



SOURCE: Hunt Design Associates Inc. (2021)



PHASE 1 OF 969, 979 AND 989 MAPLEVIEW DRIVE EAST

Commercial Market Study

Barrie, Ontario

Prepared for **Sandy Creek Estates Inc.**

February 3, 2022



SANDY CREEK ESTATES INC.

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February 3, 2022

Sandy Creek Estates Inc
2031 James Street
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To Whom It May Concern:

RE: Phase 1 of 969, 979 and 989 Maplevue Drive East – Commercial Market Study (Barrie, Ontario)

urbanMetrics inc. ("urbanMetrics") is pleased to submit this *Commercial Market Study* in support of the pending Zoning By-Law Amendment and Plan of Subdivision applications for the proposed first phase of development at 969, 979 and 989 Maplevue Drive East in the City of Barrie, Ontario.

It is our understanding that the owner of these lands—Sandy Creek Estates Inc. ("Sandy Creek Estates")—has prepared a conceptual plan to intensify the subject properties with a proposed new mixed-use project consisting of residential and commercial uses. The commercial component of the project would be integrated at grade within the "mixed-use" townhouse development blocks with frontage along Maplevue Drive East. Overall, a total of some 163 new units are proposed on the site, including 30 with commercial uses at grade and collectively representing a net addition of some 1,440 square metres (15,500 square feet) of new commercial space.

It has been a pleasure conducting this study in support of the subject application.

Yours truly,

urbanMetrics

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Executive Summary

Introduction

- urbanMetrics inc. (“urbanMetrics”) has been retained by Sandy Creek Estates Inc. (“Sandy Creek Estates”) to complete a *Commercial Market Study* for Phase 1 of development on lands known municipally as 969, 979 and 989 Mapleview Drive East (the “subject site”). This *Commercial Market Study* has been requested as one of the various technical studies required in support of the pending Zoning By-Law Amendment and Plan of Subdivision applications being sought for the subject site.
- The proposal for the subject site is to intensify the lands with a new mixed-use project consisting of a range of new residential and commercial uses in a predominantly townhouse building format (i.e., traditional towns, back-to-backs, stacked townhomes, etc.). The commercial component of the development includes 30 commercial units at grade of the mixed-use building with frontage on Mapleview Drive for a total of some 1,440 square metres (15,500 square feet) of new commercial space on the subject site.
- The focus of this study has been to demonstrate the demand for the proposed commercial development, and to evaluate its potential impact on other existing and / or planned commercial areas.

Market Opportunity

- The subject site is located within the Hewitt’s Secondary Plan Area, a developing area in the southwest area of the City that is forecast to accommodate a significant amount of residential development over the forecast period to 2031. Commercial uses at the site will benefit from the growing population and employment base, particular in the context of the more local-serving range of neighbourhood uses being contemplated on-site.
- Population growth in the Trade Area to 2031 is anticipated to be substantial, with the population forecast to increase to some 54,000 persons by 2031. This represents net growth of some 29,700 persons from a base year of 2021. This significant population growth—tied largely to development in the Hewitt’s Secondary Area—will undoubtedly generate demand for new retail/service commercial facilities to meet the needs of current and future residents, and to maintain existing service levels in the area.
- The subject site—and proposed commercial space—will be well supported by heightened levels of pass-by traffic experienced along Mapleview Drive, an *Arterial* Road that runs east-west through the Hewitt’s Secondary Plan Area. As the Hewitt’s Secondary Plan Area continues to develop, the subject site will also be supported by the existing and future transit

network, anticipated to increase customer traffic in this area of Barrie and along Maplevue Drive.

- There are a number of other proposed commercial development identified in the City of Barrie's and Town of Innisfil's development pipelines. These have been considered in our market demand analysis as potential future competition for space being contemplated on the subject site.
- Based on the results of our market assessment, there is demand for between 211,400 square feet of additional retail/service commercial space by 2026 to some 564,900 square feet of space by 2031. Forecasted demand estimates for the Trade Area exceed the amount of retail/service space being proposed in the Trade Area today, indicating that additional space may even be required over the forecast period to keep pace with the level of residential development being contemplated in the Trade Area.
- The form and function of retail/service commercial space being proposed on the subject site will strengthen this developing area in Barrie and contribute to establishing a complete community in the Hewitt's Secondary Plan Area.

The smaller size and quantity of retail units proposed on site offer a unique opportunity to capture a diversity of uses that can support future residents by providing a range of local-serving goods and services. If needed, the form and scale of the units proposed also means the uses and tenants can evolve overtime and / or adapt to the changing needs of the area. This is particularly important recognizing that the area is largely vacant today, and the specific characteristics and needs of the area are still being established.

Other Considerations

- Notwithstanding the continued effects of the COVID-19 pandemic on shopping patterns and growth in e-commerce (online shopping) activity, the types of commercial facilities being proposed as part of the mixed-use development on the subject site strike an appropriate balance in maintaining adequate access to local serving retail uses, while complimenting residential uses that can provide immediate support for new and existing retail offerings.
- The size and scale of uses being contemplated appeal to the potential reduced space needs of various retail and service tenants, while offering flexibility in the form and function of how space is used. Other formats of development throughout the full commercial hierarchy (e.g., destination retail / regional shopping / traditional large format retailing / main-street or downtown commercial environments) are more likely to be satisfied by existing commercial nodes in Barrie.

- In light of continued challenges in the sector, retail/service commercial space rarely represents the “highest and best use” of land in this part of the Province from a purely market / economic perspective. Instead, they are necessary to include as a key amenity within complete communities and to establish (or maintain) appropriate service levels to satisfy the day-to-day shopping needs of local residents. To this end, the overall scale and function of commercial units at the subject site responds to this existing and likely future market dynamic.
- The type of commercial space proposed at the site by Sandy Creek Estates is consistent with the findings and recommendations of the City’s Municipal Comprehensive Review Land Needs Study (e.g., intended outcomes of mixed use development). In particular, this study identifies a need for creative and contemporary solutions to addressing challenges relating to traditional retail formats and available market opportunities.
- Subject to the ultimate pricing established for the retail strata units contemplated by Sandy Creek Estates, the commercial units proposed for the site could represent an affordable—or at least relatively cost-effective—alternative to traditional commercial uses available for lease.
- The proposed retail units could serve to diversify the supply of available commercial units within the community, as well as support opportunities for local residents to work near their place of residence while maintaining a sense of separation between “work” and “home”.
- From the perspective of employment generation, it is possible that the retail units proposed could yield an equivalent number of employees on the site as a development scenario involving more traditional retail formats.

Conclusions

- Recognizing the continued population growth anticipated in the Trade Area, largely as a result of the build-out of the Hewitt’s Secondary Plan Area, our analysis confirms that all of the proposed retail and service facilities—both on the subject site and in the Trade Area—are warranted.
- Neither the subject proposal, nor other planned commercial developments identified in the pipeline for this part of Barrie are expected to impact the planned function of other existing and proposed commercial facilities. In fact, if anything, the results of our analysis suggest that there may be additional market opportunity to support additional expansion in the supply of retail/service commercial space as the area continues to build-out.
- Overall, given the relatively limited amount of space contemplated at the site—estimated at some 15,500 square feet in total—the subject development does not pose a significant risk with respect to commercial viability nor market impact.

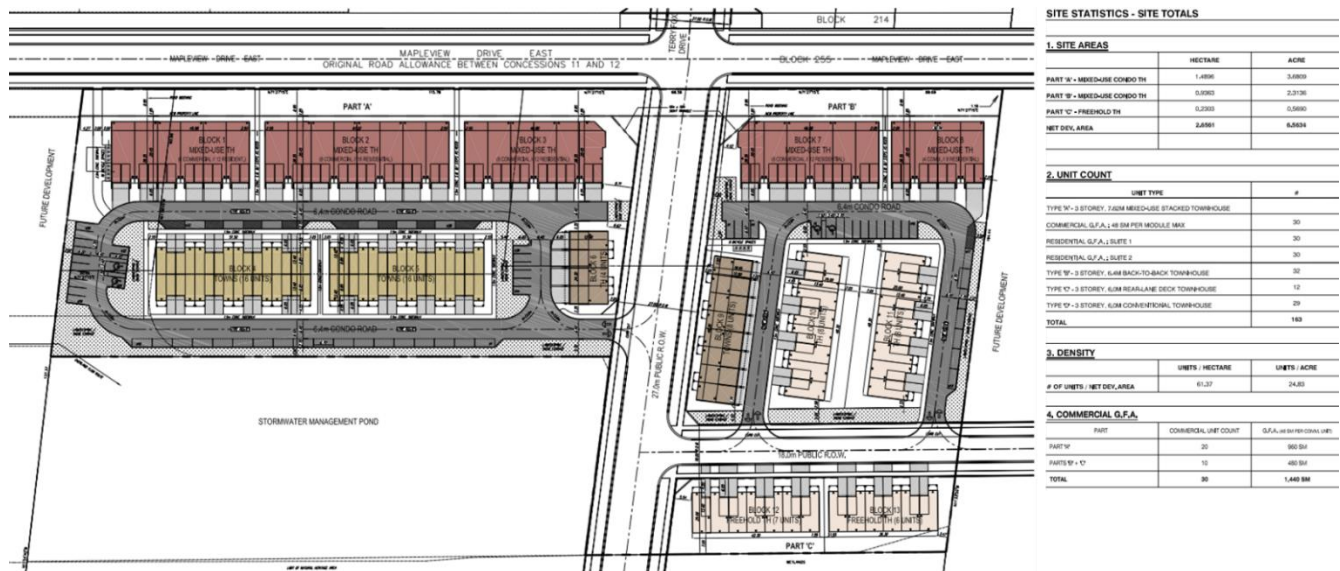
1.0 Introduction

1.1 Background

Located on the eastern extent of Maplevue Drive in the City of Barrie’s south end, the subject lands—known municipally as 969, 979 and 989 Maplevue Drive East—currently comprise a portion of the broader Hewitt’s Secondary Plan Area. In light of the supportive policy direction for new development at this location, Sandy Creek Estates Inc. (“Sandy Creek Estates”) has prepared a conceptual development plan in support of their pending Zoning By-Law Amendment and Plan of Subdivision applications for the proposed first phase of development of the subject site. The conceptual development plan, as shown in Figure 1-1, is to intensify the lands with a proposed new mixed-use project consisting of a range of new residential and commercial uses in a predominantly townhouse building format (i.e., traditional towns, back-to-backs, stacked townhomes, etc.).

As illustrated, the commercial component of the project would be integrated at grade within the “mixed-use” townhouse development blocks (Blocks 1-8) with frontage along Maplevue Drive East. **Overall, a total of some 163 new units are proposed on the site, including 30 with commercial uses at grade and collectively representing a net addition of some 1,440 square metres (15,500 square feet) of new commercial space.**

Figure 1-1: Conceptual Site Plan



SOURCE: urbanMetrics inc., based on conceptual plan provided by Hunt Design Associates Inc. (January 2022).

1.2 Purpose

As part of the municipal approvals process for the proposed development—and specifically the Zoning By-Law and Plan of Subdivision applications identified above—a commercial market study prepared by a qualified land economist is required in support of your application. In particular, based on previous discussions with municipal planning staff at the City of Barrie, a commercial market study has been requested as one of the various technical studies required in support of this submission to confirm the viability of the uses proposed.

The focus of this study—per the City’s standard terms of reference for a site-specific market study, our own professional experience with other similar studies, as well as additional feedback provided as it relates to this particular application—has been two-fold:

- i) To demonstrate the demand for the proposed commercial development; and,
- ii) To evaluate its potential impact on other existing and/or planned commercial areas.

The primary purpose and underlying objectives of urbanMetrics’ involvement with this development has therefore been to prepare a brief retail/service commercial market study, which evaluates the total demand available to existing and potential new commercial uses in this part of Barrie—including at the subject site—and to comment on any potential impact on the planned function of commercial uses throughout the community.

1.3 Approach

Site Context

- We have **reviewed the subject site and assessed its physical and locational characteristics** from a market and land use compatibility perspective – both as it relates to commercial and residential uses. This has included a review of the site’s access characteristics, visibility and exposure to pass-through traffic, relationship with surrounding land uses, proximity to nearby residential/employment uses (including those proposed on-site as part of the new mixed-use development), as well as opportunities for “cross-shopping” with other attractions/amenities or retail destinations elsewhere throughout the Hewitt’s Secondary Plan Area, and beyond.
- Similarly, we will also **examined other key commercial areas throughout the municipality in terms of their own physical and locational characteristics**, as well as their general suitability for a range of different types of retail/service commercial type uses across the full commercial hierarchy. A key part of this assignment has been to demonstrate the underlying function of the subject site in the context of the proposed new community on the site and across the

Hewitt’s SPA, and how it differs from other potentially more destination-based commercial activities that require a different form of planning.

Trade Area Delineation and Customer Origins Survey

- Based on our understanding of the current role and function of commercial businesses throughout Barrie and in particular on the subject site, as well as the potential competitive influence of other nearby shopping areas throughout the community, we have **delineated a reasonable catchment or “Trade Area”** that represents the main geographic area from which existing and potential future/new commercial facilities are likely to derive the majority of their sales volume or customer support. This Trade Area has first focused on the immediate surrounding community on site, but also includes consideration for an extended geography that reflects the appropriate drawing power and potential for inflow sales from a broader market area (i.e., other parts of the City of Barrie, and other more rural households to the south in Innisfil, etc.).
- As input to the foregoing Trade Area delineation and in order to gain a more nuanced understanding of the current retail function of the local market area, we have **undertaken a mobile analytics survey to determine customer origins**. This has involved coordinating with our mobile data provider to deliver a detailed reporting of the origins of local residents, employees and other individuals that visited selected commercial districts in Barrie over a full one-year period. This data has then been used to determine typical catchment areas for the existing retail facilities in Barrie, general traffic flows and travel patterns, projected volumes within the surrounding community, as well as in determining the full extent to which the community attracts “inflow” visitation from a broader geographic area.

We have ultimately undertaken a number of separate/distinct customer origins surveys at selected commercial nodes throughout the community, so as to further assess the level of differentiation in the underlying function of these areas. For the purposes of this study, we have completed surveys at two key locations, as follows:

- SmartCentres South Barrie (the power centre node at Highway 400 / Mapleview); and,
- Heritage Square (the mall at Big Bay Point / Yonge Street).

Where applicable, we have also relied on previous customer origins surveys prepared in Barrie for the purposes of context and benchmarking.

Inventory of Existing and Proposed Commercial Space

- An **inventory of existing retail and service commercial space located in the Primary Trade Area** and selected other areas of the broader Trade Area has been undertaken by urbanMetrics. This inventory includes street address, business names, store types based on North American Industrial Classification System (NAICS), size and level within the commercial hierarchy. We have also grouped these by store categories more typically used in retail market analyses, including “Food Store Retail (FSR)”, “Non-Food Store Retail (NFSR)”, “Beer/Wine/Liquor (BWL)” and “Services”, including articulation of all corresponding store sub-categories.

Recognizing the unique nature of commercial space users in the townhouse format proposed, we have focused on the specific types of retail/service commercial categories that may be most likely to occupy space in the subject development.

- Based on the above information, we have **calculated key performance measures for the Trade Area** as a whole, including: vacancy rates and per capita space ratios. As part of this desktop inventory, we have also completed a visual inspection of the various local commercial facilities to gain a better understanding of their general health, performance and current function.
- Based on information available from the City, a review of relevant land use planning policy information and our own research, we have **also identified locations for potential future commercial development, redevelopment and/or intensification**. The locations have been evaluated in terms of potential timing to market.

Market Profile

- Based on available Census data, municipal information and published forecasts, we have **developed a market profile for the Trade Area** that considers the existing population, as well as the level of growth anticipated as a potential indication of future demand for commercial space. The year 2021 has been assumed as the base year for our market assessment (i.e., based on the dates for which the majority of our supporting research and data are derived), with selected future years provided throughout the forecast period.
- Building on the research above, we have **considered any active construction projects or recent residential development applications** across the Trade Area, based on available municipal statistics. This information has been used to provide an indication as to the level of population growth that can be expected over the forecast period by way of new residential projects and shift towards intensification (i.e., in conjunction with any available long-term municipal population projections or forecasts, per above). Similarly, we have integrated any

potential on-site population growth generated as part of the proposed residential uses in the subject development, which will provide immediate customer support for the new commercial facilities identified.

Retail Market Demand and Impact Analysis

- Relying on the results from the previous work steps, we have undertaken a **high-level market demand assessment by major store type**. Specifically, in order to estimate additional market opportunity for retail and service commercial space that would be required to support the local population, we have relied on a **per capita space methodology** to evaluate market demand. This has applied to both typical retail store categories and other “service”-based store categories, where applicable. In our opinion, this is an appropriate methodology given the relatively limited amount of space proposed at the site.
- Based on the foregoing analysis, we have also **identified any potential impacts** on other existing or planned commercial nodes within the identified Trade Area, which may be created by the proposed changes at the subject site. Although we understand that this is not the primary focus of this market study, based on the initial request by the City, we have nonetheless addressed the issue of market impact in terms of impact on the underlying planned function of the various other existing and potential retail nodes and facilities throughout the Trade Area.

1.4 Assumptions

There are a number of underlying and basic assumptions upon which the validity of the findings presented in this report depend. Based on our considerable and long-term experience in the retail planning process, we recognize and appreciate the problems associated with making broad and generalized assumptions about future conditions. Undoubtedly, deviations from historic and current trends will take place in the future, however, basic assumptions are required regarding the possible extent of such deviations.

These basic assumptions are:

- During the forecast period discussed in this report, a reasonable degree of economic stability will prevail in the Province of Ontario, and specifically in the City of Barrie market;
- Further to above, due to the recent and ongoing conditions relating to COVID-19, it is difficult at this time to accurately and reliably determine the potential longer-term impacts of the pandemic on future economic conditions, investment patterns, shopping habits, among

various other factors that will directly influence future retail/service commercial market conditions and service levels in Barrie.

In reviewing this report, it is also important to note that a significant portion of the background and supporting research relied upon, as well as the resulting analyses, professional observations and research findings have been developed during the COVID-19 pandemic in Canada. As such, the information presented herein reflects the latest available research on relevant historical patterns and best practices;

- Estimates of future population growth in the Trade Area are assumed to be sufficiently accurate and are based on our review of Statistics Canada and Canada Mortgage and Housing Corporation (CMHC) data, available municipal projections, as well as our own evaluation of residential development application statistics obtained from the City of Barrie;
- The official statistical sources utilized in this report (based largely on Statistics Canada, CMHC and City of Barrie data, which have been footnoted where utilized) are considered sufficiently accurate for the purposes of this analysis;

If, for any reason, major changes occur that could influence the basic assumptions stated above—including ongoing monitoring of any future changes resulting from the COVID-19 pandemic—the recommendations contained in this report should be reviewed in light of such changed conditions and revised if necessary.

2.0 Site Context

Key Findings

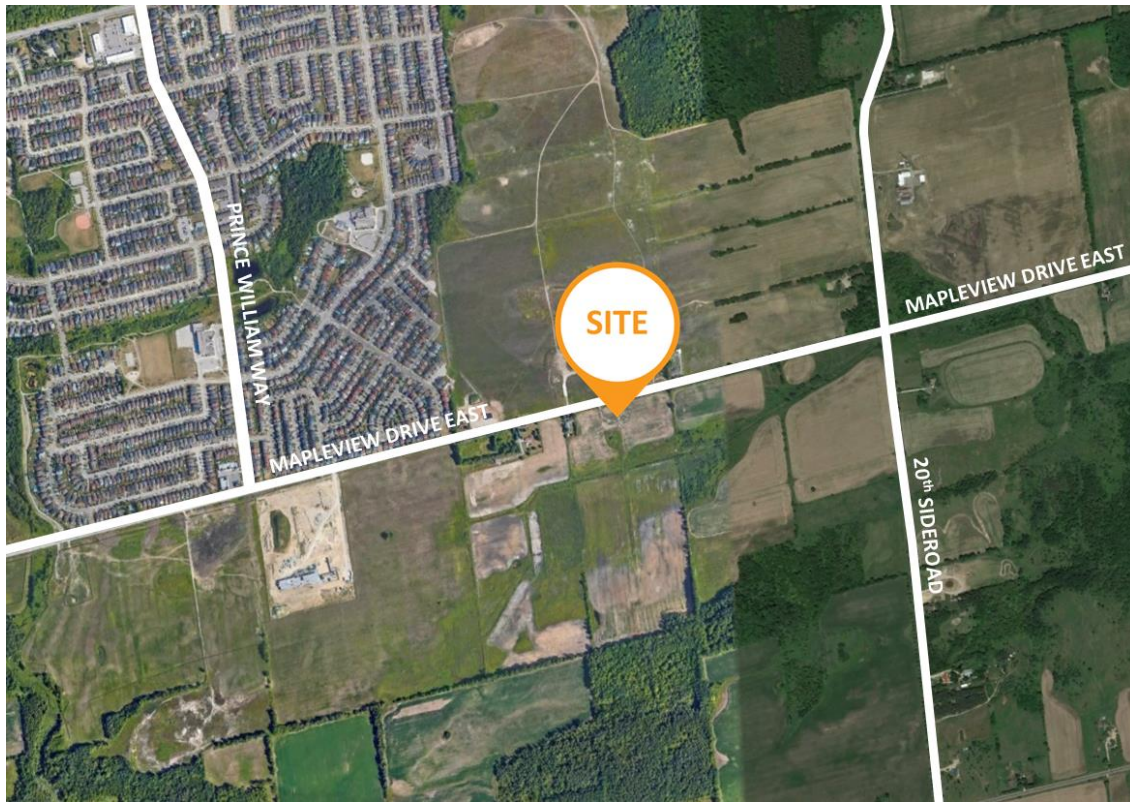
- Located within the Hewitt's Secondary Plan area, commercial uses at the site will benefit from a growing population base within this developing part of Barrie and particularly in the context of the range of more local-serving uses likely to occupy space in the subject development.
- With direct frontage on Maplevue Drive, future retail/service commercial uses on the subject site would benefit from exposure and visibility to heightened levels of pass-by traffic.
- Future retail/service commercial development on the subject site will also be supported by future transit and transportation infrastructure in the area. In particular, future access and exposure to the subject site will also be enhanced by the subject site's location along Maplevue Drive East, a future planned transit route, in addition to being situated directly west of the Gateway at 20th Sideroad.

This section of the report provides an overview of the subject site's physical and locational characteristics. These characteristics have been assessed from a market perspective to determine the site's viability and general suitability for a range of retail/service commercial establishments.

2.1 Site Characteristics

The subject site is located at 969, 979 & 989 Maplevue Drive East, in the former Town of Innisfil, now in the City of Barrie. Figure 2-1 shows the location of the subject site. As shown, the lands are located on the south side of Maplevue Road East, within the Hewitt's Secondary Plan, a master planned area in the City of Barrie. The subject site is also located in proximity to the Town of Innisfil, approximately one kilometre north from the northern edge of the Town at Lockhart Road.

Figure 2-1: Subject Site Location



SOURCE: urbanMetrics inc., with Google Earth Imagery. Image for illustration only.

2.2 Surrounding Land Uses

The subject site is located in the Hewitt's Secondary Plan, an area envisioned to accommodate a substantial amount of residential growth and development in the City of Barrie going forward. The Hewitt's Secondary Plan was approved by the former Ontario Municipal Board ("OMB") in 2016.

Currently the subject site is surrounded by the following uses, albeit largely undeveloped at present:

- **North** of the subject site on the north side of Mapleview Drive East is an assemblage of properties (including 932, 970, 1002 and 1006 Mapleview Drive East) that are also designated Neighbourhood Mixed-Use Node. These are likely to include a similar mix of residential and some retail/service commercial space upon build-out. Beyond that and further north is an area designated for *Residential* uses. Currently these lands are draft approved for development involving single-detached homes, townhomes and mixed-use development.

Northwest of the subject site—beyond the western boundary of the subject site—is a residential area largely developed with single-detached residential uses.

- Directly **east** of the subject site is an area designated *Residential Area*, beyond which is the eastern boundary of the *Secondary Plan Area*.
- **South** of the subject site is an area approved for the development of residential uses of various densities, in addition to other community amenities. Further south is Lockhart Road—the southern boundary of the *Secondary Plan* and rural and agricultural lands located within the limits of the Town of Innisfil.
- **West** of the subject site is largely vacant, with a few single-detached homes distributed along Mapleview Drive East. That said, the lands immediately adjacent to the subject site are designated *Neighbourhood Mixed-Use* in the Hewitt’s Secondary Plan, with the surrounding area further west designated for *Residential Area* similar to the majority of the balance of the Hewitt’s Secondary Plan Area.

2.3 Planning Policy

Official Plan

As mentioned above, the subject site is located in the Hewitt’s Secondary Plan Area, which is comprised of five residential areas and the Yonge Street mixed-use corridor. Section 9.0 of the City of Barrie Official Plan (the “Official Plan”) identifies that the Hewitt’s Secondary Plan Area is envisioned to be a gateway to the City of Barrie and—per policy 9.2.2—is to provide **“a range of employment, housing, and a mix of other uses that allow residents to live, work, and play in their community”**. Furthermore, Section 9.0 of the Official Plan also acknowledges that significant population and employment growth is anticipated in the area. This growing residential population near and on the subject site will likely increase demand for retail and service facilities along Mapleview Drive.

Figure 2-2 identifies the location of the subject site in relation to Schedule 9E – Development Phases, of the Official Plan. As shown, the southeast portion of the property is designated *Residential Area* in the Official Plan. By contrast, the majority of the subject site—including that which is being proposed to include the 30 commercial units at grade—is designated *Neighbourhood Mixed Use Node* in the current Official Plan. Detail related to the goals, permitted uses, interim uses and applicable policies are included in Section 9.5.4 of the Official Plan.

The primary goals for *Mixed Use Nodes and Corridors* are detailed in **Section 9.5.4.1**. Specifically,

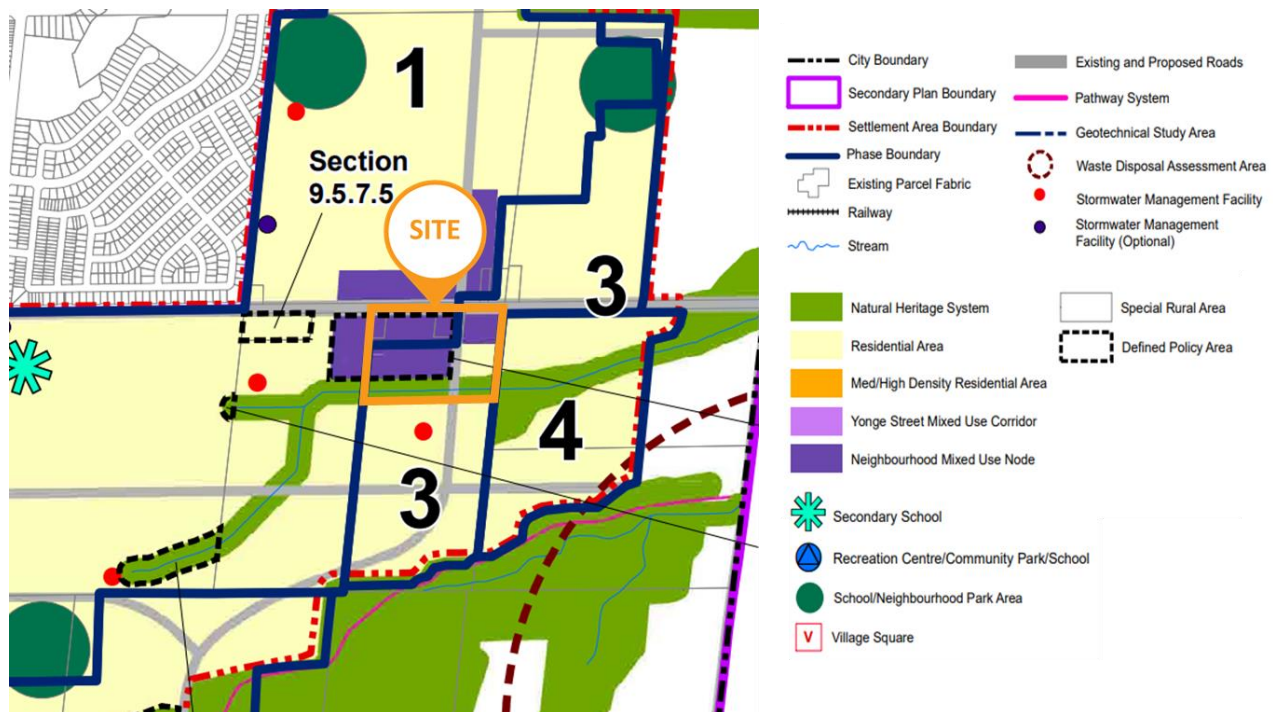
“(a) To create mixed use nodes and corridors with medium and high density residential, special needs housing, institutional and commercial facilities as a focus of community and neighbourhood activity.

(b) To create a meeting place for residents; which is designed to be pedestrian friendly and maximize the use of public transit.”

This designation permits a range of uses, including medium and high density residential uses (9.5.4.2.a), live-work developments (9.5.4.2.c), office uses (9.5.4.2.d), and retail/service commercial uses with an emphasis on ground-floor integration (9.5.4.2.f).

Furthermore, the Official Plan details that the Hewitt’s Secondary Plan Area is anticipated to establish new neighbourhood areas which include basic shops and services, a diversity of housing types, supportive active transportation and public transit, and a range of employment opportunities. Each of these components are key to developing an interconnected, supportive area, for people to live, work and play. The subject proposal is in conformity with the Hewitt’s Secondary Plan and the Official Plan more broadly.

Figure 2-2: Subject Site Land Use Designation, Schedule 9E – Development Phases



SOURCE: urbanMetrics inc., based on the Barrie Official Plan (2018), Schedule 9E - Development Phases.

Zoning

The proposed development and subject Zoning By-Law Amendment seeks to rezone the western portion of the property (i.e., the portion of the subject site designated *Neighbourhood Mixed Use* per the in-force Official Plan) as Neighbourhood Mixed Use (NMU). As per Policy 14.6.2 of Zoning By-law 2009-141, this zone permits a range of retail/commercial uses, residential uses, accessory uses and institutional uses consistent with Table 5.4.1 of By-law 2015-097, as amended. The Neighbourhood Mixed Use (NMU) zone also permits various types of townhouses.

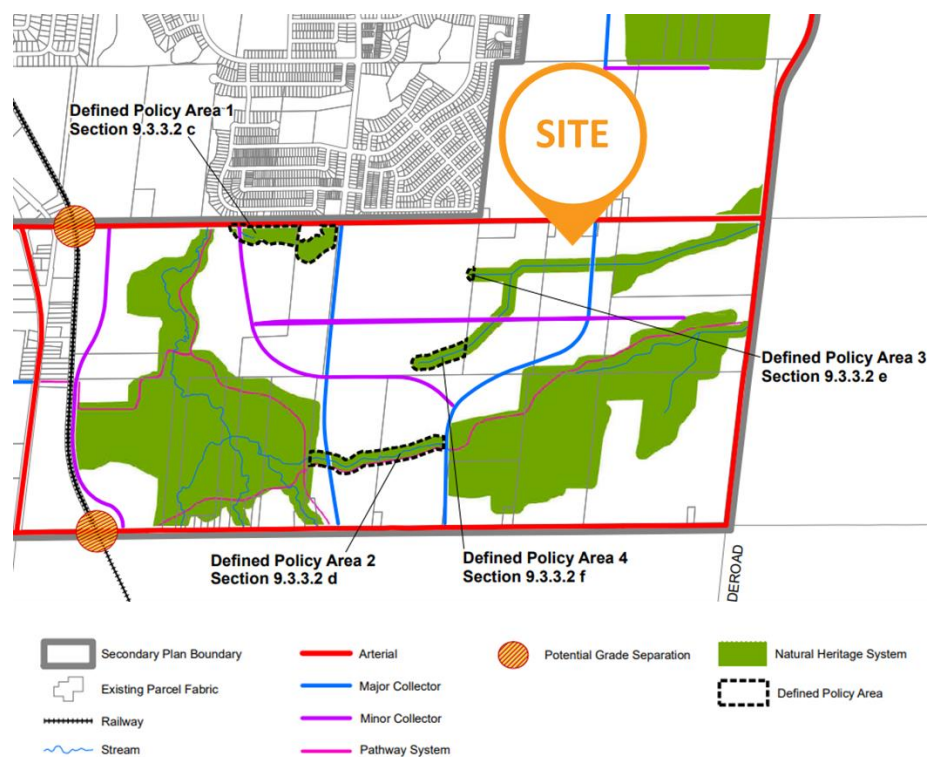
2.4 Site Accessibility

Transportation and access are critical when evaluating the retail/service commercial potential of a site. Figure 2-3 shows the location of the subject site in relation to the existing network of roadways and transportation facilities. As shown, the subject site has frontage along Mapleview Drive, a two-lane *Arterial Road* (as shown in Schedule 9D-1: Transportation Plan, of the Official Plan). As a primarily traffic carrying network, future retail/service commercial on the subject site would benefit from exposure and visibility to heightened levels of pass-by traffic.

Future retail/service commercial development on the subject site will also be supported by future transit and transportation infrastructure in the area. Section 9.0 of the Official Plan details the vision and policy direction for the Hewitt's Secondary Plan Area. Among other things, it highlights that the area will be established with a "*transportation system that seamlessly incorporates the Salem and Hewitt's Secondary Plan Areas into the Barrie community, and encourages active transportation and transit*". Future access and exposure to the subject site will also be enhanced by the subject site's exposure along Mapleview Drive East, a future planned transit route. Furthermore, the subject site is located directly west of the gateway at Mapleview Drive and 20th Sideroad (as shown in Appendix 9A of the Official Plan). Proximity to this gateway location, in addition to exposure along Mapleview Drive, will increase potential future customer traffic to the subject site.

Future retail at this location will be well-supported by heightened levels of pass-by traffic along Mapleview Drive, in addition to customer traffic generated by existing and future transit infrastructure within and throughout the Hewitt's Secondary Plan area. As the area is largely undeveloped, and designated for future residential uses, the retail being proposed on site is well positioned to support future population on the subject site and the build-out of the area more generally. It will contribute to creating a complete community, combining employment and retail opportunities amidst a range of residential development.

Figure 2-3: Barrie Official Plan (2018), Schedule 9D-1: Transportation Plan



SOURCE: urbanMetrics inc., based on the Barrie Official Plan (2018), Schedule 9D – Transportation Plan.

3.0 Market Profile

Key Findings

- A Trade Area has been delineated which represents the geographic extent from which the majority of shoppers would be derived.
- The Trade Area delineated for this analysis is bound by Big Bay Point Road to the north, 20th Sideroad to the east, 9th Line to the south, and Huronia Road to the west. It encompasses the entirety of the Hewitt's Secondary Plan Area in addition to lands in southern Barrie and northern Innisfil.
- The 2021 population of the Trade Area is estimated at 24,300 persons. Going forward—and based on substantial residential development being contemplated throughout the Hewitt's Secondary plan Area—the Trade Area population is forecast to grow to some 54,000 persons. This represents growth of some 29,700 persons over this period, or average annual growth of some 12.1%.
- We have collected mobile analytics (customer origins) data to help us understand differences in travel and shopping patterns depending on the specific commercial destination and location of customer origin. The results of this analysis indicate that retail nodes in Barrie serve varying functions, with larger big-box nodes drawing from a much larger or regional geography relative to what is planned at the subject site.

3.1 Trade Area Delineation

A “Trade Area” represents the geographic area from which a commercial development or individual retailer would expect to derive a majority of their sales volume. The main Trade Area delineated for the purposes of this analysis is intended to capture the surrounding population which is most likely to shop for goods and services from new commercial operators at the subject site.

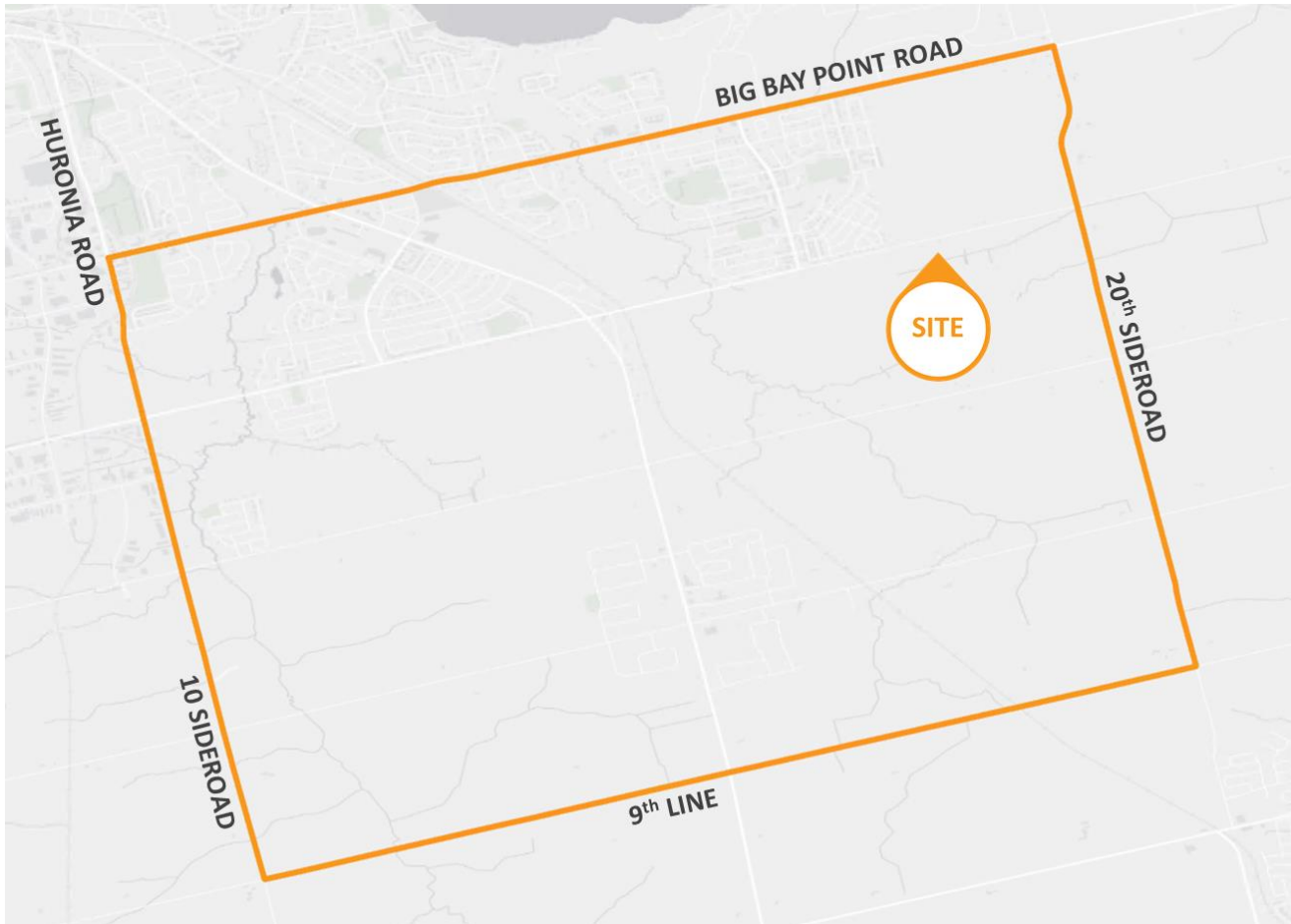
The Trade Area delineated for this analysis is shown Figure 3-1. As shown, the Trade Area is bound by Big Bay Point Road to the north, 20th Sideroad to the east, 9th Line to the south, and Huronia Road to the west. Recognizing the location of the subject site, the Trade Area delineated for this study encompasses the entirety of the *Hewitt's Secondary Plan Area* in addition to lands in both southern Barrie and northern Innisfil.

The delineation of this Trade Area was informed by several factors:

- Geographical distance and travel times to various other locations in the area;
- The location and distance to surrounding retail/service commercial competition;
- The nature and size of the potential retail/service development on the subject site;
- Natural and man-made barriers, which may inhibit or restrict the ease of movement for customers;

- The access characteristics of the site, including the accessibility and visibility of the site provided by the local and regional road network; and,
- The results of multiple customer origin surveys, which explore the directional flows of traffic to existing commercial developments in the surrounding area.

Figure 3-1: Delineated Trade Area



SOURCE: urbanMetrics inc., based on ESRI mapping software.

This Trade Area represents the main geographic area of customers who will most regularly support the retail/service commercial amenities on the subject site. However, additional customer support could be generated from occasional shopping performed by customers living outside the Trade Area (known as inflow). These customers could include visitors, the travelling public, and / or people working in the Trade Area but residing elsewhere. This additional customer support has been

considered in forecasting demand for the retail/service commercial needs being contemplated on the subject site.

3.2 Population Characteristics

In evaluating the commercial market demand in the Trade Area, it is important to establish the local population base and any projected changes in future years. Both represent key inputs in determining the current and anticipated future demand for commercial space in an area, and particularly on the subject site. These characteristics provide an understanding of the potential growth in the customer base that are likely to patronize commercial facilities in this portion of the City of Barrie.

The following section identifies the current and forecasted population levels in the Trade Area, benchmarked against the City of Barrie and the Town of Innisfil.

Trade Area Population

Figure 3-2 illustrates the population of the Trade Area. As shown, the population of the Trade Area grew by 8,400 persons between 2006 and 2016, owing largely to new residential development on the north side of Mapleview Drive. Since 2016, population growth in the area has slowed relative to historical trends, to 24,300 persons in 2021. This represents growth of 800 persons since 2016, or average annual growth of 0.7% over this period.

urbanMetrics has reviewed development application data for the City of Barrie and Town of Innisfil to forecast the population of the Trade Area to 2031. Identification of forthcoming residential development activity signifies potential future increase in expenditure potential, customer support, and ultimate market demand for additional retail/service commercial space in an area.

Some 5,100 residential units of various densities were identified in our review of active development application data. Consistent with development being contemplated on the subject site, the majority of these units are being proposed or contemplated on lands located in the Hewitt's Secondary Trade Area. The anticipated completion (i.e., year of occupancy) of each application was then estimated by urbanMetrics based on a range of factors, including the status of the application, the magnitude of the development (total units), and available timing estimates. Finally, urbanMetrics then estimated the potential population that could be accommodated in these units with applicable person per unit (PPU) factors to arrive at a 2026 and 2031 population estimate for the Trade Area.

As detailed in Figure 3-2, in 2026 the Trade Area is forecast to increase to some 38,200 persons, representing growth of some 13,900 persons over the 2021 population or an average annual growth rate of some 11.4%. The population is anticipated to grow by an additional 15,800 persons between 2026 and 2031 to some 54,000 persons. This represents average annual growth of approximately 8.3% over this period.

Population growth for the Trade Area is anticipated to outpace population growth trends for the remainder of the City of Barrie and the Town of Innisfil. However, this is largely tied to the ongoing development and build-out of the Hewitt's Secondary Plan Area, which currently remains largely undeveloped. Section 9.2.6 of the Barrie Official Plan details that the Hewitt's Secondary Plan Area is anticipated to accommodate some 26,000 persons by 2031. As a developing area, primed for substantial development, significant population growth is expected.

Figure 3-2: Trade Area Population

	Historical ¹			Current ²	Forecast ³	
	2006	2011	2016	2021	2026	2031
Trade Area	15,100	21,600	23,500	24,300	38,200	54,000
<i>Average Annual Growth</i>		1,300	380	160	2,780	3,160
<i>Average Annual Growth Rate</i>		8.6%	1.8%	0.7%	11.4%	8.3%
City of Barrie	133,400	140,300	147,100	151,300	189,200	210,000
<i>Average Annual Growth</i>		1,380	1,360	840	7,580	4,160
<i>Average Annual Growth Rate</i>		1.0%	1.0%	0.6%	5.0%	2.2%
Town of Innisfil	32,400	33,700	38,000	45,600	52,400	60,000
<i>Average Annual Growth</i>		260	860	1,520	1,360	1,520
<i>Average Annual Growth Rate</i>		0.8%	2.6%	4.0%	3.0%	2.9%

SOURCE: urbanMetrics inc. Population figures rounded to the nearest 100 residents.

¹ Based on Statistics Canada Census data, adjusted for net undercoverage. 2011 population estimates for the City of Barrie and the Town of Innisfil are based on estimates included in the 2016 Census as a result of errors reported in 2011 data.

² Based on Statistics Canada Census data, Canada Mortgage and Housing Corporation (CMHC) completions data and person per unit (PPU) assumptions contained in the City of Barrie Development Charges Background Study (2019), and the Town of Innisfil Development Charges Background Study (2018)

³ Based on forecasts included in the City of Barrie Municipal Comprehensive Review (M.C.R.) Long-Term Urban Land Needs Study, and the Town of Innisfil Development Charges Background Study (2018). Study Area forecasts are based on a review of the City of Barrie Active Development Applications.

3.3 Customer Origins

To understand the potential draw, competitive framework and customer support for retail / service commercial space on the subject site—beyond the factors outlined above—urbanMetrics has partnered with a mobile analytics data provider to better understand the travel behaviours of visitors to existing commercial establishments in the area. The results of this analysis have been utilized to support the delineation of a data-driven, market-tested Trade Area that more accurately captures the true drawing power and customer support for commercial establishments in the area, and to understand how commercial uses on the subject site may be differentiated from other commercial areas. It has also been used to assess the potential and likely impact of inflow traffic (i.e., customer

traffic generated from residents living outside the Trade Area) particularly recognizing that the area surrounding the subject site is largely vacant today.

For the purposes of this analysis, urbanMetrics identified two commercial nodes in the southern portion of the City of Barrie. These nodes were selected to capture patterns in different areas of the City, and specifically to highlight the variable market draw associated with various retail/service commercial establishments. These geographies were surveyed individually and consolidated as a total to understand how each individual geography relates to broader averages and trends in the area. The geographies surveyed include:

- **SmartCentres South Barrie** – This commercial node captures visitation to the SmartCentres location at 35 Mapleview Drive West, Barrie. It includes a Wal-Mart Supercentre, a Sobeys, in addition to other retail / service commercial establishments such as a PetSmart, an Indigo, a hair salon, and a Kelsey's restaurant.
- **Heritage Square** – Located amidst an established residential community, Heritage Square captures retail/service commercial establishments at the southwest corner of Big Bay Point Road and Yonge Street. Existing major tenants include a Zehrs supermarket, the Beer Store and a Dollarama.

It is important to note that mobile analytics data captures a representative segment or sample of total visitation to a given geography. This capture is based on a range of mobile applications installed on individual devices. Therein, the figures presented below are reported in percentage terms, as they represent a reasonable approximation as to the macro-level geographic origin of visitors, but do not present a comprehensive view of total visitation in absolute volume terms. For the purposes of this analysis, data collected is based on full year 2021 visitation patterns.

Total Visitation

Figure 3-3 shows the common evening locations of visitors to each commercial node and highlights where visitors / potential customers of each are coming from. These estimates include repeat visitation, intentionally representing the higher likelihood of more local residents to visit a given node more frequently, while similarly highlighting the more limited visitation of people who come from further afield (e.g., tourists, seasonal residents, or visitors). In doing so, this figure also highlights differences in the local, municipal, and regional drawing power of each commercial location.

As shown in Figure 3-3, there is—unsurprisingly—notable differentiation in the visitation patterns exhibited at the two commercial nodes examined in this analysis. The following highlights are noted:

- Some 85% of visitation to the SmartCentres node in 2021 was by people living outside the Trade Area. Given this finding, alongside the open format, diversity, size, and large format

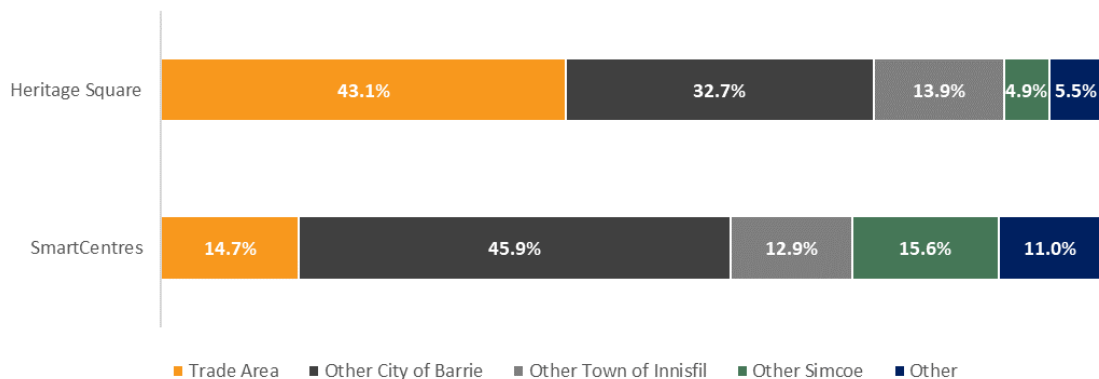
(“big-box”) nature of retail / services co-located at this node, it is reasonable to conclude this commercial area serves a distinct regional function that differs from that of the subject site.

- Approximately 43% of visitation to Heritage Square in 2021 was from residents of the Trade Area. Evidently, heritage Square represents an important local serving node, likely tied to the range of neighbourhood serving retail/service commercial uses at this location. However, owing to the presence of a Zehr’s supermarket, and the location of this node directly across from the Barrie South GO Train Station, some 57% of visits were from people living outside the Trade Area.
- Differentiation in the regional and more local-draw of each node is furthered by the percentage of visits made by people living outside the City of Barrie and Town of Innisfil. Nearly 27% of visitation to the Smart Centres in 2021 was from people living outside this area, by comparison only some 10% of visitation to Heritage Square was made by persons living outside the City and Town.

Recognizing differentiation in visitation to the two commercial nodes highlighted above is key to understanding potential future visitation and support for retail / service commercial establishments on the subject site. The format and scale of uses being contemplated are smaller than those contained in the SmartCentres node or in Heritage Square, and do not benefit from the same access characteristics (i.e., access to a major highway, existing transportation infrastructure).

The trends exhibited and drawn from the mobile analytics data validates the Trade Area delineated for this analysis, insofar that they emphasize how visitation is tied to its locational characteristics, and the form and functions of retail uses in the area. That said, we anticipate all of these origin patterns to change significantly as the area continues to develop, likely offering additional customer support to all nodes identified.

Figure 3-3: Visitation by Node, by Place of Origin



SOURCE: urbanMetrics inc., based on mobile analysis survey data.

Benchmarking

In 2019, urbanMetrics relied on similar mobile analytics data to assess the drawing power of three pre-defined nodes, including: the same SmartCentres location identified in this analysis, as well as Downtown Barrie and Georgian Mall. While this data is expressed on the basis of comparing individual visitor data—and does not account for repeat visitation in the same manner as above—it generally highlights the same patterns observed here. In particular, each of the retail nodes assessed in 2019 attract heightened levels of inflow (i.e., customer traffic) from a broader geography than Heritage Square. The distinctive nature, location, form, and function of retail uses at each of these locations coincides with a heightened regional draw.

Figure 3-4: Common Evening Location for Visitors to Various Nodes, by Place of Origin

	2019			2021	
	SmartCentres	Downtown Barrie	Geogian Mall	SmartCentres	Heritage Square
Barrie	34.8%	41.2%	42.4%	37.3%	54.0%
Innisfil	6.73%	3.46%	3.7%	10.3%	15.6%
Total	41.6%	44.7%	46.2%	47.6%	69.6%
All Other	58.4%	55.4%	53.8%	52.4%	30.5%
Total Visitors	100.0%	100.0%	100.0%	100.0%	100.0%

SOURCE: urbanMetrics inc., based on mobile analysis survey data for full-year 2019 and full-year 2021 data.

4.0 Commercial Context

Key Findings

- The Trade Area currently contains some 781,900 square feet of existing retail / service commercial space.
- Amounting to some 32.2 square feet of retail/service commercial space per capita, existing service levels in the Trade Area are currently slightly below the amount typically required to service the complete range of residents' day-to-day shopping needs.
- This indicates that there could be a pre-existing demand for additional retail/service commercial space, irrespective of any future expansion required in support of the significant population growth anticipated in the area going forward.
- The relatively limited amount of vacant retail/service commercial space in the Trade Area and vacancy rates more-or-less indicative of a healthy / balanced market further highlight the potential strength of the retail/service commercial opportunity in the area.

A review of the existing and potentially competitive retail and service facilities surrounding the site is key to understanding what commercial roles and functions are currently provided for residents and visitors to the Trade Area, as well as for understanding what competitive influences may influence the available market support for the proposed development.

4.1 Existing Space

An inventory of existing retail and service commercial space in the Trade Area, was conducted by urbanMetrics in January of 2022. This inventory includes all food store retail (FSR), non-food store retail (NFSR), Beer, Wine, and Liquor (BWL) stores, as well as all types of service-based commercial facilities.

Figure 4-1 summarizes the results of our commercial inventory. As shown, based on our inventory, the Trade Area contains some 781,900 square feet of retail / service commercial space.

This includes retail/ service commercial space located on the north side of Big Bay Point Road, and the west side of Huronia Road. More specifically, it includes:

- 123,100 square feet of **Food Store Retail** ("FSR") space;
- 189,900 square feet of **Non-Food Store Retail** ("NFSR") space;
- 22,100 square feet of **Beer, Wine, Liquor** ("BWL") space;
- 394,700 square feet of **Service** space; and,

- 52,100 square feet of **Vacant** space.

Estimated at 32.2 square feet of retail/service commercial space per capita, we would also note that the existing service level in the Trade Area is slightly below the amount typically required to serve residents day-to-day shopping needs (typical service level ranges between 35 – 40 square feet per capita). This indicates that there is likely already demand for additional retail/service commercial space, irrespective of significant population growth anticipated in the area going forward.

Figure 4-1: Trade Area Commercial Inventory

	Sq. Ft.	%	Sq. Ft. Per Capita
FSR			
Supermarkets & Grocery	98,500	12.6%	4.1
Convenience & Specialty Food	24,600	3.1%	1.0
FSR Total	123,100	15.7%	5.1
BWL Total	22,100	2.8%	0.9
NFSR		0.0%	
Apparel and Accessories	3,500	0.4%	0.1
Automotive	18,300	2.3%	0.8
Building and Outdoor Home Supply	25,300	3.2%	1.0
Furniture, Home Furnishings & Electronics Store	39,200	5.0%	1.6
General Merchandise	11,400	1.5%	0.5
Miscellaneous Retailers	38,700	4.9%	1.6
Pharmacies & Personal Care	53,500	6.8%	2.2
NFSR Total	189,900	24.3%	7.8
SERVICES			
Cultural Entertainment & Recreation	12,900	1.6%	0.5
Finance, Insurance & Real Estate	44,600	5.7%	1.8
Health Care	117,900	15.1%	4.9
Food Services & Drinking Places	80,000	10.2%	3.3
Personal Care	26,300	3.4%	1.1
Business Services ¹	74,900	9.6%	3.1
Other ²	38,100	4.9%	1.6
SERVICES Total	394,700	50.5%	16.2
VACANT	52,100	6.7%	2.1
GRAND TOTAL	781,900	100.0%	32.2

SOURCE: urbanMetrics inc., based on desktop inventory work completed in January 2022. Rounded to the nearest 100 square feet.

¹Includes: Professional, Scientific and Technical Services, Select Civic and Social Organizations, Selected Office Administration and Selected Education Services.

²Includes: Cultural, Entertainment and Recreation, Personal & Household Goods Repair and Maintenance, Social Services, Consumer Goods Rental & Transportation.

At the time of our inventory, there was approximately 52,100 square feet of vacant space in the Trade Area, or some 6.7% of all retail/service commercial space. With a normal vacancy rate being reported within about 4% to 6% of a typical market, we note that retail/service commercial space in the Trade Area is generally in equilibrium.

That said, we do note that some 11,400 square feet of vacant space is located at 490 Huronia Road. This site is currently being used as a COVID-19 vaccination clinic but has been included as vacant space in our inventory, recognizing that the clinic represents a temporary use and will likely not occupy this location over the longer-term planning horizon. This space accounts for some 22% of vacant space in the Trade Area today. Should this building be considered occupied—on the basis of its current use as a vaccination clinic—the amount of vacant space in the Trade Area would reduce to some 40,700 square feet, or some 4.8% of all retail/service commercial space in the Trade Area.

The limited amount of vacant retail/service commercial space in the Trade Area highlights the strength of the retail/service commercial market in the area, and the potential need for additional retail/service commercial facilities in the Trade Area. This is heightened recognizing substantial population growth anticipated in the Hewitt’s Secondary Plan Area, and Trade Area more generally.

4.2 Proposed Space

As another related and important input to our analysis, we have also gathered information on planned / proposed commercial developments throughout the Trade Area, including on the subject site.

Subject Site

Based on the most recent concept plan, the subject site proposes to include 30 units for commercial units, at grade of the mixed-use townhouse development blocks (Blocks 1-8), with frontage along Mapleview Drive East. Each of these units will be comprised of approximately 48 square metres (516 square feet) on average and collectively representing a net addition of some 1,440 square metres (15,500 square feet) of new commercial space to the community.

Other Developments

urbanMetrics has also reviewed recently approved and proposed developments incorporating new retail/service commercial space in the Trade Area. The relevant projects—based on information available through the City of Barrie and Town of Innisfil’s development application portals have been identified as follows:

Approved & Under Construction

- **681 and 685 Yonge Street** – This development is for a 7-storey mixed-use building include 176 residential units, and 5,434 square feet of retail/service commercial space at grade that is distributed across four units. This application was approved in 2019 and the development is currently under construction.
- **759 Yonge Street** – This proposal includes some 1,326 residential units of varying densities and approximately 30,000 square feet of retail/commercial space at the base of a six-storey mid-rise development. The retail/service commercial space will be located adjacent to the Barrie South GO Station, north of the Yonge Street corridor. This application was completed in 2016 and the development is currently under construction.

Proposed – Square Footage Known

- **441 Huronia Road** – There is a proposal to develop a one-storey medical building that will include some 9,742 square feet of space.
- **989 Yonge Street** – The proponent is seeking to rezone the lands to develop a range of uses including 60 townhomes, and four mixed-use residential and commercial buildings. The mixed-use buildings are proposed to include some 1,218 residential units. Collectively they are proposed to include some 32,291 square feet of retail/service commercial space, distributed evenly across the four buildings.
- **571 Huronia Road** – A Zoning By-law Amendment is being sought to permit the development of a new 5,614 square foot multi-tenanted building, including: a new gas station (1,903 square feet), restaurant (1,903 square feet) and car wash (1,808 square feet).
- **651, 659, 665, 669 & 673 Mapleview Drive East** – A six-building commercial development including some 76,700 square feet of new retail/service commercial space is being proposed. This development is in the pre-consultation phase but is anticipated to include a restaurant, a new food store, and a range of other retail uses.
- **1012 Yonge Street** – This proposal for an Official Plan Amendment and Zoning By-law Amendment is seeking to develop the property with 1,029 residential units, including 10 townhomes, three six-storey, and two three-storey multi-residential buildings. Retail/service commercial space is proposed to be included at the base of one of the six-storey building—with frontage onto Yonge Street—and including some 13,795 square feet of space distributed between eight units.

Proposed – Square Footage Unknown

In addition, urbanMetrics has identified a number of applications that propose to include a “Mixed-Use Block” as a component of their development proposal. With the limited level of detail currently available, it is difficult to assess the ultimate form and function of commercial spaces integrated at each of these sites.

Figure 4-2 identifies the location of each of these blocks and details the size of the mixed-use blocks associated with each. It also includes a preliminary estimate as to the quantum of space that could potentially be developed on each portion of these sites. This estimate is based on an assumed land coverage ratio and share of the mixed-use floorplate dedicated to retail/service commercial uses. These estimates are based on urbanMetrics’ own professional judgement and are likely to change as the commercial component of these projects evolve. Moreover, it is our opinion that these estimates over-state the actual amount of commercial space that is likely to be developed at these locations over the longer-term planning horizon, which is a conservative assumption in the context of our market assessment. For example, we note that the site immediately across the street from the subject site (i.e., 932, 970, 1002 & 1006 Mapleview Drive East) currently has approvals, per an Ontario Municipal Board (OMB) decision, for some 1,675 square metres (approximately 18,000 square feet) of space on Block 2 and no commercial on Block 1. As such, we have been overly conservative by considering an even greater amount of proposed space based on the results of this high-level methodology. Figure 4-2 only includes sites with active applications and does not account for other designated commercial sites that have no formal status for planned development with the City.

Figure 4-2: Potential Commercial Development Space Yield

Address	Size	Adjusted Gross to Net Space ¹	Developable Retail Area ¹
400 Lockhart Rd	1.55 ha	125,100 sf	37,500 sf
620 Lockhart Rd	0.36 ha	29,100 sf	8,700 sf
515 Mapleview Dr E - Block 1	1.36 ha	109,800 sf	32,900 sf
515 Mapleview Dr E - Block 2	1.51 ha	121,900 sf	36,600 sf
932, 970, 1002 & 1006 Mapleview Dr E - Block 1	1.73 ha	139,700 sf	41,900 sf
932, 970, 1002 & 1006 Mapleview Dr E - Block 2	0.75 ha	60,500 sf	18,200 sf
667-675 Yonge St ²	0.55 ha	44,400 sf	13,300 sf
Total	7.81 ha	586,100 sf	175,800 sf

SOURCE: urbanMetrics inc., based on information available through the City of Barrie and Town of Innisfil development application information.

¹Adjustment factor based on urbanMetrics’ experience and understanding of the nature of development contemplated on site. Rounded to the nearest 100 square feet.

²Property size measured by urbanMetrics using the Simcoe County Interactive Mapping.

Summary

Figure 4-3 consolidates the development application information detailed above, including for projects where the actual commercial space yields are known and for those where we have prepared our own estimates based on professional judgement. As shown, there is just over 300,000 square feet of retail/service commercial space under application in the Trade Area today, including potential future space on land being proposed for Mixed-Use development.

The significant amount of retail/service commercial space being proposed and contemplated in the Trade Area is largely tied to the ongoing development of the Hewitt's Secondary Plan Area. It is largely tied to substantial population growth and residential development anticipated in the area over the forecast period to 2031. To be conservative, our analysis in Section 5.0 assumes that all of the commercial space proposed—and identified above—will be developed by 2031. This effectively accounts for likely competition between these developments and potential future uses on the subject site. It also recognizes that future market opportunities for commercial space on the subject site will be—at least in part—consumed and influenced by other developments in the Trade Area.

Figure 4-3: Total Retail & Commercial Space Approved or Under Application in the Trade Area

Active Applications	
441 Huronia Rd	9,700 sf
759 Yonge St	30,000 sf
681 Yonge St	5,400 sf
989 Yonge St	32,300 sf
571 Huronia Rd	5,600 sf
651, 659, 665, 669 & 673 Mapleview Dr E	76,700 sf
1012 Yonge St	13,800 sf
Sub Total	173,500 sf
Potential Additional	
400 Lockhart Rd	37,500 sf
620 Lockhart Rd	8,700 sf
515 Mapleview Dr E	69,500 sf
932, 970, 1002 & 1006 Mapleview Dr E	60,100 sf
667-675 Yonge St	13,300 sf
Sub Total	189,100 sf
Subject Site	15,500 sf
Grand Total	378,100 sf

SOURCE: urbanMetrics inc., based on information available through the City of Barrie and Town of Innisfil development application information. Rounded to the nearest 100 square feet.

5.0 Demand Analysis

Key Findings

- Given the healthy vacancy rate and relatively low service levels in the Trade Area today, we estimate that the Trade Area currently contains less space than warranted in a number of retail/service commercial space categories.
- Based on significant population growth anticipated in the Trade Area, we estimate that there will be demand for some 211,400 square feet of additional retail/service commercial space in the Trade Area by 2026, increasing to some 564,900 square feet by 2031. These estimates exclude store categories which are unlikely to locate on the subject site (e.g., Automotive, Building and Outdoor Home Supply etc.).
- Based on the results of our high-level market assessment, there is sufficient market opportunity to support new retail/service commercial space being contemplated on the subject site, in addition to all of the other proposals identified in the Trade Area as of today. In fact, additional retail/service commercial space may even be required over the forecast period to 2031 to keep pace with the level of residential development being contemplated, which could be accommodated as part of the ongoing and future build-out of the secondary plan post-2031.
- There is notable demand for local-serving retail/service commercial amenities to serve the increasing population in the Trade Area. This—among other things—includes demand for personal care services, health and personal care stores, speciality food and convenience stores, and financial services. The form and function of retail space being proposed on the subject site represents a prime opportunity to capture a portion of this demand.
- The introduction of a number of smaller retail storefronts at grade will help animate the street while providing for a diversity of uses that can evolve overtime and/or to the changing needs of the area.

Based on the range of potential store types to be included on the subject development and the lack of site-specific leasing and/or tenant details available at this early stage of the planning process, we have evaluated market opportunity at a relatively high-level. Specifically, we have evaluated demand characteristics for a full range of pre-defined commercial categories using a per capita space ratio analysis.

We note that utilizing the per capita space methodology provides a more general guide as to the retail and service commercial space warranted to serve the local population in a given market area and particularly in the context of a new municipally led Secondary Plan such as this. Similarly, recognizing the relatively limited amount of commercial space contemplated at the subject site, we believe that this is a more appropriate methodology in evaluating market opportunities at the site. The actual space required in this area may vary depending on income levels and the amount of spending inflow and outflow which occurs. However, this analysis provides a strong indication of whether there is a more general shortage, or surplus of commercial space in the Trade Area.

5.1 Per Capita Space Analysis

Existing Conditions

Figure 5-1 details the current per capita service levels in the Trade Area based on the estimated 2021 population of 24,300 persons, and the inventory completed by urbanMetrics in January 2022.

As shown below, we have estimated that each Trade Area resident requires approximately 38 square feet of retail/service space per capita. This estimate is based on urbanMetrics market experience in countless Ontario markets and includes space across all retail/service commercial categories.

Based on our estimate, residents of the Trade Area currently support a total of some 923,800 square feet of retail/service commercial space, as detailed in Column B. Recognizing that residents of the Trade Area shop in other retail/service areas outside of the Trade Area, we have estimated target Trade Area capture rates in Column C, which vary for each store category depending on their normal drawing power (e.g., local versus community wide or regional). Applying these estimated captures rates from Column C to the space required in Column B, results in the adjusted space figures shown in Column D; a total of approximately 491,200 square feet across all retail/service categories.

In addition to the sales generated from Trade Area residents, future retail/service commercial businesses in the community will also generate a portion of their sales from customers living outside the Trade Area, also known as inflow. The majority of this inflow support is expected to come from residents in other parts of the City of Barrie and the Town of Innisfil, in addition to visitors from other areas of Simcoe County. The amount of inflow will vary by store category, resulting in an estimated overall increase in the total space warranted in the Trade Area.

Figure 5-1 details the total warranted space by store category (Column F) and compares this space to the existing space from Figure 4-1. (Column G). Unsurprisingly given the healthy vacancy rate and the relatively low service levels in the Trade Area at present, we estimate that the Trade Area currently contains slightly less space than warranted in a number of the selected categories identified (i.e., an existing shortfall).

Similarly, we note that the few store categories for which an existing surplus or over-supply of space has been identified are—at least in part—exaggerated due to the context of this part of Barrie and the ultimate delineation of our Trade Area. In particular, we note that our inventory included commercial spaces along the outer edge of the Trade Area boundary, which potentially over-states the extent to which these facilities are in fact supported by residents (and/or businesses) located within the Trade Area versus communities beyond. For example, our inventory includes a range of healthcare service type businesses located within a medical office complex on Huronia Road, which is undoubtedly supported by existing populations from across South Barrie and outside of the Trade Area. Similarly, the notable oversupply of “Business Services” can likely be attributed to commercial

establishments included in our inventory that are in fact supported primarily by other businesses in the traditional employment lands centred along the Highway 400 corridor in this part of Barrie (i.e., outside of the Trade Area delineated for the subject site).

Figure 5-1: Trade Area Per Capita Commercial Needs Analysis (2021)

Commercial Needs - Retail/Service Category	Typical Space Per Capita (Sq Ft)		Total Space Required by Residents (Sq Ft)		Target Capture		Space Required (Sq Ft)		Inflow		Total Warranted Space (Sq Ft)		Less: Existing Space		Total Net New Space Required	
Population (2021)	24,300	A	=	B	x	C	=	D	x	E	=	F	-	G	=	H
Food Store Retail																
Convenience and Speciality Food	1.5			36,500		65.0%		23,700		25.0%		31,600		24,600		7,000
Supermarkets & Grocery	3.5			85,100		70.0%		59,600		40.0%		99,300		98,500		800
Beer, Wine Liquor	1.0			24,300		60.0%		14,600		40.0%		24,300		22,100		2,200
Non-Food Store Retail																
Apparel and Accessories	2.0			48,600		40.0%		19,400		10.0%		21,600		3,500		18,100
Automotive	2.0			48,600		35.0%		17,000		10.0%		18,900		18,300		600
Building and Outdoor Home Supply	3.0			72,900		35.0%		25,500		10.0%		28,300		25,300		3,000
Furniture, Home Furnishings & Electronics Store	3.0			72,900		40.0%		29,200		20.0%		36,500		39,200		-2,700
General Merchandise	2.0			48,600		40.0%		19,400		20.0%		24,300		11,400		12,900
Miscellaneous Retailers	2.0			48,600		40.0%		19,400		15.0%		22,800		38,700		-15,900
Pharmacies & Personal Care Stores	1.5			36,500		70.0%		25,600		40.0%		42,700		53,500		-10,800
Services																
Cultural, Entertainment & Recreation	2.5			60,800		45.0%		27,400		20.0%		34,300		12,900		21,400
Finance, Insurance & Real Estate	2.0			48,600		70.0%		34,000		20.0%		42,500		44,600		-2,100
Health Care	1.5			36,500		75.0%		27,400		20.0%		34,300		117,900		-83,600
Food Service & Drinking Places	3.5			85,100		65.0%		55,300		15.0%		65,100		80,000		-14,900
Personal Care	2.0			48,600		60.0%		29,200		10.0%		32,400		26,300		6,100
Business Services ¹	1.5			36,500		60.0%		21,900		20.0%		27,400		74,900		-47,500
Other ²	3.5			85,100		50.0%		42,600		10.0%		47,300		38,100		9,200

SOURCE: urbanMetrics inc., based on desktop inventory work completed in January 2022. Rounded to the nearest 100 square feet.

¹ Includes: Professional, Scientific and Technical Services, Select Civic and Social Organizations, Selected Office Administration and Selected Education Services.

² Includes: Cultural, Entertainment and Recreation, Personal & Household Goods Repair and Maintenance, Social Services, Consumer Goods Rental & Transportation.

Forecast Demand

In calculating potential future demand for retail/service commercial space in the Trade Area (for 2026 and 2031), we have applied the same methodology above. However, we have considered marginally reduced inflows and higher capture rates across selected retail/service commercial categories that are more local-serving in nature to recognize the ongoing build-out of the Hewitt's Secondary Plan Area and the maturing of the community more generally. As residential development continues and the local population of the Trade Area increases, retail/service commercial uses are anticipated to become less reliant on inflow populations and predominantly patronised by local residents.

Based on these adjustments, our multi-period per capita space ratio analysis, and the level of population growth forecast for the Trade Area, there is some 644,100 square feet of retail/service commercial space warranted in the Trade Area to 2031. The inputs and analysis for the forecast period to 2031 are shown in Figure 5-2 and Figure 5-3.

Figure 5-2: Trade Area Per Capita Commercial Needs Analysis (2026)

Commercial Needs - Retail/Service Category	Typical Space Per Capita (Sq Ft)	Total Space Required by Residents (Sq Ft)	Target Capture	Space Required (Sq Ft)	Inflow	Total Warranted Space (Sq Ft)	Less: Existing Space	Total Net New Space Required
Population (2026)	38,200							
Food Store Retail								
Convenience and Speciality Food	1.5	57,300	65.0%	37,200	20.0%	46,500	24,600	21,900
Supermarkets & Grocery	3.5	133,700	75.0%	100,300	30.0%	143,300	98,500	44,800
Beer, Wine Liquor	1.0	38,200	60.0%	22,900	35.0%	35,200	22,100	13,100
Non-Food Store Retail								
Apparel and Accessories	2.0	76,400	40.0%	30,600	10.0%	34,000	3,500	30,500
Automotive	2.0	76,400	35.0%	26,700	10.0%	29,700	18,300	11,400
Building and Outdoor Home Supply	3.0	114,600	35.0%	40,100	10.0%	44,600	25,300	19,300
Furniture, Home Furnishings & Electronics Store	3.0	114,600	40.0%	45,800	15.0%	53,900	39,200	14,700
General Merchandise	2.0	76,400	40.0%	30,600	15.0%	36,000	11,400	24,600
Miscellaneous Retailers	2.0	76,400	40.0%	30,600	15.0%	36,000	38,700	-2,700
Pharmacies & Personal Care Stores	1.5	57,300	75.0%	43,000	30.0%	61,400	53,500	7,900
Services								
Cultural, Entertainment & Recreation	2.5	95,500	45.0%	43,000	20.0%	53,800	12,900	40,900
Finance, Insurance & Real Estate	2.0	76,400	70.0%	53,500	20.0%	66,900	44,600	22,300
Health Care	1.5	57,300	75.0%	43,000	20.0%	53,800	117,900	-64,100
Food Service & Drinking Places	3.5	133,700	65.0%	86,900	20.0%	108,600	80,000	28,600
Personal Care	2.0	76,400	60.0%	45,800	10.0%	50,900	26,300	24,600
Business Services ¹	1.5	57,300	60.0%	34,400	20.0%	43,000	74,900	-31,900
Other ²	3.5	133,700	50.0%	66,900	10.0%	74,300	38,100	36,200

SOURCE: urbanMetrics inc., based on desktop inventory work completed in January 2022. Rounded to the nearest 100 square feet.

¹Includes: Professional, Scientific and Technical Services, Select Civic and Social Organizations, Selected Office Administration and Selected Education Services.

²Includes: Cultural, Entertainment and Recreation, Personal & Household Goods Repair and Maintenance, Social Services, Consumer Goods Rental & Transportation.

Figure 5-3: Trade Area Per Capita Commercial Needs Analysis (2031)

Commercial Needs - Retail/Service Category	Typical Space Per Capita (Sq Ft)	Total Space Required by Residents (Sq Ft)	Target Capture	Space Required (Sq Ft)	Inflow	Total Warranted Space (Sq Ft)	Less: Existing Space	Total Net New Space Required
Population (2031)	54,000							
Food Store Retail								
Convenience and Speciality Food	1.5	81,000	65.0%	52,700	20.0%	65,900	24,600	41,300
Supermarkets & Grocery	3.5	189,000	75.0%	141,800	30.0%	202,600	98,500	104,100
Beer, Wine Liquor	1.0	54,000	60.0%	32,400	35.0%	49,800	22,100	27,700
Non-Food Store Retail								
Apparel and Accessories	2.0	108,000	40.0%	43,200	10.0%	48,000	3,500	44,500
Automotive	2.0	108,000	35.0%	37,800	10.0%	42,000	18,300	23,700
Building and Outdoor Home Supply	3.0	162,000	35.0%	56,700	10.0%	63,000	25,300	37,700
Furniture, Home Furnishings & Electronics Store	3.0	162,000	40.0%	64,800	15.0%	76,200	39,200	37,000
General Merchandise	2.0	108,000	40.0%	43,200	15.0%	50,800	11,400	39,400
Miscellaneous Retailers	2.0	108,000	40.0%	43,200	15.0%	50,800	38,700	12,100
Pharmacies & Personal Care Stores	1.5	81,000	75.0%	60,800	30.0%	86,900	53,500	33,400
Services								
Cultural, Entertainment & Recreation	2.5	135,000	45.0%	60,800	20.0%	76,000	12,900	63,100
Finance, Insurance & Real Estate	2.0	108,000	70.0%	75,600	20.0%	94,500	44,600	49,900
Health Care	1.5	81,000	75.0%	60,800	20.0%	76,000	117,900	-41,900
Food Service & Drinking Places	3.5	189,000	65.0%	122,900	20.0%	153,600	80,000	73,600
Personal Care	2.0	108,000	60.0%	64,800	10.0%	72,000	26,300	45,700
Business Services ¹	1.5	81,000	60.0%	48,600	20.0%	60,800	74,900	-14,100
Other ²	3.5	189,000	50.0%	94,500	10.0%	105,000	38,100	66,900

SOURCE: urbanMetrics inc., based on desktop inventory work completed in January 2022. Rounded to the nearest 100 square feet.

¹Includes: Professional, Scientific and Technical Services, Select Civic and Social Organizations, Selected Office Administration and Selected Education Services.

²Includes: Cultural, Entertainment and Recreation, Personal & Household Goods Repair and Maintenance, Social Services, Consumer Goods Rental & Transportation.

Warranted Space Summary

As detailed in the figure below, some 211,400 square feet of retail/service commercial space across selected store categories most likely to locate on the subject site could be warranted in the Trade Area by 2026, and increasing to more than 564,900 square feet by 2031. These estimates are based on the warranted space estimates presented above in our per capita space ratio analyses but excluding a number of the store categories that are unlikely to locate on the subject site (e.g., Automotive, Building and Outdoor Home Supply, etc.).

Unsurprisingly based on the level of residential development and corresponding population growth forecast for this area, this represents a significant level of new demand that will certainly justify the development of the limited amount of commercial space being proposed at the subject site, particularly in response to significant population growth anticipated over the forecast period. It also provides sufficient new demand to support the range of other commercial developments currently proposed throughout this part of Barrie and Innisfil.

Figure 5-4: Summary of Total Space Warranted

	2026	2031
Retail		
FSR	66,700	145,400
GAFO	67,100	133,000
Health & Personal Care	7,900	33,400
BWL	13,100	27,700
Total Retail Space Warranted	154,800	339,500
Services		
Cultural, Entertainment & Recreation	40,900	63,100
Finance, Insurance & Real Estate	22,300	49,900
Health Care	-64,100	-41,900
Food Service & Drinking Places	28,600	73,600
Personal Care	24,600	45,700
Business Services ¹	-31,900	-31,900
Other ²	36,200	66,900
Total Services Space Warranted	56,600	225,400
Total Retail + Services Warranted	211,400	564,900

SOURCE: urbanMetrics, based on detailed market demand analysis tables provided throughout this report.

5.2 Impact Assessment

Based on the amount and type of commercial space planned for the subject site, as well as numerous other proposed commercial developments identified as part of our supporting research program, our analysis recognizes the potential impacts of these new commercial projects on the health of existing shopping districts throughout the Trade Area.

As shown in Figure 5-5, we have summarized the market potential available across all Retail and Service commercial categories (i.e., per the warranted space calculations presented earlier), and subtracted the total amount of retail/service commercial space proposed on the subject site and at other potential new commercial developments identified in our review. The total amount of space proposed, and reflected in each forecast period, is based on urbanMetrics review of active development applications and is consistent with information included in Section 3.2 and 4.2.

These calculations result in a residual potential estimate to provide a general indication as to the likely surplus or shortfall of space at each interval of the forecast period.

Given the significant amount of growth anticipated over this period, it appears that the market will have sufficient opportunity to support the introduction of all of the new space proposed without any impact on existing retailers or services. In fact, as shown in Figure 5-5, our analysis shows that additional space may even be required over the forecast period to keep pace with the level of residential development being contemplated in the Trade Area, and specifically if current service levels are intended to be maintained.

We do note, however, that in an environment of significant uncertainty and rapid change within the retail industry, these numbers may serve more of a “buffer” of sorts to ensure there are no critical impacts to existing and/or potential new commercial businesses rather than necessarily confirming the demand for a significant expansion of the current supply, above and beyond those proposals already identified in the Trade Area. This is particularly heightened given the total shown below represents a total for all retail/service commercial space, rather than highlighting potential gaps or demand associated with particular store categories.

Figure 5-5: New Commercial Development Impact Summary

	2026	2031
Retail	154,800	339,500
Services	56,600	225,400
Total Retail + Services Space Warranted	211,400	564,900
Less: Proposed Space	136,000	378,100
Residual Potential (Total Retail + Services Space Surplus / Shortfall)	75,400	186,800

SOURCE: urbanMetrics, based on detailed market demand analysis tables provided throughout this report.

6.0 Other Considerations

6.1 Commercial Market Trends

E-Commerce and Covid-19

Prior to the COVID-19 pandemic, the impacts of increased e-commerce and internet shopping were already being felt throughout the retail sector, resulting in a significant slowdown in the development of large format retail space; the consolidation/or closing of many retail chains; a reduction in store size modules; and the strategic placement of stores to support on-line shopping.

While the longer-term implications of the ongoing pandemic are not known and remain subject to change, the following provides some context as it relates to the subject proposal, and our latest understanding of current retail trends:

- Retail restrictions and lockdowns have resulted in increased online shopping activity, extending to retail sectors that were not previously affected (i.e., grocery), and penetrating older demographics. While this bump may not translate into significant permanent changes in shopping patterns it has exposed more customer demographic sectors to a range of opportunities associated with online shopping that will likely impact their future shopping behaviour.
- The impact of e-commerce will affect each retail sector differently, and bricks and mortar stores will have to reorganize and respond to their own unique situation. Some retailers will experience minimal, if any, impact; some will see a reduction in their physical space needs; others will draw a harmonious balance between providing sufficient space for physical browsing and gathering – with a more robust online presence.
- For many, shopping is an enjoyable, social activity. Despite the convenience of online shopping, a segment of the population will still prefer the in-person element of browsing, meaning bricks and mortar retailing will always appeal to a certain segment of the population.
- It is still unclear if the impact of COVID-19 will result in a more permanent shift to online shopping, or if this shift was borne out of necessity rather than consumer preference. It is apparent that the COVID-19 pandemic has resulted in the acceleration of online shopping trends, particularly with respect to staple goods; however, post-pandemic it remains to be seen if this uptick in on-line shopping will continue.

The integration of commercial facilities being proposed as part of the mixed-use development on the subject site strikes a balance in maintaining adequate access to local serving retail uses, while complimenting residential uses that can provide immediate support for new and existing retail offerings. The size and scale of uses being contemplated appeal to the possibly reduced space needs

of various retail and service tenants, while offering flexibility in the form and function of how space is used.

Mixed Use Development

A rise in housing prices, combined with diminishing land supply has led to increasingly intensified, mixed-use development formats. Mixed-use developments are a key component of urban development as they provide an effective way to efficiently use land and combine a range of uses. The success of retail development in mixed-use environments is still tied to location, in particular the access, exposure and visibility characteristics of a development, and the proximity to nearby residential, employment and visitor populations.

The importance of flexibility is also emphasized in the Municipal Comprehensive Review Long-Term Urban Land Needs Study (the “MCR Land Needs Study”). In particular, this Study acknowledges the importance of creating more flexible and creative retail environments that can respond to shifting market changes, varying demand, and can be better integrated within more intensified development.

For example, the MCR Land Needs Study specifically confirms that the *“amount of retail space supported by on-site residents of a mixed-use development is typically over-stated”* and further that *“market support for the commercial space must extend well beyond the immediately adjacent demand generators”*. We agree with both of these observations, particularly the viability of retail/service commercial space becomes increasingly challenging in the face of ongoing changes within the retail sector, as well as in the context of both market opportunity (i.e., demand from shoppers and/or interest from available tenants) and financial feasibility (i.e., the ability to command sufficient revenues—one-time or recurring—to offset the significant capital costs associated with new developments). Furthermore, unlike various forms of new housing and residential development, retail/service commercial space rarely represents the “highest and best use” of a given property from a purely market / economic perspective. Instead, it is necessary to include as a key amenity within complete communities and to establish (or maintain) appropriate service levels to satisfy the day-to-day shopping needs of local residents.

In light of the challenges highlighted above, the MCR Land Needs Study further suggests that creative solutions are required where market demand is not available to support traditional forms of commercial space (e.g., standalone shopping centres / big-box or large format powercentres, strip plazas, etc.):

“If market demand to support traditional types of retail is not present, which is the case in many non-main-street infill mixed-use developments, consideration should be given to interim uses that allow for transition to retail uses when demand materializes. These interim uses require creative thought from development and could include uses such as live work units.”

As it relates to the Hewitt’s Secondary Plan Area more broadly, we note that a significant portion of the new retail/service commercial space delivered will be in mixed-use formats and predominantly local-serving in nature, based on preliminary development plans. This is key to developing a complete community in the Secondary Plan Area and providing an appropriate level retail service for future residents of the community. Also, based on our own professional experience and familiarity with Barrie, it is our general opinion that there is already an appropriate pre-existing supply of commercial space across most other levels of the commercial hierarchy, including main-street shopping environments such as the Downtown and/or other regional-serving commercial nodes like at Mapleview Drive and Highway 400, Georgian Mall, etc. As such, the more community-oriented nature of new commercial uses proposed at the subject site are entirely consistent with this trend and market observation.

6.2 Subject Proposal

In addition to the more general market trends and commentary outlined above, we offer the following as it relates to the subject proposal and the specific format of commercial space expected to be delivered at the site:

- The MCR Land Needs Study mentioned above identifies not only a need to find creative solutions for the delivery of retail/service commercial space in mixed use development formats, but also explicitly highlights the notion of live-work units as one such example. While the subject development does not represent a true live-work format per se, with separate access and ownership of residential / commercial spaces, their built form and partitioning of units are ultimately similar at grade. As such, we note that the commercial component of the subject proposal is similar to the proposed solutions identified by the City’s own land economics consultants.

Furthermore, the MCR Land Needs Study also identifies a number of intended outcomes for this type of mixed use development, including—but not limited to—the activation of the street edge or neighbourhood; providing retail goods and services in efficient formats; as well as the ability to live and work in the same community. In our opinion, the commercial units proposed for the subject site achieve all of the above objectives.

- The ongoing COVID-19 pandemic has undoubtedly made a significant impact on work-from-home patterns, the way in which individuals engage with their immediate surrounding communities, as well as more general decisions relating to where people want to live and/or engage with their usual place of work. The retail units planned at the subject site could effectively leverage these changes by offering new opportunities for small business owners to locate closer to their place of residence, while still maintaining some physical separation between “work” and “home”. That is, in addition to being available to prospective purchasers

from beyond the community, it is possible there will be interest among local residents immediately within the Hewitt's Secondary Plan Area seeking to start-up a new small business and/or relocate an existing business closer to their homes at the subject development.

- With increasing commercial rents throughout the Greater Toronto Area and beyond resulting from the growing premium on real estate in this part of the Province, it can be difficult for small businesses to afford commercial space. Subject to the ultimate pricing established for the retail units contemplated by Sandy Creek Estates, the commercial units proposed for the site could represent an affordable—or at least cost-effective—alternative to other traditional and typically much larger commercial uses available for lease in Barrie. Similarly, even as a function of their size alone (i.e. relatively small, efficient units), the pricing for these units may be more palatable to some operators.
- From the perspective of employment generation, it is possible that the specific types of retail units proposed could yield an equivalent number of employees on the site as a development scenario involving more traditional retail formats. For example, based on a typical retail employment density for traditional retail/service commercial uses (space per worker factor), a total of approximately 38 full-time equivalent employees ("FTE's") could be accommodated by the equivalent amount of commercial space as proposed on the subject site. By comparison, the estimated 30 distinct commercial units proposed at the subject site would theoretically include a minimum of 1.0 employees per space (i.e., 30 total employees), and more likely could involve some additional support via part-time workers and/or others involved in supporting the operations of businesses on-site (e.g., the spouse / partner / family members of the primary business owner). Based on this assumption, at an estimated 1.5 employees per unit, the subject proposal could generate up to 45 FTE's as part of new development on the site.

Overall, it is important to note that the commercial units proposed at the site represent just one component of the broader range of commercial offerings available within the Hewitt's Secondary Plan Area and across the City of Barrie. These will account for a reasonably small percentage of the total supply of commercial space in this area and—if anything—may help to establish a more diverse and comprehensive offering of commercial units available to prospective tenants / businesses, based on their individual preferences.

Appendix A North American Industry Classification System (NAICS)

Figure A- 1: Retail Store Types Based on North American Industry Classification System (NAICS)

Group	NAICS	Description
FOOD		
90	Supermarkets	
	44511	Supermarkets and Other Grocery (except Convenience) Stores
100	Convenience and Specialty Food Stores	
	44512	Convenience Stores
	44521	Meat Markets
	44522	Fish and Seafood Markets
	44523	Fruit and Vegetable Markets
	44529	Other Specialty Food Stores, including Baked Goods Stores, & Confectionary & Nut
BEVERAGE STORES		
110	Beer, Wine and Liquor Stores	
	44531	Beer, Wine and Liquor Stores
NON-FOOD STORE RETAIL (NFSR)		
Automot		
20	Used and Recreational Motor Vehicle and Parks Dealers (Tires, Batteries, Automotive Accessories component)	
	44131	Automotive Parts and Accessories Stores
	44132	Tire Dealers
Furniture, Home Furnishings and Electronics Stores		
30	Furniture Stores	
	44211	Furniture Stores
40	Home Furnishings Stores	
	44221	Floor Covering Stores (excludes retailers or only ceramic or only hardwood flooring which are in Building Supply)
	44229	Other Home Furnishings Stores (e.g. window treatments, fireplace/accessories, kitchen and tableware, bedding and linens, brooms and brushes, lamps and shades, and prints and picture frames).
50	Computer and Software Stores	
	44312	Computer and Software Stores (includes retailing new computers, computer peripherals, pre-packaged software, game software and related products)
60	Home Electronics and Appliance Stores	
	44311	Appliance, Television and other Electronics Stores
	44313	Camera and Photographic Supplies Stores
Building and Outdoor Home Supplies Stores		
70	Home Centres and Hardware Stores	
	44411	Home Centres
	44413	Hardware Stores (includes tool stores)
80	Specialized Building Materials and Garden Stores	
	44412	Paint and Wallpaper Stores
	44419	Other Building Material Dealers (excluding manufacturing and construction firms) (includes doors, windows, kitchen cabinets, electrical, glass, plumbing,
	44421	Outdoor Power Equipment Stores (lawn mowers, tractors, hedge trimmers, snow blowers)
	44422	Nursery Stores and Garden Centres
Pharmacies and Personal Care Stores		
120	Pharmacies and Personal Care Stores	
	44611	Pharmacies and Drug Stores
	44612	Cosmetics, Beauty Supplies and Perfume Stores
	44613	Optical Goods Stores
	44619	Other Health and Personal Care Stores (includes stores retailing health and personal care items, such as vitamin supplements, hearing aids, and medical

...Continued

Group	NAICS	Description
Clothing and Accessories Stores		
140	Clothing Stores	
	44811	Men's Clothing Stores
	44812	Women's Clothing Stores
	44813	Children's and Infant's Clothing Stores
	44814	Family Clothing Stores
	44819	Other Clothing Stores
150	Shoe, Clothing Accessories and Jewellery Stores	
	44815	Clothing Accessories Stores
	44821	Shoe Stores (includes athletic shoe retailers)
	44831	Jewellery Stores
	44832	Luggage and Leather Goods Stores
General Merchandise Stores		
170	Department Stores	
	45211	Department Stores
175	45211	Department Stores with a Large food component (i.e. Walmart Supercentres)
180	Other General Merchandise Stores	
	45291	Warehouse Clubs and Superstores
	45299	All Other General Merchandise Stores: <i>Home & Auto (i.e. Canadian Tire)</i> <i>Other General Merchandise Stores (e.g. general stores, variety stores, "dollar" stores)</i>
Miscellaneous Retailers		
160	Sporting Goods, Hobby, Music and Book Stores	
	45111	Sporting Goods Stores (excludes athletic shoe retailers)
	45112	Hobby, Toy and Game Stores (excludes computer games and software)
	45113	Sewing, Needlework and Piece Goods Stores
	45114	Musical Instrument and Supplies Stores
	45121	Book Stores and News Dealers
	45122	Pre-Recorded Tape, Compact Disc and Record Stores
190	Miscellaneous Store	
	45311	Florists
	45321	Office Supplies and Stationery Stores
	45322	Gift, Novelty and Souvenir Stores
	45331	Used Merchandise Stores
	45391	Pet and Pet Supplies Stores
	45392	Art Dealers (excludes art galleries)
	45399	All Other Miscellaneous Store Retailers (e.g. tobacco supplies, artist supplies, collectors items, beer & wine making, swimming pool/spas/accessories, religious goods and accessories)

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Group	NAICS	Description
SERVICES		
200	Consumer Goods Rental	
	53221	Consumer Electronics and Appliance (Appliance rental and leasing, rental of consumer audio-visual equipment (including rent-to-own), Television
	53222	Formal Wear and Costume Rental
	53223	Video Tape and Disc Rental
	53229	Other Rental (sporting goods, garden equipment, home health, fitness etc.)
	53231	General Rental Centres (including contractors' and builders' tools and equipment, home repair tools, lawn and garden equipment, moving equipment
210	Finance	
	52211	Banks
	52213	Credit Unions
215	52239	Other Financial (including cheque cashing, mortgage brokers, other financial services (e.g. Edward Jones))
220	Insurance and Real Estate	
	52421	Insurance Agencies and Brokerages
	53121	Offices of Real Estate Agents and Brokers
	53132	Office of Real Estate Appraisers
230	Professional, Scientific & Technical Services	
	54111	Offices of Lawyers
	54119	Other Legal Services (eg. Paralegal, Title search, immigration consultation, notaries)
	54121	Offices of Accountants, Tax Preparation Services, Bookings, Payroll
	54131	Architectural Services
	54132	Landscape Architecture (includes urban planners, industrial development planning, landscape architects)
	54134	Drafting Services
	54137	Survey and Mapping Services
	54138	Testing Labs (excluding medical, auto, veterinary)
	54141	Interior Design Services
	54143	Graphic Design Services (includes art studios)
	54149	Other Specialized Design Services (e.g. clothing, jewellery, fashion)
	54151	Computer Systems Design and Related Services (e.g. computer consulting and programming)
	54161	Management Consulting Services
	54162	Environmental Consulting Services
	54169	Other Scientific and Technical Consulting (e.g. economic, hydrology, safety)
	54171	Research & Development in the Physical, Engineering and Life Sciences (includes medical research labs)
	54172	Research & Development in the Social Sciences and Humanities (eg. demographic, education, psychology research)
	54181	Advertising Agencies
	54182	Public Relations Services (e.g. lobbyists, political consultants)
	54191	Marketing Research & Public opinion polling
	54192	Photographic Services (e.g. passport photography, photo studios portrait photography studies)
	54193	Translation and Interpretation Services
	54194	Veterinary Services (excludes pet care (81291))
	54199	All Other Professional, Scientific and Technical Services (includes consumer credit counselling)
240	Selected Office Administrative Services	
	56131	Employment Services (includes placements, executive search, casting agencies etc.)
	56141	Document Preparation Services (proofreading, word processing, desktop publishing etc.)
	56142	Telephone Call Centres
	56143	Business Service Centres (eg. printing, copying, mail centres) (excludes commercial printing)
	56144	Collection Agencies
	56145	Credit Bureaus
241	56151	Travel Agencies
	56159	Other Travel Arrangement & Reservation Services (eg. ticket sales agency, tourist info, busticket offices, etc.)
	56162	Security Systems (includes security system sales, installation and monitoring; locksmiths (excluding key duplication - 81149))
245	Selected Educational Services	
	61161	Fine Arts Schools (e.g. dance, drama, music, art, handicrafts)
	61162	Athletic Instruction (e.g. aerobic dance, gymnastics, judo, karate, martial arts, scuba, swimming) (excludes athletic instruction in sport and recreation
	61163	Language Schools
	61169	All Other Schools and Instruction (e.g. driving instruction, public speaking, Kumon, Oxford)

...Continued

Group	NAICS	Description
250	Health Care	
	63111	Offices of Physicians
	62121	Offices of Dentists
	62131	Offices of Chiropractors
	62132	Offices of Optometrists (excludes eyeglass stores - 44613)
	62133	Offices of Mental Health Practitioners (psychologists, psychiatric social workers)
	62134	Offices of Physical, Occupational, Speech Therapists and Audiologists
	62135	Offices of Other Health Practitioners (eg. acupuncturists, dental hygienists, dieticians, naturopath, podiatrists)
	62141	Family Planning Centres
	62142	Outpatient Mental Health and Substance Abuse Centres
	62149	Other Outpatient Care Centres (e.g. public health clinics, hearing testing, dialysis)
	62151	Medical and Diagnostic Laboratories (e.g. medical, x-ray, dental lab (excluding making of dentures, ortho appliances, teeth))
255	Social Services	
	62411	Child and Youth Social Services (e.g. Children's aid, youth centres, adoption)
	62149	Other Individual and Family Services (eg. AA, marriage counselling, outreach)
	62441	Child Day Care
260	Cultural, Entertainment and Recreation	
261	71312	Amusement Arcades (e.g. indoor play areas, pinball arcades, video game arcades)
		Fitness & Recreational Sports Centres (includes athletic clubs, spas (w/o accommodation), aerobic dance centres, health clubs)
262	71394	
263	71395	Bowling Centres
264	71399	All other Amusement and Recreation Industries (includes billiards parlours)
265	51213	Motion Picture and Video Exhibition (includes cinemas)
270	Food Services and Drinking Places	
271	72211	Full-Service Restaurants
272	72221	Limited-Service Eating Places
273	72232	Caterers (includes banquet halls)
274	72241	Drinking Places (Alcoholic Beverages) -(includes night clubs, bars (including those with gaming), pubs, taverns
280	Personal and Household Goods Repair and Maintenance	
281	81111	Automotive Mechanical & Electrical Repair & Maintenance (includes engine repair, exhausts, transmission, electrical system repair)
281	81112	Automotive Body, Paint, Interior and Glass Repair (includes collision repair, auto upholstery, paint & body shops)
	81119	Other Automotive Repair & Maintenance (includes auto detail, washing, diagnostic centres, lub, rustproofing, undercoating, emissions testing)
281		
282	81121	Electronic and Precision Equipment Repair and Maintenance (includes inkjet cartridges (cleaning and refilling), tv repair)
	81141	Home and Garden Equipment and Appliance Repair & Maintenance (e.g. small engine repair)
	81142	Reupholstery and Furniture Repair
	81143	Footwear and Leather Goods Repair (e.g. shoe repair)
	81149	Other Personal and Household Goods Repair and Maintenance (includes key cutting, china firing/decorating, jewellery repair, sharpening of knives, skate sharpening, watch repair etc.)
282		
290	Personal Care Services	
	81211	Hair care and Esthetic Services (includes barber, beauty, hair salons)
	81219	Other Personal Care services (includes day spa, diet centres, hair removal, massage parlours, tanning salons, tattoo parlours, weight reduction centres)
	81231	Coin-operated Laundries and dry cleaners (self service)
	81232	Dry Cleaning and Laundry services (except coin operated)
	81233	Linen and Uniform Supply (includes work clothing supply services - industrial)
	81291	Pet Care (except veterinary)
	81292	Photofinishing Services
	81299	All other Personal Services (e.g. fortune tellers, dating services, psychic services, shoeshine)
295	Civic and Social Organizations	
	81341	Civic and Social Organizations (includes clubs)
	81391	Business Associations (includes board of trade, real estate boards etc.)
	Transportation	
296	49111	Postal Service (post office)
300	VACANT	
	9999	VACANT RETAIL/SERVICE SPACE