last commodity for which shoppers were asked their place of shopping was hardware. In this case, the town, where the major building materials stores are located (see Table 6), appears a solid performer. Fully 78.3 per cent of the respondents in the downtown area indicated they shopped for hardware there, while almost two-fifths of the mall respondents replied that they purchased their hardware supplies downtown.

It is evident by the above analysis that the share of clothing and hardware sales generated by the downtown area is adequate.

Less than 10 per cent of the downtown shoppers patronized the area because of the variety of stores (see Table 9A). The next table shows that 15.8 per cent of the malls' shoppers were there because of the variety of stores. More than one-fifth of the downtown shoppers reported in Table 10 indicated that they consider the building of a greater variety of stores would translate into an improvement in the downtown area.

Parking facilities are usually a problem in downtown areas and Yarmouth is no exception. Less than one-half of one per cent of its shoppers liked the parking situation there (see Table 9A). Consequently, 18.6 per cent of them recommended that these facilities be improved.

None of the downtown shoppers responded that they liked the downtown area because of its clean attractive buildings. One-eighth of them said that they should be painted and cleaned up (see Table 10). This would involve not only the retail establishments but also housing renewal and a general refacing and upgrading of the downtown emphasizing its interesting historical character. This type of redevelopment has been successfully implemented in a number of other harbour locations. Such revitalization would not only stimulate increased local purchases but also help promote Yarmouth as a place to stay for tourists. The increased tourist expenditures would provide a general boost in retail trade. Hence, future improvement or expansion of retail sales facilities should be concentrated in the downtown area to develop the optimum potential of the Town as a whole.

In addition, a brief for the Yarmouth Downtown Business Association rightly noted that: "Shopping centres thrive and grow only at the expense of Main Street, higher property taxes, the bankruptcy of many independents, and the export of profits to head office locations in Toronto and Montreal. Here again, lies another reason why retail development should in future be centred downtown in order to avoid an unnecessary strain on the health of its business district and not generate unwarranted extra road and other service costs in the fringe areas.

Should the above-mentioned improvements, accompanied by the necessary restoration and increasing of residential housing, be carried out, the downtown area could look forward to gaining an increasing share of existing and future increased retail sales.

It already enjoys the advantage of having surroundings and merchants who are familiar and friendly to the customers (see Table 9A). If the downtown could maintain its pleasant atmosphere and these advantages while achieving the above-mentioned enhancements, it could regain its vitality and a degree of the prominence it once enjoyed in the economy of the greater Yarmouth area.

In order to project retail sales potential into the future, four important components must be analyzed historically. Firstly, the geographic trade area must be determined, secondly, the population must be calculated for the defined trade area, thirdly, per capita disposable income must be known, and fourthly, retail expenditure levels are essential for the trade area.

The trade area comprises Yarmouth County which is the primary trade zone and parts of Digby and Shelburne Counties which are the secondary trade zone. However, the data in Table 11 relates to the primary trade zone only.

Analysis of the historical population data for Yarmouth County over the period 1951 to 1976 reveals a trend recording .427 per cent yearly compound growth rate. The projected population is expected to increase from 25,465 in 1979 to 25,984 in 1985. The modest increase for the future is a reflection of past performance. However, the rate of growth could increase steadily and dramatically with a concerted effort put forth towards industrial and tourist development.

Experience has indicated that per capita disposable income levels provide reasonable insight into the expenditure habits of residents in a given area. It has been found that segments of a population with similar income characteristics

tend to possess similar expenditure patterns for a broad range of merchandise categories. This observation provides the basis upon which potential retail expenditures are estimated for the trade area.

Over the ten year period 1969 to 1979, the per capita disposable income for Yarmouth County grew from \$1,310 to \$3,990. After adjusting for inflation, this represents a 49.93 per cent increase from 1969, during which time per capita disposable income grew at a yearly compound rate of 4.125 per cent. Based on this trend, Table 11 forecasts an increase in per capita disposable income to \$5,084 by 1985 for Yarmouth County.

The estimates of retail expenditures, which are indicative of the overall strength of a retail market, are normally divided into the following six categories:

- Food
- General Merchandise
- Automotive
- Apparel and Accessories
- Hardware and Home Furnishings
- Other Retail

During the years 1969 to 1979, total retail expenditures in Yarmouth County increased from \$26,300,000 to \$64,505,000. After deflating, the growth over the ten year period was only 18.6 per cent for a yearly compound growth rate of 1.71875 per cent. Projecting this trend in Table 11 provides an estimate of retail expenditure for 1985 of \$71,450,000. Table 11 also provides forecasts for each of the above six categories for the period 1979 to 1985.

The four categories of General Merchandise, Apparel and Accessories, Hardware and Home Furnishings, and Other Retail are

grouped in Table 11 under the heading of Department Store Type Merchandise (DSTM). In addition, per capita retail expenditures for DSTM and for Food are given in Table 11.

An inventory of retail space presently existing in the Town of Yarmouth and projected additional requirements to 1985 are contained in Table 12. The supporting data for the retail space needs for 1979 and the estimates of new retail space needs to 1985 are developed in Exhibit C.

In Exhibit C there are (labeled pessimistic, realistic and optimistic scenarios) developed for each of the three situations (consisting of (a) secondary trading area, (b) tourism, and (c) industrial) where judgment as well as fact was used to arrive at basic assumptions or premises from which estimates of additional retail space needs were made. In each of the three situations the estimate labeled realistic was used in Table 12.

It is believed that the 98,519 square foot estimate for new retail space required during the period 1981 to 1985 is both realistic and reasonable. However, any combination of the nine scenarios in Exhibit C could be used in Table 12. If the downtown redevelopment and revitalization program implementation does not move forward quickly and if the renewed emphasis is not placed on tourism development and industrial development, the need for more retail space could be even less than the most pessimistic situation taken from Exhibit C. On the other hand, if all stops are pulled and all programs move forward in an enthusiastic and co-ordinated manner, it is certainly possible to far exceed the most optimistic projections taken from Exhibit C.

It is estimated that 15,625 square feet of retail space will be needed because of increased emphasis in tourist development, that 19,125 square feet will be needed because of increased emphasis in industrial development, and that an additional 7,785 square feet of retail space will be needed to 1985 in order to accommodate the normal growth. Because of the impact of the downtown redevelopment on the secondary trade areas coupled with some recapture it is estimated that 86,009 square feet of new retail space will be required to meet this demand. During the five year period an additional 98,519 square feet of retail space or approximately 19,700 square feet per year will be required in the Yarmouth area. If the various initiatives proposed in this study are quickly and effectively implemented, the space forecasts should prove to be extremely conservative.

Every effort should be put forth to concentrate the development of new retail space in the downtown core area of Yarmouth. A first and foremost requirement in the downtown is a first class food store which is easily accessible and which has an efficient grocery pick-up area. A 10,000 square foot food store would require about \$2,500,000 annual gross sales to break even which is about 16 per cent of the forecast 1979 food sales for Yarmouth. If a private operator cannot be located, every effort should be put forth by the Yarmouth Downtown Business Association to organize a Co-operative food store.

Finally, the downtown share of retail sales can be improved substantially and fairly quickly by moving ahead immediately to

implement improvements for the benefit and convenience of the shopper. It means merchants working together as well as individually to improve their own lot as well as that of their customers. Co-operation is the name of the game and the prize is a healthier community together with greater individual rewards.

Note: References in the text and tables to Yarmouth malls means the two malls:

1. Yarmouth Mall (Zellers County Fair Mall)
2. K-Mart Plaza

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TABLE 1
TRENDS IN PERSONAL DISPOSABLE INCOME AND RETAIL SALES

	<u>PERSONAL DISPOSABLE INCOME PER CAPITA</u>	<u>% INCREASE OVER 1963</u>	<u>RETAIL SALES PER CAPITA</u>	<u>% INCREASE OVER 1963</u>	<u>RETAIL SALES AS % OF PERSONAL DISPOSABLE INCOME</u>
1979					
Yarmouth County	3,990	348.3	2,496	241.6	62.6
Canada	7,225	357.3	3,190	222.2	44.2
Yarmouth as % of Canada	55.2	-	78.2	-	-
Nova Scotia	5,816	384.7	2,973	245.7	51.1
Yarmouth as % of N.S.	68.6	-	84.0	-	-
1975					
Yarmouth County	2,800	214.6	1,990	158.4	71.1
Canada	4,520	186.1	2,130	151.5	47.1
Yarmouth as % of Canada	61.9	-	93.4	-	-
Nova Scotia	3,680	206.7	2,040	137.2	55.4
Yarmouth as % of N.S.	76.1	-	97.5	-	-
1971					
Yarmouth County	1,610	80.9	1,270	64.9	78.9
Canada	2,750	74.1	1,420	43.4	51.6
Yarmouth as % of Canada	58.5	-	81.2	50.0	-
Nova Scotia	2,160	80.0	1,290	-	59.7
Yarmouth as % of N.S.	74.5	-	98.4	-	-
1963					
Yarmouth County	890	-	770	-	86.5
Canada	1,580	-	990	-	62.7
Yarmouth as % of Canada	56.3	-	77.7	-	-
Nova Scotia	1,200	-	860	-	71.7
Yarmouth as % of N.S.	74.2	-	89.5	-	-

Source: Financial Post, Survey of Markets

TABLE 2
RETAIL SALES BY MAJOR CATEGORY

	<u>Total</u>	<u>Food</u>	<u>Auto Sales</u>	<u>Clothing and Accessories</u>	<u>Hardware</u>	<u>Furniture Appliances TV, Radio</u>	<u>Service Stations</u>
(Sales in \$ Millions)							
<u>1979</u>							
Canada	75,546.3	18,865.4	15,199.8	4,030.9	755.1	2,061.7	4,939.0
% Share	100.0	25.0	20.1	5.3	1.0	2.7	6.5
% Increase over 1961	370.0						
Nova Scotia	2,520.8	604.6	521.0	137.7	23.2	58.2	201.1
% Share	100.0	24.0	20.7	5.5	0.9	2.3	8.0
% Increase over 1961	334.4						
Yarmouth County	63.3	15.6	8.5	5.0	1.7	2.4	5.4
% Share	100.0	24.6	13.4	7.9	2.7	3.8	8.5
% Increase over 1961	281.3						
	<u>Total</u>	<u>Food</u>	<u>Auto Sales and Maintenance</u>	<u>Clothing and Accessories</u>	<u>Hardware and Home Furnishings</u>	<u>General Merchandise</u>	<u>Other Retail</u>
<u>1971</u>							
Canada	31,390.1	8,200.8	9,158.3	2,101.7	2,027.2	5,383.6	4,518.4
% Share	100.0	26.1	30.3	6.7	6.5	17.2	14.4
Nova Scotia	1,079.7	280.1	324.9	63.6	53.9	192.0	165.2
% Share	100.0	25.9	30.1	5.9	5.0	17.8	15.3
Yarmouth County	28.5	7.4	7.1	2.4	2.5	4.6	4.5
% Share	100.0	26.0	24.9	8.4	8.8	16.1	15.8
<u>1961</u>							
Canada	16,073.0	4,298.2	4,602.5	1,166.4	1,115.9	2,716.7	2,173.2
% Share	100.0	26.7	28.6	7.3	6.9	16.9	13.5
Nova Scotia	580.3	161.8	170.3	34.9	33.3	107.8	72.3
% Share	100.0	27.9	29.3	6.0	5.7	18.6	12.5
Yarmouth County	16.6	3.5	4.7	1.3	1.6	3.9	1.6
% Share	100.0	21.1	28.3	7.8	9.6	23.5	9.6

Sources: Financial Post, Survey of Markets
 Statistics Canada, 1961 and 1971 Census

TABLE 3
FAMILY EXPENDITURE DISTRIBUTION
HALIFAX, 1976

<u>Items</u>	<u>Average Dollar Expenditure on Current Consumption</u>	<u>%</u>
Shelter	2,664.3	21.4
Food	2,401.4	19.3
Travel & Transportation	2,340.2	18.8
Clothing	1,171.6	9.4
Recreation	736.2	5.9
Furnishings & Equipment	711.2	5.7
Furniture	239.4	1.9
Household Appliances	136.5	1.1
Other	335.3	2.7
Household Operation	696.8	5.6
Smoking & Alcoholic Beverages	558.6	4.5
Personal Care	261.7	2.1
Medical Care	242.9	1.9
Education	174.4	1.4
Reading	97.8	0.8
Miscellaneous	407.4	3.3
Total	<u>12,464.7</u>	<u>100.0</u>

Source: Statistics Canada, Urban Family Expenditure, 1976

TABLE 4
DISTANCE OF RESPONDENT'S RESIDENCE FROM SURVEY LOCATION

SURVEY LOCATION	DISTANCE OF RESIDENCE AWAY		1 - 2 MILES		2 - 5 MILES		OVER 5 MILES		TOTAL	
	LESS THAN 1 MILE									
Yarmouth Downtown	62	24.5%	36	14.2%	19	7.5%	136	53.8%	253	100%
Yarmouth Malls ¹	42	7.7%	83	15.3%	86	15.8%	333	61.2%	544	100%
Digby Downtown	55	32.4%	20	11.8%	19	11.2%	76	44.7%	170	100%
Digby Mall	45	14.8%	26	8.5%	27	8.9%	207	67.9%	305	100%
Annapolis Royal Downtown	24	14.5%	39	23.6%	34	20.6%	68	41.2%	165	100%
Bridgetown Downtown	96	40.0%	36	15.0%	35	14.6%	73	30.4%	240	100%
Middleton Downtown	48	32.4%	23	15.5%	28	18.9%	49	33.1%	148	100%

¹ Includes both the K-Mart Plaza and Yarmouth Mall.

Source: 1979 Shoppers' Survey

TABLE 5
DO YOU WORK NEAR THE SURVEY LOCATION?

<u>SURVEY LOCATION</u>	<u>YES</u>		<u>NO</u>		<u>TOTAL</u> <u>APPLICABLE</u>
	<u>No.</u>	<u>%</u>	<u>No.</u>	<u>%</u>	<u>No.</u>
Yarmouth	69	60.5	45	39.5	114
Yarmouth Malls ¹	81	37.3	136	62.7	217
Digby	61	64.9	33	35.1	94
Digby Mall	72	46.2	84	53.8	156
Annapolis Royal	43	75.4	14	24.6	57
Bridgetown	98	83.1	20	16.9	118
Middleton	46	61.3	29	38.7	75

1. Includes both the K-Mart Plaza and Yarmouth Mall

Source: 1979 Shoppers' Survey

TABLE 6
RETAIL FACILITIES INVENTORY

SHOPPING TYPE OF RETAIL ESTABLISHMENT	YARMOUTH DOWNTOWN		K-MART PLAZA		YARMOUTH MALL		TOTAL YARMOUTH	
	No.	%	No.	%	No.	%	No.	%
General Merchandise	3	2.2	1	5.6	1	14.3	5	3.1
Food and Drugs	6	4.5	2	11.1	1	14.3	9	5.7
First Order Total	9	6.7	3	16.7	2	28.6	14	8.8
Clothing	17	12.7	5	27.8	2	28.6	24	15.1
Miscellaneous	30	22.4	4	22.2	1	14.3	35	22.0
Building Materials Hardware and Garden Supply	7	5.2	0	0	0	0	7	4.4
Second Order Total	54	40.3	9	50.0	3	42.9	66	41.5
Automobile Dealers	2	1.5	0	0	0	0	2	1.3
Furniture, Home Furnishing and Equipment	8	6.0	0	0	0	0	8	5.0
Third Order Total	10	7.5	0	0	0	0	10	6.3
Retail Trade Total	73	54.5	12	66.7	5	71.4	90	56.6
Entertainment	12	8.9	4	22.2	0	0	16	10.1
Other	6	4.5	1	5.6	0	0	7	4.4
First Order Total	18	13.4	5	27.8	0	0	23	14.5
Second Order Total	15	11.2	1	5.6	0	0	16	10.1
Third Order Total	28	20.9	0	0	2	28.6	30	18.8
Retail Services Total	61	45.5	6	33.3	2	28.6	69	43.4
Retail Establishments Total	134	100.0	18	100	7	100	159	100.0

Source: 1979 Shoppers' Survey and
 Mainstreet 80 - Raw Survey Data for Yarmouth Downtown - 1980

TABLE 7
TRADING AREA DATA

	<u>Population of Trading Area</u>	<u>Other Trading Areas in same category overlapped</u>	<u>Population in Overlap Area and % Total Trading Area Population</u>
<u>MALLS</u>			
Yarmouth	59,048	Digby	8742 (14.8%)
Digby	19,571	Yarmouth	8742 (44.7%)
<u>PRIMARY DOWNTOWN</u>			
Yarmouth	27,300	Yarmouth Malls ¹	-

1. Includes both the K-Mart Plaza and Yarmouth Mall

Source: 1979 Shoppers' Survey

TABLE 8
PLACE OF SHOPPING FOR SELECTED COMMODITIES

PLACE OF SHOPPING	SURVEY LOCATION	YARMOUTH DOWNTOWN	YARMOUTH MALLS ²	TOTAL	DIGBY DOWNTOWN	DIGBY MALL	TOTAL
<u>NO. OF RESPONDENTS / %</u>							
<u>GROCERIES</u>							
YARMOUTH GENERAL ¹		-	2/0.4	2/0.2	-	-	-
YARMOUTH DOWNTOWN		56/22.2	40/7.5	96/12.2	-	-	-
YARMOUTH MALLS ²		163/64.7	387/72.7	550/70.1	1/0.6	1/0.3	-
YARMOUTH OTHER ³		15/6.0	12/2.3	27/3.4	-	1/0.3	-
SUBTOTAL FOR SURVEY AREA		234/92.9	441/82.9	675/86.1	1/0.6	2/0.6	3/0.6
<u>CLOTHING</u>							
YARMOUTH GENERAL ¹		1/0.4	26/5.1	27/3.6	1/0.6	-	-
YARMOUTH DOWNTOWN		166/68.6	118/23.3	284/37.9	1/0.6	1/0.3	-
YARMOUTH MALLS ²		66/27.3	313/61.7	379/50.6	2/1.2	6/2.0	-
YARMOUTH OTHER ³		-	1/0.2	1/0.1	-	2/0.7	-
SUBTOTAL FOR SURVEY AREA		233/96.3	458/90.3	691/92.2	4/2.4	9/3.0	13/2.7
<u>FURNITURE AND APPLIANCES</u>							
YARMOUTH GENERAL ¹		-	2/0.4	2/0.3	-	-	-
YARMOUTH DOWNTOWN		87/38.8	133/28.7	220/31.9	-	1/0.4	-
YARMOUTH MALLS ²		26/11.6	72/15.5	98/16.9	-	1/0.4	-
YARMOUTH OTHER ³		94/42.0	165/35.6	259/37.6	1/0.7	4/1.7	-
SUBTOTAL FOR SURVEY AREA		207/92.4	372/80.2	579/84.2	1/0.7	6/2.5	7/1.7
<u>HARDWARE</u>							
YARMOUTH GENERAL ¹		-	5/1.0	5/0.8	-	-	-
YARMOUTH DOWNTOWN		184/78.3	196/39.8	380/52.1	-	1/0.3	1/0.2
YARMOUTH MALLS ²		19/8.1	92/18.7	111/15.2	-	1/0.3	1/0.2
YARMOUTH OTHER ³		18/7.7	111/22.5	129/17.7	1/0.6	1/0.3	2/0.4
SUBTOTAL FOR SURVEY AREA		221/94.1	404/82.0	625/85.9	1/0.6	3/0.9	4/0.8

¹ Category including respondents who indicated they usually shopped in Greater Yarmouth but would not be more specific as to locations within that centre.

² Includes both K-Mart Plaza and Yarmouth Mall

³ Includes highway commercial strips on the edge of town and isolated stores or clusters of stores throughout a town.

Source: 1979 Shoppers' Survey

TABLE 9A
YARMOUTH (DOWNTOWN)

Question: What do you like about shopping here?

<u>Options</u>	<u>Number of Positive Responses</u>	<u>Percent of Total Surveys Completed</u>
0 nothing	39	15.4
a large department store(s)	1	0.4
b large supermarket(s)	3	1.2
c familiarity with shopkeepers	38	15.0
d lower prices	12	4.7
e better quality	4	1.6
f variety of merchandise	12	4.7
g pleasant atmosphere	38	15.0
h variety of stores	23	9.1
i clean attractive buildings	-	-
j convenient parking	1	0.4
k compactness	15	5.9
l longer business hours	1	0.4
m close to home	48	19.0
n close to work	26	10.3
o weather protection	1	0.4
p sales	-	-
q loyalty to home town	-	-
r friendly, courteous service	24	9.5
s familiar surroundings	52	20.6
t spaciousness	7	2.8
Total Number of Surveys Completed	<u>253</u>	<u>N.A.*</u>

* Not applicable, since respondents could choose several options (percent total would then be greater than 100%) or might give no response (percent would be less than 100%).

Source: 1979 Shoppers' Survey

TABLE 9B
YARMOUTH (MALLS)¹

Question: What do you like about shopping here?

<u>Options</u>	<u>Number of Positive Responses</u>	<u>Percent of Total Surveys Completed</u>
0 nothing	36	6.6
a large department store(s)	11	2.0
b large supermarket(s)	28	5.1
c familiarity with shopkeepers	12	2.2
d lower prices	52	9.5
e better quality	17	3.1
f variety of merchandise	107	19.6
g pleasant atmosphere	93	17.0
h variety of stores	86	15.8
i clean attractive buildings	4	0.7
j convenient parking	76	13.9
k compactness	101	18.5
l longer business hours	4	0.7
m close to home	18	3.3
n close to work	11	2.0
o weather protection	20	3.7
p sales	17	3.1
q loyalty to home town	-	-
r friendly, courteous service	54	9.9
s familiar surroundings	19	3.5
t spaciousness	<u>34</u>	<u>6.2</u>
Total Number of Surveys Completed	<u>546</u>	<u>N.A.*</u>

¹ Includes both K-Mart Plaza and Yarmouth Mall

* Not applicable, since respondents could choose several options (percent total would then be greater than 100%) or might give no response (percent would be less than 100%).

Source: 1979 Shoppers' Survey

TABLE 10
 COMMUNITY - YARMOUTH
POSSIBLE IMPROVEMENTS TO THE DOWNTOWN SHOPPING AREA

<u>Options</u>	<u>Number of Positive Responses</u>	<u>Percent of Total Surveys Completed</u>
a new large department store(s)	1	0.4
b new large supermarket(s)	127	50.2
c greater variety of stores	52	20.6
d painting and cleaning up buildings	32	12.6
e fixing up streets/sidewalks	26	10.3
f improved parking facilities	47	18.6
g increased compactness of downtown	9	3.6
h longer business hours	4	1.6
i redevelopment	4	1.6
j washrooms	10	4.0
k improved traffic flow control	1	0.4
l free parking	10	4.0
m downtown mall	2	0.8
n keep kids off streets	<u>3</u>	<u>1.2</u>
Total Number of Surveys Completed	<u>253</u>	<u>N.A.*</u>

* Not applicable, since respondents could choose several options (percent total would then be greater than 100%) or might give no response (percent would be less than 100%).

Source: 1979 Shoppers' Survey

TABLE 11
POPULATION, PER CAPITA DISPOSABLE INCOME AND RETAIL EXPENDITURE PROJECTIONS
YARMOUTH COUNTY
1979 TO 1985

	1979	1980	1981	1982	1983	1984	1985
Population (primary trade zone only)	25,465	25,554	25,626	25,725	25,822	25,906	25,984
Per Capita Disposable Income	\$3,990	\$4,155	\$4,326	\$4,504	\$4,690	\$4,883	\$5,084
Per Capita Retail Expenditures	\$2,540	\$2,572	\$2,605	\$2,639	\$2,673	\$2,707	\$2,742
Retail Expenditures by Category							
Food (000,000)	15.868	16.207	16.552	16.904	17.264	17.631	18.005
General Merchandise (000,000)	12.578	12.795	13.015	13.238	13.466	13.697	13.933
Automotive (000,000)	16.256	16.468	16.685	16.905	17.126	17.350	17.577
Apparel and Accessories (000,000)	5.096	5.184	5.273	5.363	5.455	5.549	5.645
Hardware and Home Furnishings (000,000)	4.193	4.265	4.338	4.413	4.489	4.566	4.644
Other Retail (000,000)	10.514	10.695	10.879	11.066	11.256	11.450	11.646
Totals (000,000)	64.505	65.614	66.742	67.889	69.056	70.243	71.450
Department Store Type Merchandise (000,000)	32.381	32.939	33.505	34.080	34.666	35.262	35.868
Per Capita DSTM	\$1,272	\$1,289	\$1,307	\$1,325	\$1,342	\$1,361	\$1,380
Per Capita Food	\$ 623	\$ 634	\$ 646	\$ 657	\$ 669	\$ 681	\$ 693

Sources: Projections For Province, Counties and Halifax Metro Area, 1979
 Statistics Canada, 1966, 1971 and 1976 Census Data
 Statistics Canada, Retail Trade
 Statistics Canada, Consumer Price Index
 Financial Post Survey of Markets, 1969, 1971, 1973, 1976 and 1979
 Downtown Renewal Consultants Ltd., Survey, Analysis, and Projections

TABLE 12
ANALYSIS OF EXISTING AND ESTIMATES FOR ADDITIONAL RETAIL SPACE
(GROUND FLOOR ONLY)
YARMOUTH
1979 to 1985

		<u>Area in Square Feet</u>
Downtown Study Area		
Retail	150,000	
Financial	21,000	
Office	50,000	
Restaurants	11,000	
Vacant	<u>25,000</u>	257,000
Yarmouth Mall		100,000
K-Mart Plaza		108,000
Parade Square		<u>18,000</u>
		483,000
Less Non-Retail		
Financial	21,000	
Office	50,000	
		<u>71,000</u>
		412,000
Yarmouth Retail Space Needs - 1979 (Exhibit "C")		<u>381,975</u>
Statistical Surplus of Retail Space		30,025
Increased Emphasis on Tourist Development (Exhibit "C")		15,625
Increased Emphasis on Industrial Development (Exhibit "C")		19,125
Estimates of Normal Increases 1979 to 1985 (Exhibit "C")		7,785
Increases from Digby County (Exhibit "C")		47,808
Increases from Shelburne County (Exhibit "C")		<u>38,201</u>
Estimate of New Retail Space Requirements 1981-1985		98,519
Average New Retail Space per Year for 5 Year Period		19,704

Source: Downtown Renewal Consultants Ltd.

EXHIBIT A

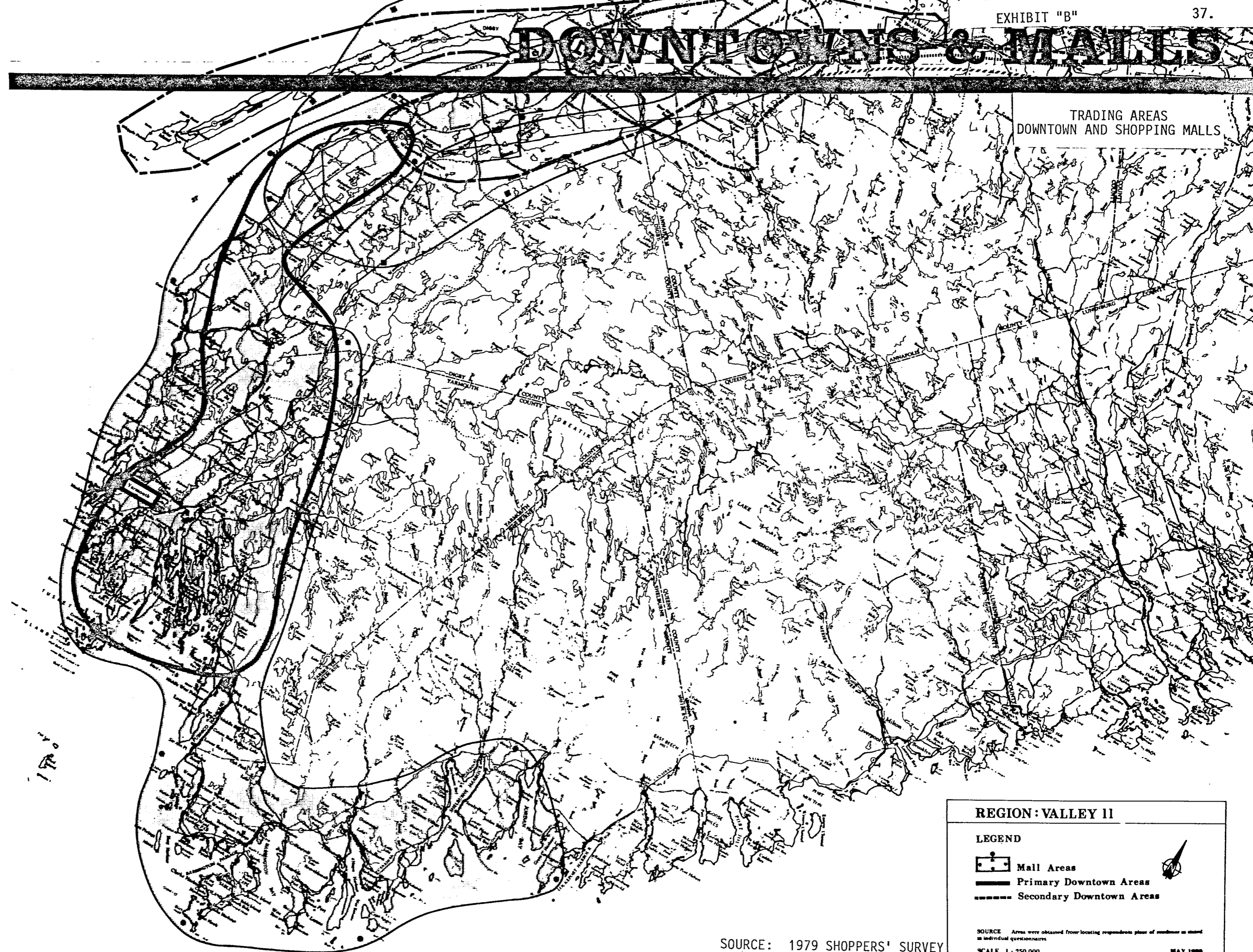
RETAIL BUSINESS TYPES IN THE DETAILED FACILITIES INVENTORY

<u>A. RETAIL TRADE - FIRST ORDER</u>			<u>THIRD ORDER</u>	
1.	<u>GENERAL MERCHANDISE</u>	<u>DUN AND BRADSTREET CODE</u>	1.	<u>AUTOMOBILE DEALERS</u>
	Department Stores	5311		Motor vehicle dealers (new and used)
	Auto and home supply stores	5531		Motor vehicle dealers (used only)
	General stores	5399		Boat dealers
				Recreational and utility trailer dealers
	2.			Motorcycle dealers
	<u>FOOD AND DRUGS</u>			
	Corner grocery stores	5499	2.	<u>FURNITURE, HOME FURNISHINGS AND EQUIPMENT</u>
	Supermarkets	5411		Furniture stores
	Fruit stores and vegetable markets	5431		Floor covering stores
	Dairy products stores	5451		Miscellaneous home furnishings stores
	Bakeries	5462		Household appliance stores
	Drug stores	5912		Radio and television stores
	Meat and fish markets	5423		Music stores
	<u>SECOND ORDER</u>			
	1.		B.	<u>SERVICES - FIRST ORDER</u>
	<u>CLOTHING</u>			1.
	Men's and boy's clothing	5611		<u>ENTERTAINMENT</u>
	Women's clothing	5621		Take-out restaurants
	Children's and infant's and family clothing	5641		Drive-in restaurants
	Shoe stores	5661		Sit-down restaurants
				Drinking places
	2.			Liquor store
	<u>MISCELLANEOUS</u>			Motion picture theatres, except drive-in
	Candy, nut and confectionary stores	5441		Drive-in motion picture theatres
	Antique stores	5931		Billiard and pool establishments
	Used clothing stores	5931		
	Used book stores	5931		2.
	Sporting goods stores and bicycle shops	5941		<u>OTHER</u>
	Book stores	5942		Banks
	Stationery stores	5943		Coin-operated laundries
	Jewelry stores	5944		Gasoline service stations
	Hobby, toy and game shops	5945		Car washes
	Camera and photographic supply stores	5946		
	Gift, novelty and souvenir shops	5947		<u>SECOND ORDER</u>
	Luggage and leather goods stores	5948		Dry cleaning establishments
	Sewing, needlework and piece good stores	5949		Beauty shops
	Mail order houses	5961		Barber shops
	Direct selling establishments	5963		Offices of physicians
	Florists	5992		
	Cigar stores and stands	5993		<u>THIRD ORDER</u>
	Record stores	5733		Offices of dentists
	Newsstands	5994		Offices of optometrists
	Miscellaneous retail stores	5999		Legal services
				Photographic studios, portrait
	3.			Shoe repair shops, shoe shine parlours
	<u>BUILDING MATERIALS, HARDWARE AND GARDEN SUPPLY</u>			Funeral parlours
	Lumber and other building materials dealers	5211		Miscellaneous personal services
	Paint, glass and wallpaper stores	5231		Insurance
	Hardware stores	5251		Real estate
	Retail nurseries, lawn and garden supply stores	5261		Trust companies
				Finance companies
				Government agency offices

Source: 1979 Shoppers' Survey




DOWNTOWNS & MALLS

TRADING AREAS
DOWNTOWN AND SHOPPING MALLS



REGION: VALLEY II

LEGEND

-  Mall Areas
-  Primary Downtown Areas
-  Secondary Downtown Areas



SOURCE: Areas were obtained from locating respondents' place of residence as stated in individual questionnaires.

SCALE 1:250,000

MAY 1980

SOURCE: 1979 SHOPPERS' SURVEY

EXHIBIT C

TRADING AREA, TOURISM AND INDUSTRIAL SUPPORT DATA1. Trading Area

a) Primary - Yarmouth County - 1979

Retail space required to service the primary retail trading area in 1979 is as follows:

1979 Population by the square foot retail sales area per capita

$$25,465 \times 15 = 381,975 \text{ sq. ft.}$$

b) Primary - Yarmouth County - Normal Increases
1979 - 1985

The Yarmouth County population is expected to increase from 25,465 in 1979 to 25,984 in 1985. This increase of 519 is essentially based on historic trends and is taken from a document entitled "Projections for Province, Counties and Halifax" which was prepared for the Nova Scotia Department of Development in 1979 by the Regional and Urban Studies Centre, Institute of Public Affairs, Dalhousie University.

The population increase of 519 multiplied by the square foot retail sales area per capita of 15 indicates a need for 7,785 square foot increase in retail sales area during the 1979 to 1985

period which increase is attributable to normal growth.

c) Secondary - Digby and Shelburne Counties

Because of the tremendous positive impact on the shopping public of the downtown redevelopment and revitalization program, Yarmouth will, in addition to recapturing some lost retail spending, capture a larger share of the secondary trading area markets. It is impossible to accurately predict the additional volume of retail space required to service this expanded secondary market, however, the following three scenarios are presented for consideration:

	<u>1979 Population</u>	<u>Total Retail Space in sq. ft.</u>	<u>Pessimistic 10% of Retail Space in sq. ft.</u>	<u>Realistic 15% of Retail Space in sq. ft.</u>	<u>Optimistic 25% of Retail Space in sq. ft.</u>
Digby	21,248	318,720	31,872	47,808	79,680
Shelburne	<u>16,978</u>	<u>254,670</u>	<u>25,467</u>	<u>38,201</u>	<u>63,668</u>
Totals	<u>38,226</u>	<u>573,390</u>	<u>57,339</u>	<u>86,009</u>	<u>143,348</u>

2. Tourism

- a) Because of increased emphasis and expected new initiatives in the tourism sector, there will be new jobs created in the area as a result of the increased tourist expenditures. Based on a very conservative "party-day" expenditure of \$50.00 for

the type of tourist party attracted to Yarmouth, it is estimated that about \$25.00 per "party-day" is expended for food and other retail activity and that the remaining \$25.00 is expended for accommodation and transportation. It is impossible to accurately predict the additional volume of retail space required to service the tourist market expansion expected to result from extended stays of tourists and from new tourist parties, however, the following three scenarios are presented for consideration:

	<u>Average Annual Party-Day Increase Over the 5 Year Period</u>	<u>Retail Space Increases over the 5 Year Period in sq. ft.</u>
Pessimistic	50,000	10,417
Realistic	75,000	15,625
Optimistic	100,000	20,833

The retail square foot area is calculated by multiplying the party-days by \$25.00 retail expenditure per day and by dividing by \$120 of sales per gross square foot per annum for DSTM.

- b) The above calculations do not take into consideration the additional retail space spinoff requirements that will be needed because of the substantial number of new jobs that will be created in the tourism sector to service the increased "party-days".

3. Industrial

- a) Because of anticipated new promotional initiatives in industrial development, it is assumed that new jobs will be created over the five year period 1980 to 1985. It is impossible to predict the number of new jobs each year or for the whole period. However, the following three scenarios are presented for consideration:

	Average Number of New Jobs Per Year	Total Number of New Jobs for 5 Year Period	Retail Space Increases Over the 5 Year Period in sq. ft.
Pessimistic (0 to 50)	25	125	6,375
Realistic (51 to 100)	75	375	19,125
Optimistic (101 to 150)	125	625	31,875

The retail square foot area is calculated by multiplying the total number of new jobs for the five year period by 3.4, which is the average number of persons per family for the Yarmouth area, and by 15, which is the square foot retail sales area per capita.

BUILDINGS AND ZONING

The study area contains 426 buildings of which 218 are residential in use and with another 42 buildings combining commercial and residential usages. The entire study area contains approximately 5,000,000 square feet with the residential component being approximately 1,250,000 square feet and with the mixed use property area being an additional 350,000 square feet. The residential assessment within the study area is \$4.42 million plus a tax-exempt residential assessment of \$102,000 (see Table 1). Therefore, the average residential unit is assessed at approximately \$17,000.

The 1976 census reveals that the Town of Yarmouth had a total of 2,511 dwellings in 1976 of which 1,248 were owned and 1,263 were rented. As illustrated in Table 2, the data show a slow increase in the number of dwellings and a slow decline in the percentage of rental accommodation over the 15 year period. In 1971, the Town of Yarmouth had an average of 3.4 persons per household compared to the Nova Scotia average of 3.7. In 1976 this figure had declined to 3.0 in Yarmouth while the Nova Scotia average was 3.3 persons per household.

The residential vacancy rate in the Town of Yarmouth hovers near zero. According to some sources, new apartments are rented before the foundations are dry. Landlords often have long waiting lists of prospective tenants. The Yarmouth Housing Authority, working in conjunction with the Nova Scotia Housing Commission, has tried to alleviate the problem through the construction of 242 public housing units since 1967 consisting of 136 senior citizen units and 106 three and four family units (see Table 3). Rent is based on tenant income.

The units are in various locations, scattered throughout the town. Although the number of units seems substantial, being close to 10% of the total number of dwellings in the town, the Administrator of the Yarmouth Housing Authority has 85 anxious applicants for senior citizen housing although the turnover of units last year was a mere five. The Housing Authority has requests for 100 family units of which 50 are for two-bedroom units. The Authority has requested thirty more senior citizen units and fifteen more family units. Though these requests were not able to be acted upon in 1980, there is hope that in the 1981 allotments, the Town of Yarmouth will receive more senior citizen and family units. The housing shortage in the town affects both public and private tenants.

The Housing Authority Administrator feels strongly that it is most desirable to have senior citizen and public family housing in the downtown area. Many public housing tenants do not own cars and for shopping convenience require downtown locations. Easy access to a grocery store is most important as is close proximity to transportation and medical facilities.

Market rents in the town vary considerably. While older buildings in the downtown area generally have rents of \$100-\$150 a month for one-bedroom apartments and \$200-\$225 a month for two or three-bedroom apartments, it is not unusual for a new property owner to find a tenant in an older large three-bedroom apartment paying as little as \$60 a month. New apartments rent for \$200-\$250 a month for a one-bedroom unit and about \$300 a month for a two or three-bedroom unit. Although these rents may seem lower in comparison to many other towns, one must realize the average incomes for Yarmouth,

where the 1976 tax filer had an average income of \$7793.00, were 84.8% of the Nova Scotia average.

The data in Table 2 show the town has a large percentage of tenant occupied housing. The town acts as the rental accommodation centre for the area. There is some fear that this increases the transient population and reduces pride of ownership, resulting in property decay. Although the town clearly needs more rental accommodation as the vacancy rate and waiting lists indicate, private construction of new owner occupied housing also should be encouraged. The maintenance and rehabilitation of the existing housing stock must continue as well.

The Regional Assessor believes the residential property assessments reflect market value. Although the assessments have remained more or less constant since the 1974 reassessment, he feels the 1981 reassessment will show very little change in the values of Yarmouth's residential properties.

Throughout the study area many of the houses are over 100 years in age. Although their age suggests retention, other factors must be taken into account, such as size, siting and structural condition before economically feasible rehabilitation is possible. Being mostly wood frame buildings, some have been poorly maintained and are in a bad state of decay. Though many can be rehabilitated, others will have to be replaced. All new housing, however, should generally reflect the traditional styles of housing in Yarmouth in consideration of scale, materials, shape, etc.

Housing conditions in the South End have been addressed by various associations and agencies. The South End Renewal Association and the Universite Ste-Anne Housing Society have been key in improving

both housing and community conditions. Yarmouth is fortunate enough to have two existing co-ops...both the South End Housing Co-op and the Brothers and Sisters Co-op have either rehabilitated old units or constructed new units, in all totalling 40 units in the area. The government-financed NIP and RRAP programs have also helped to alleviate many severe problems. RRAP has completed 26 of its 135 packages within the area. The South End today is in a much improved state than it was 10 to 15 years ago with an improved community spirit, yet with an abundance of vacant land. Now is the time for this empty land to be developed in to new housing units, helping to alleviate the town's housing shortage. The South End, being one of the oldest and most historic residential areas in the town, has both shopping areas and park space within close walking distance as well as a strong neighborhood character.

Yarmouth has 3 distinct neighborhoods within it divided by invisible boundaries. The areas of the South End, Centre Town and Milton are each strong communities. This strong sense of neighborhood should be reinforced rather than destroyed through new development. New housing construction and housing rehabilitation should be placed within each area, allowing residents, especially senior citizen tenants to remain within their own neighborhood.

As previous studies and the Municipal Development Plan point out, the town's population has decreased in recent years because of the volume of new housing construction outside the town limits. In order to help stabilize and indeed help increase the population, more land must become available within the town for housing development. It is recommended that land be assembled in the downtown core for

public housing with the selling price being subsidized and being the same as the selling price of undeveloped serviced land outside the downtown core.

Housing, both rehabilitation and new construction, is not only an important component but is an essential component in downtown redevelopment. Residential units, especially multiple dwelling units, should be strongly promoted for construction in the downtown area by both private and public housing developers. There is an urgent need in the downtown area of Yarmouth for both senior citizen and family units. Combined or mixed commercial and residential, say retail or office on the ground floor and housing units on the second and third floors, is a very appropriate component of and a very important contributor to successful downtown revitalization.

Based on the virtually zero vacancy rate in Yarmouth and based on the lengthy waiting lists for public housing (both senior citizen and family units), it is suggested that the Town of Yarmouth can absorb an average of at least 50 rental housing units per year over the next five years. It is strongly recommended that at least half of the units be built in the downtown core.

The Town of Yarmouth possesses a very strong heritage character which has deep-seated historical roots. The many varied and beautiful historical buildings, both residential and commercial, contribute abundantly to the heritage of the area. Both the community and individuals should put forth their best efforts towards preserving the historical buildings. Because of today's high cost of construction, a good practice to follow is to maintain the original historic character of the exterior of buildings and to renovate the interiors

consistent with the conveniences of the times.

In addition to preserving individual heritage buildings, groups of historic buildings and historic streetscapes should also be preserved. Heritage components in our built environment are very important assets to our communities and Yarmouth is certainly not an exception in this respect.

An act to provide for the identification, preservation and protection of heritage property was introduced to the Nova Scotia Legislative Assembly in the Spring of 1980 and assented to by the Lieutenant-Governor on June 5, 1980. It is recommended that the Town of Yarmouth by by-law establish a municipal registry of heritage property and provide for the establishment of a heritage advisory committee. Such a registry and advisory committee will contribute greatly to the understanding of our heritage as well as its preservation for future generations to enjoy.

A "List of Historical Housing as Compiled by Parks Canada in the Town of Yarmouth" and extracted from the Town of Yarmouth Municipal Development Plan Background Studies is contained in Appendix "11-A". The list has been updated by deleting those houses not in the study area.

In addition to residential, the study area contains: 114 commercial, 32 industrial and 20 institutional properties. The commercial (including industrial) assessment within the study area is in excess of \$18.0 million and the business occupancy assessment is about \$6.29 million. About 53.2 per cent of the Town's commercial property tax and about 50.1 per cent of the

Town's business occupancy tax will be generated from the study area in 1980.

The downtown area contains a mix of commercial buildings from the historic gems to the modern concrete. There is room for considerable upgrading of the retail and office space in the downtown area. By upgrading, it is not being suggested that old buildings be demolished and replaced with shiny new buildings but, rather, it is suggested that many of the buildings need some work and fresh paint on the exteriors. The historic character of the many fine old buildings in the downtown area should be maintained as improvements proceed.

There is a definite need in downtown Yarmouth for first class office and retail space. There is no doubt that such space will command premium base rents. Governments, especially the Provincial and Federal Governments, should establish policy to locate all offices in the downtown area as another tangible means of supporting the downtown revitalization.

A list of historic commercial properties within the study area is contained in Appendix "11-B". The list was recently prepared by the Yarmouth County Historical Society.

An extremely important aspect of any redevelopment or revitalization plan is the selection of appropriate initial anchor projects. In the case of the Town of Yarmouth, two very worthy community projects were in the initial planning stage when the study was getting underway. The two projects are a new arena proposed for the southeast corner of Brown

and Water Streets and a new YMCA proposed for the northeast corner of Main and Cliff Streets. The two projects will make very substantial positive contributions to the Town and County of Yarmouth both during and after construction. Both the arena and the YMCA will not only contribute to the social and physical well-being of Yarmouthians but also to the economic growth of the Town and County.

The value of construction by category for building permits issued in Yarmouth County and Nova Scotia in the years 1971, 1973, 1975, 1977, 1978 and 1979 are contained in Table 4. It will be noted for 1979 that the total construction for Yarmouth County was up substantially over 1978 and that the total construction for the Town of Yarmouth decreased significantly over 1978. It is expected that the implementation of the downtown revitalization and redevelopment program will increase the value of construction dramatically for the Town over the next five years or so.

Table 5 contains a comparative analysis of assessment role and taxes for the Town of Yarmouth and the study area. In addition to downtown Yarmouth being the business center of the community, it provides very generously to the fiscal well-being of the Town of Yarmouth. In 1980, the study area contained 32.19 per cent of the taxable value of property and business occupancy and generated 37.78 per cent of the property and business occupancy tax revenue of the Town of Yarmouth. As the downtown redevelopment and revitalization program gets underway and gains momentum, the tax revenue generated for the Town from

the study area will increase significantly. Of course, the benefit from the increased taxes will be offset in the first few years because of the major expenditures for infrastructure and other services that the Town will need to make in the study area. However, the community will receive the long-term financial benefits along with many other socio-economic gains.

The whole key to the success of the redevelopment and revitalization is the creation of an exciting and dynamic downtown environment where people want to live, work, shop and, yes, relax and enjoy themselves too.

In order to facilitate implementation of the proposed building and other improvements, the Downtown and Waterfront areas of Yarmouth require zoning that is both flexible and protective.

Flexibility is related to land use and, therefore, makes provision for a variety of uses within a designated geographic area. In some cases mixed uses bring about serious conflicts while in other cases mixed uses greatly enhance the social and economic life of an area. Some examples of flexibility for single or mixed uses in a designated geographic area are as follows:

- (a) A specific single use such as for housing or for light industry.
- (b) General mixed use such as retail/office/residential, etc.
- (c) Marine uses such as shipping/fishing/transportation, etc.

Although a substantial proportion of the proposed development is consistent with the existing Zoning By-law, certain geographic sectors within the study area will need to have zoning revisions to introduce the necessary flexibility for the implementation of the proposed Development Plan. It is recommended that the necessary changes be identified and introduced as the planning and implementation of the proposed development proceeds.

It is also desirable to introduce certain protective measures with respect to zoning to ensure that the proposed development can be implemented. Some of the proposed protective measures are as follows:

- (a) Building height restrictions within the study area should be a matter of study.
- (b) Building line (setback) should be such that new buildings must follow the existing dominant building lines. For example, no setbacks would be permitted further back than the adjacent buildings on Main Street streetscape.
- (c) The backyards of the designated pedestrian courtyard spaces should have the necessary building lines established in order to maintain a free circulation pattern.
- (d) The dominant materials in the Downtown area are wood, brick, and stone and the

intent should be to maintain this character.

- (e) Signage guidelines should be established to achieve an attractive visual effect in character with the traditions of the Downtown.
- (f) Historically interesting buildings should be preserved and enhanced. It is usually desirable to maintain as closely as possible the exterior character of historically significant buildings. The historic character of interiors is usually maintained where possible but not at the expense of reasonable comfort unless the building is of very significant historic merit.

After a thorough review of the proposed Development Plan, the desirable protective measures should be introduced into the Zoning By-law.

A proposed zoning amendment which makes provision for a Comprehensive Development Area is included in the report as Appendix "IV".

TABLES

1. RESIDENTIAL PROPERTY ASSESSMENT ROLE SURVEY
2. OCCUPIED DWELLINGS BY TENURE
3. RESIDENTIAL UNITS DEVELOPED BY YARMOUTH HOUSING AUTHORITY
4. VALUE OF CONSTRUCTION BY CATEGORY FOR BUILDING PERMITS
5. COMPARATIVE ANALYSIS OF ASSESSMENT ROLE AND TAXES

TABLE 1
RESIDENTIAL PROPERTY
ASSESSMENT ROLE SURVEY
TOWN OF YARMOUTH AND STUDY AREA
1980

	<u>Town</u>	<u>Study Area</u>	<u>Study Area as Percent of Town</u>
Taxable Value	\$42,788,275	\$4,417,000	10.3
Exempt Value	\$ 1,099,545	\$ 102,400	9.3
Number of Properties	2,092	260	12.4
Average Assessed Value per Property	\$ 20,979	\$ 17,382	82.9
Tax Rate	\$ 2.10	\$ 2.10	-
Real Property Tax	\$ 898,554	\$ 92,757	10.3

Source: Town of Yarmouth Assessment Role Survey - 1980
and Downtown Renewal Consultants Ltd. Survey

TABLE 2
 OCCUPIED DWELLINGS BY TENURE
YARMOUTH COUNTY, 1961, 1966, 1971 and 1976

<u>Year</u>	<u>Total Dwellings</u>	<u>Owned (%)</u>	<u>Rented (%)</u>
1976	2511	1248 (49.7)	1263 (50.3)
1971	2450	1171 (47.8)	1279 (52.2)
1966	2308	1136 (49.2)	1172 (50.8)
1961	2315	1102 (47.6)	1213 (52.4)

Source: Statistics Canada, Census of Canada

TABLE 3
RESIDENTIAL UNITS DEVELOPED
YARMOUTH HOUSING AUTHORITY
1967 to 1979

<u>YEAR COMPLETED</u>	<u>UNITS</u>	<u>DESCRIPTION AND SERVICES</u>
1967	F.P. 1 24 Units	3 bedroom units--12 duplex (Tooker, Kempt, So. East St.'s) Services included - water, range.
1967	F.P. 2 8 Units	3 bedroom units - 8 apartment dwelling-(Shaw Avenue) Services included - heat, water, hot water, range, parking.
1970	F.P. 4 10 Units	4 bedroom units--5 duplex (Pleasant, Murphy, So. East St.'s) Services included - water, range, fridge.
1970	F.P. 4Sr. 20 Units	14 (1-bedroom units) 6 (bach. units) (2 Murphy Ave.) Services included - heat, water, hot water, range, fridge, power, parking.
1970	F.P. 5 16 Units	4 bedroom units - 6 single units, 5 duplex houses - (Pleasant, Argyle, William, Goudey, Prince St.'s) Services included - water, range, fridge.
1974	F.P. 6 20 Units	8 4-bedroom & 12 3-bedroom--10 duplex (Ford Ave., Hibernia St.) Services included - water, fridge, range.
1974	F.P. 7Sr. 36 Units	36 1-bedroom units (1 Beacon St.) Services included - water, hot water, heat, range, fridge, parking.
1975	F.P. 8 28 Units	18 3-bedroom, 10 4-bedroom--14 duplex (MacNeil Ave.) Services included - water, range, fridge.
1975	F.P. 9Sr. 30 Units	30 1-bedroom units (MacNeil Ave.) Services included - water, hot water, heat, lights, range, fridge, parking.
1978	F.P. 10Sr. 30 Units	30 1-bedroom units (Hibernia St.) Services included - water, hot water, heat, power range, fridge, parking.
1979	F.P. 11Sr. 20 Units	20 1-bedroom units (41 Main St.) Services included - water, hot water, heat, lights, range, fridge.

Source: Yarmouth Housing Authority

TABLE 4
 VALUE OF CONSTRUCTION BY CATEGORY
 FOR BUILDING PERMITS ISSUED
 IN YARMOUTH COUNTY AND NOVA SCOTIA, 1971, 1973, 1975, 1977, 1978 AND 1979

	VALUE OF CONSTRUCTION					Per Cent of Total
	Residential	Industrial	Commercial	Institutional & Government	Totals	
	(\$'000)					
<u>1971</u>						
Yarmouth Town	119	30	285	3	437	24.36
Argyle Municipality	379	3	20	9	411	22.91
Yarmouth Municipality	848	13	71	14	946	52.73
Total, Yarmouth County	1,346	46	376	26	1,794	100.00
Nova Scotia	65,631	9,653	18,345	10,082	103,711	
<u>1973</u>						
Yarmouth Town	1,306	11	1,127	213	2,657	46.72
Argyle Municipality	607	1	15	1	624	10.97
Yarmouth Municipality	2,194	40	113	59	2,406	42.31
Total, Yarmouth County	4,107	52	1,255	273	5,687	100.00
Nova Scotia	111,025	9,367	46,389	14,652	181,433	
<u>1975</u>						
Yarmouth Town	1,087	4	4	-	1,095	20.91
Argyle Municipality	1,331	11	6	-	1,348	25.75
Yarmouth Municipality	2,543	58	64	128	2,793	53.34
Total, Yarmouth County	4,961	73	74	128	5,236	100.00
Nova Scotia	199,113	16,458	75,798	49,547	340,916	
<u>1977</u>						
Yarmouth Town	1,392	345	3,327	126	5,190	43.89
Argyle Municipality	1,815	69	268	276	2,428	20.53
Yarmouth Municipality	3,495	83	73	556	4,207	35.58
Total, Yarmouth County	6,702	497	3,668	958	11,825	100.00
Nova Scotia	218,335	7,935	49,247	41,203	316,720	
<u>1978</u>						
Yarmouth Town	923	-	1,765	30	2,718	30.25
Argyle Municipality	2,139	132	60	10	2,341	26.06
Yarmouth Municipality	3,711	23	86	105	3,925	43.69
Total, Yarmouth County	6,773	155	1,911	145	8,984	100.00
Nova Scotia	213,357	26,901	59,013	62,088	361,359	
<u>1979</u>						
Yarmouth Town	246	550	627	188	1,611	11.63
Argyle Municipality	2,306	35	104	-	2,445	17.64
Yarmouth Municipality	4,317	258	5,162	65	9,802	70.73
Total, Yarmouth County	6,869	843	5,893	253	13,858	100.00
Nova Scotia	192,593	22,990	107,587	41,693	364,863	

Sources: Statistics Canada, 64-203 and 64-001
 Yarmouth County Statistical Profile, 1979
 Town of Yarmouth Building Inspector

TABLE 5
 COMPARATIVE ANALYSIS OF ASSESSMENT ROLE AND TAXES
 TOWN OF YARMOUTH AND STUDY AREA
 1980

	TOWN		STUDY AREA					
	* Taxable Value 1	Per Cent	* Town Taxes 2	* Taxable Value 3	Per Cent	* Study Area Taxes 4	3 as Per Cent of 1	4 as Per Cent of 2
Residential Property	42,788,275	47.84	898,554	4,417,000	15.34	92,757	10.32	10.32
Commercial Property	33,996,800	38.01	1,240,883	18,080,550	62.81	659,940	53.18	53.18
Resource-General Property	101,450	0.11	2,130					
Business Occupancy	12,558,535	14.04	458,386	6,290,855	21.85	229,616	50.09	50.09
Totals	89,445,060	100.00	2,599,953	28,788,405	100.00	982,313	32.19	37.78

* Does not take appeal adjustments into account

Note: Residential and Resource-General Property Rate for 1980 is \$2.10

Commercial and Business Occupancy Rate for 1980 is \$3.65

Sources: 1980 Assessment Role for Town of Yarmouth and
 Downtown Renewal Consultants Survey

TOURISM

Being one of Nova Scotia's entry points, the Town of Yarmouth, with a population of 7,801, is the regional tourist and transportation center for Western Nova Scotia. Yarmouth is the terminus of the Dominion Atlantic Railway (Via Rail Canada Inc.), the Canadian National Railways Southwestern (freight only) and Halifax routes, and the end of highway routes 1 and 3 (101 and 103). The Acadian and MacKenzie bus lines serve the area to and from Halifax via the South Shore and the Valley and Air Canada offers daily flights between Halifax and Boston through Yarmouth. Yarmouth also serves as Nova Scotia's gateway for ferry operations between Maine and Nova Scotia.

The CN ferry, M.V. Bluenose, sails between Yarmouth and Bar Harbour and the Lion ferry, M.S. Caribe and the CN ferry M.V. Evangeline operate between Yarmouth and Portland. The Bluenose carries passenger, automobile and commercial traffic and she will accommodate 600 passengers and 150 vehicles. Although the Evangeline carries some passenger and automobile traffic, she caters primarily to the commercial traffic on the Yarmouth-Portland run. On the other hand, the Caribe carries primarily passenger and automobile traffic on the Yarmouth-Portland run and she will accommodate 1,000 passengers and 200 vehicles. Summaries of traffic for August and year to date 1980 compared with the same period in 1979 are presented for the Bluenose, Evangeline, and Caribe in Tables 1, 2, and 3 respectively. All classes of passenger traffic excepting

"Campers (self-propelled)" have increased substantially on both the Bluenose and the Caribe in 1980 over 1979. However, a slight note of caution should be noted as both vessels were out of service during the Summer of 1979 for upwards of two weeks.

CN Marine Inc., operators of the Bluenose and Evangeline, has introduced two innovations to the Bluenose run in 1980. In response to a request from the Province of Nova Scotia and the Yarmouth County Tourist Association, the Bluenose commenced its summer activity on June 1, 1980, two weeks later than normal, and she will operate to the end of October, which is two weeks later than normal. The Bluenose operators also introduced a passage booking service in the Eastern United States through the services of more than 1,000 travel agents who receive a \$7.00 commission for each booking. The booking experiment is certainly generating positive results and the two-week longer fall run is also expected to increase the overall traffic for the season.

CN Marine Inc. has announced that it will be calling tenders on October 15, 1980 for modifications to the Bluenose to increase its passenger-carrying capability from 615 to 700 passengers. The increase will mean that the Bluenose will be able to carry approximately 10,000 more passengers during the heavy months of July and August. The MV Bluenose has served faithfully over the years and in 1981 will celebrate a quarter of a century of plying back and forth between Yarmouth and Bar Harbour. Because of the energy crisis and other related life-style changes, people will more and more in the future be turning to the traditional modes of transportation including ferry

crossings. This is already very evident by the dramatic increase in tour bus traffic on the Bluenose during the past few years. The operators and the Federal Government should be moving forward in frantic haste to arrange for the replacement of the Bluenose at an early date with a vessel of even greater capacity. A continuing dependable link between Yarmouth and Bar Harbour is not only crucial to the economy of Western Nova Scotia but to Nova Scotia as a whole.

Via Rail Canada Inc. introduced a new experimental passenger train service between Halifax and Yarmouth on June 8, 1980. The major improvements include better scheduling, allowing same day return between Yarmouth and Halifax, modern refurbished railiners and an extensive promotional campaign inaugurating the service. As noted in Table 4, the new service has resulted in a dramatic increase in traffic exceeding 100% for both arrivals and departures to and from Yarmouth.

In relation to other entry points, Yarmouth has the third largest amount of motor vehicle traffic entering the Province (see Table 5). Yarmouth leads all entry points for tour bus traffic with 39% of the total (see Tables 6 and 7). Thirty per cent of United States traffic coming to Nova Scotia entered the Province at Yarmouth (see Yarmouth Socio-Economic Profile, Appendix 1, Table 14). The Nova Scotia Census of Motor Vehicles by entry point for the period June 1 to June 15, 1980 inclusive reveals that Yarmouth had a phenomenal increase of 2,556 automobile visitations or a 60% increase over the same period in 1979.

Although Yarmouth County has its own Tourist Association, the County is divided between the tourist regions of South Shore and Annapolis Valley in respect to most of the tourist related statistical information. Therefore, it is impossible to obtain much tourist data that accurately relate to the County or the Town. The type and number of accommodations, visitor party nights per trip, and total visitor expenditure per trip within Yarmouth County are not available. However, a recent Vanguard article (July 30, 1980) states, "A spot check of the motel and campground operators in the area suggests that in general, so far this year, it has been a relatively good tourist year." Commercial travellers indicate that it is difficult to obtain accommodation in Yarmouth even in winter. Both ferry operators also suggest that a major deterrent to increasing ferry traffic between Yarmouth and Bar Harbour and Yarmouth and Portland is the extremely low vacancy rate for accommodation, especially during the peak summer tourist season.

Yarmouth's ferry terminal is the only entry point in Nova Scotia that is in the center of a town. Unlike many other Nova Scotia communities, Yarmouth does not have the problem of how to lure the tourist into the core, but rather Yarmouth's problem is one of how to retain the tourists in the Town. A strong downtown and waterfront redevelopment, that enhances the local amenities offered, will certainly assist in strengthening the tourist trade within the Town and the area.

Some additional co-ordination of the ferry, rail, and bus transit systems and schedules would aid the redevelopment. An integrated transportation center located near the Ferry Terminal and the Nova Scotia Travel Bureau, or alternatively

at the present VIA Rail Terminal site, would prove to be a tremendous step towards such co-ordination.

A major concentration of effort should be put forth to substantially expand the tourist industry. The emphasis should be on changing Yarmouth from simply an entry-exit point to a destination point. The rapidly escalating energy costs should prove to be of real benefit to the destination point concept. Yarmouth and the surrounding area are blessed with an abundance of natural resources, especially water, including both the sea and the many lakes. These water resources should be exploited and developed to the fullest extent possible as a means of attracting and retaining tourist visitors within the area. Boating activities should be developed and vigorously promoted both locally and as part of the tourist information packages. A good public marina should be developed for both the local boating enthusiast and the tourist. Such a public marina could be located on the Yarmouth waterfront, perhaps near the southern end of the waterfront. In addition to providing the usual berthing facilities, a public marina would provide a safe haven for pleasure and other craft in time of storm.

The Yarmouth County Tourist Association should be encouraged to impress on the Department of Tourism the desirability to commence the proposed Tourist Inventory Study in Yarmouth County at an early date and on a priority basis. The responsibility for identifying tourism needs and opportunities and for formulating an on-going tourism development strategy for the County should rest with the Yarmouth County Tourist Association.

It is suggested that one of the prime responsibilities of the Executive Director of the Association should be in the area of on-going tourism development. It is essential that the town and the surrounding area provide the necessary amenities and facilities to meet the needs of the tourist of the eighties.

Along with the existing one night stop bus tours, Yarmouth should develop a program and vigorously promote the destination bus tour concept with, say, three or four, seven, ten and fourteen day summer resort packages. The natural beauty of the Yarmouth area, the ferries, the energy crisis, and the close proximity to the Eastern United States provide ample opportunity for expanding the tourist industry, especially through the introduction of the destination bus tour concept.

The construction of a multiple-use arena in the downtown area will also strengthen the tourist industry. The facility, which would be primarily an ice surface during the winter months, could be used for regional and provincial hockey tournaments and clinics. Spectators and participants alike would use the local hotels, motels, restaurants and shops during their stay in Yarmouth. During the summer months, the arena could be taken over by tourist-related activities. Seafood suppers, farmers' and fishermen's markets, a supervised indoor playground, and beer festivals are some possible activities that could be promoted for the arena. The arena building, which will be sited in close proximity to the ferry terminal and transportation center, will be well used by tourists awaiting boat departure. Convention meetings and industrial and other exhibitions could also be held within the arena. Summer festivals and other major waterfront

activities directed at the tourist as well as the local community could share the center of focus between the waterfront and the arena.

For the out-of-province tourist, Nova Scotia crafts are an added attraction. Both the Acadian and English cultures in Yarmouth county have a tradition of producing quality crafts. The 1977 report entitled "The Economic and Social Base of Southwestern Nova Scotia" by the Southwestern Nova Scotia Study Team recommended that a local handcraft co-operative be set up to aid local crafts people. Suggesting that the extension service of the Universite Ste. Anne might be an appropriate promotion agency, the report sees, "long-term commercial development if a means could be found to develop markets, provide training, quality control, packaging and bookkeeping." A site near the waterfront in close proximity to tourism and transportation centers would be very suitable for a craft operation. Although significant amounts of development assistance and some financial support from Federal and Provincial agencies would be required initially, substantial educational and employment benefits would accrue to the area.

The Town of Yarmouth has been a tourist center since the mid-19th century. Although the number and type of tourist facilities have dwindled somewhat in the past 50 years, there are still many fine attractions within both the Town and the County.

The Yarmouth County Historical Museum is one of the finest community museums in Nova Scotia. With an impressive collection of nautical memorabilia and heritage photography, the Museum staff and volunteers change the displays regularly. The Firefighters Museum of Nova Scotia contains a unique display of firefighting

equipment. Both the fine old homes and the working waterfront of Yarmouth, are two more attractions that tourists enjoy.

By adding to the many interesting physical features of downtown Yarmouth, such as its historic buildings and its working waterfront, a new face lift for existing buildings, infill of new buildings, attractive pedestrian walkways, appealing signage, underground wiring, new street lighting, etc., a significantly larger piece of the expanding tourist market can undoubtedly be recaptured for the Town and surrounding area.

Using Yarmouth as a base, more tourists should be encouraged to explore the countryside in a series of well planned day trips. Both the Yarmouth County Tourist Association and the booklet entitled "Tiding Over" map out auto, bicycle and pedestrian routes that highlight interesting sites unique to the area. Rock hounding, hunting, fishing, beach combing, bird watching, and antique shopping are just a few of the things that are possible. Tourists, after a day in the country, would return to the Town of Yarmouth to participate in a variety of evening activities.

Some tourist opportunities that appear not to be available at present or that may require improvement or expansion are as follows:

- a) There is no place for the American tourist to change United States funds into Canadian funds during the times the chartered banks are not open. It is suggested that a suitable location

be identified and that the chartered banks within the Town be encouraged to operate on a rotational basis a money-changing facility both within and without normal banking hours during the summer tourist season.

- b) More outdoor activities are needed where a tourist can learn a new skill or perform a skill already learned such as horse-back riding, sailing, canoeing and perhaps handcrafts.
- c) A bus tour operation could be established for tours within Yarmouth County and the adjoining counties. Perhaps mini-buses or even the London double-decker type bus could be acquired for such a business.
- d) An excursion boating business could be established for scheduled harbour cruises and other charter activities.
- e) Deep-sea fishing opportunities should be available in the area, not necessarily located right in Yarmouth but perhaps from a smaller port such as Port Maitland.
- f) Additional good quality accommodation is required within the Yarmouth area.

The above ideas are not by any means intended to be original as each one is operating successfully in other locations. Some have been tried in Yarmouth and failed. However, that does

not necessarily mean that some or all of the proposals cannot be tried again.

It is strongly recommended that the Nova Scotia Department of Tourism immediately designate Yarmouth County as a Designated Destination Area in order to allow Yarmouth County to take full advantage of the tourism development incentives programs. Expansion of the tourist industry in the Town and County of Yarmouth is the most immediate and important means available for improving the economy of the Town and County in the shortest time at the least possible cost in terms of public and private input. Urgently needed jobs can be created in the tourist sector at a fraction of the cost of creating jobs in most other sectors of the economy and the jobs can generally become available more quickly.

TABLES

1. COMPARATIVE SUMMARY OF BLUENOSE TRAFFIC
2. COMPARATIVE SUMMARY OF EVANGELINE TRAFFIC
3. COMPARATIVE SUMMARY OF CARIBE TRAFFIC
4. COMPARATIVE RAILINER TRAFFIC DATA
5. PERCENTAGES OF CANADIAN AND AMERICAN MOTOR VEHICLES ENTERING NOVA SCOTIA BY ENTRY POINT - 1979
6. COMPARATIVE SUMMARY OF TOUR BUSES ENTERING NOVA SCOTIA BY POINT OF ENTRY - 1978 AND 1979
7. TOUR BUSES ENTERING NOVA SCOTIA BY MONTH - 1979

TABLE 1
 COMPARATIVE SUMMARY OF BLUENOSE TRAFFIC
 AUGUST AND YEAR TO DATE 1980 WITH 1979
 YARMOUTH/BAR HARBOUR SERVICE

	<u>Current Month</u>			<u>Year To Date</u>		
	<u>August 1980</u>	<u>Increase (Decrease) Over August 1979</u>	<u>Per Cent Increase (Decrease)</u>	<u>1980</u>	<u>Increase (Decrease) Over 1979</u>	<u>Per Cent Increase (Decrease)</u>
<u>PASSENGER TRAFFIC</u>						
Passengers	30,053	3,221	12.0	67,415	9,855	17.1
Automobiles	7,686	829	12.1	17,187	2,710	18.7
Auto Trailers	283	12	4.4	676	40	6.3
Campers (Self-Propelled)	390	67	20.8	933	148	18.9
Buses	100	25	33.3	207	29	16.3
Motorcycles & Bicycles	1,432	317	28.4	3,381	899	36.2
Total Passenger Related Vehicles	9,891	1,250	14.5	22,384	3,826	20.6
<u>COMMERCIAL TRAFFIC</u>						
Straight Trucks	70	4	6.1	153	(45)	(22.7)
Tractor & Trailer	9	3	50.0	16	(2)	(11.1)
Trailer Only						
Tractor Only	-	(1)	-	1	-	-
Mobile Home						
Other	-	(1)	-	-	(1)	-
Total Commercial Units	79	5	6.8	170	(48)	(22.0)
CNTL Trlrs. (incl. Above)						
<u>MISCELLANEOUS</u>						
Single Crossings	62	-	-	163	2	1.3
Vessel Operating Days	31	-	-	94	5	5.6

Sources: CN Marine Inc. and
 Nova Scotia Department of Development

TABLE 2
 COMPARATIVE SUMMARY OF EVANGELINE TRAFFIC
 AUGUST AND YEAR TO DATE 1980 WITH 1979
 YARMOUTH/PORTLAND SERVICE

	Current Month			Year To Date		
	August 1980	Increase (Decrease) Over August 1979	Per Cent Increase (Decrease)	1980	Increase (Decrease) Over 1979	Per Cent Increase (Decrease)
<u>PASSENGER TRAFFIC</u>						
Passengers	766	100	15.0	5,395	(1,553)	(22.4)
Automobiles	126	8	6.8	1,144	(578)	(33.6)
Auto Trailers	7	5	-	44	5	12.8
Campers (Self-Propelled)	2	1	-	19	(13)	(40.6)
Buses	2	2	-	2	(1)	(33.3)
Motorcycles & Bicycles	37	2	5.7	121	(68)	(36.0)
Total Passenger Related Vehicles	174	18	11.5	1,330	(655)	(33.0)
<u>COMMERCIAL TRAFFIC</u>						
Straight Trucks	165	(24)	(12.7)	1,299	21	1.7
Tractor & Trailer	107	47	78.3	692	212	44.2
Trailer Only	33	5	17.9	325	140	75.7
Tractor Only	1	1	-	2	-	-
Mobile Home				-	(1)	-
Other	1	1	-	2	1	-
Total Commercial Units CNTL Trlrs. (incl. Above)	307	30	10.8	2,320	373	19.2
<u>MISCELLANEOUS</u>						
Single Crossings	26	(1)	(3.7)	209	6	3.0
Vessel Operating Days	31	-	-	243	1	0.4

Sources: CN Marine Inc. and
 Nova Scotia Department of Development

TABLE 3
COMPARATIVE SUMMARY OF CARIBE TRAFFIC
AUGUST AND YEAR TO DATE 1980 WITH 1979
YARMOUTH/PORTLAND SERVICE

	Current Month			Year To Date		
	August 1980	Increase (Decrease) Over August 1979	Per Cent Increase (Decrease)	1980	Increase (Decrease) Over 1979	Per Cent Increase (Decrease)
<u>PASSENGER TRAFFIC</u>						
Passengers	38,580	1,819	5.0	98,235	28,385	40.6
Automobiles	6,711	1,025	18.0	16,791	5,771	52.4
Auto Trailers	88	31	54.4	182	54	42.2
Campers (Self-Propelled)	124	(77)	(38.3)	327	(116)	(26.2)
Buses	288	27	10.4	639	131	25.8
Motorcycles & Bicycles	1,009	166	19.7	2,245	544	32.0
Total Passenger Related Vehicles	8,220	1,172	16.6	20,184	6,384	46.3
<u>COMMERCIAL TRAFFIC</u>						
Straight Trucks	11	-	-	54	34	-
Tractor & Trailer	2	(1)	(33.3)	16	6	60.0
Trailer Only						
Tractor Only				-	(1)	-
Mobile Home						
Other	3	3	-	3	3	-
Total Commercial Units	16	2	14.3	73	42	-
CNTL Trlrs. (incl. Above)						
<u>MISCELLANEOUS</u>						
Single Crossings	62	-	-	211	84	66.2
Vessel Operating Days	31	-	-	112	48	75.0

Sources: CN Marine Inc. and
Nova Scotia Department of Development

TABLE 4
 COMPARATIVE RAILINER TRAFFIC DATA
 YARMOUTH - HALIFAX SERVICE
 BY MONTH FOR 1979 AND 1980

	<u>ARRIVING YARMOUTH</u>		<u>DEPARTING YARMOUTH</u>	
	<u>1979</u>	<u>1980</u>	<u>1979</u>	<u>1980</u>
January	254	191	335	279
February	201	224	185	233
March	351	347	401	405
April	209	277	197	298
May	212	388	266	386
June	219	540*	275	519*
July	385	828	342	865
August	477	1,010	413	999
September	207		217	
October	203		264	
November	203		218	
December	267		261	

* A new service was implemented on June 8, 1980

Source: Via Rail Canada Inc.

TABLE 5
 PERCENTAGES OF CANADIAN AND AMERICAN MOTOR VEHICLES
 ENTERING NOVA SCOTIA BY ENTRY POINT - 1979

<u>PLACE</u>	<u>CANADIAN</u>	<u>AMERICAN</u>	<u>ALL MOTOR VEHICLES</u>
Amherst	77.8%	49.3%	73.5%
Caribou	11.2%	10.3%	11.0%
Digby	3.3%	8.4%	4.1%
North Sydney	3.4%	N/A	2.9%
Tidnish	3.8%	2.1%	3.6%
Yarmouth	.5%	29.9%	4.9%
TOTAL	100.0%	100.0%	100.0%

Source: Visitor Travel to Nova Scotia, 1979

TABLE 6
 COMPARATIVE SUMMARY
 TOUR BUSES ENTERING NOVA SCOTIA
 BY POINT OF ENTRY - 1978 AND 1979

<u>Entry Point</u>	<u>1978</u>	<u>Share of Total</u>	<u>1979</u>	<u>Share of Total</u>	<u>Per Cent Increase (Decrease)</u>
Amherst	201	17%	310	24%	54.23
Caribou	322	27%	256	19%	(20.50)
Digby	114	10%	205	16%	79.82
Tidnish	2	-	8	1%	300.00
Yarmouth	478	41%	508	39%	6.28
North Sydney	54	5%	15	1%	(72.22)
All points	1,171	100%	1,302	100%	11.19

Source: Visitor Travel to Nova Scotia, 1979

TABLE 7
 TOUR BUSES ENTERING NOVA SCOTIA
 BY MONTH - 1979

<u>Entry Point</u>	<u>Caribou</u>	<u>Digby</u>	<u>Amherst</u>	<u>Tidnish</u>	<u>Yarmouth</u>	<u>North Sydney</u>	<u>Totals</u>	<u>Per Cent by Month</u>
<u>Month</u>								
June	29	41	23	1	10	6	110	8.45
July	55	64	68	6	162	5	360	27.65
August	51	55	72	1	147	3	329	25.27
September	95	35	104	-	159	1	394	30.26
October	26	10	43	-	30	0	109	8.37
TOTAL	256	205	310	8	508	15	1,302	100.00

Source: Visitor Travel to Nova Scotia, 1979

INDUSTRY

Although real economic growth in Yarmouth County during the past quarter century has been limited, industrial development has certainly helped provide stability to the economy over the years and, there is little doubt that industrial development was a major contributor over the years towards keeping the economy of the Town of Yarmouth from actually declining in real terms (see Tables 1 and 2).

Population projections prepared for the Nova Scotia Department of Development in February, 1979, estimated that the population of Yarmouth County would grow by only 1.9 per cent during the period 1980 to 1986, while the Province's entire population is projected to grow by 5 per cent within the same time period. From a review of the Yarmouth County historical population growth data and the estimated future population growth data, it is not difficult to visualize a scenario of rather stagnant socio-economic conditions prevailing in Yarmouth for the next five years or so. However, the essentially no-growth economy can be turned into an expanding economy by the deliberate introduction of significant positive intervention such as vigorously promoting the Town of Yarmouth by means of well planned industrial, tourism and downtown development programs.

An important key to healthy economic growth is population growth resulting from an expanding labour force within minimum employment. Creating new jobs is synonymous with an expanding economy. The three levels of government should join forces for a major co-operative thrust in creating long term jobs in Yarmouth. Job creation efforts should concentrate initially on two main areas, namely industrial development and tourism

development.

The responsibility should rest with the Yarmouth Area Industrial Commission for formulating effective industrial strategies and for aggressively marketing the Town of Yarmouth as an exciting and dynamic community that is both sensitive and responsive to the peculiar needs of various industries. In order to properly sell Yarmouth to new and existing industries, an essential first step is to recognize and catalogue the assets and liabilities of Yarmouth in terms of its attractiveness to industry. Therefore, part of the process of planning an effective industrial strategy should be the development of appropriate programs to enhance the assets and diminish the liabilities of the community in regards to industrial development. One extremely important program that will both greatly improve the assets and greatly decrease the liabilities of Yarmouth as an industrial community will be the implementation of the downtown and waterfront redevelopment and revitalization program. A dynamic and healthy business community will have a very important position in the resources audit of an industry making a decision to relocate or expand in Yarmouth.

Another very significant component in a company's community resource audit is the availability of attractive, serviced and strategically located industrial sites. Although many sites can be located within the Yarmouth area, the majority, if not all, will flunk the test with respect to attractiveness, degree of servicing, and/or location. In addition to completing the very necessary planned industrial survey at an early date,

the Yarmouth Area Industrial Commission should identify, acquire, and develop appropriate industrial sites on a priority basis. Two such sites have been identified during this study and both are strongly recommended for acquisition and development for industrial purposes.

In developing an appropriate industrial strategy for Yarmouth, it is suggested that emphasis should be placed on the marine and fisheries industries which are indigenous to the area (see Table 3). However, this proposition is not intended to, nor does it, preclude the establishment of other worthwhile industries. The majority of the marketing and incentive programs should be directed towards those industries that are more likely to be satisfied and successful in Yarmouth. The two site locations identified during the study for potential industrial development are located in the South End and from a transportation point of view, both sites can be well serviced by the proposed new perimeter truck route as well as by rail and sea.

The first site is proposed for light industries and is located along and adjacent to the waterfront on the east side of Water Street and the north side of Hueston Street. It is a relatively long and narrow strip containing approximately 5 acres. It is suggested that this site can be used for light industries that may or may not be directly related to the marine and fisheries sectors. The site has a wide green strip on its eastern boundary and is well screened by trees from a proposed new housing development which is planned to be located to the east of the site.

The second site is located on the waterfront south of Hueston Street and is proposed as land fill extending southerly between the shoreline and the main harbour channel from a proposed new sea wall and docking facility located on the south side of the South Channel. The dimensions and area of the site are flexible because the site can be developed with fill, including dredged material as such material becomes available and/or as the need for additional land is identified. It is conceivable that the site could someday include the entire area between the shoreline and the main channel from the proposed new sea wall to Bunkers Island. This total reclaimed land area would contain approximately 211 acres. Because the site is presently a mud flat covered by shallow water at high tide and totally exposed at low tide, it would be a simple operation to reclaim the land. It is suggested that this site be used exclusively for marine and fisheries related industries.

The site will provide much needed additional docking facilities for the shipping and fishing industries as well as a very suitable location for the expansion of existing and the development of new fish processing facilities. The site will also be ideal for such industries as boat building, refrigeration and other warehousing. In the event that the potential offshore oil industry develops, the site would be an ideal location for the storage of equipment and other materials. It could also be the principal shipping point for refined or unrefined tin ore from the potential tin mining industry that is presently under feasibility evaluation.

Although industrial development is not essential to the implementation of a successful downtown redevelopment and revitalization program, the two programs are certainly complementary to each other and especially so because of the proposed locations of the two new industrial sites. The complementary and combined effect of the proposed downtown, industrial, and tourism development programs will put the contagion theory in motion resulting in not only a healthy growing economy but perhaps even a booming economy in Yarmouth for the next several years.

In addition, for example, to the Nova Scotia Industrial Estates Limited's Small Business Financing Program, Nova Scotia Department of Development's Rural Industry Program, Federal Department of Regional Economic Expansion's Regional Development Incentives Program and the Federal Business Development Bank Programs being available to industries in Yarmouth, it is strongly recommended that the governments of Nova Scotia and Canada give very serious consideration to extending the Industrial Estates Limited's and Department of Regional Economic Expansion's Industrial Incubation Program to the Yarmouth area.

Finally, the Yarmouth Area Industrial Commission should immediately appoint a full time General Manager, Executive Director, or Co-ordinator to develop and market appropriate industrial strategies on behalf of Yarmouth. Maximum results cannot be achieved in industrial development by the Yarmouth Area Industrial Commission unless the Commission has all the essential resources including manpower as well as funding.

TABLES

1. SUMMARY DATA ANALYSIS OF NOVA SCOTIA AND
YARMOUTH COUNTY MANUFACTURERS
2. TOWN OF YARMOUTH MANUFACTURING DATA
3. COMPARATIVE ANALYSIS OF FISHERY STATISTICS
FOR NOVA SCOTIA AND YARMOUTH

TABLE 1
SUMMARY DATA ANALYSIS
NOVA SCOTIA AND YARMOUTH COUNTY MANUFACTURERS
BY MAJOR GROUP
1979 - 1980

Code	Manufacturing Industries Major Groups	Nova Scotia			Yarmouth County			Yarmouth Employees as Per Cent of Nova Scotia Employees
		No. of Plants	No. of Employees	Per Cent Employees	No. of Plants	No. of Employees	Per Cent Employees	
1	Food and Beverage	357	13,275	29.2	31	1,250	55.5	9.4
2	Tobacco Products	-	-	-	-	-	-	-
3	Rubber and Plastic Products	18	4,240	9.3	1	4	0.2	0.1
4	Leather	10	85	0.2	-	-	-	-
5	Textile	29	1,288	2.8	3	460	20.4	35.7
6	Knitting Mills	9	1,461	3.2	1	45	2.0	3.1
7	Clothing	14	170	0.4	2	9	0.4	5.3
8	Wood	238	3,579	7.9	12	184	8.2	5.1
9	Furniture & Fixtures	101	667	1.4	5	12	0.5	1.8
10	Paper & Allied Industries	19	3,529	7.8	-	-	-	-
11	Printing, Publishing & Allied Industries	111	1,749	3.8	5	114	5.0	6.5
12	Primary Metal	13	3,853	8.5	-	-	-	-
13	Metal Fabricating	139	2,238	4.9	8	42	1.9	1.9
14	Machinery	37	530	1.2	-	-	-	-
15	Transportation Equipment	123	4,175	9.2	14	85	3.8	2.0
16	Electrical Products	21	1,033	2.3	-	-	-	-
17	Non-Metallic Mineral Products	93	1,129	2.5	4	39	1.7	3.5
18	Petroleum and Coal Products	9	584	1.3	-	-	-	-
19	Chemical and Chemical Products	24	1,285	2.8	-	-	-	-
20	Miscellaneous Manufacturing	109	580	1.3	5	9	0.4	1.6
	Totals All Groups	1,474	45,450	100.0	91	2,253	100.0	5.0

Source: Nova Scotia Directory of Manufacturers, 1979 - 80

TABLE 2

TOWN OF YARMOUTH MANUFACTURING DATA
BY FIRM NAME AND NUMBER OF EMPLOYEES
1979 - 80

<u>FIRM NAME</u>	<u>NO. OF EMPLOYEES</u>
Acadian Seaplants Limited	26
Alwood Products Limited	123
Atl. Herring Fishermen's Mkt. Co-op Ltd.	3
Birley Q Garment Industry Division	4
Bonda Textiles Ltd.	45
Borcherdt Concrete Products Ltd.	10
Brannen, Amos, & Sons Limited	30
Churchill, A. Earle	1
Dominion Textile Inc.	450
Dunhill Research & Development Ltd.	4
Ellis Print	3
Fundy Group Publications Ltd.	90
Hamilton & Porter Machine Works Ltd.	25
IMO Foods Limited	120
Kennebec Fisheries Ltd.	200
L'Imprimerie Lescarbot Limitee	11
Marine Colloids Limited	20
Millard Ply Bows Ltd.	5
Nova Scotia Building Supplies Ltd.	10
Pothier, R.H., Fabrication Ltd.	10
Sentinel Printing Limited	10
Sweeney, Laurence, Fisheries Ltd.	300
Sweeney, Laurence	15
Sweeney, J.R., Upholstering	1
Tri Star Industries Ltd.	7
West Nova Marine Ltd.	8
Yarmouth Concrete & Gravel Ltd.	24
Total	1,555

Sources: Nova Scotia's Directory of Manufacturers, 1979 - 80
 Scott's Industrial Directory Atlantic Manufacturers -
 Second Edition, 1979
 Fisheries and Oceans Canada, 1980

TABLE 3
COMPARATIVE ANALYSIS OF FISHERY STATISTICS
NOVA SCOTIA AND YARMOUTH

	<u>NOVA SCOTIA</u>	<u>YARMOUTH</u>	<u>YARMOUTH AS PER CENT OF NOVA SCOTIA</u>
<u>NO. OF FISHERMEN BY EXTENT OF FISHING (1978)</u>			
10 months and over	3,900	295	7.56
5 to 10 months	3,093	845	27.32
less than 10 months	3,466	134	3.87
Totals	10,409	1,274	12.24
<u>NO. OF FISHERMEN BY PER CENT OF INCOME EARNED (1979)</u>			
0 - 25	4,014	373	9.29
26 - 75	1,656	202	12.20
76 - 100	5,128	758	14.78
Totals	10,798	1,333	12.34
<u>LANDINGS IN METRIC TONS (1979)</u>			
Groundfish	230,738	5,109	2.21
Pelagic and Estuarial	65,918	14,887	22.58
Molluscs and Crustaceans	104,322	6,632	6.36
Seaweed and Viscera	14,123	4,429	31.36
Totals	415,101	31,057	7.48
<u>NO. OF VESSELS BY LENGTH IN FEET (1979)</u>			
34 feet and less	4,487	363	8.09
35 feet and over	2,473	459	18.56
Totals	6,960	822	11.81
<u>NO. OF BOAT BUILDERS AND NO. OF EMPLOYEES (1977-78)</u>			
Boat builders	54	4	7.41
Employees	1,862	22	1.18
<u>NO. OF FISH PLANTS (1979)</u>			
Fish Plants	202	50	24.75

Source: Yarmouth Area Industrial Commission - Rupert White

CHARACTERISTICS AND ECONOMICS

This section deals with the existing characteristics of the study area, the characteristics and capital cost estimates for the proposed new development, the income required to service the capital costs of the proposed new private development, historic trends for interest rates and bond yields, rental rates, annual taxes generated by the proposed new private development, proposed tax forgiveness, and proposed expenditures and funding excluding private, community and industrial development projects.

The existing basic characteristics of the study area were compiled in May and June of 1980. The summary data presented in Table 1 indicates that the study area contains 59 town blocks, 497 properties and about 112 acres. Of the 497 properties in the study area, 71 properties (consisting of about 18 acres) are presently vacant land. One-quarter of the land area is presently in residential use.

A comparative analysis of present and proposed commercial space by category for downtown areas "B", "C" and "D" is presented in Table 2. It is proposed to increase the retail space by about thirty-two per cent from 160,500 sq. ft. to 212,600 sq. ft. and to increase the office and financial space by about thirty-seven per cent from 158,000 sq. ft. to 216,200 sq. ft.

Table 3 contains a summary of the proposed new building areas by category and geographic area for the whole of the study area. The community category consists of proposed

new buildings for the YMCA, the arena, the courthouse, public waiting and bathrooms, and an expansion to the town warehouse on Water Street. The industrial category does not include buildings on either the proposed new light industry site or on the proposed new landfill industrial site as industrial planning and promotion is a responsibility of the Yarmouth Area Industrial Commission. The "other" category consists of additional hotel/motel space.

A summary of the proposed new downtown public spaces by category and geographic area is presented in Table 4. Sidewalks, pedestrian street, parking, roads, and land assembly are the categories for public spaces presented in the Table.

Table 5 presents the unit capital cost estimates for the proposed new construction by category. The Table excludes unit costs for land assembly. The unit capital cost estimates for each category of construction includes costs for design and supervision, interim financing during construction, actual construction, and miscellaneous items such as soils investigation and insurance and taxes during construction.

The summary data contained in Tables 3, 4, and 5 is consolidated in Table 6 to provide total capital cost estimates for the proposed new construction by category excluding land costs. The total capital cost estimates for the proposed new construction for private development is \$15,734,400 and for community and public development is \$7,772,800 for a total of \$23,507,200.

It should be noted that the data presented in Tables 3 to 6 inclusive are for new construction and, therefore, excludes improvements to existing buildings, grounds and services. It is impossible to provide budget estimates for improvements to buildings and grounds because of the wide range in the condition of the various properties and because of the wide range in the attitude and resources of the various property owners. Although the study area is essentially fully serviced, there may be situations uncovered during planning or construction where maintenance or upgrading of services is required.

The revitalization of the Downtown Area is not only dependent upon new construction but is to an even greater degree dependent upon the improving and upgrading of existing properties including both buildings and grounds. Therefore, public and private property owners should be encouraged to improve their properties where desirable. In addition to assistance to private property owners such as provided through the Nova Scotia Mainstreet Program, limited sources should be made available to assist with preliminary studies, concept plans, color selection and co-ordination, etc.

Revitalization means that a concentrated effort will have to be put forth to promote, encourage, and stimulate both new development and upgrading of existing lands and buildings.

Tables 7, 8 and 9 contain data on the income per sq. ft. per annum required to service capital debt at various interest rates and for various amortization periods for industrial,

retail, office, community, and other space. Table 10 contains data on income per unit per month required to service capital debt for residential space at various interest rates and for various amortization periods.

The actual Toronto-Dominion Bank prime commercial lending rate changes for the period 1961 to 1980 inclusive are presented graphically in Table 11. Although the rate changes are cyclical and mirror the performance of the economy as a whole, it is significant to note that the low point in each cycle gradually increased during the twenty year period from a low in 1961 of 5 1/2% to a low in July, 1980 of 12 1/4%.

Table 12 compares graphically three selected Canadian interest rates and bond yields by quarter for the years 1971 to 1980. The average interest rate for prime business loans (prime commercial lending rate), the average yield for municipal bonds, and the average mortgage rate for conventional mortgages are plotted by quarter in the Table. Neither rate changes nor maximum nor minimum peaks are presented in the Table because the data reflects predetermined quarterly points in time for March, June, September and December in each of the ten years.

The low and high present rental rates for the study area are compared with the base rental rates for selected mortgaged rates and amortization periods required to service the proposed new construction for retail, office and residential categories and are presented in Table 13. Although some higher

and a few lower present rental rates were suggested by individuals, they have been purposely excluded from the Table because of a lack of verification. A great deal of caution should be used in comparing the present rental rates for the study area with the base rental rates required to service the proposed new construction. In some instances, the present rental rates are absolute net including capital costs only and excluding all operating costs and in other instances, the present rental rates include capital costs and some or all operating costs.

Although a cursory review of the data contained in Table 13 would seem to suggest that new construction may not be economically feasible, this is not the case since the revitalization process will effectively and substantially raise the market rents in the whole of the Downtown Area. The provision of first class office, retail and residential space in the Downtown Area will cause companies and individuals to move from inferior space to superior space in the newly constructed or newly renovated buildings. In order to retain existing tenants or obtain new tenants, landlords will be forced to replace or upgrade inferior space.

Table 14 contains estimates of the annual tax revenue for the proposed new private development by category based on the 1980 tax rates. It will be noted from the data contained in the Table that the proposed new private construction will generate approximately \$648,871 in new taxes for the Town based on the 1980 tax rates. However, because of the present high costs for both money and construction, it is suggested that a

tax forgiveness program be implemented for new construction and major upgrading of existing properties in the study area. Such a tax forgiveness program over ten years is proposed in Table 15. In order to eliminate any negative impact on the Town's budget, it is suggested that the proposed tax forgiveness program should relate to the incremental increases in tax assessment which are attributable directly to property improvements. The proposed tax forgiveness program benefits the developer most in the early years when losses are normally sustained because of loss of income during the construction and the lease-up periods. The appropriate mechanism for implementing the tax forgiveness program is left to the discretion of the Town and/or the Province.

Budget estimates for proposed expenditures by category and by year for the five year period 1981-1985 inclusive are presented in Table 16. The data excludes costs for private and community development projects, for the upgrading of Water Street, and for industrial site development. It should be noted that the budget for land assembly would appear to be reasonable, however, it is not intended to be precise. If any portion of the land assembly should prove to be unduly difficult, it is recommended that the necessary land be expropriated by the Town.

The proposed funding by source and by year for the five year period 1981-1985 inclusive is contained in Table 17. It is suggested that the principal funding sources for the

expenditures contained in Table 16 be the Province through the Department of Development's Mainstreet Program, the Town of Yarmouth, and the Yarmouth Downtown Business Community. It is further suggested that the Province provide sixty per cent of the funds, the Town twenty per cent of the funds, and the Downtown Business Community the remaining twenty per cent of the funds.

It is proposed that the share of the funding from the Downtown Business Community be provided by means of a surcharge on the commercial property and business occupancy taxes for 1980. Table 5 in the section entitled "Building Review" indicates that the commercial property tax for the study area in 1980 was \$659,940 and that the business occupancy tax for the study area for 1980 was \$229,616 for a total of \$889,556. A twenty per cent surcharge on the \$889,556 would yield \$177,911. In order to encourage rather than discourage revitalization and redevelopment of the Downtown Area, it is strongly recommended that the surcharge apply to the commercial property and business occupancy taxes for 1980. It may be desirable to prescribe new geographic boundaries for the Downtown business district that are not co-terminus with the boundaries for the existing study area.

Table 18 contains a proposed list of annual operating budget items for the proposed Yarmouth Downtown Development Corporation. The organization of the Yarmouth Downtown Development Corporation will be dealt with in the section entitled

"Implementation and Organization".

In addition to obtaining funding from the Province's Mainstreet Program, the Town of Yarmouth, and the Yarmouth Downtown Business Community, several other potential sources of funding exist, some of which are as follows:

1. The Heritage Canada Foundation's New Mainstreet Program which was announced by the Heritage Canada Foundation at its Annual Meeting in Winnipeg in October, 1980. Because of the historical significance of Yarmouth and, in particular, the historical significance of many of Yarmouth's buildings, it is suggested that the Foundation's New Mainstreet Program will be very appropriate to Yarmouth. Although the New Mainstreet Program is not expected to be ready for implementation until about March of 1981, it is strongly recommended that the Heritage Canada Foundation be approached immediately with respect to this new program.
2. Central Mortgage and Housing Corporation for programs such as -
 - (a) Provincial and Municipal Housing;
 - (b) Non-Profit Co-operatives;
 - (c) Public Housing Assistance;
 - (d) Insured Loans for Rental Housing; and
 - (e) Private Non-Profit Housing Corporations.

3. Other Provincial Departments and Agencies such as the Recreation Department with respect to the arena and the YMCA, The Transportation Department with respect to the upgrading of Water Street, The Department of Tourism with respect to potential new tourist attractions, and Industrial Estates Limited and The Department of Development with respect to industrial development.
4. Other Federal Departments and Agencies such as The Department of Regional Economic Expansion with respect to programs such as the upgrading of Water Street, the development of new tourist attractions, and the development of new industrial parks.
5. Private Lending Institutions - the proposed new Yarmouth Downtown Development Corporation should be able to borrow funds from private lending institutions such as banks provided the Corporation is able to pledge securities such as real property. Therefore, it is desirable that assets such as land be, in fact, owned by the new development corporation.

TABLES

1. BASIC CHARACTERISTICS OF STUDY AREA
2. COMPARATIVE ANALYSIS OF PRESENT AND PROPOSED COMMERCIAL SPACE
3. SUMMARY OF PROPOSED NEW BUILDING AREAS
4. SUMMARY OF PROPOSED NEW DOWNTOWN PUBLIC SPACES
5. UNIT CAPITAL COST ESTIMATES FOR PROPOSED NEW CONSTRUCTION
6. TOTAL CAPITAL COST ESTIMATES FOR PROPOSED NEW CONSTRUCTION
7. INCOME PER SQUARE FOOT PER ANNUM FOR NEW INDUSTRIAL SPACE
8. INCOME PER SQUARE FOOT PER ANNUM FOR NEW RETAIL, OFFICE AND COMMUNITY SPACE
9. INCOME PER SQUARE FOOT PER ANNUM FOR NEW OTHER SPACE
10. INCOME PER UNIT PER MONTH FOR NEW RESIDENTIAL SPACE
11. T-D BANK PRIME COMMERCIAL LENDING RATE CHANGES
12. SELECTED CANADIAN INTEREST RATES AND BOND YIELDS
13. PRESENT RENTAL RATES COMPARED WITH NEW BASE RENTAL RATES
14. ESTIMATES OF ANNUAL TAX REVENUE FOR PROPOSED NEW PRIVATE CONSTRUCTION
15. PROPOSED TEN YEAR TAX FORGIVENESS PROGRAM
16. PROPOSED EXPENDITURES BY CATEGORY AND BY YEAR
17. PROPOSED FUNDING BY SOURCES AND BY YEAR
18. PROPOSED ANNUAL OPERATING BUDGET ITEMS

TABLE 1
 BASIC CHARACTERISTICS OF STUDY AREA
 BY LAND USE CATEGORY
AS OF JUNE, 1980

	<u>Residential</u>	<u>Commercial</u>	<u>Industrial</u>	<u>Institutional</u>	<u>Mixed</u>	<u>Vacant Land</u>	<u>Totals</u>
Number of Blocks							59
Number of Properties by Use	218	114	32	20	42	71	497
Land Area by Use in Square Feet	1,214,206	895,315	1,027,332	599,016	331,772	793,543	4,861,184
Land Area by Use in Acres	27.9	20.6	23.6	13.7	7.6	18.2	111.6
Land Area by Use in Square Meters	112,800	83,175	95,439	55,648	30,822	73,720	451,604
Land Area by Use in Per Cent	25.0	18.5	21.1	12.3	6.8	16.3	100.0

Source: Downtown Renewal Consultants Ltd. Survey

TABLE 2
COMPARATIVE ANALYSIS OF PRESENT AND PROPOSED COMMERCIAL SPACE
BY CATEGORY FOR DOWNTOWN AREAS "B", "C" AND "D"

	<u>Retail</u>		<u>Office and Financial</u>	
	<u>Present</u>	<u>Proposed</u>	<u>Present</u>	<u>Proposed</u>
<u>Area "B"</u>				
Existing	52,000	52,000	62,000	62,000
New				7,500
Sub-Totals	52,000	52,000	62,000	69,500
<u>Area "C"</u>				
Existing	28,500	24,000	27,000	22,000
New		54,000		34,000
Sub-Totals	28,500	78,000	27,000	56,000
<u>Area "D"</u>				
Existing	80,000	76,000	69,000	66,000
New		6,600		24,700
Sub-Totals	80,000	82,600	69,000	90,700
Totals	<u>160,500</u>	<u>212,600</u>	<u>158,000</u>	<u>216,200</u>

	<u>Retail</u>	<u>Office and Financial</u>
Square Foot Area Increase	52,100	58,200
Per Cent Increase	32.46	36.84

Source: Downtown Renewal Consultants Ltd. Survey
and Proposed Development Plan

TABLE 3
 SUMMARY OF PROPOSED NEW BUILDING AREAS
 BY CATEGORY AND GEOGRAPHIC AREA

	Area "A"	Downtown Area "B"	Downtown Area "C"	Downtown Area "D"	Southend Area "E"	Southend Area "F"	Milton	Downtown Waterfront Industrial	Totals
Retail (sq. ft.)			54,000	6,600			10,000		70,600
Office (sq. ft.)		7,500	34,000	24,700			14,000		80,200
Community (sq. ft.)	3,600	5,000	77,000	50,000					135,600
Industrial (sq. ft.)		10,000	14,000					53,000	77,000
Other (sq. ft.)			18,000						18,000
Residential (Units)	69			10	50				129

Source: Downtown Renewal Consultants Ltd. Proposed Development Plan

TABLE 4
SUMMARY OF PROPOSED NEW DOWNTOWN PUBLIC SPACES
BY CATEGORY AND GEOGRAPHIC AREA

	<u>Sidewalks sq. ft.</u>	<u>Pedestrian Street sq. ft.</u>	<u>Parking sq. ft.</u>	<u>Roads sq. ft.</u>	<u>Land Assembly sq. ft.</u>
Main	26,000				
Central	8,000			12,000	
Interior of Parking Lots	20,000				
Forest	8,000				
John		13,000			
Alma		3,000			
Brown		14,000			
Jenkins		3,000			
Hawthorne			86,000	30,000	
Collins			50,000		
Parking					86,000
Arena Site					<u>45,000</u>
Totals	<u>62,000</u>	<u>33,000</u>	<u>136,000</u>	<u>42,000</u>	<u>131,000</u>

Source: Downtown Renewal Consultants Ltd. Proposed Development Plan

TABLE 5
UNIT CAPITAL COST ESTIMATES
PROPOSED NEW CONSTRUCTION BY CATEGORY
(EXCLUDING LAND COSTS)

	<u>Design and Supervision</u>	<u>Interim Financing</u>	<u>Construction</u>	<u>Miscellaneous</u>	<u>Totals</u>
Retail (\$ per sq. ft.)	2.60	4.00	40.00	1.40	48.00
Office (\$ per sq. ft.)	2.60	4.00	40.00	1.40	48.00
Community (\$ per sq. ft.)	2.60	4.00	40.00	1.40	48.00
Industrial (\$ per sq. ft.)	1.95	3.00	30.00	1.05	36.00
Other (\$ per sq. ft.)	3.25	5.00	50.00	1.75	60.00
Residential (\$ per unit)	1,950.00	3,000.00	30,000.00	1,050.00	36,000.00
Sidewalks (\$ per sq. ft.)	.20	.20	2.00	.10	2.50
Pedestrian Street (\$ per sq. ft.)	.40	.40	4.00	.20	5.00
Parking (\$ per sq. ft.) - A	.10	.10	1.00	.05	1.25
- B	.12	.12	1.20	.06	1.50
Roads (\$ per sq. ft.)	.10	.10	1.00	.05	1.25

Source: Downtown Renewal Consultants Ltd.

TABLE 6
TOTAL CAPITAL COST ESTIMATES
PROPOSED NEW CONSTRUCTION BY CATEGORY
(EXCLUDING LAND COSTS)

	<u>Area in Sq. Ft.</u>	<u>Cost per Sq. Ft.</u>	<u>Project Costs</u>	<u>Per Cent of Total</u>
<u>Private Development</u>				
Retail	70,600	48.00	3,388,800	14.42
Office	80,200	48.00	3,849,600	16.38
Industrial	77,000	36.00	2,772,000	11.79
Residential (not sq. ft. but Units)	129	36,000.00	4,644,000	19.76
Other	18,000	60.00	<u>1,080,000</u>	4.59
Sub-Total			15,734,400	66.93
<u>Community and Public Development</u>				
Community	135,600	48.00	6,508,800	27.69
Sidewalks	62,000	2.50	155,000	.66
Pedestrian Street	33,000	5.00	165,000	.70
Parking - A	50,000	1.25	52,500)	
- B	86,000	1.50	129,000)	.81
Roads	42,000	1.25	52,500	.22
Underground Wiring and Street Lights			<u>700,000</u>	2.98
Sub-Total			<u>7,772,800</u>	33.07
Total			<u><u>23,507,200</u></u>	100.00

Source: Downtown Renewal Consultants Ltd.

TABLE 7
 INCOME PER SQUARE FOOT PER ANNUM REQUIRED TO SERVICE CAPITAL DEBT
 FOR INDUSTRIAL SPACE COSTING \$36.00 PER SQUARE FOOT
AT VARIOUS INTEREST RATES AND FOR VARIOUS AMORTIZATION PERIODS

<u>Interest Rate</u>	<u>Amortization Periods</u>				
	<u>10 yrs.</u>	<u>15 yrs.</u>	<u>20 yrs.</u>	<u>25 yrs.</u>	<u>30 yrs.</u>
10	5.66	4.59	4.11	3.86	3.73
11	5.89	4.84	4.39	4.16	4.03
12	6.13	5.10	4.67	4.46	4.35
13	6.36	5.37	4.96	4.76	4.66
14	6.61	5.64	5.24	5.07	4.99
15	6.85	5.91	5.55	5.38	5.31
16	7.10	6.19	5.85	5.70	5.63
17	7.35	6.47	6.15	6.02	5.96
18	7.61	6.76	6.46	6.33	6.29
19	7.86	7.05	6.76	6.66	6.61
20	8.12	7.34	7.07	6.98	6.94

Source: Downtown Renewal Consultants Ltd.

TABLE 8
 INCOME PER SQUARE FOOT PER ANNUM REQUIRED TO SERVICE CAPITAL DEBT
 FOR RETAIL, OFFICE AND COMMUNITY SPACE
 COSTING \$48.00 PER SQUARE FOOT
AT VARIOUS INTEREST RATES AND FOR VARIOUS AMORTIZATION PERIODS

Interest Rate	Amortization Periods				
	<u>10 yrs.</u>	<u>15 yrs.</u>	<u>20 yrs.</u>	<u>25 yrs.</u>	<u>30 yrs.</u>
10	7.55	6.12	5.48	5.15	4.97
11	7.86	6.46	5.85	5.54	5.38
12	8.17	6.81	6.23	5.94	5.80
13	8.49	7.16	6.61	6.35	6.22
14	8.81	7.52	7.00	6.76	6.65
15	9.14	7.89	7.39	7.18	7.08
16	9.47	8.26	7.79	7.60	7.51
17	9.80	8.63	8.20	8.02	7.94
18	10.14	9.01	8.61	8.45	8.38
19	10.49	9.40	9.02	8.87	8.82
20	10.83	9.78	9.43	9.30	9.25

Source: Downtown Renewal Consultants Ltd.

TABLE 9
 INCOME PER SQUARE FOOT PER ANNUM REQUIRED TO SERVICE CAPITAL DEBT
 FOR OTHER SPACE COSTING \$60.00 PER SQUARE FOOT
AT VARIOUS INTEREST RATES AND FOR VARIOUS AMORTIZATION PERIODS

<u>Interest Rate</u>	<u>Amortization Periods</u>				
	<u>10 yrs.</u>	<u>15 yrs.</u>	<u>20 yrs.</u>	<u>25 yrs.</u>	<u>30 yrs.</u>
10	9.44	7.65	6.85	6.44	6.21
11	9.82	8.07	7.31	6.93	6.72
12	10.21	8.51	7.78	7.43	7.25
13	10.61	8.95	8.26	7.94	7.77
14	11.01	9.40	8.75	8.45	8.31
15	11.42	9.86	9.24	8.97	8.85
16	11.83	10.32	9.74	9.50	9.39
17	12.25	10.79	10.25	10.03	9.93
18	12.68	11.27	10.76	10.56	10.48
19	13.11	11.75	11.27	11.09	11.02
20	13.54	12.23	11.79	11.63	11.57

Source: Downtown Renewal Consultants Ltd.

TABLE 10
 INCOME PER UNIT PER MONTH REQUIRED TO SERVICE CAPITAL DEBT
 FOR RESIDENTIAL SPACE COSTING \$36,000 PER UNIT
AT VARIOUS INTEREST RATES AND FOR VARIOUS AMORTIZATION PERIODS

Interest Rate	Amortization Periods				
	20 yrs.	25 yrs.	30 yrs.	35 yrs.	40 yrs.
10	343	322	311	304	300
11	366	347	336	330	327
12	389	371	362	357	355
13	413	397	389	385	382
14	437	423	415	412	410
15	462	449	442	439	438
16	487	475	469	467	466
17	512	501	497	494	494
18	538	528	524	522	521
19	564	555	551	550	549
20	589	581	578	577	577

Source: Downtown Renewal Consultants Ltd.

TABLE 11
T-D BANK PRIME COMMERCIAL LENDING RATE CHANGES
FOR THE PERIOD 1961 TO 1980 INCLUSIVE

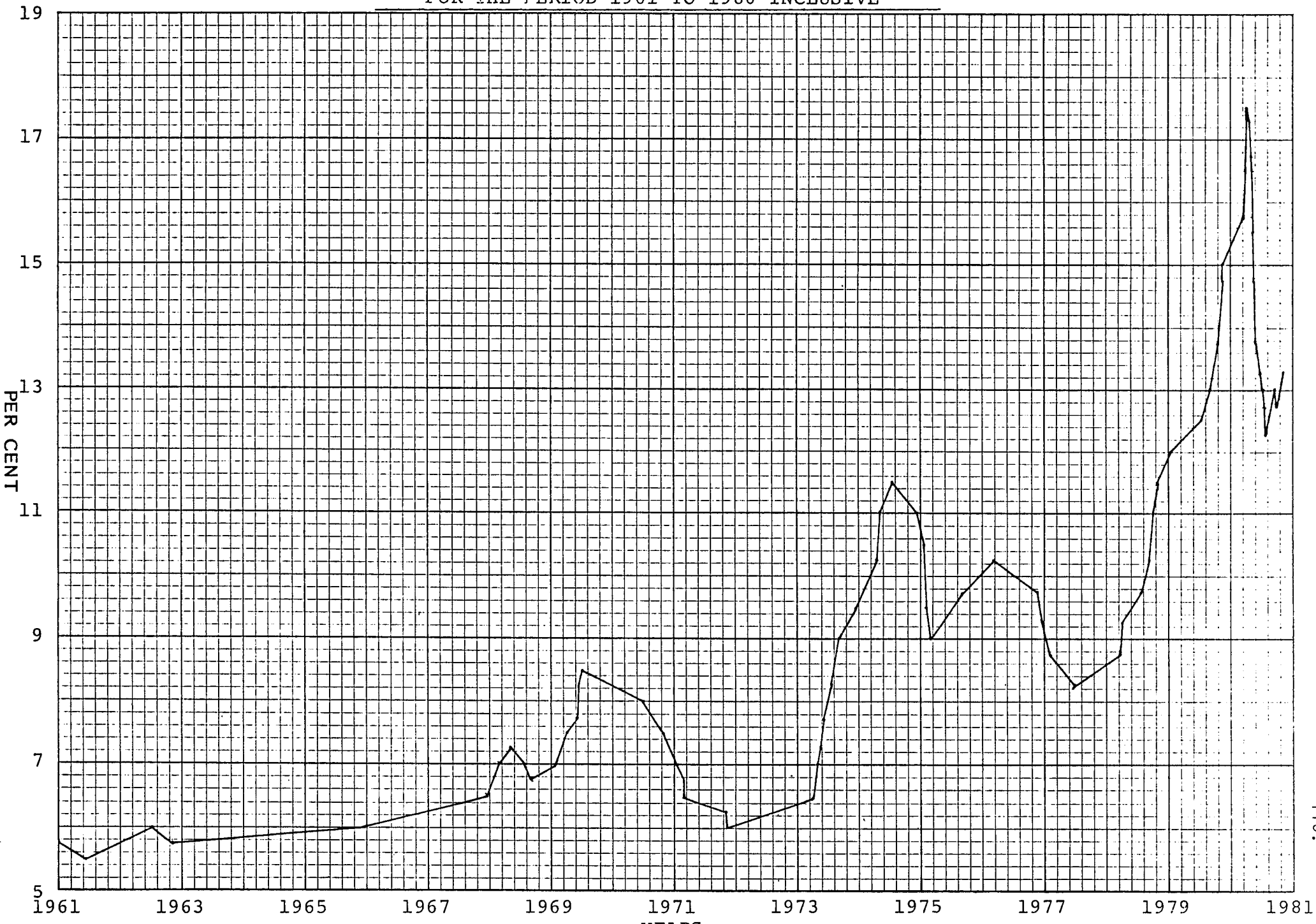


TABLE 12
SELECTED CANADIAN INTEREST RATES AND BOND YIELDS
BY QUARTER FOR YEARS 1971 TO 1980

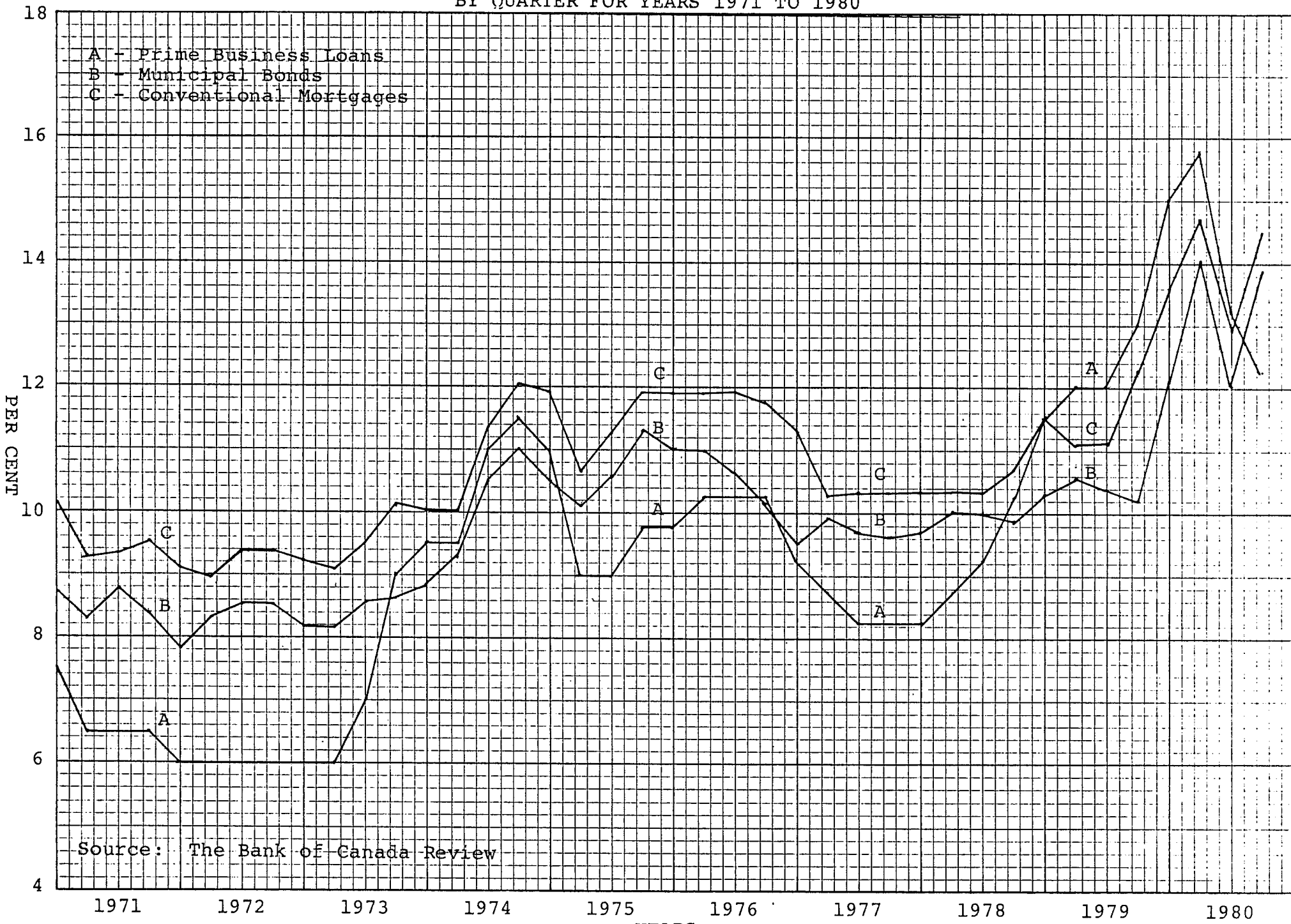


TABLE 13

PRESENT RENTAL RATES FOR THE STUDY AREA COMPARED WITH
 BASE RENTAL RATES FOR SELECTED MORTGAGE RATES AND AMORTIZATION PERIODS
 REQUIRED TO SERVICE THE PROPOSED NEW CONSTRUCTION
 FOR RETAIL, OFFICE AND RESIDENTIAL CATEGORIES

	<u>PRESENT RENTAL RATES FOR STUDY AREA</u>		<u>BASE RENTAL RATES REQUIRED TO SERVICE PROPOSED NEW CONSTRUCTION</u>		
	<u>LOW</u>	<u>HIGH</u>	<u>12%-25 yrs.</u>	<u>15%-25 yrs.</u>	<u>15%-20 yrs.</u>
Retail (per sq. ft. per annum)	2.50	6.00	5.94	7.18	7.39
Office (per sq. ft. per annum)	1.00	5.00	5.94	7.18	7.39
Residential (per unit per month)	100.00	300.00	371.00	449.00	462.00

Source: Downtown Renewal Consultants Ltd.

TABLE 14

ESTIMATES OF ANNUAL TAX REVENUE FOR PROPOSED NEW PRIVATE CONSTRUCTION
 BY CATEGORY AND BY TAXABLE VALUE PER SQUARE FOOT OR UNIT AND BY TOTAL TAXABLE VALUE
 BASED ON 1980 TAX RATES

	<u>1980 Tax Rate</u>	<u>Taxable Value per sq. ft./unit¹</u>	<u>Taxes per sq. ft./unit per annum</u>	<u>Total Taxable Value¹</u>	<u>Annual Taxes</u>
Retail Property	3.65	48.00	1.75	3,388,800	123,691
Office Property	3.65	48.00	1.75	3,849,600	140,510
Industrial Property	3.65	36.00	1.31	2,772,000	101,178
Residential Property (not sq. ft. but units)	2.10	36,000.00	756.00	4,644,000	97,524
Other Property	3.65	60.00	2.19	1,080,000	39,420
Business Occupancy	3.65			<u>4,015,021²</u>	<u>146,548</u>
Totals				<u>19,749,421</u>	<u>648,871</u>

1. See Table 6 this section

2. Based on the above commercial property values (total for retail, office, industrial and other) compared with the data in Table 5 of the section entitled "Building Review"

Source: Downtown Renewal Consultants Ltd.

TABLE 15
 PROPOSED TEN YEAR TAX FORGIVENESS PROGRAM
BASED ON TOTAL ANNUAL TAXES FROM TABLE

		<u>Total Annual Taxes</u>	<u>Annual Tax Forgiveness</u>	<u>Net Annual Tax Revenue</u>
Year 1	90/10	648,871	583,984	64,887
Year 2	80/20	648,871	519,097	129,774
Year 3	70/30	648,871	454,210	194,661
Year 4	60/40	648,871	389,323	259,548
Year 5	50/50	648,871	324,435	324,436
Year 6	40/60	648,871	259,548	389,323
Year 7	30/70	648,871	194,661	454,210
Year 8	20/80	648,871	129,774	519,097
Year 9	10/90	648,871	64,887	583,984
Year 10	0/100	<u>648,871</u>	<u>-</u>	<u>648,871</u>
Totals		<u>6,488,710</u>	<u>2,919,919</u>	<u>3,568,791</u>

Source: Downtown Renewal Consultants Ltd.

TABLE 16
 PROPOSED EXPENDITURES¹ BY CATEGORY AND BY YEAR
 FOR THE FIVE YEAR PERIOD 1981 TO 1985 INCLUSIVE
YARMOUTH DOWNTOWN DEVELOPMENT CORPORATION

	<u>1981</u>	<u>1982</u>	<u>1983</u>	<u>1984</u>	<u>1985</u>	<u>Totals</u>
Infrastructure ²		180,000	230,000	300,000	543,500	1,253,500
Land Assembly ³	680,000	500,000	450,000	370,000		2,000,000
Operating ⁴	<u>150,000</u>	<u>150,000</u>	<u>150,000</u>	<u>150,000</u>	<u>150,000</u>	<u>750,000</u>
Totals	<u>830,000</u>	<u>830,000</u>	<u>830,000</u>	<u>820,000</u>	<u>693,500</u>	<u>4,003,500</u>

1. Excludes private and community development projects.
2. Infrastructure consists of sidewalks, pedestrian street, parking, roads and underground wiring and street lights as presented in Table 6 of this section.
3. Land assembly consists of land purchase costs, appraised fees, survey fees, realtor fees, legal fees and any other costs associated with the acquisition of land.
4. A proposed operating budget is presented in Table 18.

Note: Proposed expenditures are in 1980 dollars and, therefore, make no provision for inflation.

Source: Downtown Renewal Consultants Ltd.

TABLE 17
 PROPOSED FUNDING¹ BY SOURCES AND BY YEAR
 FOR THE FIVE YEAR PERIOD 1981 - 1985 INCLUSIVE
YARMOUTH DOWNTOWN DEVELOPMENT CORPORATION

	<u>1981</u>	<u>1982</u>	<u>1983</u>	<u>1984</u>	<u>1985</u>	<u>Totals</u>
Province - Mainstreet Program	498,000	498,000	498,000	492,000	416,100	2,402,100
Town of Yarmouth	166,000	166,000	166,000	164,000	138,700	800,700
Downtown Business Community	<u>166,000</u>	<u>166,000</u>	<u>166,000</u>	<u>164,000</u>	<u>138,700</u>	<u>800,700</u>
Totals	<u>830,000</u>	<u>830,000</u>	<u>830,000</u>	<u>820,000</u>	<u>693,500</u>	<u>4,003,500</u>

1. Excludes private and community development projects.

Note: Proposed funding is in 1980 dollars and, therefore, makes no provision for inflation.

Source: Downtown Renewl Consultants Ltd.

TABLE 18
PROPOSED ANNUAL OPERATING BUDGET ITEMS
YARMOUTH DOWNTOWN DEVELOPMENT CORPORATION

Meetings (lunches, dinners, receptions, etc.)
Office Supplies
Travel
Directors Fees
Publicity and Promotion
Preliminary Studies¹
Telephone
Professional Fees (legal and accounting)
Wages and Benefits
Office Space (1,000 sq. ft.)
Furniture and Equipment
Equipment Rental (Xerox, etc.)

1. This item is intended to provide modest resources to do simple preliminary studies and concept plans to help stimulate private development.

Source: Downtown Renewal Consultants Ltd.

ORGANIZATION FOR IMPLEMENTATION

An appropriate and an effective organization is necessary for implementing the proposals for the redevelopment and revitalization of the Yarmouth Downtown and Waterfront areas.

It is recommended that a limited company be established under "The Nova Scotia Companies Act 1967". It is proposed that the name of the limited company be "Yarmouth Downtown Development Corporation".

The goal proposed for the new company is, "to help improve the economic and social life of the Town of Yarmouth". The objectives of the Yarmouth Downtown Development Corporation are proposed as follows:

1. To redevelop and to revitalize the Yarmouth Downtown area,
2. To improve the Yarmouth Waterfront area including its accessibility, attractiveness and utilization,
3. To repopulate the Downtown area by improving residential accommodations and surroundings,
4. To, wherever possible, retain streetscapes or building facades of historic or architectural merit, and
5. To promote and encourage commercial expansion in the Downtown and Waterfront areas.

Three different proposals for the shareholder structure and for the nominations to the Board of Directors are presented in Exhibit "A". Any one of the three proposals should prove to

be functional, however, the final recommendation for an appropriate shareholder structure is left to the BID Committee. It is strongly recommended that the Board of Directors of the Corporation consist of no fewer than five members and no more than ten members. Fewer than five Board members may not allow for enough input into the decision-making process whereas more than ten Board members can become very unwieldy and can cause unnecessarily lengthy meetings.

It is recommended that the By-laws of the Corporation provide for the Board of Directors to elect a Chairman and a Vice-Chairman from its membership. It is further recommended that the By-laws of the Corporation make provision for the offices of President, Vice-President, and Secretary-Treasurer with the offices to be filled by the Board of Directors by election from its membership.

The By-laws of the Corporation should provide the flexibility and authority necessary for the Board of Directors to fulfill the mandate of the Corporation. Of course, it goes without saying that the Board of Directors must conduct its affairs in a responsible manner on behalf of the shareholders of the company.

In order for the company to be considered as a non-taxable corporation for corporate income tax purposes, it is recommended that the shareholders formally agree not to declare nor pay dividends.

Information on the corporate structure and By-laws of the Truro Development Corporation Limited, the Amherst Downtown Development Corporation, and the Charlottetown Area Development Corporation has been given to Mr. Walter Boudreau, Co-Chairman of the Yarmouth Business Improvement District Committee, for reference purposes..

It is recommended that the By-laws of the Corporation make provision for the appointment of a General Manager of the Corporation. A proposed terms of reference and statement of duties for the position of General Manager is attached as Exhibit "B". It is recommended that the General Manager not be a Director of the Corporation.

It is recommended that the General Manager employ a Secretary to carry out the secretarial, clerical, and bookkeeping functions of the Corporation. The necessary action should be taken to fill the positions of General Manager and Secretary at an early date.

It is recommended that the General Manager keep the Minutes for Meetings of the Shareholders and that the General Manager's Secretary (under the direction of the General Manager) keep the Minutes for Meetings of the Board of Directors.

It is suggested that the Corporation will require approximately 1,000 sq. ft. of appropriate office space to provide for a general office where the Secretary will be located, for an office for the General Manager, and for a Boardroom. The offices of the Corporation should be located

in the Downtown area and should be easily accessible to the public.

The proposed list of annual operating budget items for the Corporation is contained in Table 18 of the section entitled "Characteristics and Economics". In addition to the proposed list of annual operating budget items, Tables 16 and 17 of the section entitled "Characteristics and Economics" suggest proposed expenditures by category and by year and proposed funding by sources and by year for the Corporation.

It is recommended that the necessary steps be taken immediately to establish the Yarmouth Downtown Development Corporation, to appoint a General Manager and a Secretary, to lease appropriate office space, and to purchase the necessary furniture and equipment.

COMMON SHARE STRUCTURE AND BOARD OF DIRECTORS COMPOSITION PROPOSALS

YARMOUTH DOWNTOWN DEVELOPMENT CORPORATION

	Proposal No. 1			Proposal No. 2			Proposal No. 3		
	Per Cent of Shares	Number of Board Members	or Number of Board Members	Per Cent of Shares	Number of Board Members	or Number of Board Members	Per Cent of Shares	Number of Board Members	or Number of Board Members
Province of Nova Scotia	60	3	6						
Town of Yarmouth	20	1	2	20	1	2	50	3	4
Business Improvement District Committee				60	3	6			
Downtown Business Community	<u>20</u>	<u>1</u>	<u>2</u>	<u>20</u>	<u>1</u>	<u>2</u>	<u>50</u>	<u>3</u>	<u>4</u>
Totals	<u>100</u>	<u>5</u>	<u>10</u>	<u>100</u>	<u>5</u>	<u>10</u>	<u>100</u>	<u>6</u>	<u>8</u>

PROPOSED TERMS OF REFERENCE AND STATEMENT OF DUTIES
FOR
THE GENERAL MANAGER OF THE YARMOUTH DOWNTOWN DEVELOPMENT CORPORATION

1. TERMS OF REFERENCE

The General Manager of the Corporation is responsible to the Board of Directors of the Yarmouth Downtown Development Corporation in three general areas as follows:

- A. to assist the Board to set policy and make decisions,
- B. to administer the affairs of the Corporation, and
- C. to co-ordinate and manage the implementation of projects of the Corporation to meet specified objectives.

2. STATEMENT OF DUTIES

Subject to direction and approval by the Board:

- A. To assist the Board to set policy and make decisions
 - (a) by identifying alternatives for consideration by the Board,
 - (b) by drafting policy statements for approval by the Board,
 - (c) by submitting programs, budgets, plans and projects in appropriate form for approval of the Board, and
 - (d) by implementing decisions of the Board and by informing the Board of progress.

- B. To administer the affairs of the Corporation
- (a) by representing the Corporation on a day-to-day basis,
 - (b) by maintaining liaison with governments and other agencies by establishing a public relations program,
 - (c) by undertaking forward planning and on this basis to develop plans, programs, and budgets for approval by the Board,
 - (d) by defining specific projects for approval by the Board,
 - (e) by selecting consultants for approval by the Board and by administering consultants to assist in developing plans, programs, budgets and projects,
 - (f) by identifying sources of financing, by arranging financing, and by administering funds of the Corporation in accordance with requirements,
 - (g) by administering legal, accounting and other services required by the Corporation,
 - (h) by establishing and maintaining financial and administrative controls on the affairs of the Corporation,
 - (i) by supervising construction and other tendering processes for contracts of the Corporation,

- (j) by supervising the preparation of legal documents for execution by the Corporation,
 - (k) by arranging for property acquisition by the Corporation, and
 - (l) by managing properties acquired for, or developed by, the Corporation.
- C. To co-ordinate and manage the implementation of projects of the Corporation to meet specified objectives
- (a) by setting out for approval by the Board plans for project implementation specifying scope and functions of project; plans, budgets, and schedules; and proposed project management,
 - (b) by retaining project management upon approval by the Board, in accordance with a contract which specifies objectives, restraints, and responsibilities,
 - (c) by establishing with the project management programs to monitor performance, and
 - (d) by monitoring performance on each project to ensure attainment of objectives.

PROJECT IMPLEMENTATION

Typical commercial development project

1. Define scope, function, budget
2. Manage design to meet specified objectives

3. Prepare tenders for construction
4. Negotiate, recommend construction contracts
5. Supervise construction to completion
6. Prepare marketing and leasing programs
7. Negotiate, recommend leases, sales, etc.
8. Organize commencement of operations
9. Assist in securing long-term financing
10. Assist in establishing property management

APPENDICES

YARMOUTH SOCIO-ECONOMIC PROFILE

POPULATION

A. Growth Trends

The rate of population expansion in Yarmouth County over the period 1951 to 1976 was considerably slower than that of the Province of Nova Scotia as a whole, as the data in Table 1 indicates. The population of Nova Scotia grew by less than half of the 61.3 per cent growth in the Canadian population from 1951 to 1976. The number of Yarmouth County residents expanded by only 10.6 per cent over the same 25 year period at a rate only a bit over one-third as quickly as the relatively slow provincial showing. This, in itself, is representative of rather sluggish industrial development in Yarmouth County over the last few decades.

B. Geographic Distribution

The distribution of the Yarmouth County population changed in a fashion similar to many other parts of Canada during the 1961 to 1976 period. The Town of Yarmouth lost a number of its residents to the neighboring areas of Yarmouth and Argyle municipalities.

The 1976 Census data in Table 2 indicate that there was a larger proportion of the Yarmouth County population in rural areas (61.3 per cent) than the comparable proportion for Nova Scotia (44.2 per cent). Most of the Yarmouth County residents are, however, within easy commuting distance to the Town itself.

Escalating oil prices have had a significant influence in the revitalization of urban areas in other parts of Canada and in the United States and they could well serve as a stimulus to a regaining of the

population and increased importance of the Town of Yarmouth where most of the South Western Nova Scotia Regional community services are now concentrated. Rising transportation fuel costs are expected to continue their rapid upward climb.

C. Age Distribution

The population of Yarmouth County includes a higher proportion of "dependent" persons (i.e. 65 years of age and over) than does the Province (see Table 3). Both the County and the Province experienced an aging of their overall populations from 1971 to 1976. However, while 8.6 per cent of the male population and 10.8 per cent of the female residents of the entire Province were 65 and over, the 1976 Census showed that the corresponding figures for Yarmouth County were 11.5 per cent and 14.3 per cent respectively. These figures are another reflection of the relatively static economic situation which has characterized the County for a considerable number of years. One probable cause of its high proportion of dependent persons might have been the out-migration of its younger people to areas with more promising employment opportunities. This factor tends to somewhat inhibit the potential for industrial growth in the County because the productive capacity of the population is more limited and a higher percentage of its resources must be devoted to such expenditures as health care and housing for the aged. In addition, the tax base available to this area is more restricted because a smaller proportion of its population are in the normally more "productive" income-generating age range of 15-64.

THE LABOUR MARKET

A. Employment Growth

The data in Table 4 indicate that the employment level in Yarmouth County grew by only 2.9 per cent to a level of 8,330 during the period between the 1971 and 1976 census. This performance trailed substantially behind the percentage increase in Nova Scotia jobs (10.6 per cent) and in total national jobs (17.8 per cent) during the same time frame.

The participation rate data also reflect the variance in economic activity within the three areas (Canada, Nova Scotia and Yarmouth County) between the 1971 and the 1976 census. The proportion of the Yarmouth County working age population (15 years of age and over) who either worked or sought employment actually declined by a half percentage point over the five year period, while the Nova Scotia and Canadian rates rose by 0.7 and 2.0 per cent respectively. The larger national increase in participation rates was reflective of an economic growth far more buoyant than that of Nova Scotia, especially Yarmouth County.

B. Unemployment / Labour Market Surplus Data

The unemployment rate for Yarmouth County was 9.7 per cent according to the 1976 Census. The same report indicated that the comparable provincial and national rates were 9.2 and 6.8 per cent respectively.

The census data do not adequately reflect the true disparity in unemployment between the three areas mentioned above because they are tabulated at June 1, a period of high seasonal employment in

Yarmouth County. The County had 11.6 per cent of its labour force engaged in the seasonal activity of fishing (according to the 1971 Census (see Table 5). The comparable percentages for Nova Scotia and Canada were 2.0 and 0.3 per cent respectively. An examination of the Table 6 figures indicates that processing (primarily fish products) is a far more important activity in Yarmouth County (13.1 per cent of its labour force) than for Nova Scotia as a whole (2.3 per cent).

Employment activity in fishing and related processing is buoyant in June but very low during the winter months. Canada Employment and Immigration Commission data indicates the number of unemployment insurance beneficiaries in the Yarmouth Canada Employment Centre area (includes Yarmouth, Shelburne, Digby and part of Annapolis Counties) varied radically from 9,211 in February to 1,549 in September, 1979. While it is well recognized that unemployment insurance beneficiaries are not identical to the Statistics Canada concept of unemployment, the former does afford an interesting year round and more recent reflection of labour surplus for areas such as the Yarmouth Canada Employment Centre (C.E.C.).

The data in Table 7 show that the 1979 proportion of labour force participants who were unemployment insurance beneficiaries was 16.9 per cent in the Yarmouth C.E.C. areas as opposed to 10.7 per cent in Nova Scotia and 6.4 per cent for a national average. As previously mentioned, the Yarmouth C.E.C. area encompasses several counties in the South Western part of the Province. These counties are, however, very similar in that their economies are heavily dependent on fishing,

on related processing and services and on trade activities heavily reliant on tourism. Hence, the labour surplus rate for the Yarmouth C.E.C. is also very indicative of the proportion of people without jobs for Yarmouth County.

C. Education Attainment of the Labour Force

The labour force of Yarmouth County had a lower academic achievement level than that of either Nova Scotia or Canada as of the 1976 Census (see Table 8). Whereas less than one in five of the latter two areas' labour forces had less than Grade 9 as an educational attainment, there were more than one-quarter of the Yarmouth County labour force at the lower grade achievement level.

As in other parts of the nation, the youth (aged 15 - 24) of Yarmouth County have received a better formal education. These young people, therefore, have the potential to acquire the occupational skills required by future industrial development in the County.

INCOME

Given the fact the Yarmouth County's economy relies heavily on the seasonal and relatively low-skilled occupations related to the fishery and related processing, it is not surprising that the average income level of its work force was approximately 15 per cent less than the Provincial average in 1976 (see Table 9). The latter average was, in turn, 11 per cent lower than the Canadian average. Note that, during the period 1970 to 1976, Yarmouth County did not show any noticeable improvement in income averages relative to the Province. The lower portion of the same table indicates that the Province, as a whole, had 36.2 per cent of its income tax filers who earned \$10,000 or more while only 24.2 per cent of the Yarmouth County filers fell in this income group.

The profile of Yarmouth County to this point is indicative of many areas in the Atlantic Region which are underdeveloped and heavily dependent on seasonal employment related to the primary sector, in this case, fishing. Expansion in population and employment has been slow here and high unemployment is a persistent reality. Reported income from the Department of National Revenue and Taxation is low. Yet, there are other somewhat less measurable factors which lead one to reconsider this gloomy image of Yarmouth County. As the 1977 study regarding the Economic and Social Base of South Western Nova Scotia phrased it:

"There is relatively little apparent poverty. Home ownership is wide spread and the quality of housing stock is good.

Non-monetary supplements to family income such as large gardens, family woodlots, fishing for home consumption, exchanges of labour and services within the family or the community (especially in house and vehicle repairs) is very extensive. One could argue that the standard of living supported by the relatively low family incomes is as high or higher than that found in more financially prosperous and economically "active" areas of the country. This is so without even mentioning the amenities of the rural environment - the back country, the sea and the fresh, clean air."

In addition to these factors, a portion of the Yarmouth labour force is able to repair housing, boats, cars and tend to their own woodlot requirements while drawing unemployment insurance benefits during periods of seasonal economic downturn.

HOUSING

The building permit data from Statistics Canada indicate that the bulk of construction activity in Yarmouth County consisted of residential units (see Table 10). Most of these units were constructed in the Municipalities of Yarmouth and Argyle. The Town of Yarmouth accounted for only 54 of the 233 units constructed within the entire County during 1975. The building permit data also indicate that the volume of dwelling units constructed, similar to many other parts of Canada, has declined from 233 in 1975 to 208 in 1978.

The data in Table 10 indicate that during the period from the 1971 to the 1976 Census the degree of dwelling ownership in Yarmouth County grew at a rate exceeding that of the Province. It is interesting to note that the rural areas of Yarmouth County had a much higher percentage of ownership than the Town itself. It was observed in the Initial section of the Yarmouth Socio-Economic Profile that the Town had lost residents principally to the municipality of Yarmouth.

The Town contains a number of older residential and office buildings where the rents for accommodation are quite low. However, the local Canada Mortgage and Housing Corporation office asserts that new rental units are needed because ones recently built have been filled before completion even though their rents are considerably higher than the older accommodations. As a general comment, one should note that not only the rental rates but the sales price of houses in Yarmouth are low by provincial and national standards. This coupled with the availability of very reasonably priced land should serve as a positive factor in encouraging economic growth.

TRANSPORTATION

The Town of Yarmouth continues to be the transportation hub for the South Western Region. It is almost equidistant from Halifax via Highways 1 and 101 through the Annapolis Valley or Routes 3 and 103 via the South Shore. It is the closest sizable port to the New England coast.

Freight service is available through the Canadian National Railway along the South Shore or the Canadian Pacific Dominion Atlantic Railway through the Annapolis Valley. The DAR runs a daily passenger service to Halifax.

Air service proceeds from Halifax to Boston through Yarmouth. Additional runs between Halifax and Yarmouth are conducted by Coastal Airways.

Canadian National Marine and the Lion Ferry operate three vessels between Maine, U.S.A. and Yarmouth. These vessels are used for both automobile and commercial traffic (particularly fish products), but there are times when the speed of freight delivery has been delayed considerably. This is a major concern to fish processors who require speed and certainty of delivery to the New England export market. During the last 18 months the number of commercial units on the Maine to Yarmouth runs have shown noticeable increases as the table on the following page indicates. Hence, some means of accommodating both the automobile and commercial traffic satisfactorily should be developed within the limited government and private industry resources now available for the ferry systems.

COMMERCIAL TRAFFIC
MAINE, U.S.A. TO YARMOUTH

	Number of Commercial Units	% Increase (Decrease) over previous identical period
1979	1482	12.4
Jan.-July 1980	1016	29.4

INDUSTRIAL OVERVIEW

A. Fisheries, Processing and Marine Services

Harvesting the sea is the most important goods-producing activity of Yarmouth County. The principal stocks caught include lobster, scallops and herring. The groundfish stocks are repleting themselves due to the implementation of the 200 mile economic fishing zone. However, even after the high catch size for the 1979 season, these species accounted for only 11.7 per cent of the total landed value of fish landings reported for the County (see Table 11). The lobster and scallop (shellfish) segment of the fishing industry delivered 69 per cent landed seafish value during the same year. Gains in shellfish landed value from 1975 to 1979 were accompanied by significant improvement in the landed value of the pelagic species (principally herring). Despite a large output drop in the latter species, its landed value rose because a significant shift took place in processing herring from the low value added product for industrial use to herring for human consumption, with a far higher market price.

The rapid growth rate in quantities and landed values of seafish species between 1975 and 1978 decelerated in 1979 for Nova Scotia. In Yarmouth County's case, the output indicators actually showed a decline last year. The recent Green Paper "Toward An Economic Development Strategy for Nova Scotia" indicated that "...two of Nova Scotia's most valuable species (scallops and lobster) are not likely to experience increasing catches" over the next few years. Furthermore, the market for lobster has softened and further

significant price improvements are not likely. The dispute between Canada and the United States over ownership and control of the George's Bank scallop fishing grounds constitutes another dampening feature of the outlook in this sector.

Given the rather lacklustre outlook for growth in the fisheries, employment gains in the related processing industry will probably be much lower than those posted over the last few years. Moderate employment gains in the fisheries and related processing are possible providing that certain opportunities are exploited. The principal one entails improving the quality of fish to stimulate increased exports and generate higher value added. A second involves the potential for further developing the recreational fishery as a part of a tourism strategy. Fleet modernization could lead to increased productivity and improved fish quality. This development is quite contingent upon government financing assistance.

The figures in Table 12 demonstrate the importance of the fishery to Yarmouth Town. Six hundred and twenty of the 1338 manufacturing jobs in the Town involved fish processing. Another 161 of the total manufacturing jobs involved boat building and marine fabricating and repair. This attests to the fact that the Town, with its good transportation links (especially to the New England export market), has become the fisheries service centre for South Western Nova Scotia.

Yarmouth can strengthen its participation in boatbuilding should the potential for growth in the fisheries sector be realized.

B. Forestry

The data in Table 5 indicated that only 0.7 per cent of the Yarmouth County 1971 Census labour force were engaged in the Forestry industry. Production figures in Table 13 demonstrate that the output of sawn lumber in the County declined noticeably from 4.0 per cent of provincial output in 1971 to 2.1 per cent by 1977. Pulpwood production remained at a low 1.1 per cent of provincial output.

The industry still remains a necessary adjunct to the dominant fishing industry. Wood is readily available for building boats, lobster traps, fish boxes and pallets. In addition, it provides a source of home heat.

The potential for expansion in this sector is constrained by two factors. Firstly, there is an inadequate quantity to support a highly efficient capital intensive industry. Secondly, the first growth timber has been cut without sufficient reforestation in time to allow for wood of optimum dimensions for productive efficiency. Local production can only compete in highly specialized markets such as those dealing with fishing and related processing.

C. Other Manufacturing

The textile and clothing firms located in the Town of Yarmouth are another major source of employment. As Table 12 demonstrates, 430 persons work for these firms.

TOURISM

Tourism is an important activity in that it stimulates employment growth in a number of industrial sectors; especially in food and accommodation services and retail trade.

The Town of Yarmouth is one of Nova Scotia's entry points for tourists visiting the region. Yarmouth is the terminus of the Dominion Atlantic Railway, the Canadian National Railway Halifax route and Highway Routes 1 and 3. The principal entry means are the three ferries operating between the Town and the ports of Bar Harbour and Portland, Maine. Air Canada offers flights between Halifax and the United States through Yarmouth.

The Nova Scotia Department of Tourism 1978 Report on Visitor Travel indicated that the number of non-resident automobiles entering the Province through Yarmouth during that year was 23,750; up 13.8 per cent over the poor 1977 performance (see Table 14). The 1978 tourist flow was, however, considerably below that of 1975 which represented the peak point of the rapid growth in visitors which had commenced during the late sixties and continued through the early 1970's. Yarmouth had 6.0 per cent of the non-resident automobile traffic entering the Province during 1978. The Town received 41 per cent of the buses entering the Province during the June to October tourist season of that year. The bus tour is becoming more predominant as a means of visiting on vacation due in good measure to rapidly rising energy prices.

More recent data on overall ferry traffic flows between Maine and Yarmouth indicate that a considerable drop in most passenger vehicle traffic apart from buses and motorcycles and bicycles occurred during last year in comparison to 1978 (see Table 15). Although these figures would include a small proportion of Nova Scotia resident traffic returning home (21 per cent in 1978), they serve as a good reflection of tourist flow trends. These data show a 15.5 per cent overall drop in ferry passenger vehicle traffic from Maine to Yarmouth in 1979. The cumulative figures for January to July, 1980 indicate a substantial 38.8 per cent passenger vehicle gain over the comparable period for 1979.

Although air travel brought only 2,572 non-resident air travellers into Yarmouth (1978 Air Travel Report, Nova Scotia Department of Tourism) during the 1978 season (May 15 to October 31), 89.2 per cent of them are there on vacation rather than business. Their expenditures would, therefore, have a noticeable impact on Yarmouth tourism revenues.

The foregoing data indicate that Yarmouth will probably continue to attract a large number of tourists, despite the constraints of rising fuel price and a relatively short season. The challenge the Town faces is to extend the stay of tourists within the area. It has the potential resources to accomplish this - fine old homes, a working waterfront, the Yarmouth County Historical Museum with its excellent collection of nautical memorabilia and the Firefighters Museum, to name a few. The surrounding countryside holds the possibility

of fishing, touring the beautiful coastline, hunting and antique shopping. Nearby villages have strong Acadian and Loyalist historical significance and are a source of high quality crafts.

RETAIL TRADE

The volume of retail sales in Yarmouth County was estimated at 63,300,000 by the 1980 Financial Post Survey of Markets (see Table 16). This represented 2.5 per cent of total provincial sales, down from a comparable figure of 2.7 per cent from the 1971 Census. The slight percentage decline resulted from both the slower population growth in Yarmouth County discussed in an earlier portion of this overview combined with a smaller expansion in per capita sales there in relation to the entire Province. One must note, however, that the estimated 1979 per capita disposable income for Yarmouth County at \$3,990 was only 68.6 per cent of the comparable provincial figure (see Table 17). The relatively low per capita disposable income acts as a constraint on the potential for expansion of retail trade in the County apart from that which would arise from any forthcoming increase in tourism related expenditures.

The estimated 1979 retail sales for Digby and Shelburne County also appear in Table 16. One can see that Yarmouth County with estimated 1979 retail sales of 63.3 million dollars exceeded the performance of Digby and Shelburne Counties at 53.9 and 38.3 million dollars respectively.

The Town of Yarmouth and the nearby Municipality of Yarmouth with the Yarmouth Mall, K-Mart Plaza and downtown section possess shopping facilities which are superior to those of the two neighboring counties. Hence, the Yarmouth retail facilities draw a proportion of

the retail trade away from Digby and Shelburne Counties. It is also commonly recognized that the two shopping malls mentioned above have drawn retail shoppers away from the merchants of downtown Yarmouth.

PUBLIC ADMINISTRATION, HEALTH AND EDUCATION SERVICES

These institutional segments provide non-seasonal high income employment and, therefore, constitute a strong and more stable component of a particular area's economy. The figures in Table 18 indicate that Yarmouth County, with 832 such employees, is less dependent on provincial government, health and educational services on a per capita basis than the Province as a whole, Digby or Shelburne Counties.

The Town of Yarmouth is the work site for a good portion of the provincial employees mentioned above. The Town contains the Hospital for the South Western Region as well as a number of major schools. In addition it houses the Regional Centre for Federal Fisheries and other federal offices such as the Canada Employment Centre.

Given the emphasis on budgetary restraint and declining school enrolments, government, education and health services cannot be expected to grow appreciably, if at all, in future. These sectors will nevertheless provide a stabilizing element in the Town's future economy.

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FOR
YARMOUTH SOCIO-ECONOMIC PROFILE

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TABLE 1
POPULATION GROWTH,
YARMOUTH COUNTY, NOVA SCOTIA AND CANADA

	<u>1951</u>	<u>1961</u>	<u>1966</u>	<u>1971</u>	<u>1976</u>
CANADA	14,009,429	18,238,247	20,014,880	21,568,311	22,598,016
NOVA SCOTIA	642,584	737,007	756,039	788,960	828,571
Yarmouth County	22,794	23,386	23,552	24,682	25,210
Yarmouth	8,106	8,636	8,319	8,516	7,801
Argyle, municipality	7,812	7,810	8,117	8,517	8,618
Yarmouth, municipality	6,865	6,935	7,104	7,640	8,767
Indian Reserves	11	5	12	9	24
 <u>INDEX OF POPULATION GROWTH</u> (1951= 100.0)					
CANADA	100.0	130.2	142.9	154.0	161.3
NOVA SCOTIA	100.0	114.7	117.7	122.8	128.9
Yarmouth County	100.0	102.6	103.3	108.3	110.6
Yarmouth	100.0	106.5	102.6	105.1	96.2
Argyle, municipality	100.0	100.0	103.9	109.0	110.3
Yarmouth, municipality	100.0	101.0	103.5	111.3	127.7
Indian Reserves	100.0	45.4	109.1	81.8	218.2

Source: Statistics Canada, Census of Canada, and
Yarmouth County Statistical Profile

TABLE 2
RURAL AND URBAN POPULATION DISTRIBUTION
NOVA SCOTIA AND YARMOUTH COUNTY

	NOVA SCOTIA				YARMOUTH COUNTY			
	Number		%		Number		%	
	<u>1971</u>	<u>1976</u>	<u>1971</u>	<u>1976</u>	<u>1971</u>	<u>1976</u>	<u>1971</u>	<u>1976</u>
Rural	330,980	365,985	42.0	44.2	14,230	15,460	57.6	61.3
Non-Farm	316,030	353,506	40.1	42.7	13,845	15,168	56.1	60.2
Farm	14,950	12,479	1.9	1.5	385	292	1.5	1.1
Urban	457,975	462,590	58.0	55.8	10,455	9,750	42.4	38.7
Total	788,960	828,570	100.0	100.0	24,685	25,210	100.0	100.0

SOURCE: Statistics Canada, Census of Canada, and Yarmouth County Statistical Profile

TABLE 3
AGE-SEX, % DISTRIBUTION OF THE POPULATION
NOVA SCOTIA AND YARMOUTH COUNTY

	NOVA SCOTIA				YARMOUTH COUNTY			
	1971		1976		1971		1976	
	<u>Male</u> %	<u>Female</u> %	<u>Male</u> %	<u>Female</u> %	<u>Male</u> %	<u>Female</u> %	<u>Male</u> %	<u>Female</u> %
0-14	31.1	29.9	27.7	26.3	29.5	28.1	27.3	24.9
15-24	19.1	18.6	20.0	19.1	18.8	17.8	18.3	17.7
25-34	12.3	11.9	15.0	14.6	10.3	10.1	14.1	13.1
35-44	10.3	10.3	10.4	10.1	8.9	9.2	8.6	8.9
45-64	18.9	19.1	18.2	19.1	21.0	21.1	20.2	21.0
65 +	8.3	10.1	8.6	10.8	11.4	13.8	11.5	14.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
TOTAL NUMBER	396,470	392,490	414,155	414,420	12,310	12,375	12,455	12,760

SOURCE: Statistics Canada, Census of Canada, and
Yarmouth County Statistical Profile

TABLE 4
 LABOUR MARKET CHANGES
 YARMOUTH COUNTY, NOVA SCOTIA AND CANADA
 1971 to 1976 Census

	Population 15 +	Labour Force	Employment	Unemployment	Unemployment Rate	Participatio Rate
<u>Yarmouth County</u>						
A. 1971	17,560	8,795	8,095	700	8.0	50.1
B. 1976	18,630	9,220	8,330	890	9.7	49.5
% change B over A	6.1	4.8	2.9	27.1	1.7	-0.5
<u>Nova Scotia</u>						
A. 1971	548,240	292,135	268,325	23,805	8.1	53.3
B. 1976	604,840	326,855	296,745	30,115	9.2	54.0
% change B over A	10.3	11.9	10.6	26.5	1.1	0.7
<u>Canada</u>						
A. 1971	15,189,505	8,813,345	8,117,380	695,960	7.9	58.0
B. 1976	17,096,430	10,261,660	9,561,695	699,965	6.8	60.0
% change B over A	12.6	16.4	17.8	0.6	-1.1	2.0

Source: Statistics Caanada, Census of Canada

TABLE 5
 LABOUR FORCE,¹ 15 YEARS AND OVER, BY SEX, SHOWING INDUSTRY DIVISIONS,
 YARMOUTH COUNTY, 1971

	YARMOUTH COUNTY			% OF TOTAL LABOUR FORCE ¹		
	Male	Female	Total	Yarmouth County	Nova Scotia	Canada
Agriculture	130	25	160	1.8	2.5	5.6
Forestry	60	-	60	0.7	1.1	0.9
Fishing and Trapping	995	10	1,010	11.6	2.0	0.3
Mines, Quarries and Oil Wells	15	-	15	0.2	2.2	1.6
Manufacturing	1,140	380	1,520	17.5	14.4	19.8
Construction	515	20	540	6.2	7.5	6.2
Transportation, Communication and Other Utilities	580	75	650	7.5	8.4	7.8
Trade	935	400	1,335	15.4	15.2	14.7
Finance, Insurance and Real Estate	90	80	170	2.0	3.1	4.1
Community, Business & Personal Services	735	1,305	2,040	23.5	23.2	23.7
Public Administration & Defence	425	125	540	6.2	13.5	7.4
Industry Unspecified or Undefined	345	305	655	7.5	7.2	7.9
Total Labour Force ¹	5,965	2,725	8,695	100.0	100.0	100.0

¹ By place of residence, excludes persons looking for work who last worked prior to January 1, 1970 and who never worked.

SOURCE: Statistics Canada, Census of Canada and
 Yarmouth County Statistical Profile

TABLE 6
EXPERIENCED LABOUR FORCE ¹ BY OCCUPATION GROUPS - 1971
YARMOUTH COUNTY

	YARMOUTH COUNTY			% OF TOTAL EXPERIENCED LABOUR FORCE	
	Male	Female	Total	Yarmouth Co.	Nova Scotia
Managerial, Administrative & Related	245	55	300	3.5	3.4
Natural Sciences, Engineering & Math	80	10	90	1.0	2.2
Occupations in Social Sciences & Related	55	20	75	0.9	0.8
Occupations in Religion	35	-	35	0.4	0.4
Teaching & Related Occupations	135	230	365	4.2	4.4
Occupations in Medicine & Health	70	260	330	3.8	4.1
Artistic, Literary, Recreational & Related	45	10	55	0.6	0.7
Clerical & Related	235	565	800	9.2	13.3
Sales Occupations	605	240	845	9.7	9.6
Service Occupations	515	665	1,180	13.6	15.7
Farming, Horticulture & Animal Husbandry	225	35	260	3.0	3.0
Fishing, Hunting, Trapping & Related	1,125	15	1,140	13.1	2.3
Forestry & Logging	60	-	60	0.7	1.1
Mining & Quarrying	5	-	5	-	1.2
Processing Occupations	475	245	720	8.3	4.5
Machining & Related Occupations	75	-	75	0.9	1.9
Product Fabricating, Assembly & Repairing	305	15	320	3.7	5.2
Construction Trades	580	10	590	6.8	9.0
Transport Equipment Operating	475	10	485	5.6	5.0
Materials Handling & Related	120	15	135	1.6	2.5
Other Crafts & Equipment Operating	85	20	105	1.2	1.2
Occupations not Elsewhere Classified	55	-	55	0.6	0.9
Occupations not Stated	360	315	675	7.8	7.6
Total Experienced Labour Force	5,965	2,730	8,695	100.0	100.0

¹ Excludes persons looking for work, who last worked prior to January 1, 1970 or who never worked.

SOURCE: Statistics Canada, Census of Canada, and
Yarmouth County Statistical Profile

TABLE 7
 LABOUR SURPLUS DATA
 1979

	CANADA	NOVA SCOTIA	YARMOUTH CANADA EMPLOYMENT CENTRE ¹ AREA
A. Labour Force	11,207,000	352,000	26,979
B. Unemployment Insurance Beneficiaries	713,444	37,762	4,571
Labour Surplus Rate (B/A x 100%)	6.4%	10.7%	16.9%

¹ Includes Yarmouth County, Digby County, Shelburne County and part of Annapolis County (Subdivision A and Town of Annapolis Royal)

Sources: Statistics Canada, Labour Force Survey

Canada Employment and Immigration Commission, Administrative Data

TABLE 8
 PERCENTAGE DISTRIBUTION OF THE
 LABOUR FORCE BY EDUCATIONAL ATTAINMENT
 1976 CENSUS

	<u>Less than Grade 9</u>	<u>Grades 9 - 13</u>	<u>Post Secondary Non-University</u>	<u>University</u>
<u>Yarmouth County</u>				
All Ages 15 and over	28.0	36.4	22.7	12.9
Aged 15-24	15.1	42.3	28.0	14.5
Aged 25 and over	32.8	34.2	20.7	12.3
<u>Nova Scotia</u>				
All Ages (15 and over)	18.2	42.5	19.9	19.3
<u>Canada</u>				
All Ages (15 and over)	19.0	43.2	16.8	21.1

Source: Statistics Canada, Census of Canada

TABLE 9

AVERAGE INCOME PER INCOME TAX FILER

YARMOUTH COUNTY AND NOVA SCOTIA, 1970, 1972, 1974 and 1976

ALL RETURNS FILED

	<u>Number</u>	<u>Total Income</u> \$'000	<u>Average Income</u> \$	<u>% Average Income of Nova Scotia Average</u> %
Yarmouth County				
- 1970	8,617	33,374	3,873	84.1
- 1972	9,891	46,980	4,750	85.0
- 1974	10,757	64,471	5,993	83.1
- 1976	11,473	89,408	7,793	84.8

PERCENTAGE OF RETURNS BY INCOME GROUP

Income Group	NOVA SCOTIA		YARMOUTH COUNTY	
	<u>1970</u> %	<u>1976</u> %	<u>1970</u> %	<u>1976</u> %
Under \$2,000	27.6	11.0	31.8	10.8
\$ 2,000 - \$ 4,000	25.9	14.3	35.1	19.7
\$ 4,000 - \$ 5,000	10.2	6.7	10.4	8.6
\$ 5,000 - \$ 7,000	17.0	13.9	11.0	18.9
\$ 7,000 - \$10,000	12.2	17.8	7.0	17.8
\$10,000 - \$15,000	5.1	19.7	3.3	13.9
\$15,000 - \$20,000	1.1	10.2	0.6	5.6
\$20,000 +	0.9	6.3	0.7	4.7

SOURCE: Revenue Canada, Taxation; Taxation Statistics, and
Yarmouth County Statistical Profile

TABLE 10
 OCCUPIED DWELLINGS BY TENURE AND TYPE,
 YARMOUTH COUNTY AND NOVA SCOTIA, 1971 AND 1976

		<u>YARMOUTH</u>	<u>MUNICIPALITY OF ARGYLE</u>	<u>MUNICIPALITY OF YARMOUTH</u>	<u>YARMOUTH COUNTY</u>	<u>NOVA SCOTIA</u>
<u>TENURE:</u>						
1971	- Owned (%)	47.8	92.4	85.7	73.9	71.2
	Rented (%)	52.2	7.6	14.3	26.1	28.8
	Total (No.)	2,450	2,096	2,149	6,700	207,510
1976	- Owned (%)	49.7	92.7	89.2	77.2	72.4
	Rented (%)	50.3	7.3	10.8	22.8	27.6
	Total (No.)	2,511	2,384	2,656	7,555	243,100
<u>TYPE:</u>						
1971	- Singles & Doubles (%)	59.9	95.2	92.3	83.0	78.8
	Row & Apt. (%)	40.1	3.3	6.3	16.1	18.7
	Mobile (%)	0.0	1.4	1.4	0.9	2.5
	Total (No.)	2,450	2,095	2,150	6,700	207,510
1976	- Singles & Doubles (%)	60.4	92.9	89.6	80.9	73.9
	Row & Apt. (%)	39.2	2.3	4.9	15.4	20.4
	Mobile (%)	0.4	4.8	5.7	3.6	5.7
	Total (No.)	2,515	2,385	2,660	7,555	243,100

SOURCE: Statistics Canada, Census of Canada, and
 Yarmouth County Statistical Profile

TABLE 11
QUANTITY AND VALUE OF SEAFISH LANDINGS

	<u>Groundfish</u>		<u>Pelagic</u>		<u>Shellfish</u>		<u>Others</u>		<u>Total</u>	
	<u>Quantity</u> Lb'000	<u>Value</u> \$'000	<u>Quantity</u> Lb'000	<u>Value</u> \$'000	<u>Quantity</u> Lb'000	<u>Value</u> \$'000	<u>Quantity</u> Lb'000	<u>Value</u> \$'000	<u>Quantity</u> Lb'000	<u>Value</u> \$'000
Yarmouth County										
1969	10,940	875	123,502	1,713	7,056	5,776	45	4	141,443	8,368
1972	9,266	897	105,028	1,702	5,206	7,838	1,033	107	120,524	10,544
1975	5,646	815	87,673	1,600	6,249	10,561	704	59	100,272	13,035
1978	7,920	1,592	61,228	5,319	21,532	13,943	13,120	782	103,800	21,636
1979	11,240	2,273	32,750	3,139	14,390	13,378	9,744	608	68,324	19,398
% Share-1979	-	11.7	-	16.1	-	69.0	-	3.1	-	100
Nova Scotia										
1969	374,205	20,442	261,187	7,754	36,205	25,686	1,709	139	673,306	54,021
1972	347,414	24,279	254,068	5,105	28,841	36,775	2,214	216	632,537	66,375
1975	308,189	30,967	274,142	7,373	37,924	51,013	880	67	621,141	89,420
1978	451,000	63,800	227,599	25,325	299,726	104,089	43,947	1,875	1,124,732	195,133
1979	507,540	80,212	145,020	22,344	229,288	111,031	31,071	1,422	1,004,538	215,009
% Share-1979	-	37.3	-	10.4	-	51.6	-	.7	-	100

Source: Nova Scotia Department of Fisheries

TABLE 12

TOWN OF YARMOUTH MANUFACTURING DATA

1979

<u>Industrial Activity and Firm Name</u>	<u>Number of Employees</u>	<u>Sub-totals</u>
<u>Fish Processing</u>		
- Amos Branner and Son Ltd.	20	
- Imo Foods Limited	150	
- Kennebec Fisheries Limited	150	
- Lawrence Sweeney Fisheries Ltd.	<u>300</u>	620
<u>Boat Building and Marine Fabricating and Repair</u>		
- Alwood Products Ltd.	120	
- O.C. Frost & Son	4	
- Willard Ply-Bows Ltd.	5	
- Hamilton & Porter Machine Works Ltd.	25	
- West Nova Marine Ltd.	<u>7</u>	161
<u>Textiles and Clothing</u>		
- Bonda Textiles Ltd.	38	
- Bradshaw's of Yarmouth Limited	4	
- Dominion Textile Inc.	<u>388</u>	430
<u>Printing and Publishing</u>		
- Fundy Group Publications Ltd.	85	
- L'Imprimerie Lescarbot Limitee	11	
- Sentinel Printing Ltd.	<u>9</u>	105
<u>Metal Products</u>		
- Cleveland Aluminum Products Ltd.	12	
- Tri-Star Industries Ltd.	<u>7</u>	19
<u>Ice Products</u>		
- MacConnell Ice Co.	<u>6</u>	<u>6</u>
 Total		 <u>1,338</u>

Source: Scott's Industrial Directory Atlantic Manufacturers - Second Edition

TABLE 13
 FOREST PRODUCTION STATISTICS,
 YARMOUTH COUNTY, 1971, 1973, 1975 AND 1977

	SAWN LUMBER (M. fbm.)				PULPWOOD (Cords)			
	1971	1973	1975	1977	1971	1973	1975	1977
Softwood	5,719	8,233	2,984	3,716	9,911	10,342	11,468	11,116
Hardwood	241	256	144	118	-	-	-	-
TOTAL	5,960	8,489	3,128	3,834	9,911	10,342	11,468	11,116
% Nova Scotia								
Softwood	3.9	4.3	3.9	2.1	1.1	1.2	1.2	1.2
Hardwood	7.0	5.4	2.6	2.3	-	-	-	-
TOTAL	4.0	4.3	1.9	2.1	1.1	1.0	1.1	1.1

SOURCE: Nova Scotia Forest Products Directory, and
 Yarmouth County Statistical Profile

TABLE 14

AUTOMOBILE VOLUME VISITATION BY POINT OF ENTRY (1969-79)

<u>Amherst</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
Canadian	174,719	182,063	194,290	211,111	230,002	227,522	239,292	240,861	271,447	249,972	262,362
United States	61,437	70,404	67,721	73,635	64,768	49,357	54,635	47,147	46,371	42,564	29,046
Foreign	527	597	639	741	999	590	770	353	47	93	5
TOTAL	236,683(77.8)	253,064(76.1)	262,650(74.7)	285,487(75.7)	295,769(73.9)	277,469(72.6)	294,697(72.0)	288,361(73.0)	371,865(75.7)	292,629(73.5)	291,413(73.5)
<u>Caribou</u>											
Canadian	20,853	23,169	23,384	23,259	29,873	32,010	31,818	33,307	32,861	33,872	37,607
United States	9,160	10,601	10,486	8,870	11,140	9,293	10,136	8,993	9,185	8,275	6,104
Foreign	6	6	1	4	3	4	9	4	13	10	0
TOTAL	30,019(9.9)	33,803(10.2)	33,871(9.6)	32,133(8.5)	41,016(10.3)	41,307(10.8)	41,963(10.0)	42,304(11.0)	42,059(10.0)	42,157(10.5)	43,711(11.0)
<u>Digby</u>											
Canadian	2,812	3,059	7,593	7,468	7,160	6,968	8,584	8,465	8,958	9,808	11,310
United States	3,706	4,178	7,782	8,526	7,127	5,648	7,113	5,731	6,619	6,663	4,963
Foreign	1	1	7	5	4	2	4	35	-	-	-
TOTAL	6,519(2.1)	7,238(2.2)	15,382(4.4)	15,999(4.2)	14,291(3.6)	12,618(3.4)	15,701(4.0)	14,231(4.0)	15,577(3.7)	16,471(4.1)	16,273(4.1)
<u>North Sydney</u>											
Canadian	6,151(2.0)	6,084(1.8)	6,162(1.8)	7,300(1.9)	7,684(1.9)	9,886(2.6)	11,330(3.0)	11,031(3.0)	10,896(2.6)	11,639(3.0)	11,410(2.9)
<u>Tidnish</u>											
Canadian	10,555	9,888	11,602	11,007	11,987	12,718	13,124	11,845	11,581	10,431	12,879
United States	1,383	1,351	1,470	1,296	1,888	1,440	1,684	1,092	1,245	1,063	1,232
Foreign	1	5	3	1	1	14	6	12	-	9	2
TOTAL	11,939(3.9)	11,244(3.4)	13,075(3.7)	12,304(3.3)	13,876(3.5)	14,172(3.7)	14,778(4.0)	12,949(3.0)	12,826(3.0)	11,503(2.9)	14,113(3.6)
<u>Yarmouth</u>											
Canadian	1,450	1,885	1,500	1,636	1,691	1,881	2,407	2,120	1,850	2,272	1,708
United States	11,631	19,159	18,774	22,435	25,447	24,662	28,545	23,227	19,009	21,478	17,613
Foreign	-	2	3	7	-	4	8	27	3	-	-
TOTAL	13,081(4.3)	21,046(6.3)	20,277(5.8)	24,078(6.4)	27,138(6.8)	26,547(6.9)	30,960(7.0)	25,374(6.0)	20,862(5.0)	23,750(6.0)	19,321(4.9)
<u>All Points</u>											
Canadian	216,540	226,175	244,531	261,781	288,397	290,985	306,555	307,629	337,623	317,994	337,276
United States	87,317	105,693	106,233	114,762	110,370	90,400	102,077	86,190	82,429	80,043	58,958
Foreign	535	611	653	758	1,006	614	797	431	63	112	7
TOTAL	304,392(100.0)	332,579(100.0)	351,417(100.0)	377,301(100.0)	399,773(100.0)	381,999(100.0)	409,429(100.0)	394,250(100.0)	420,115(100.0)	398,149(100.0)	396,241(100.0)

Source: Visitor Travel to Nova Scotia, 1979

TABLE 15
 FERRY TRAFFIC FLOW
MAINE U.S.A. TO YARMOUTH

	<u>Automobiles</u>	<u>Auto Trailers</u>	<u>Campers Self Propelled</u>	<u>Buses</u>	<u>Motorcycles and Bicycles</u>	<u>Total Passenger Vehicles</u>	<u>Passengers</u>
<u>1979</u>							
Number	20,636	505	876	521	2,822	25,360	100,194
Increase (Decrease) ¹	(-4,810)	(-97)	(-174)	(- 9)	431	(-4,659)	
% Increase (Decrease)	(-18.9)	(-16.1)	(-11.7)	(-1.7)	18.0	(-15.5)	(-14.7)
<u>January-July 1980</u>							
Number	11,918	337	460	250	2,088	15,053	57,193
Increase (Decrease) ²	3,467	52	26	70	590	4,205	18,323
% Increase (Decrease)	41.0	18.2	6.0	38.9	39.4	38.8	47.1

1. Change relative to 1978

2. Change relative to similar period in 1979

Source: C.N. Marine

TABLE 16
RETAIL SALES DATA

	<u>Nova Scotia</u>	<u>Yarmouth County</u>	<u>Yarmouth Town</u>	<u>Digby County</u>	<u>Shelburne County</u>
1979 ¹					
Total Sales (\$000)	2,520,800	63,300	N/A	53,900	38,300
% of Total	100	2.5	N/A	2.1	1.5
Sales per Capita (\$)	2,973	2,496	N/A	2,546	2,240
% of Sales per Capita	100	83.9	N/A	85.6	75.3
1971 ²					
Total Sales (\$000)	1,079,720	28,849	19,880	23,868	17,308
% of Total	100	2.7	1.8		
Sales per Capita (\$)	1,369	1,154	2,324	1,173	1,039
% Increase Total Sales 1979 over 1971	133.5	119.4	N/A	125.8	121.3
% Increase Sales per Capita 1979 over 1971	171.7	162.9	N/A	170.5	155.9

Sources: 1 The Financial Post Survey of Markets 1980

2 Statistics Canada, Census of Canada

TABLE 17
PERSONAL DISPOSABLE INCOME

1979

	<u>Nova Scotia</u>	<u>Yarmouth County</u>	<u>Digby County</u>	<u>Shelburne County</u>
Personal Disposable Income (\$ Millions)	4,932.0	101.3	75.7	73.3
% of Total	100	2.1	1.5	1.5
Per Capita (\$)	5,816	3,990	3,577	4,286
% of Provincial per Capita	100	68.6	61.5	73.7

Source: The Financial Post Survey of Markets 1980

TABLE 18

NOVA SCOTIA GOVERNMENT, HEALTH AND EDUCATION SERVICES EMPLOYMENT, 1976

Area	Population (1975)	Provincial Departmental Employment	Prov. Crown Corporation Employment	Health Institutions Employment	Educational Institutions Employment	Total Prov. Based Employment	Population Per Employee
Digby County	20,030	102	22	143	369	636	31.5
Shelburne County	16,847	142	12	90	229	473	35.6
Yarmouth County	25,526	126	45	338	323	832	30.7
Nova Scotia	815,454	6,385	5,131	11,688	16,178	39,382	20.7

SOURCE: N.S. Department of Development, and
Economic and Social Base of South Western Nova Scotia

APPENDIX "11"

LISTS OF HERITAGE BUILDINGS

UPDATED LIST OF HISTORICAL HOUSING

IN

THE DOWNTOWN WATERFRONT STUDY AREA

EXTRACTED FROM

LIST OF HISTORICAL HOUSING AS COMPILED
BY PARKS CANADA IN THE TOWN OF YARMOUTH

APPENDIX NUMBER 111

OF

TOWN OF YARMOUTH
MUNICIPAL DEVELOPMENT PLAN
BACKGROUND STUDIES

<u>STREET</u>	<u>NUMBER</u>	<u>YEAR</u>
Albert	24	1870
Alma	7	
	19	1880
	23	1830
Barnard	6*	1880
	7*	1870
	10	1870
	11	1885
	12	1850
Catherine	1	1880
	9	1870
Chester	2	1870
	4	1880
Cliff	12	1850
	13	1870
	16	1870
	17	1820
	19	1850
	31	1841
	38	1885
	39	1880
	41	1870
	45	1870
	49	1850

* Demolished

<u>STREET</u>	<u>NUMBER</u>	<u>YEAR</u>
Collins	4	1860
	14	1830
Commercial	1	1885
	5	1870
	6*	1880
	9	1850
	10*	1885
	11	1820
Cumberland	4	1870
	5	1870
	7	1880
	10	1880
Fifth	2	1870
	5	1870
	9	1880
First	21	1870
Forest	6	1860
	8	1880
	18	1870
	26	1880
	30	1880
	32	1880

* Demolished

<u>STREET</u>	<u>NUMBER</u>	<u>YEAR</u>
Haskell	3*	1850
	5*	1870
	9	1870
	12	
	14*	1850
	16	1850
	18	1880
Hawthorne	22	1880
	24	1870
	25	1880
	29	1870
	33	1820
Horton	1	1870
	4	1864
	5	1880
	7	1820
	8	1864
Hueston	8	1870
	10	1870
James	8	1860
Jenkins	3	1850
	4	1850
	8	1870

* Demolished

<u>STREET</u>	<u>NUMBER</u>	<u>YEAR</u>
John	4	1870
	8	1870
	40	1870
	42	1840
Kirk	3	1870
	4	1860
	5	1880
	6	
	10	1860
	11	1820
Lewis Lane	8	1880
Main	68	
	69	
	70	
	74	
	76	
	79	
	80	
	84	
	104	
	106	
	108	
	110	
	111	
	112	
	114*	

* Demolished

<u>STREET</u>	<u>NUMBER</u>	<u>YEAR</u>
Main (cont'd)	115	
	120	
	123	
	136	
	142	
	145	
	147	
	148	
	152*	
	153	
	156	
	160	
	160B	
	166*	
	170*	
	173	
	174	
	175*	
	178	
	182	
	186	
	190	
	196	
	200	
	211	
	212	

* Demolished

<u>STREET</u>	<u>NUMBER</u>	<u>YEAR</u>
Main (cont'd)	215	
	216	
	215	
	242	
	253	
	256	
	257	
	258	
	260	
	262	
	272	
	278	
	287	
	316	
	329	
	334	
	352	
	416	
	420	
	424	
	428	
	446	
	458	
	459	
	460	
	468	
	469	

<u>STREET</u>	<u>NUMBER</u>	<u>YEAR</u>
Main (cont'd)	471	
	472	
	476	
	477	
	478	
	480	
	481	
	490	
	494	
	493	
	503	
	507	
	519	
	521	
	529	
	544	
	548	
	552	
	554	
	555	
	561	
	562	
	564	
	567	
	568	
	572	

<u>STREET</u>	<u>NUMBER</u>	<u>YEAR</u>
Main (cont'd)	574	
	580	
Moody's Lane	5	1885
	7	1885
Pearl	2	1870
	5	1880
	7	1870
	10	1880
	11	1830
Public	6	1870
	8	1870
Queen	4	1810
Roger's Lane	2	1880
Second	5	1850
	9	1870
	10	1820
	13	1850
Store	2	1870
	4	1870
	5	1830
	6	1830
Third	9	1885
Water	9Z*	
	90	1850
	143	1870

* Demolished

<u>STREET</u>	<u>NUMBER</u>	<u>YEAR</u>
Water (cont'd)	145	1870
William	70	1874
Willow	6	1870
	8	1860
	11	1880
	12	1870

LIST OF HISTORICAL COMMERCIAL BUILDINGS
IN
THE DOWNTOWN AND WATERFRONT STUDY AREA
OF
THE TOWN OF YARMOUTH
AS COMPILED BY THE
YARMOUTH COUNTY HISTORICAL SOCIETY

WATER STREET

- Dominion Textiles - The Yarmouth Duck and Yarn Company was established in 1883, and in 1902 became the Cosmos Cotton Co. A 1902 advertisement shows the present three-story brick building, with lesser buildings that have since disappeared.
- Kennebec - Once the home of the New Burrill - Johnson Iron Co. Their original building burned in 1909, and the present concrete building was raised on the same location.
- Gas Works - Corner of Water and Jenkins Streets. This brick building was built in 1863 for the Yarmouth Gas Light Company.
- Parker Eakins Co. - Parker-Eakins and Company purchased Young's Wharf and stores in 1877. One source says the store was built in 1874. The various buildings now belonging to Parker-Eakins Co. were purchased over the years.
- Killam Bros. - Killam Bros. Co. was first established in 1849, but the exact date of the present building and wharf is not known. We asked the present owner, Mr. Robert Killam, for information

and he is sure the building pre-dates the time the firm was established. There were Killam ships many years before 1849.

There are several other interesting buildings on Water Street, but we have no dates for the following:

- the red sheds at the end of (south) Water Street, once occupied by Sweeney Fisheries
- the present site of Sweeney's Fisheries, which was once the terminal for Eastern Steamship Company's ships to Boston
- large red warehouse with dry stone foundation now used as DAR warehouse
- Sweeney's slip
- UMF store in Yarmouth North

MAIN STREET

Brick building, corner of Main and Chestnut Streets

- Was built by Lyman Cann in 1873 and became Cann and Allen Grocers - now an apartment house.

House of Craft

- 584 Main Street was built in 1889 and was known as the Milton Library for many years. It later housed the Yarmouth Historical Society Museum.

Sweeney's Funeral Home

- 567 Main Street was the residence of William Dudman, built in 1859.

- Sunset Terrace - Corner of Main and James Streets, also known as the Old Ladies Home, was built in 1890.
- Yarmouth Jail - 1864-65
- Yarmouth Court House - Originally opened in 1863 and in 1889, it was raised and a stone foundation and steps placed under it.
- Frost Park - Was originally the town burying ground, but was discontinued in 1863. For many years it was called Victoria Park.
- R.H. Davis & Co. - 361 Main Street was built for Mr. R.H. Davis sometime after 1900.
- Old Royal Bank of Canada - Corner Main and Alma Streets, built in 1913.
- Guests Hardware - 339 Main Street, was sold in 1878 to S.A. Crowell & Co., so we know the building is earlier, but we do not know the exact date.
- Marjorie's Yarns & Crafts - 329 Main Street has always housed a drug store, until its present owners. In 1884, J. Craig purchased the drug-store of A.C. Hutchinson, which was on this site, so we know the building pre-dates 1884. Later became Ross Drug United.
- Wool Shoppe - 352 Main Street was built sometime in the 1860's for Porter and Pendrigh, Dry Goods.

- Shirlee Shoppe - 334 Main Street is housed in part of the Ryerson Block, built in 1866. Upstairs was the Ryerson's Hall, used for lectures, concerts, etc.
- Old Royal Store - Corner Main and Central Streets was built in 1856, and according to Yarmouth Reminiscences was the first brick mercantile building in Western Nova Scotia. The original building had 55 feet on Main Street and 55 feet on Central Street. It has housed many businesses over the years.
- LeMars Men's Wear - 296 Main Street. In 1874 Moses and Sterritt were here, but we cannot ascertain if it was built for them. In 1883 it housed the firm of Moses and Ross.
- Y.M.C.A. - Corner of Main and Cliff Streets. Known as the Boston Marine Building and built in 1887 by Rhodes, Curry and Company of Amherst. William Law and Co. had its office and warehouse in this building. It also housed the Royal Opera House.
- Odeon Theatre - 297 Main Street was the residence of S.M. Ryerson. We know he had a small fire there in 1871, so the house was

built prior to 1871. In 1879 it was raised to 3 stories and fitted as a hotel and was sold in 1896.

- Yarmouth Credit Stores - 262 Main Street was built in 1866 and known as Brown's Brick Building. The Yarmouth Hotel was in this building.
- W.L. Harding - We can't find an exact date for this store, but several sources assure us that it is well before 1900. A Mr. Crosby had a grocery store there at one time, but he left for New Brunswick and founded the Crosby Molasses Co. Mr. Harding purchased the store from Mr. Crosby and set up his crockery business. Another source tells us it was a Mr. Eldridge who sold the store to Mr. Harding.
- Jackson's Men's Wear - 230 Main Street was erected in 1891 by Walter Thompson. Joseph Pink & Co. were there.
- Salvation Army Barracks - 259 Main Street From Yarmouth Reminiscences; "Whitten and White erected the building familiarly known as Mason's Hall, as Utley's Hall and now as the Salvation Army Barracks, in 1854. At the time of completion, it was said to have a handsome exterior, being 35 feet wide by 70 feet deep and three stories high."

- U.S. Consulate - 253 Main Street was the former residence of Dr. Joseph Farish.
- Christmas Elves - Residence of Balfour Brown, built in 1850.

There are certainly many old structures in the south end of Main Street such as:

- the old Yarmouth Academy
- Hubert Brush Center
- the store opposite Argyle Street

APPENDIX "111"

COMPREHENSIVE DEVELOPMENT AREA ZONE

The Town of Yarmouth Municipal Development Plan sets forth the objective of encouraging the development of the waterfront in an attractive fashion since it is the most important entrance to the town. This important objective can best be achieved by ensuring that development in the waterfront area is planned and implemented in an integrated fashion. For this and other reasons a Comprehensive Development Area Zone is proposed for the downtown and waterfront areas.

A Comprehensive Development Area is a defined area of land planned and developed as an integrated project to include, and characterized by, a number of varied commercial, residential, industrial, institutional, and other uses. Development in a Comprehensive Development Area Zone would not be bound to comply with the general zoning restrictions outlined in the Town of Yarmouth Zoning By-law. The necessary control would be achieved by the Town Council through the approval of a "Development Scheme". The "Development Scheme" is proposed by a developer or developers for a Comprehensive Development Area and consists mainly of a master plan showing the location and form of all public and private development being proposed. The scheme would provide Council with one or more maps at a suitable scale showing the location of all existing and proposed development features, land uses, improvements, and facilities including streets, sidewalks, building lines, elevations, parking areas, landscaping, and utilities. The Development scheme would also outline detailed regulations to control

the form, character, scale, types of building materials, population density, maximum square footages for various land uses, parking ratios, loading requirements, and the phasing of the development.

The major advantages which this type of zoning offers are as follows:

- A) A mixture of land use is permitted while retaining for Council the ability to control development in a manner which ensures compatibility of adjacent uses.
- B) Development is encouraged in that the developer is able to achieve approval for an overall plan and implementation strategy in one submission to the Planning Advisory Committee and Council. This facilitates adequate review by Town officials as well in that they have the opportunity to consider the relationship which each component bears to the overall scheme being proposed.
- C) Since guidelines and requirements governing the development are established by Council and the developer at the time that the development scheme is approved, the developer is allowed some flexibility in the design and integration of land uses without resubmission to Council.
- D) Piecemeal submissions for development and for alterations to original submissions are avoided because the developer is required to propose an integrated project involving a variety of buildings and land uses.

- E) The approach of an overall development approval with phasing permits a planned approach to the requirement for parking as opposed to the piecemeal approach derived from a number of individual applications for development permits.
- F) By approving an overall development scheme the Town is able to satisfy itself that the waterfront area with its important role as a major entrance to the town is developed in a manner consistent with its full potential.

The steps involved in establishing a Comprehensive Development Area Zone are as follows:

1. The presentation of an application for rezoning to the Planning Advisory Committee of the Town of Yarmouth.
2. Recommendation for approval by the Planning Advisory Committee to Council.
3. The adoption of a resolution by Council indicating its intent to enact the By-law which gives effect to the rezoning. A proposed By-law amending the existing By-law is included as Exhibit "A". A map outlining the area proposed for rezoning is also attached as Exhibit "B". This map would form Schedule "C" to the Zoning By-law.
4. A hearing is held by Council to receive public opinion.
5. If no objections are received, the By-law is passed and formal notice of this fact is advertised allowing any person or corporation who so wishes thirty (30) days to appeal to the Provincial Appeals Board.

6. Concurrently with step 5 notice is given to the Community Planning Division of the Department of Municipal Affairs and if no objections are noted the rezoning becomes fact.

EXHIBIT "A"

A PROPOSED BY-LAW TO AMEND THE TOWN OF YARMOUTH
ZONING BY-LAW

Be it enacted by the Council of the Town of Yarmouth that the Town of Yarmouth Zoning By-law adopted by Council on August 30, 1977 and approved by the Minister of Municipal Affairs on October 5, 1977 be amended as follows:

1. That Part 3 - Zones and Zoning Maps be amended by adding after "Conservation" in the list of zones, "Comprehensive Development Area" and by adding after O-2 in the list of symbols CDA-1.
2. That Part 3 - Zoning Maps be amended by revising line one to read Schedules "A" and "B" and "C" and by adding to the list of Schedules, Schedule "C" - Comprehensive Development Area Zone.
3. That Part 4 - Interpretation be amended by revising section 1 - Symbols to read Schedules "A" and "B" and "C" and by revising section 2 - Defined to include Schedule "C".
4. That Part 25 - Administration be renumbered to be Part 26.
5. That Part 25 be entitled Comprehensive Development Area Zone.
6. By providing for Part 25 to read as follows:
 - a. The provisions of this part apply and extend to a Comprehensive Development Area Zone.
 - b. All development in a Comprehensive Development Area Zone shall conform to the provisions of this part.
 - c. A "Comprehensive Development Area" shall be defined to mean one or more parcels of land containing any number of existing and/or proposed buildings and uses and planned as an integrated project.

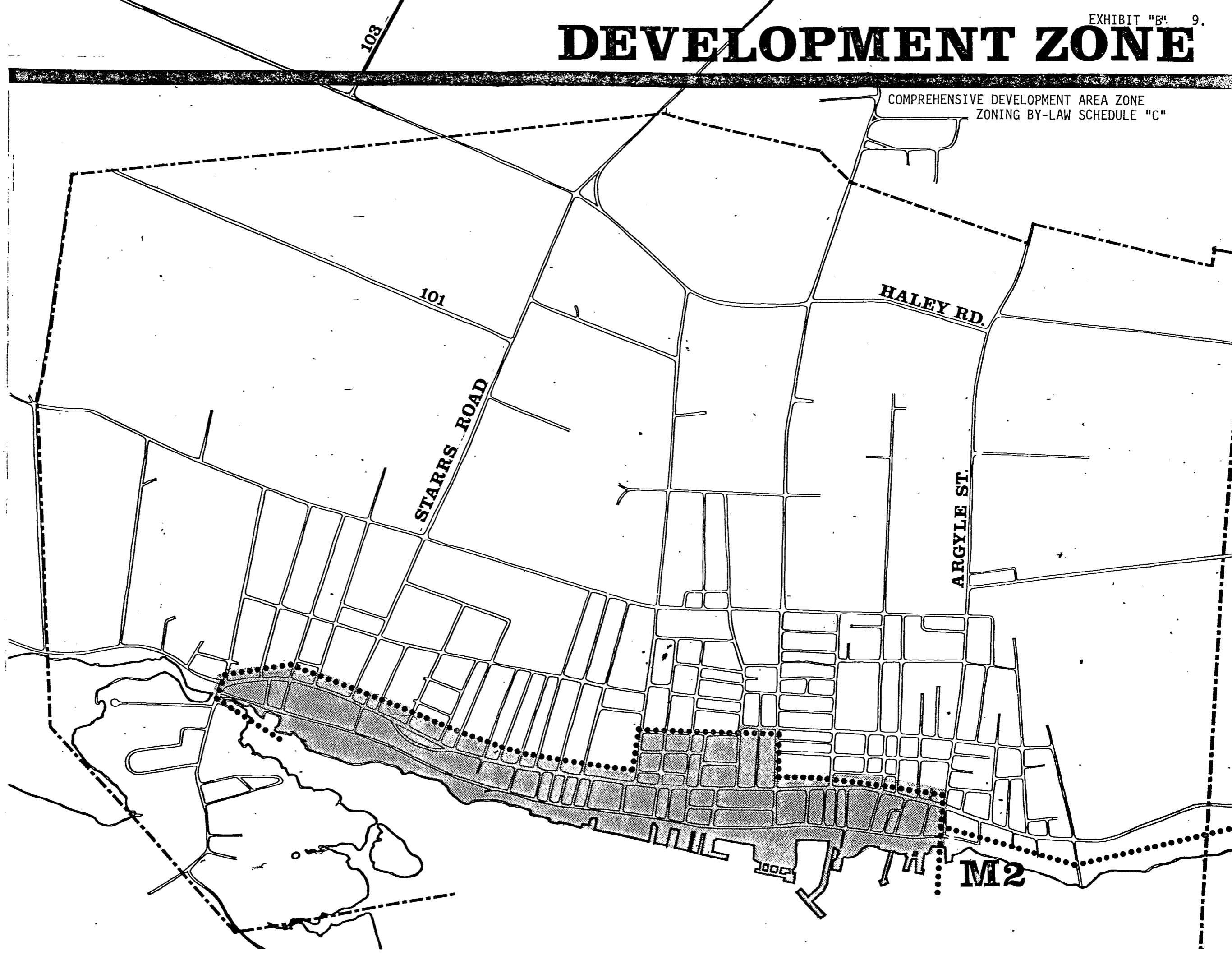
- d. "Development" shall be defined to include any erection, construction, addition, alteration, replacement or relocation of or to any building or structure and change or alteration in the use made of land, buildings, or structures.
- e. A "Development Scheme" shall be defined to mean a detailed plan showing the location, land use and form of all development in a Comprehensive Development Area.
- f. A "Schedule" shall be defined to mean a set of detailed regulations and/or plans to control a development scheme.
- g. Development in a Comprehensive Development Area Zone is not bound to comply with the general zoning restrictions contained in Part 5, subsections 2, 4, 6, 7, 8, 9, 14, 15 and 17 to 28 inclusive, nor with the general zoning restrictions contained in Part 6.
- h. Development within a Comprehensive Development Area shall be controlled through the approval of a Development Scheme and its attached Schedule(s).
- i. No development consisting of new buildings and/or structures or the relocation of buildings and/or structures shall take place in a Comprehensive Development Area Zone until a Development Scheme has been proposed to and adopted by Council.
- j. Council, before approving or amending a Development Scheme, shall consider the following:
 - (i) the preservation of existing site features of unique quality and the preservation of the natural beauty of the area;

- (ii) the proposed population density of the area, the adequacy of open space areas, building form, parking, pedestrian walkways, streets, water supply, sanitary and storm sewers;
 - (iii) the floor area ratio;
 - (iv) the suitability and interrelationship of the land uses;
 - (v) any other factors recommended by the Town Planning Advisory Board.
- k. Subsequent to the approval of the Development Scheme, Council shall approve each phase or portion within the Comprehensive Development Area, provided it is, in the opinion of Council, consistent with the overall Development Scheme and Schedule(s). The quality of the architectural design of proposed buildings and their compatibility with the character and scale of adjacent development shall be considered at this time. To ensure implementation of a Development Scheme, Council may require the developer to enter into an agreement setting out responsibilities on the part of both the developer and the Town of Yarmouth.
- l. A Comprehensive Development Area Zone shall comprise no less than two acres in one parcel unless it constitutes an expansion to an existing Comprehensive Development Area.
- m. Upon approval of the Development Scheme by Council, the Development Scheme and the Schedule(s) shall form part of and be an amendment to the zoning by-law for each Comprehensive Development Area or expansion to an existing Comprehensive Development Area.

- n. Before Council approves or amends a Development Scheme in a Comprehensive Development Area, a public hearing shall be held to receive the views and opinions of the public.
- o. The schedules shall specifically outline, to the extent that Council may require, controls in the areas of the use of existing buildings, height regulations, conformity to existing setbacks, permissibility of temporary, special, or multiple uses, accessory buildings, signage, density, loading requirements, parking requirements, and such other provisos as Council may determine or require.
- p. Building permits in accord with an approved Development Scheme and its attached Schedule(s) will be issued in accordance with Part 26 - Administration of this by-law.

DEVELOPMENT ZONE

COMPREHENSIVE DEVELOPMENT AREA ZONE
ZONING BY-LAW SCHEDULE "C"



EXTRACTS FROM
REVITALIZING ONTARIO'S DOWNTOWNS
GUIDELINES FOR A NEW PROGRAM
A STUDY PREPARED FOR THE PROVINCE OF ONTARIO
BY
PETER BARNARD ASSOCIATES
AND
PROCTOR AND REDFERN LIMITED

ONTARIO'S DOWNTOWNS SHOULD BE PRESERVED...

Unrestrained, new commercial development gravitates towards the periphery of an urban centre because of the lower costs and lower risks as compared to the downtown. The amenities provided in suburban shopping centres can readily provide greater attraction than an outdated downtown and in many cities symptoms of the resulting problems are clearly evident. If this trend continues - that is if market forces are left to shape the future of our downtown areas - the result will be a falloff in investment in maintenance and expansion and decay not only in the commercial districts but in the nearby residential areas as well. A decline in the downtown will lead to the loss of the city's focal point and to reduction in the diversity of services and communication normally provided there. In particular the poor and the elderly who typically live near the core will suffer most.

While there are some encouraging examples of strong local governments taking steps to preserve the downtown, many municipalities lack the power, the will or the resources to deal with the problems of their downtowns. It is clear that a philosophy of "Let the Market Prevail" is almost certain to cause a decline in Ontario's downtowns.

FOUR MAIN AREAS OF NEED

From our review of the 24 cities across the province it is clear that, notwithstanding some needs in the larger cities, the major problems are in the smaller centres, particularly those in the 25 - 100,000 population range. It is equally clear that the urban renewal needs are diverse and that many steps could be

taken to halt declining downtowns or revitalize those that are stagnant. The important consideration is to determine the key needs, that is, those actions which would overcome the major obstacles to increased confidence, private investment and subsequent use of the downtown by the community.

Taking the 24 municipalities surveyed as representative, the needs of Ontario's downtowns can be summarized in the following order of priority:

1. Establish a proper planning framework and control over developments. To eliminate uncertainty and set the stage for revitalization, the role of the downtown should first be defined and other plans and zoning brought into conformance with that role. In parallel with this need, there must be some means by which competing developments within and, more importantly, outside the municipality's jurisdiction can be controlled so as not to counteract the measures taken to upgrade the downtown. Of prime importance is the question of shopping centres in neighbouring townships - not their elimination but the need for a proper balance with plans for the downtown.
2. Introduce a major anchor use in medium-sized cities. As we have argued earlier, these centres need a focus and main attraction for the downtown. The introduction of such an anchor would enable the downtown to compete with the strong shopping centres in these communities and would:

- increase the level of downtown business
- encourage other private investment
- provide a location for public services and facilities as well as commercial uses
- provide a focal point for the downtown and the community
- increase the levels of amenity downtown

The type of anchor use would have to be tailored to what the municipality could support both economically and in practical terms. The major development store or large retail complex has been probably the most successful type of anchor. However, office, hotel, cultural or civic uses would also serve the purpose, especially in those centres unable to justify a retail development. Frequently, of course, several uses can be combined in one project. While the provision of an anchor may require redevelopment in most instances, in some cities a major rehabilitation of an existing building or buildings may be feasible.

3. Rehabilitate deteriorated buildings and facades. The uncertainty about the future of the downtown in many cities has caused owners to postpone maintenance and repair work, with the result that many buildings or parts of buildings are badly deteriorated. They in turn contribute to the uncertainty by creating visual evidence of the lack of confidence in the downtown.

Ultimately they contribute to further deterioration in adjacent properties and elsewhere in the downtowns.

The need is clear. Where a building can continue to serve a useful function it needs to be rehabilitated and continually maintained from then on. In cases where there are a number of such buildings and there is little or no demand for the space they can offer even when rehabilitated, then the need is to lessen their blighting influence on the rest of the downtown. This might be done by removing them unless removal would be socially or aesthetically detrimental to the area. Even when there are few deteriorated buildings, there are benefits from the increased attractiveness and character that a unified approach to the repair of the facades can bring to a downtown street.

It is important to note four factors which are inhibiting rehabilitation in most small and medium sized cities.

- (a) Building codes. All rehabilitation work is required to meet new construction standards - usually considerably higher than the standards under which the buildings were originally constructed. The costs of meeting some building code requirements are often prohibitive.
- (b) Parking requirements. Where zoning bylaws require parking in central areas it is often difficult or next to impossible for owners of small lots to renovate or rebuild and meet the parking standard.

Recognizing this, some cities have eliminated parking requirements in some areas. Neither consideration is satisfactory since the former inhibits rehabilitation and the latter can lead to a parking shortage.

- (c) Taxes. When an owner invests in the rehabilitation of his property the increase of value will usually result in an increased assessment being placed on the property. The prospect of higher taxes acts as a further deterrent to rehabilitation work.
- (d) High cost of renovation. The final factor inhibiting rehabilitation is that much of the space in older buildings is obsolete and difficult to convert to modern uses. Floor spans and areas, ceiling heights and circulation pattern often do not suit current merchandizing needs. Even more common, however, is the "upper-storey problem". Many if not most downtowns in small and medium sized centres have old two and three storey buildings, often with period architectural facades which give the area much of its character and heritage. Unfortunately, the upper storeys have lost their former value as residences or storage for the lower floor retail space with the result that large proportions are vacant and badly deteriorated. Fifty per cent vacancies in upper storeys are not uncommon.

Therefore, many cities need rehabilitation and/or facelifting of the facades in the downtown areas. However, before this can be accomplished steps will have to be taken to remove the deterrents.

4. Upgrade public services and amenity. In many municipalities public services in the downtown area have deteriorated and are contributing to the general lack of confidence or are inhibiting development or rehabilitation activities. There are four primary needs:
 - Parking. Centrally located parking with convenience more closely approximating that of the competing shopping centre is a need in several communities. While there are often sufficient numbers of spaces in the downtown area they are frequently located away from the main retail areas or in places which are difficult to find. Parking is undoubtedly one of the keys to a successful downtown and it was one of the most persistently mentioned problems in our survey.
 - Underground services. The high cost of replacing sewers and other underground services has resulted in many cities postponing this investment in the downtown in favour of other locations. This in turn has held back redevelopment or major improvements to private property. In some instances flooding or other problems caused by underground

- services is further contributing to a decline in confidence in the area.
- Amenity. The knowledge that underground services must someday be repaired has held back needed improvements to roads, sidewalks and above-ground services. Also as an element in the overall strategy to restore confidence in the downtown area or to support a program for improving the facades of buildings, many municipalities need to provide a complementary program of landscaping, other improvements to public spaces and facilities or even a covered mall to equal that offered by the shopping centres.
 - Access. In some instances the development of the downtown is inhibited by access constraints that create delays and bottlenecks to the point where shoppers are no longer willing to use the downtown. Any efforts at revitalization would be ineffective without first dealing with these constraints.

PRIMARY NEEDS ARE COMMITMENT AND SEEDING PROJECTS

As we mentioned many times, the ingredient lacking in those municipalities with stagnant or declining downtowns is confidence in the future. Without it, there is an unwillingness to invest in maintenance and upkeep (on both the property owner and municipalities part) and a continuing decline is ensured. What is needed is a demonstration of renewed confidence in the downtown, first on the part of the municipality, and then, on the part of the private sector.

The municipality must first define the role of the downtown in relation to other parts of the community and declare its commitment to ensuring that role. This implies some ability to control or strongly influence competing developments.

The second step is to introduce a seeding project into the downtown which will have the effect of restoring confidence, increasing the attractiveness and focal point image of the downtown for the residents of the community and spurring private renewal activities. As we have seen from the review of the past program, this took the form of redevelopment projects in the large cities which in turn are "seeding" a rejuvenation of the remainder of the area. The need for the anchor in medium-sized cities may take this form, and it could be a major rehabilitation project or a renewal of deteriorated roads and underground services preventing private renewal. In smaller centres the seeding could be such projects as the rehabilitation of a key public corporate building or group of buildings, the introduction of streetscaping and uniform facade renovations for buildings on the main street or the introduction of a major community facility. Regardless of the form it takes, the emphasis is on a key project which will have the effect of restoring confidence and helping to turn around the downtown from its current stagnation or decline.

