



# Population-Related Employment Land Market Study

Township of Springwater

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Final Report

October 20, 2020

Watson & Associates Economists Ltd.  
905-272-3600  
info@watsonecon.ca

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## List of Acronyms and Abbreviations

B.W.L.	Beer, wine and liquor stores
C.M.A.	Census Metropolitan Area
C.R.U.	Commercial rental unit
C.S.D.	Census subdivision
F.I.R.E.	Financial, insurance and real estate
F.S.R.	Food store retail
F.S.W.	Floor space per worker
G.F.A.	Gross floor area
G.G.H.	Greater Golden Horseshoe
G.L.A.	Gross leasable area
G.I.S.	Geographic information systems
G.M.S.	Growth management strategy
ha	Hectares
N.F.S.R.	Non-food store retail
N.F.P.O.W.	No fixed place of work



## List of Acronyms and Abbreviations (Cont'd)

O.P.	Official Plan
P.P.U.	Persons per unit
P.R.E.	Population-related employment
P.T.A.	Primary Trade Area
sq.ft.	square foot/feet
sq.m	square metre(s)
S.T.A.	Secondary Trade Area



# Executive Summary



# Executive Summary

The Township of Springwater Growth Management Strategy<sup>1</sup> identified the need to prepare a Population-Related Employment (P.R.E.) Land Market Study that would assess if there is an adequate amount of designated lands to accommodate commercial and institutional growth in Springwater to 2031. The Township retained Watson & Associates Economists Ltd. (hereinafter referred to as “Watson”) to prepare a P.R.E. Land Market Study.

## **What is Population-Related Employment?**

P.R.E. includes a wide range of employment uses intended to serve the local population and surrounding area, as well as visitors from outside the local area. P.R.E. uses are concentrated within the urban settlement areas of Elmvale and Midhurst and are largely driven by population growth. P.R.E. include the following types of uses:

- Retail and office buildings;
- Health care and social services facilities;
- Arts and recreation facilities;
- Schools; and
- Public administration and civic services buildings (community centres, libraries, museums, fire halls, police stations).

For the purposes of this report, P.R.E. lands refer to lands with a mixed-use, commercial, or institutional land-use designation.

## **Why is it Important to Plan for P.R.E. Uses?**

P.R.E. lands provide an important component in building complete communities by providing residents access to retail goods and services. Further, P.R.E. generally represents the largest employment sector of the local employment base. A key component of planning for P.R.E. requires consideration of the anticipated types of P.R.E. required to support the current and future population, as well as the opportunity to direct P.R.E. growth to strategic areas.

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<sup>1</sup> Township of Springwater Growth Management Strategy, August 2018, prepared by WSP.



## Overall Findings of the Study

The Township's urban settlement areas of Midhurst and Elmvale have more than an adequate supply of designated vacant P.R.E. lands to 2031. Further, opportunities exist to potentially accommodate P.R.E. uses within vacant building space in Elmvale and through development on underutilized lands within the Midhurst Bayfield Street Corridor.

While the Township's urban settlement areas of Midhurst and Elmvale have a surplus of designated P.R.E. lands to 2031 (approximately 95 ha), all the designated lands for P.R.E. uses would ultimately be required over a 19- to 24-year time frame.<sup>1</sup> The actual timing of buildout of the P.R.E. land supply would depend on the pace of population growth beyond 2031. The surplus of designated P.R.E. lands is primarily due to the supply of designated lands within Midhurst. Within the context of Midhurst, the surplus of P.R.E. lands to 2031 is considered an advantage since a wide range of commercial space is required to support the anticipated population growth to 2031 and at residential buildout. The supply of P.R.E. lands within Midhurst is sufficient to accommodate demand, as well as to provide market choice of available sites for prospective P.R.E. uses over the next 10 to 20 years.

## Key P.R.E. Land Needs Inputs

The following provides a summary of key inputs utilized as part of determining the P.R.E. land requirement, including P.R.E. employment growth, employment density assumed (jobs/ha), and designated P.R.E. vacant land supply.

### Population-Related Employment Forecast to 2031

- It is forecast that the Township of Springwater will reach an employment base of approximately 11,800 by 2031, an increase of approximately 4,500 between 2020 and 2031. It is estimated that nearly half (48%) of employment (2,150 jobs) will be accommodated on P.R.E. lands within the urban settlement areas in the Township.<sup>2</sup>

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<sup>1</sup> Assuming a land absorption rate of 4 to 5 ha of P.R.E. lands absorbed annually (similar to the land absorption rate utilized for 2020 to 2031).

<sup>2</sup> Forecast is derived from the Township of Springwater G.M.S., August 2018, prepared by WSP, with an adjustment made to account for estimated growth since 2016.



### Employment Density (jobs/ha) Assumption

- The density average for P.R.E. uses is forecast at 36 jobs/net ha, an increase from the existing density of 28 jobs/net ha on P.R.E. lands. The increase in density primarily reflects a higher land utilization (a greater amount of building space relative to land area and more jobs per hectare) and an anticipated wider range of retail and commercial uses compared to the existing P.R.E. employment base. As such, this study assumes that future P.R.E. development will have a higher utilization of land and a higher average of employees per hectare.

### Total Population-Related Employment Land Needs Analysis to 2031

- The Township has approximately 156 ha of vacant lands designated for P.R.E. uses which exceeds the land needs requirement for P.R.E. of 60 ha (there is a surplus of 95 ha).

### **Retail and Commercial Demand Analysis**

The following provides details on the retail and service commercial analysis, a core component of P.R.E. uses. The demand for retail and service commercial uses, core P.R.E. uses have been assessed in greater detail in the study utilizing a standard industry methodology. This methodology isolates the portion of the P.R.E. that would be accommodated within retail and commercial service space, which is more directly influenced by market forces (development industry and commercial sector).

### Retail and Commercial Service Employment to 2031

- The results of the retail and commercial demand analysis indicate an anticipated employment increase of 730 new jobs between 2020 and 2031 accommodated on retail and commercial sites. The remaining 1,420 new P.R.E. jobs are anticipated to be accommodated on institutional lands or in non-retail purpose-built buildings on commercial/mixed-use sites (e.g. medical clinic buildings).

### Market Considerations

- The Township of Springwater has a very large portion of residents who are influenced by commercial options beyond the Township of Springwater, while



conversely, the Township has the opportunity to cater to the employees who live outside the Township.

- The Midhurst Urban Settlement Area currently lacks a range of local serving retail uses, such as grocery stores, drug stores, restaurants/food services, liquor/wine/beer stores and personal care services.
- The Township has a high vacancy rate of approximately 17%. The high vacancy rate is in part due to a large portion of the vacant building space comprised of aging buildings (including an abandoned motel) that require extensive retrofitting, and, because of the work required to meet the needs of prospective commercial uses, may be considered obsolete for today's needs. A healthy vacancy rate in a balanced market is typically between 5% and 10%.
- Vacant space is primarily concentrated in the downtown area of Elmvale and within the Midhurst Bayfield Corridor.

### **Retail and Service Commercial Space Demand by Urban Settlement Area**

The following provides a breakdown of the retail and service commercial space demand by urban settlement area (Midhurst and Elmvale).

#### Midhurst Urban Settlement Area

- By 2031, it is anticipated that Midhurst will have the market potential to support additional new retail and commercial incremental space of 286,000 sq.ft. (26,600 sq.m), in addition to the 66,000 sq.ft./6,100 sq.m of retail and commercial space currently operating within Midhurst.
- Beyond 2031 (i.e. buildout), Midhurst will have the market support for another 103,000 sq.ft. (9,600 sq.m) of retail and commercial service space.
- It is estimated that the retail and commercial service space forecast would accommodate approximately 600 new employees within Midhurst by 2031.

#### Elmvale Urban Settlement Area

- The Elmvale urban settlement area is anticipated to have the market support to absorb approximately 62,000 sq.ft. (5,800 sq.m) of retail and commercial service



G.L.A. space by 2031; this is the equivalent of the current occupied built space outside the downtown core in Elmvale.<sup>1</sup>

- Beyond 2031 (i.e. between 2031 and buildout), an additional 17,000 sq.ft. G.L.A. (1,600 sq.m) will be required.
- It is important to note that Elmvale has approximately 27,000 sq.ft. (2,500 sq.m) of vacant commercial building space which could accommodate a portion of the immediate and short-term (to 2031) demand.
- It is estimated that the retail and commercial service space forecast would accommodate approximately 130 new employees within Elmvale by 2031.

### **Intensification Opportunities**

There are significant opportunities for intensification within the Midhurst and Elmvale urban settlement areas, including the following types of intensification:

- Commercial Rental Unit (C.R.U.s) building site pads on large retail sites;
- Additional retail and commercial uses through the conversion of residential housing on lands designated for commercial and mixed use;
- Opportunities to accommodate further institutional development on lands that currently accommodate the County of Simcoe offices and school board offices;
- Opportunities to accommodate additional retail and service commercial within vacant C.R.U.s and buildings; and
- Redevelopment of designated P.R.E. lands within the Midhurst Bayfield Street Corridor.

Of the above intensification opportunities, the most significant opportunity for intensification is on lands designated for commercial/mixed-use within the Bayfield Street Corridor in the Midhurst urban area. These lands primarily contain land extensive commercial (such as building/material supply stores) and industrial uses and have the capacity to support all the market demand for retail and commercial service space for Midhurst by 2031.

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<sup>1</sup> There are currently 66,000 sq.ft. of occupied and built space within Elmvale, outside the downtown core.



Growth pressures within the Barrie Census Metropolitan Area (C.M.A.) will continue to require land-extensive commercial uses<sup>1</sup> on sites with location characteristics similar to the Midhurst Bayfield Street Corridor. Despite the growth pressures for low-order commercial uses, a high yield of retail and service commercial uses can be achieved on fewer sites primarily through multi-storey developments.<sup>2</sup>

The opportunity for commercial development, through the conversion of housing units to commercial uses, may provide the opportunity to accommodate the demand for commercial growth in the short term within the urban settlement area of Midhurst. As residential growth progresses within the Midhurst Secondary Plan Area, however, there will be a need for more conventional commercial developments to accommodate a range of retail and service commercial uses.

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<sup>1</sup> Including automotive dealerships, heavy equipment sales and service, recreational uses (trampoline parks, swimming academies, and recreational complexes) and building supplies stores.

<sup>2</sup> Similar to the Bolton Royal Courtyards (Town of Caledon), an example of a development discussed in the report (refer to photo on page 3-1).



# Report



# Chapter 1

## Introduction



# 1. Introduction

## 1.1 Terms of Reference

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The Township of Springwater Growth Management Strategy (G.M.S.) identified the need to prepare a Population-Related Employment (P.R.E.) Land Market Study that would determine the commercial and institutional market demand in Springwater to the year 2031. The Township retained Watson & Associates Economists Ltd. (Watson) to prepare a P.R.E. Land Market Study. A key objective of the P.R.E. Land Market Study includes an assessment of the Township's commercial and institutional land needs and the opportunity to accommodate these uses on underutilized population-serving lands within the urban areas of Midhurst and Elmvale, in particular the Bayfield Street Corridor (Bayfield Street and Snow Valley Road) within Midhurst. The Bayfield Street Corridor has been identified as a priority area by the Township for non-residential intensification and is envisioned in the Midhurst Secondary Plan to provide "high order" retail uses. Ultimately, the P.R.E. Land Market Study would serve as a background document during the Township's Official Plan Review (currently underway).

In assessing the demand to accommodate P.R.E. uses and the potential to direct development on underutilized population-serving lands, the following has been assessed:

- A review of macro-trends including employment trends and key disruptions that are impacting retailing in Canada, including e-commerce;
- A demographic profile of the Township of Springwater and its urban settlement areas;
- A review of local and regional trade dynamics and a summary of the inventory of current vacant and built retail space within the Township of Springwater;
- An assessment of the demand for retail and service commercial space, including a gap analysis that identifies retail and service commercial uses that are under-represented within the Township and the market potential to accommodate these uses over the forecast horizon;
- A review of commercial space metrics in selected comparable markets to provide direction in terms of typical commercial uses, average G.L.A. (gross leasable



area) in sq.ft. and key site/location characteristics that can be expected on P.R.E. lands in future, as the Township's urban settlement areas develop; and

- An assessment of the market potential to accommodate high-order retail uses within the Bayfield Street Corridor as envisioned in the Midhurst Secondary Plan, including the type of retail uses, built form, and scale.

## 1.2 What are Population-Related Employment Lands?

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P.R.E. lands (also known as commercial and institutional lands) typically accommodate a broad range of employment sectors that primarily support the local and regional population base. A proportion of neighbourhood-serving population-related uses, such as home businesses, schools, and neighbourhood retail stores, can locate on residentially designated lands, subject to planning policies addressing their site-specific suitability.<sup>1</sup> The majority of P.R.E. jobs, however, are accommodated in residential mixed-use, commercial, and institutional designations. For the purposes of this report, P.R.E. lands refer to lands with a mixed-use, commercial, or institutional land-use designation.

## 1.3 Why Assess the Need for Population-Related Employment Lands?

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P.R.E. lands provide an important component in building complete communities by providing access to retail goods and services to residents. Further, P.R.E. generally represents the largest employment sector of the local employment base. A key component of planning for P.R.E. requires consideration of the anticipated types of P.R.E. required to support the current and future population, as well as the opportunity to direct P.R.E. growth to strategic areas.

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<sup>1</sup> Adapted from the Township of Springwater Growth Management Strategy, August 2018, prepared by WSP.



# Chapter 2

## Macro-Trends and Demographic Profile



## 2. Macro-Trends and Demographic Overview

The following chapter provides a brief overview of macro trends in employment, a review of national and provincial P.R.E. trends, and a demographic profile of the Township of Springwater, including a summary of population, income, residential development activity and employment.

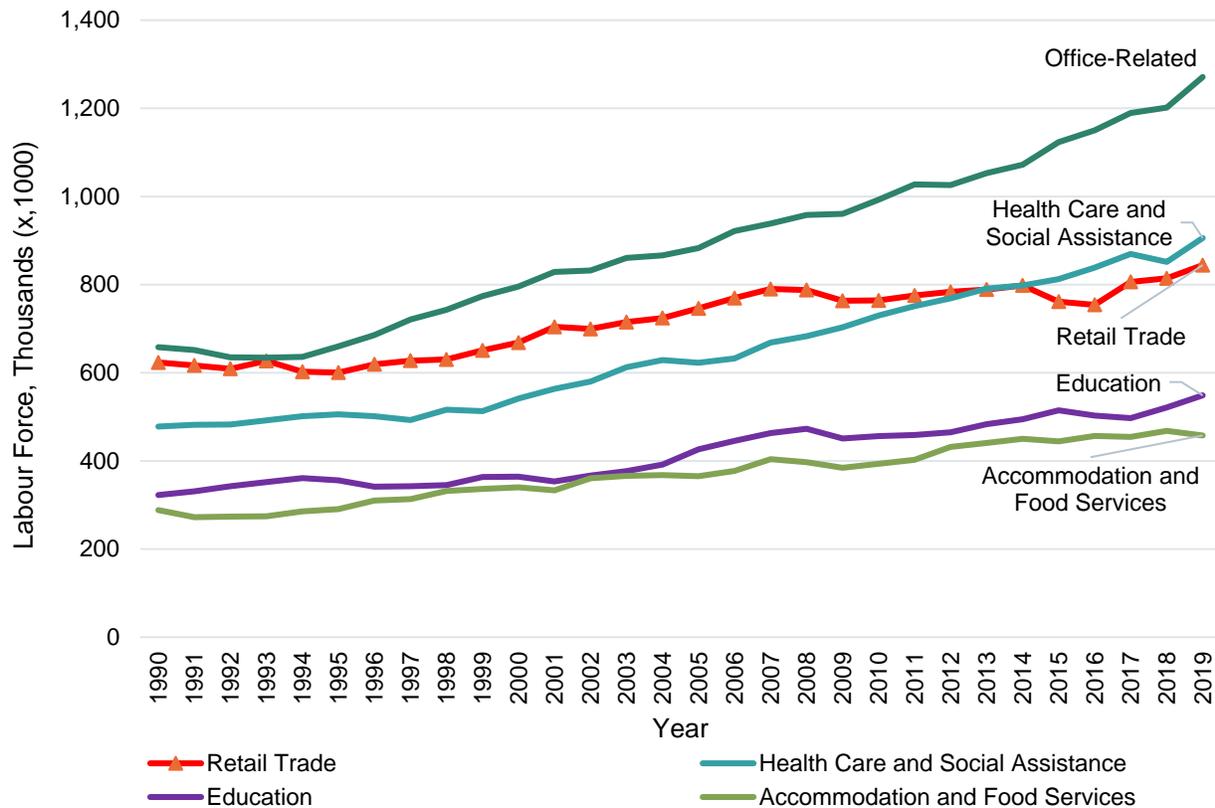
### 2.1 Labour Trends in Population-Related Employment Sectors in Ontario

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Figure 1 summarizes P.R.E. sectors since 1990. Employment within the retail trade sector has remained relatively stable, while other population-related sectors, including office-related and health care and social assistance have increasingly become large components of employment in Ontario. In 2014, employment in health care and social assistance exceeded employment within the retail trade sector in Ontario. The expansion of these sectors has resulted in an increase of health-care practices and a rise in the number of office tenants within shopping centres and retail plazas, locations that provide convenience to their clients. These sectors typically can accommodate up to 30% to 40% of the G.L.A. space of a retail site.



Figure 1  
Ontario  
Labour Force Employment by Population-Related Sectors  
1990 to 2019

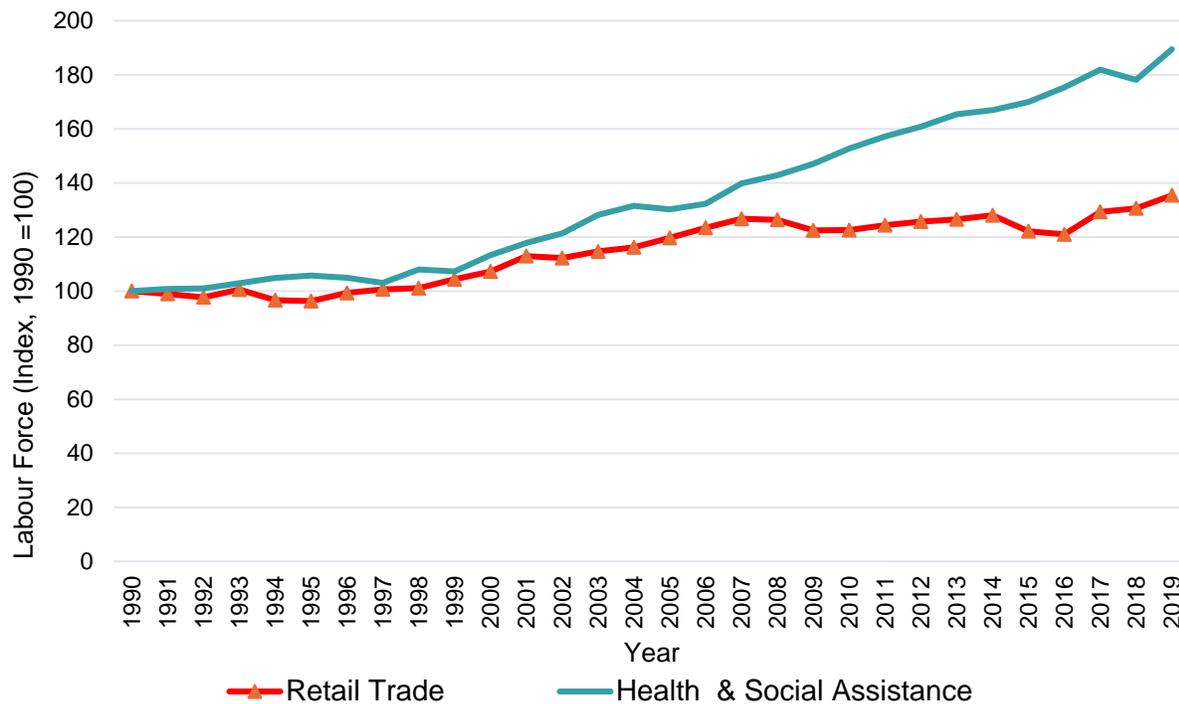


Source: Derived from Statistics Canada. Table 14-10-0023-01 Labour force characteristics by industry, annual (x 1,000) by Watson & Associates Economists Ltd.

Figure 2 further illustrates the employment growth of retail trade and health and social assistance employment since 1990. As illustrated, the health care and social assistance sector has significantly added more employees over the past 30 years compared to the retail trade sector.



Figure 2  
Ontario  
Labour Force Employment Change Since 1990 (1990 = 100)  
Retail Trade and Health and Social Assistance  
1990 to 2019



Source: Derived from Statistics Canada. Table 14-10-0023-01 Labour force characteristics by industry, annual by Watson & Associates Economists Ltd.

## 2.2 Changes in Consumer Behaviours and Commercial Disruptors

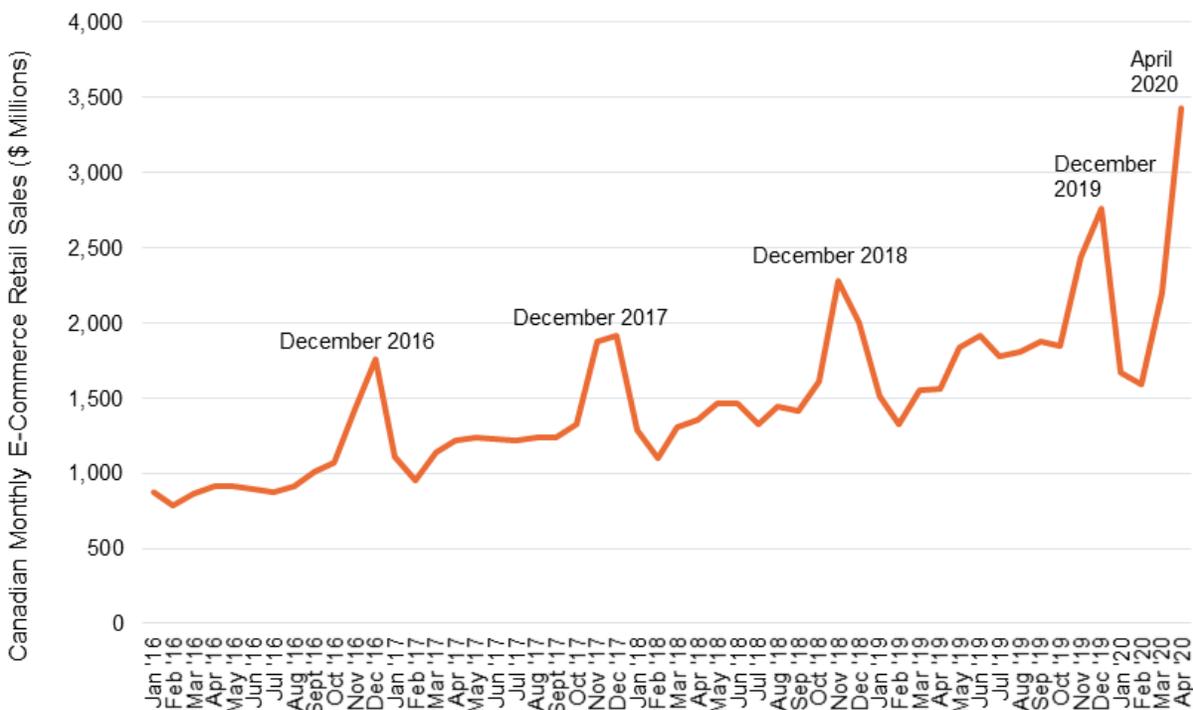
### 2.2.1 E-commerce Retail Sales

Figure 3 illustrates the monthly e-commerce retail sales since 2016. Since that time, e-commerce sales have increased significantly. The coronavirus disease (COVID-19) lockdown which involved the temporary closure of stores in the second quarter of 2020, resulted in a significant increase in e-commerce spending. April 2020 represented the largest single-month increase in e-commerce spending in Canada. Retail e-commerce sales have risen steadily, with the proportion of online sales rising from 2.4% in 2016 to 4.0% percent in 2019. It is anticipated that e-commerce levels will eventually drop with



the gradual re-opening of stores in Canada.<sup>1</sup> Further, the digital impact of retail sales is even greater with mobile purchasing platforms (e.g. uberEats, Skip the Dishes) that support retail sales of local retailers by providing alternative platforms for purchasing products and services.

Figure 3  
Canada  
Monthly Canadian E-commerce Sales, January 2016 to April 2020



Source: Derived from Statistics Canada, Canadian Monthly E-commerce sales, January 2016 to April 2020 by Watson & Associates Economists Ltd.

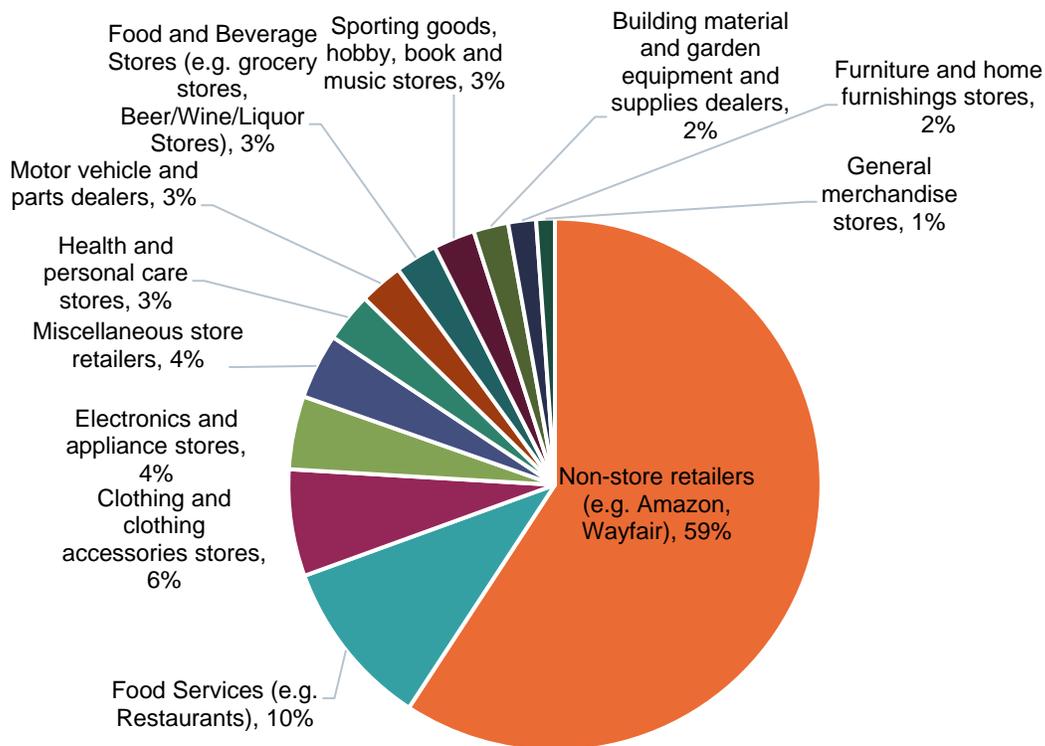
Figure 4 provides a summary of e-commerce sales by retail store type. As summarized in Figure 4, non-store retailers, businesses without a bricks-and-mortar retail store (e.g. Wayfair and Amazon) represent approximately 60% of retail e-commerce sales. The remaining 40% of retail e-commerce sales are comprised from retailers that operate bricks-and-mortar retail stores. Food services and clothing and accessories retailers represent the largest share of e-commerce sales among those that operate bricks-and-

<sup>1</sup> Adapted from Retail Insider article, *Retail E-Commerce Explodes in Canada Amid COVID-19 Pandemic*, prepared by Mario Toneguzzi, July 29, 2020.



mortar retail stores, while the remaining retail store categories represent a quarter of the e-commerce sales in Canada.<sup>1</sup>

Figure 4  
Canada  
Share of Canadian E-commerce Sales by Retail Store Type, 2018



Source: Statistics Canada, Table 20-10-0065 Retail trade, retail e-commerce sales, 2018 and Food and Drinking Places, Table 21-10-0232-01 Food services and drinking places, e-commerce sales by Watson & Associates Economists Ltd.

## 2.2.2 National Commercial Trends

There have been some major retail trends influencing the commercial landscape across the Country, which generally will influence the demand for retail and commercial space within the Township of Springwater. These trends are discussed below.

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<sup>1</sup> Data obtained from Statistics Canada, Table 20-10-0065 Retail Trade and Table 21-10-0232-01 Food Services and Drinking Places, 2018.



## Increasing Productivity of Retail Stores

Retailers are embracing the concept of “just-in-time retail” which involves using the latest technologies in controlling product inventory and applying scheduling techniques to provide the same product assortment with less real-estate square footage.<sup>1</sup>

While sales per square foot (sq.ft.) has been a typical measuring metric for store performance, retailers are now also evaluating store performance based on meeting other corporate objectives, including enabling e-commerce sales or creating a showroom for brand experiences.



Retail automation (Tally) - an autonomous shelf-scanning inventory robot. Photo taken in Giant Eagle (grocery store), Philadelphia, USA.

## Service-Based Commercial Uses Leading Commercial Growth

The rise of e-commerce has influenced the demand for retail square footage, in particular the demand for retail goods.<sup>2</sup> While e-commerce has been capturing market share from goods-based retailers,<sup>3</sup> growth in service-based retailers<sup>4</sup> continues as they provide social experiences and other services that cannot be purchased remotely. Further, mobile delivery platforms, such as Skip the Dishes and uberEats are extending the customer reach of food service establishments, including adding convenience for food service establishments that do not offer their own delivery service. Service-based retailers typically have smaller footprints than goods-based retailers and, therefore, have greater flexibility for intensification areas. These service-

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<sup>1</sup> The “backroom” storage component of a retail store, the non-sales area, can comprise 10% to 20% of the gross leasable area of a commercial rental unit (C.R.U.). Improvements in inventory management can reduce the storage floor space requirements.

<sup>2</sup> Includes merchandise that is sold for consumption outside the store (i.e. household).

<sup>3</sup> Goods-based retailers are retailers that sell merchandise for consumption outside the store (i.e. household). Typically, the merchandise is groceries and durable goods.

<sup>4</sup> Service-based retailers include retailers that sell services (e.g. travel agency, hair salon and dry cleaner), commercial businesses that provide accommodations and entertainment (e.g. bowling alley, escape room, and cinema) and establishments that prepare food and drink items (restaurant and bar) that are consumed on site or for immediate consumption.



based retailers are driving the intensification of retail plazas, power centres and shopping centre sites across Canada by adding retail space to parking lots and occupying vacant retail space previously inhabited by goods-based retailers.

### **Innovation in Retail Platforms and Delivery**

As previously discussed, technology, specifically e-commerce, is providing opportunities for retail and service establishments to better reach customers. In addition, technology is also providing opportunities for innovation in retail platforms. Beyond bricks-and-mortar retail buildings, retailers and service providers are also investing in self-serve kiosks and providing retail platforms on wheels (such as trucks converted to libraries to reach customers and provide access to library resources and staff assistance).



PizzaForno Automated Pizza Oven, Queen Street, Downtown Elmvale

### **Small Store and “Right-Size” Store Format**

The majority of Canada’s top retail players (e.g. Canadian Tire, Sobeys, and Loblaws), which have traditionally been “big-box” retailers, have developed small-store prototypes that range in size from 5,000 to 20,000 sq.ft. (460 sq.m to 1,860 sq.m). The small-store prototype is about serving a more defined targeted demographic from a smaller local trading area and pursuing infill opportunities that may have been overlooked in the past. The small-store footprint provides developers with greater flexibility in incorporating retail into mixed-use developments and small infill retail sites.

With the exit of large retailers (e.g. Sears, Target, and Future Shop) in Canada within the past decade, retail property owners are redeveloping or breaking up big-box retail buildings into multiple retail units. Further, over the past few years, retailers have been rationalizing retail networks which has led to some store closures and “downsizing” of leased space to a “right-sized” footprint (i.e. leased space is being subdivided).

### **Redeveloping and Re-Purposing Aging Retail Sites**

As the retail base is evolving, the retail-built forms of mature retail areas are becoming less desirable and require new building forms and a new tenant mix. As a result, municipalities and developers across Canada are exploring opportunities for the



redevelopment of aging retail sites to other uses (i.e. mixed-use) or other retail development concepts.

## **2.3 Demographic Profile**

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### ***2.3.1 Township of Springwater Population and Employment Activity Rate, 2006 to 2031 and Buildout***

It is estimated that the Township of Springwater will reach a population base of approximately 37,800 by 2031, an increase of approximately 15,100 persons between 2020 to 2031,<sup>1</sup> as summarized in Figure 5. An estimate of the buildout population is also provided. The buildout population is provided as input in the retail and commercial service demand analysis to offer an illustration of the magnitude of the growth of retail and service commercial space that is required to specifically accommodate to the buildout of the Midhurst Secondary Plan Area.<sup>2</sup> Over the forecast period, the employment activity rate, the ratio of employment to jobs, is anticipated to remain steady over the forecast horizon.

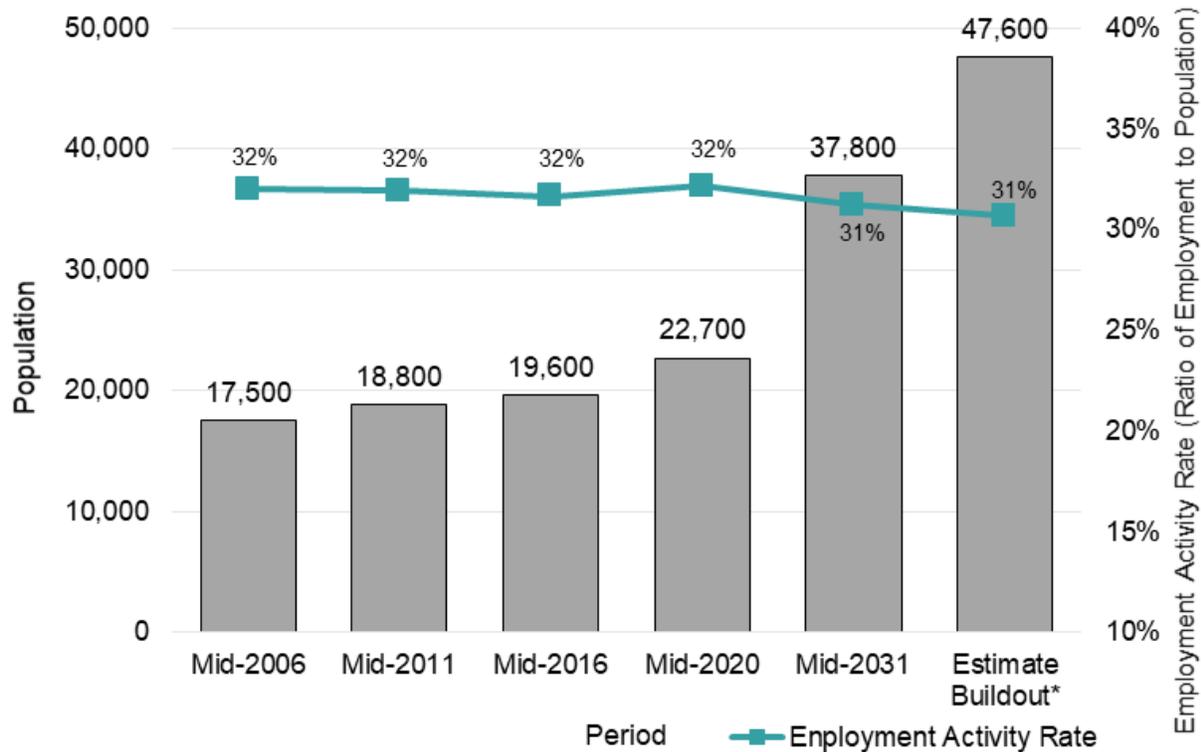
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<sup>1</sup> Based on the Township of Springwater Growth Management Strategy, August 2018, prepared by WSP, and background work prepared for the Township of Springwater Development Charges Background Study prepared by Watson & Associates Economists Ltd., 2018.

<sup>2</sup> Buildout is based on the background work prepared for the Township of Springwater Development Charges Background Study prepared by Watson & Associates Economists Ltd., 2018, and the Township of Springwater Growth Management Strategy, August 2018, prepared by WSP.



Figure 5  
Township of Springwater  
Population and Employment Activity Rate,  
2006 to 2031 and Buildout



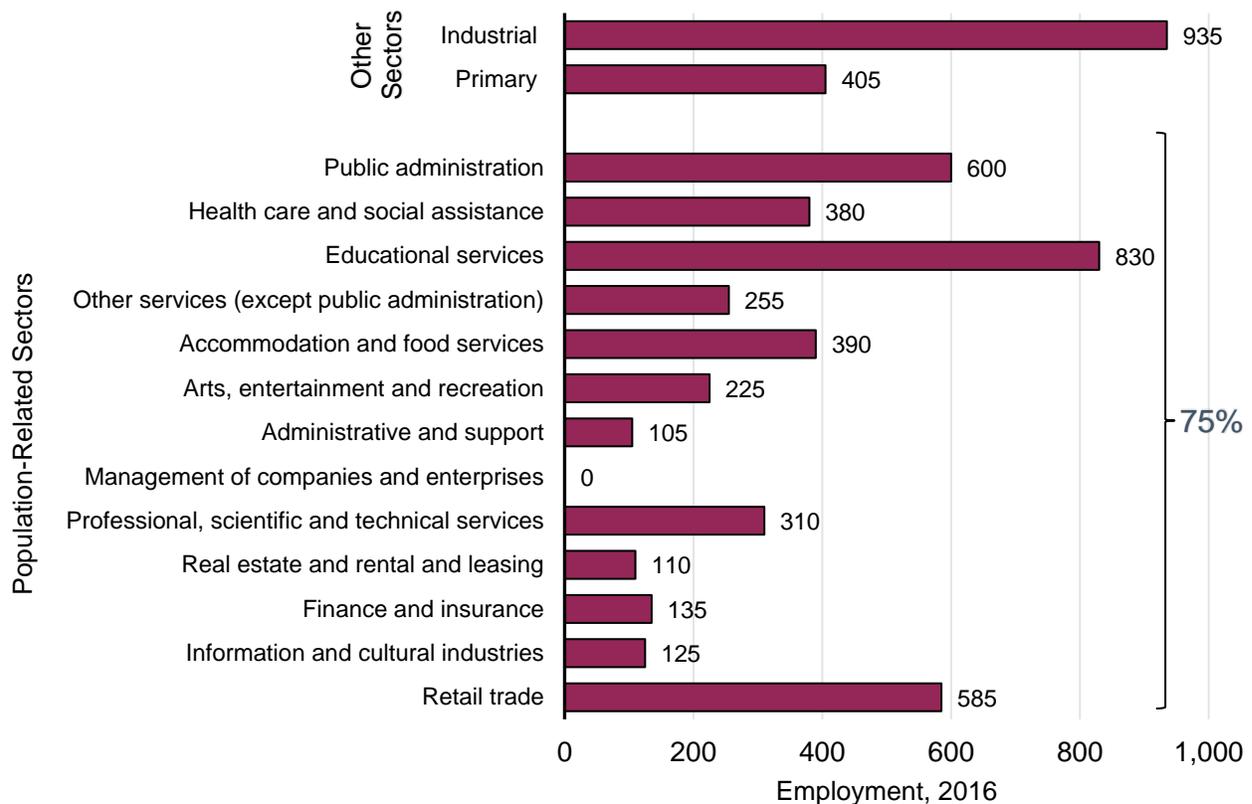
\*Buildout is based on the approximate buildout of units in the development process plus additional rural units.  
Notes: Population includes undercount at approximately 2.9%. Population has been rounded.  
Source: 2006, 2011 and 2016 based on Statistics Canada Census. No Fixed Place of Work is calculated based on approach utilized by A Place to Grow, Growth Plan for the Greater Golden Horseshoe Region, Growth Plan forecasts.  
2031 forecast is derived from the Township of Springwater Growth Management Strategy prepared by WSP, August 2018.  
2020 and buildout is based on background work for the Township of Springwater Development Charges Background Study prepared by Watson & Associates Economists Ltd., April 2018. Buildout reflects buildout of units in development approvals process as well as an additional 313 rural low density units.



### 2.3.2 Township of Springwater Employment by Sector

Figure 6 provides a summary of employment by sector. As summarized, the P.R.E. sectors comprised 75% of the Township’s employment base in 2016. Within the Township of Springwater context, P.R.E. sectors include a broad range of sectors and generally exclude industrial (manufacturing, wholesale and logistics, and transportation and warehousing). Public administration, educational services, and retail trade represent the largest components of the P.R.E. sectors.

Figure 6  
Township of Springwater  
Employment by Sector, 2016



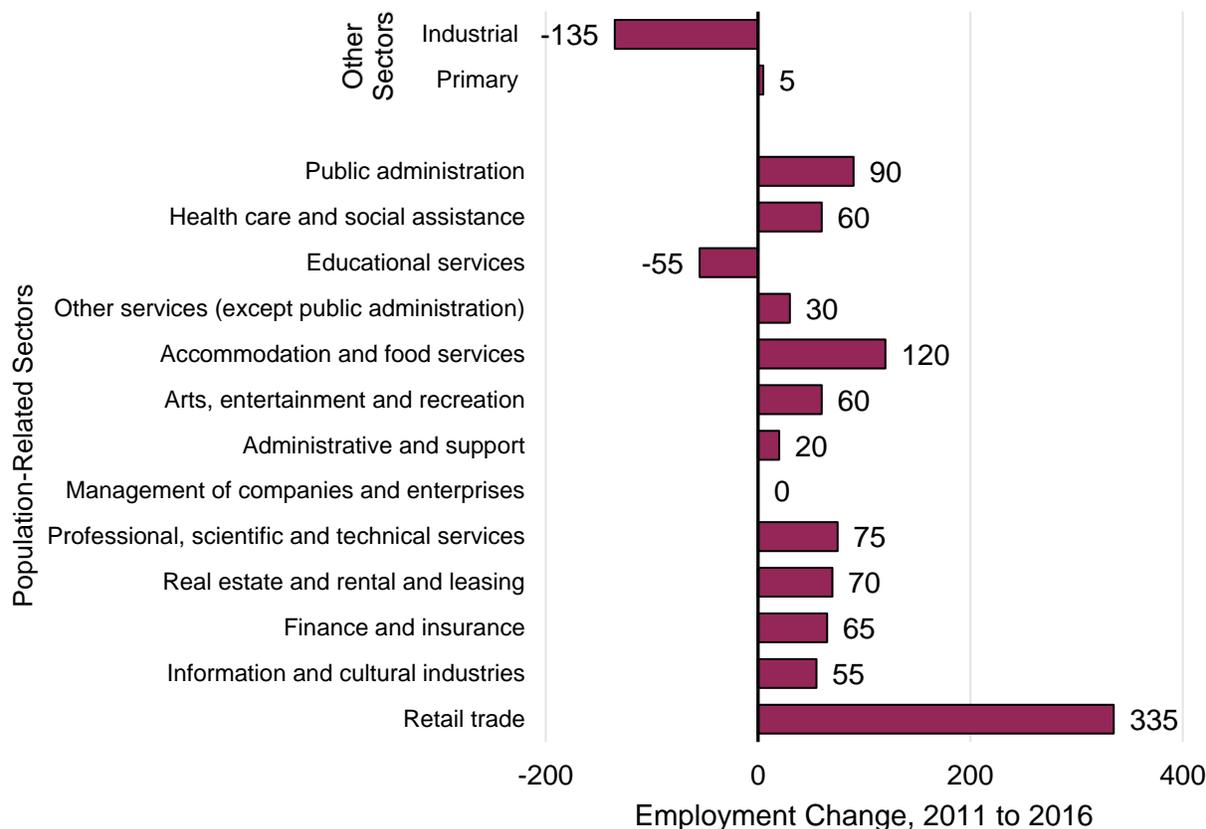
Source: Derived from 2016 Statistics Canada Place of Work data by Watson & Associates Economists Ltd. Employment by NAICS categories. Industrial and primary include 11, 22, 31-33, 41, 48-49 and 56.

Figure 7 provides a summary of employment change by employment sector over the 2011 to 2016 period. As summarized in Figure 7, retail trade within the Township of



Springwater had the largest increase in employment over that period, while industrial employment experienced a large decline in employment.

Figure 7  
Township of Springwater  
Employment Change by Employment Sector, 2011 to 2016



Source: Derived from 2006-2016 Statistics Canada Place of Work data by Watson & Associates Economists Ltd. Employment by NAICS categories. Industrial and primary include 11, 22, 31-33, 41, 48-49 and 56. Sectors exclude No Fixed Place of Work.

### 2.3.3 Township of Springwater Employment Forecast, 2031

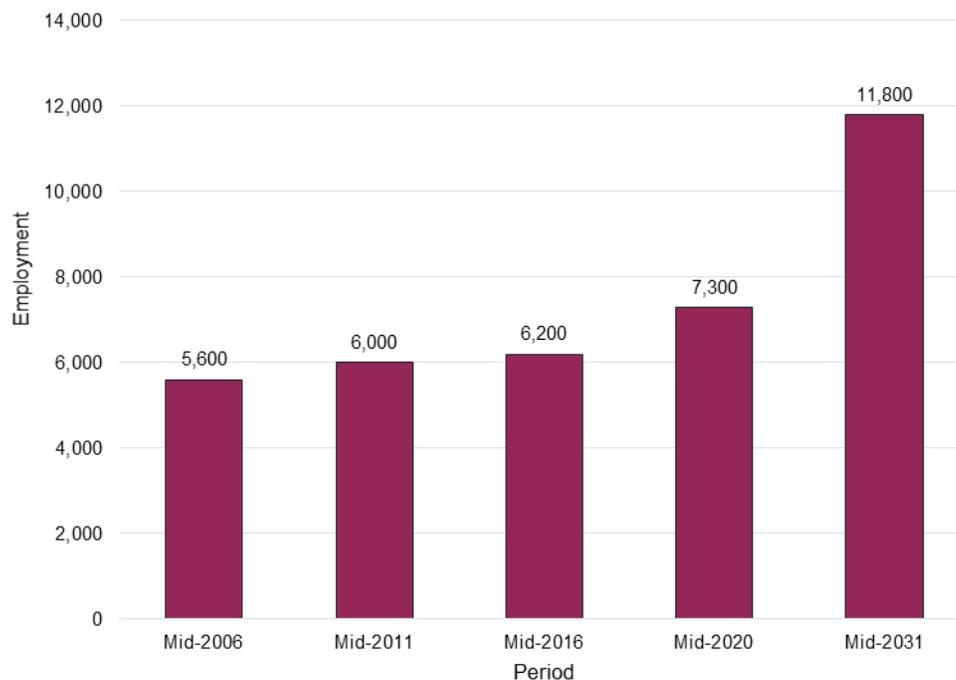
It is forecast that the Township of Springwater will reach an employment base of approximately 11,800 jobs by 2031, an increase of approximately 4,500 between 2020 and 2031,<sup>1</sup> as summarized in Figure 8. It is estimated that approximately 48% of

<sup>1</sup> Based on the Township of Springwater Growth Management Strategy, August 2018 prepared by WSP. Employment for 2020 is an estimate by Watson & Associates Economists Ltd.



employment will be accommodated on P.R.E. lands within the urban settlement areas in the Township, while the remaining 52% will be accommodated within the rural areas, on employment lands, and through work at home employment and no fixed place of work (N.F.P.O.W.) employment.<sup>1</sup>

Figure 8  
Township of Springwater  
Employment, 2006 to 2031



Notes: Employment includes Work at Home employment and No Fixed Place of Work employment.  
Source: 2006, 2011 and 2016 based on Statistics Canada Census. 2031 forecast is derived from the Township of Springwater Growth Management Strategy prepared by WSP, August 2018.

### 2.3.4 Township of Springwater Commuting Patterns

The share of employed residents commuting to other municipalities has an influence on the shopping patterns of residents. Generally, municipalities with a large share of outflow commuters experience a leakage of retail spending due to the opportunities for employees to shop near work or along their commute. Conversely, municipalities with a

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<sup>1</sup> Based on the Township of Springwater Growth Management Strategy, August 2018 prepared by WSP. Employment for 2020 is an estimate by Watson & Associates Economists Ltd.



large share of inflow commuters generally benefit from an influx of retail spending from employees that reside outside the municipality.

The following provides a summary of the commuting patterns of residents within the Township of Springwater. The Township of Springwater is unique; although it has a very large portion of residents that commute to the City of Barrie and other municipalities largely within the Simcoe Area (approximately 85% of employed residents commute outside the Township to work), the Township of Springwater employed labour force is largely comprised of residents outside the Township of Springwater (71%). As a result, the Township of Springwater has a very large portion of residents who are influenced by commercial options beyond the Township of Springwater, while conversely, the Township has the opportunity to cater to the employees who live outside the Township.

Figure 9a summarizes to where the Township's residents commute for employment, while Figure 9b summarizes the place of residence of those who work within the Township of Springwater. As summarized, 15% of workers employed within the Township of Springwater live in the Township. Nearly half (49%) the residents work outside the Township and commute to the City of Barrie for work, followed by 11% commuting to municipalities within the Greater Toronto Area (G.T.A.); the remainder largely commute to other municipalities within the Simcoe area.

Of the total employment base in the Township, 36% of jobs are held by City of Barrie residents, followed by Township of Springwater residents (29%), residents of municipalities within the northern area of Simcoe County<sup>1</sup> (22%) and those living in other municipalities within the southern area of Simcoe County (9%). Workers that reside within the Town of Midland, the City of Orillia, and other municipalities within Ontario, represent the remaining 3% of the in-flow commuters.

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<sup>1</sup> Includes Town of Collingwood, Town of Wasaga Beach, Township of Clearview, Township of Oro-Medonte, Township of Tay, Township of Tiny, Town of Penetanguishene, Township of Severn, and Township of Ramara.



Figure 9a  
Township of Springwater  
Commuting Patterns  
Location of Work for Township of Springwater Residents, 2016

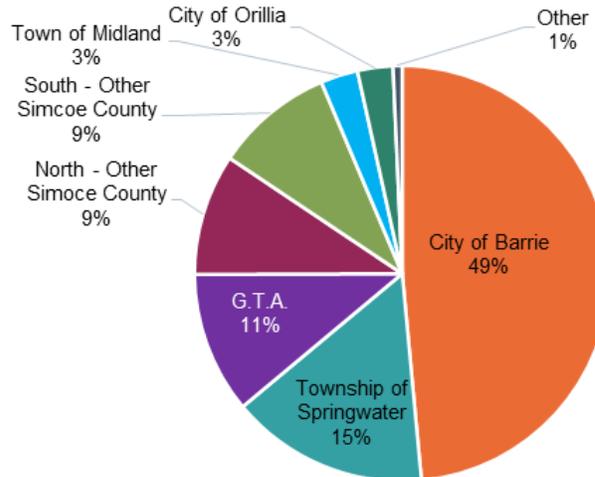
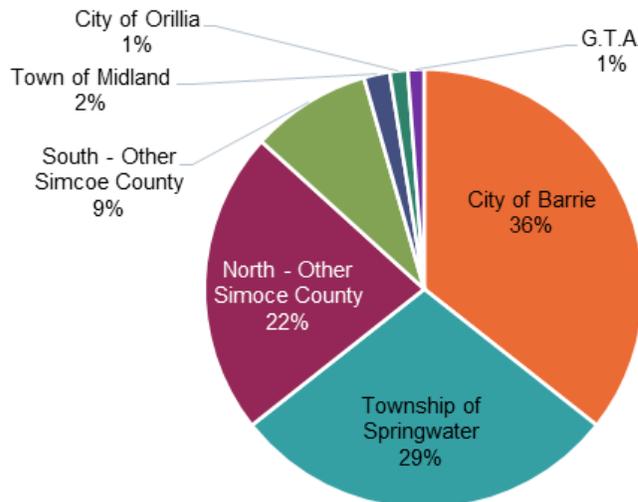


Figure 9b  
Township of Springwater  
Commuting Patterns  
Location of Residence for Workers within Township of Springwater, 2016



Source: Derived from Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016325 by Watson & Associates Economists Ltd.



### **2.3.5 Township of Springwater Settlement Areas**

Figure 10 provides a map of the nine settlement areas within the Township of Springwater.

The following is a list of settlement areas within the Township of Springwater which has been organized into two areas for the purpose of this study based on location within the Township.

North Portion, North of Horseshoe Valley Road:

- Elmvale
- Hillsdale
- Phelpston

South Portion, South of Horseshoe Valley Road:

- Midhurst
- Centre Vespra
- Snow Valley
- Anten Mills
- Minesing

The urban settlement areas of Midhurst and Elmvale are the primary focus areas for P.R.E. over the current planning horizon of the Official Plan.<sup>1</sup> There are approximately 235 hectares (ha) of P.R.E lands within the settlement areas of Midhurst and Elmvale.<sup>2</sup>

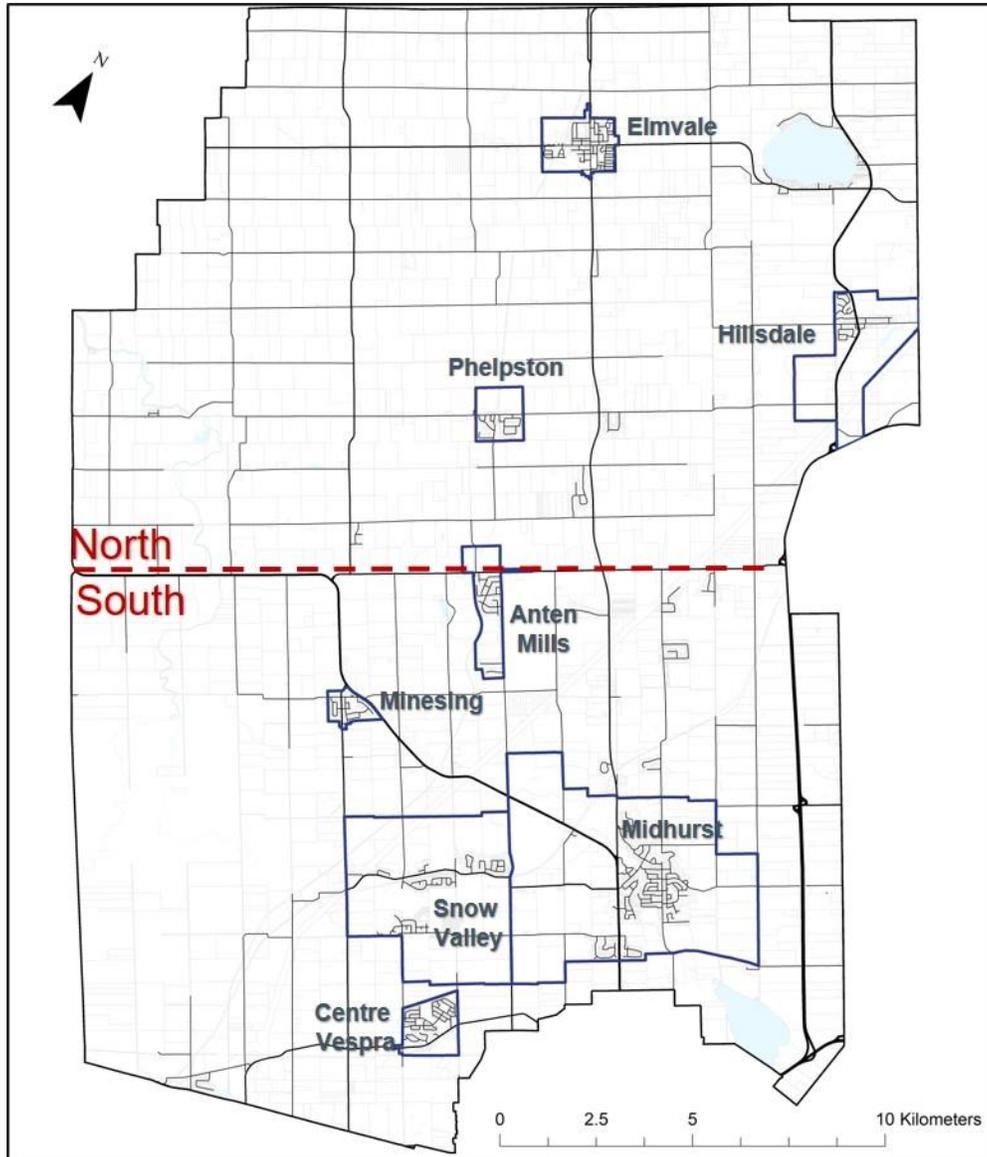
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<sup>1</sup> Elmvale and Midhurst are also two of four fully serviced settlement areas within the Township. Other fully serviced settlement areas include Snow Valley and Centre Vespra.

<sup>2</sup> Township of Springwater Growth Management Strategy, August 2018, p. 37.



Figure 10  
Township of Springwater  
Map of Settlement Areas<sup>1</sup>



<sup>1</sup> Based on mapping adapted from the Township of Springwater by Watson & Associates Economists Ltd. For the purposes of this study, the North and South Areas of the Township of Springwater are based on their location relative to Horseshoe Valley Road. The North Area includes the Statistics Canada Census tract 0202.00, while the South Area includes the Census tracts of 0200.00 and 0201.00.



### 2.3.6 Township of Springwater Average Household Income Per Capita, 2015

Figures 11 and 12 provide a comparison of the average household income per capita (a commercial metric that identifies the relative purchasing potential based on income and household size). As summarized in Figure 11, the Township of Springwater has a significantly higher household income per capita than the Province, the County of Simcoe, and the Barrie Census Metropolitan Area (C.M.A.). The Midhurst urban settlement area in particular has a significantly higher average household income, while the urban settlement area of Elmvale has an average household income that is lower than the provincial average.

Figure 11  
Township of Springwater  
Provincial, Regional and Local Average  
Household Income Per Capita Comparisons, 2015

Location	Average Household Income (2015)	Persons per Unit (P.P.U.)	Average Household Income per Capita	Income Index to Province
	A	B	C = A / B	D = C / \$38,200
Ontario	\$ 97,860	2.562	\$ 38,200	100.0
County of Simcoe	\$ 92,560	2.567	\$ 36,060	94.4
Barrie C.M.A.	\$ 96,920	2.681	\$ 36,150	94.6
<b>Township of Springwater</b>	<b>\$ 127,240</b>	<b>2.828</b>	<b>\$ 45,000</b>	<b>117.8</b>
Midhurst Urban Settlement Area <sup>1</sup>	\$ 160,190	2.996	\$ 53,460	139.9
Elmvale Urban Settlement Area <sup>2</sup>	\$ 78,110	2.325	\$ 33,600	88.0
Rest of Township of Springwater <sup>3</sup>	\$ 128,150	2.917	\$ 43,930	115.0

Source: Derived from Statistics Canada, 2016 Census by Watson & Associates Economists Ltd.

Figure have been rounded.

<sup>1</sup>Based on the following Census Dissemination Areas as of 2016:  
35430640, 3543061, 35430642, 35430653, 35430644 and 35430645.

<sup>2</sup>Based on the area defined by Statistics Canada as Elmvale Population Centre.

<sup>3</sup>Based on the remaining Dissemination Areas within the Township of Springwater.

Figure 12 provides an additional summary of the average household income per capita by dividing the Township into two components – north and south. As summarized in Figure 12, the population south of Horseshoe Valley Road has a significantly higher per capita household income compared to the northern portion of the Township of Springwater.



Figure 12  
Township of Springwater  
Provincial, Regional and Local Average  
Household Income Per Capita Comparisons, 2015

Location	Average Household Income (2015)	Persons per Unit (P.P.U.)	Average Household Income per Capita	Income Index to Province
	A	B	C = A / B	D = C / \$38,200
Ontario	\$ 97,860	2.562	\$ 38,200	100.0
County of Simcoe	\$ 92,560	2.567	\$ 36,060	94.4
Barrie C.M.A.	\$ 96,920	2.681	\$ 36,150	94.6
<b>Township of Springwater</b>	<b>\$ 127,240</b>	<b>2.828</b>	<b>\$ 45,000</b>	<b>117.8</b>
North - North of Horseshoe Valley Road	\$ 93,570	2.604	\$ 35,940	94.1
South - South of Horseshoe Valley Road	\$ 152,050	3.018	\$ 50,380	131.9

Source: Derived from Statistics Canada, 2016 Census by Watson & Associates Economists Ltd.

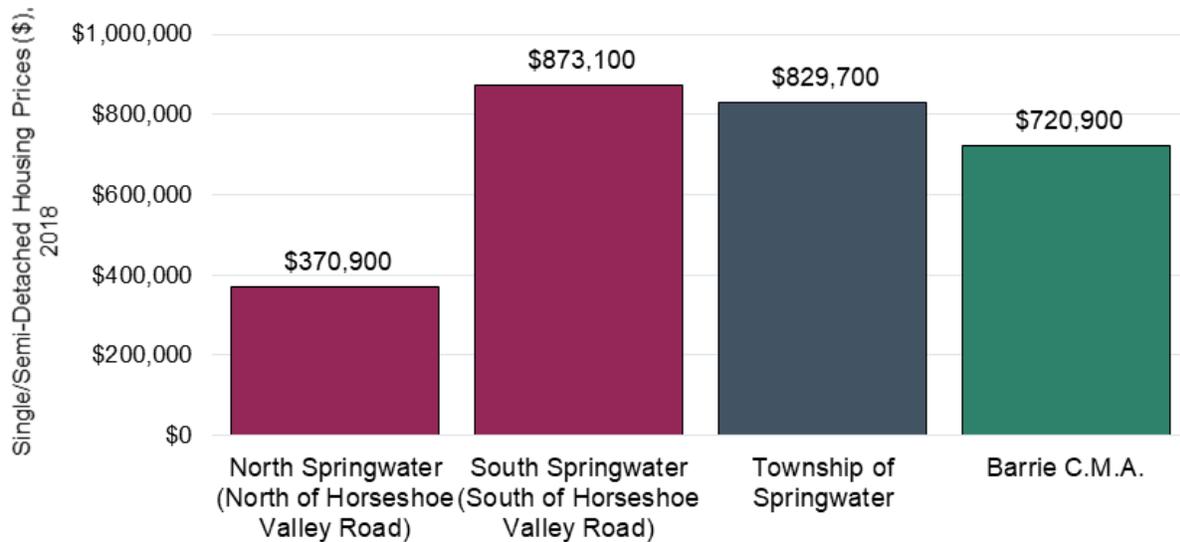
Figure have been rounded.

### ***2.3.7 Township of Springwater Historical Housing Trends by Area - North and South Areas of Township***

The Township of Springwater has experienced strong housing activity over the past decade, due to a number of factors including its natural/recreational amenities, proximity to larger labour markets, and its range of housing price options. As summarized in Figure 13, while the Township has an overall average housing price that is higher than the Barrie C.M.A. average, the average housing prices in the northern portion of the Township (primarily in Elmvale and Hillsdale) are significantly lower. The range of housing prices between the north and south portions of the Township are a key indicator that the demographics of the Township are comprised of two large distinct markets. As summarized in Figure 14, growth has largely been concentrated within the southern portion of the Township.



Figure 13  
Township of Springwater and Barrie C.M.A.  
Single/Semi-Detached Housing Prices, 2018<sup>1</sup>



Source: Derived from CMHC Housing Starts Survey, 2018 by Watson & Associates Economists Ltd.



New Single Detached, Elmvale  
(North Area of Township of Springwater)

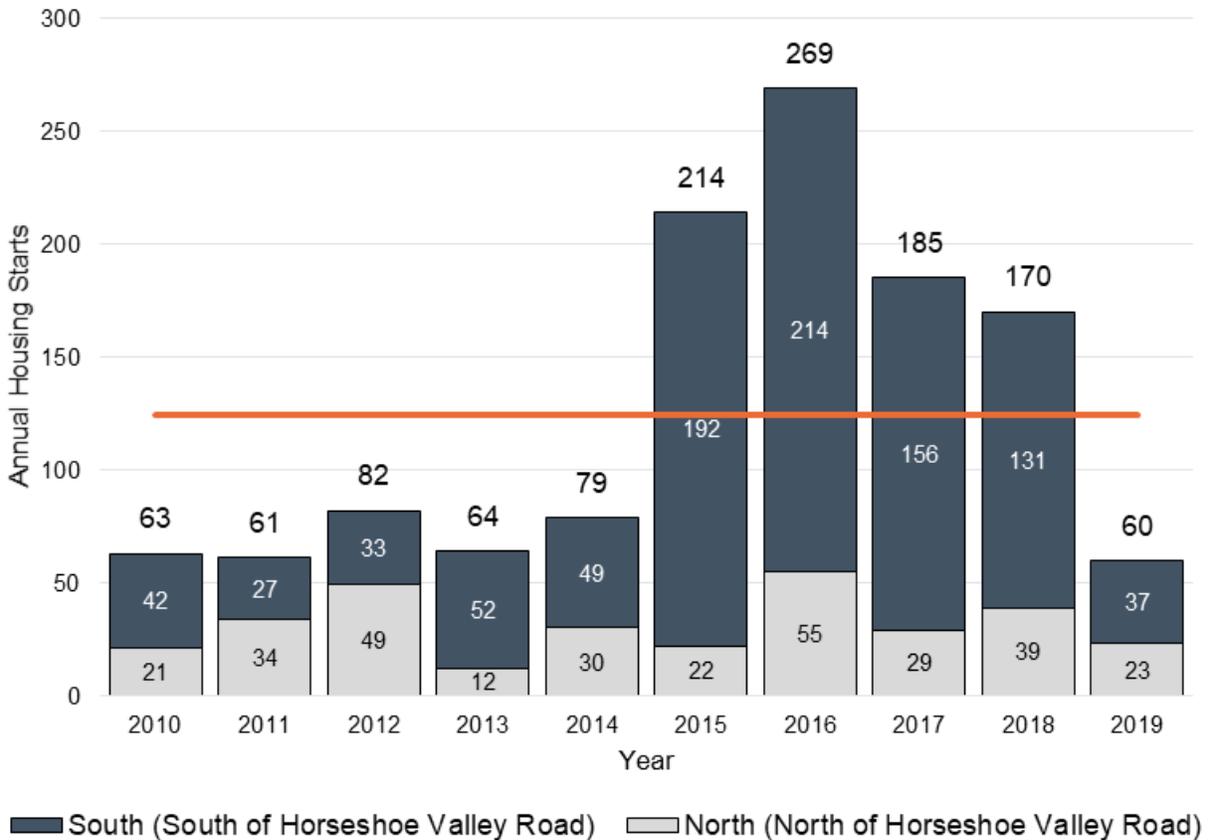


New Single Detached, Centre Vespra  
(South Area of Township of Springwater)

<sup>1</sup> Data is based CMHC survey data on singles/semi-detached dwellings on absorbed lands (i.e. excludes re-sale homes). Data for 2018 was utilized due to small sample for the Township of Springwater in 2019.



Figure 14  
Township of Springwater  
North and South Areas of Township of Springwater  
Housing Starts, 2010 to 2019



Source: Derived from CMHC Housing Starts Survey, 2010 to 2019 by Watson & Associates Economists Ltd.



# Chapter 3

## Local and Regional Dynamics of Commercial Trade



### 3. Local and Regional Dynamics of Retail and Service Commercial Trade

The following chapter provides a brief overview of the key components that influence retail and service commercial trade within the Township of Springwater. This analysis is used to inform key assumptions on retail and service commercial demand within the Township of Springwater. Key components include:

- A brief overview of the regional retail and service commercial service use structure;
- A summary of the local P.R.E. structure within the Township of Springwater;
- A summary of the retail and commercial built space inventory;
- Details on the trade area delineation; and
- An urban area comparator analysis to inform the retail and service commercial space demand analysis.

#### 3.1 Regional Retail and Commercial Service Use Structure

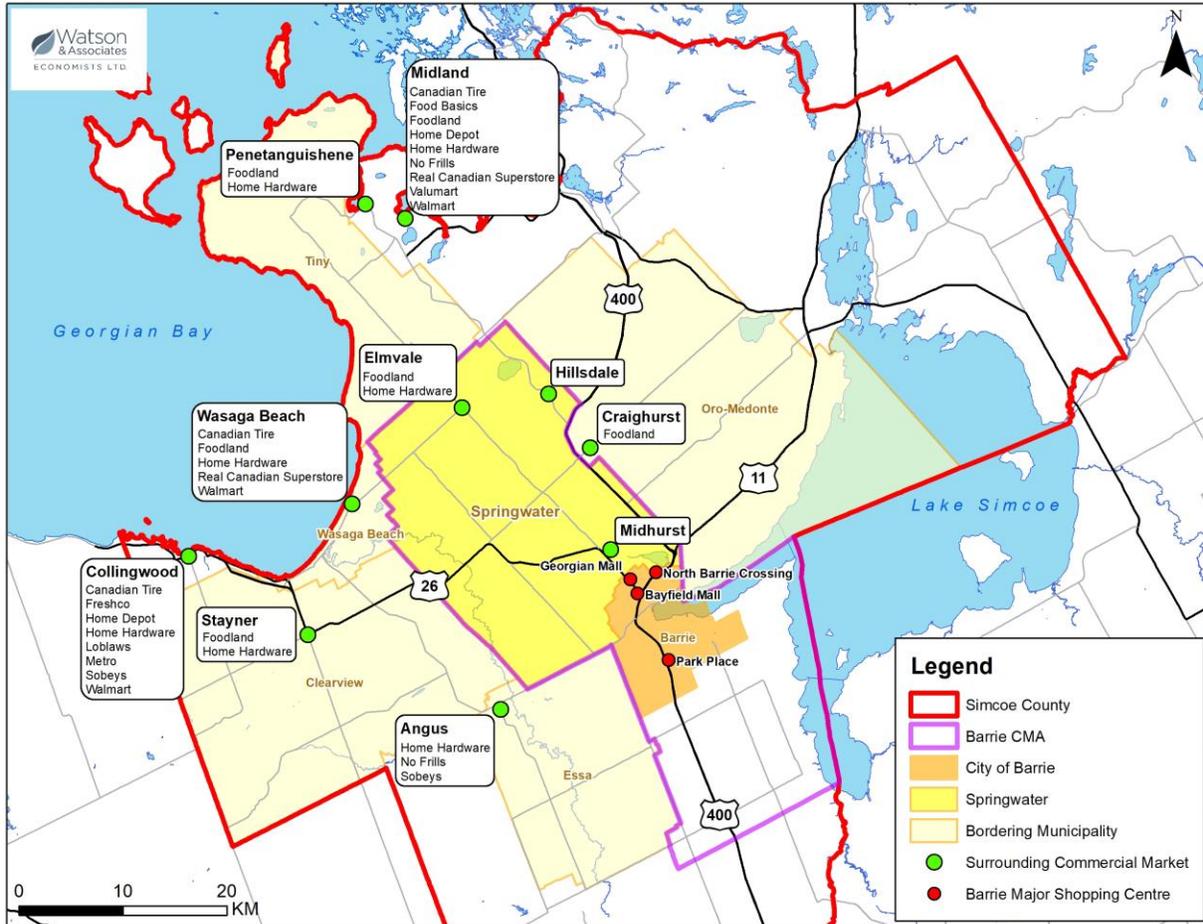
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Figure 15 provides a map of the surrounding commercial competition, while Figure 16 provides a summary of the estimated retail and commercial services space and drive-time distances to Midhurst, Elmvale, and Hillsdale. As summarized in Figure 16, it is estimated that residents in Elmvale, Midhurst, and Hillsdale are within 5 to 30 minutes of the Bayfield Street commercial corridor in the City of Barrie which provides over 2 million sq.ft. (185,800 sq.m.) of primarily quick-serve restaurants, automotive dealerships, and comparison-based retail uses housed in big-box stores and two regional malls. Figure 17 provides a map of the Bayfield Street Corridor within the City of Barrie, illustrating the proximity to the urban area of Midhurst.

Other competitive markets include the Town of Wasaga Beach and the Town of Midland which provide convenient access to residents in the northern portion of the Township, while the urban area of Angus provides access to the far southwestern extent of the Township of Springwater (including Centre Vespra). Other smaller urban areas, including Craighurst (Township of Oro-Medonte) and Stayner (Township of Clearview), provide access to local serving retail uses to rural residents within the Township of Springwater.



Figure 15  
Township of Springwater and Surrounding Area  
Regional Commercial Context





**Figure 16**  
**Township of Springwater and Surrounding Area**  
**Regional Commercial Context**

Surrounding Market Area	Commercial Gross Leasable Floor Area (G.L.A.) Sq.ft. <sup>1</sup>	G.L.A. as a Percentage of Market Area %	Drive-time Analysis <sup>2</sup>		
			Midhurst (Snow Valley Road/Bayfield Road)	Elmvale (Downtown)	Hillsdale
Barrie - Bayfield Corridor	2,253,000	56%	5 Minutes	30 Minutes	20 Minutes
Wyevale (Tiny)	5,000	0.1%	25 Minutes	10 Minutes	15 Minutes
Wasaga Beach	971,000	24%	30 Minutes	15 Minutes	25 Minutes
Stayner (Clearview)	180,000	4%	30 Minutes	30 Minutes	35 Minutes+
Angus (Essa)	372,000	9%	20 Minutes	35 Minutes+	35 Minutes+
Craighurst (Oro-Medonte)	33,000	1%	15 Minutes	15 Minutes	5 Minutes
<b>Total Surrounding Market Areas</b>	<b>3,814,000.0</b>	<b>94%</b>			
<b>Springwater Township</b>					
Elmvale	157,500	4%	15 Minutes	-	10 Minutes
Midhurst	65,800	2%	-	15 Minutes	15 Minutes
Hillsdale	5,600	0.1%	15 Minutes	10 Minutes	-
Apto	2,000	0.0%	10 Minutes	10 Minutes	10 Minutes
Phelpston	2,300	0.1%	15 Minutes	10 Minutes	10 Minutes
<b>Total Township of Springwater</b>	<b>233,200</b>	<b>6%</b>			
<b>Total</b>	<b>4,047,200</b>	<b>100%</b>			

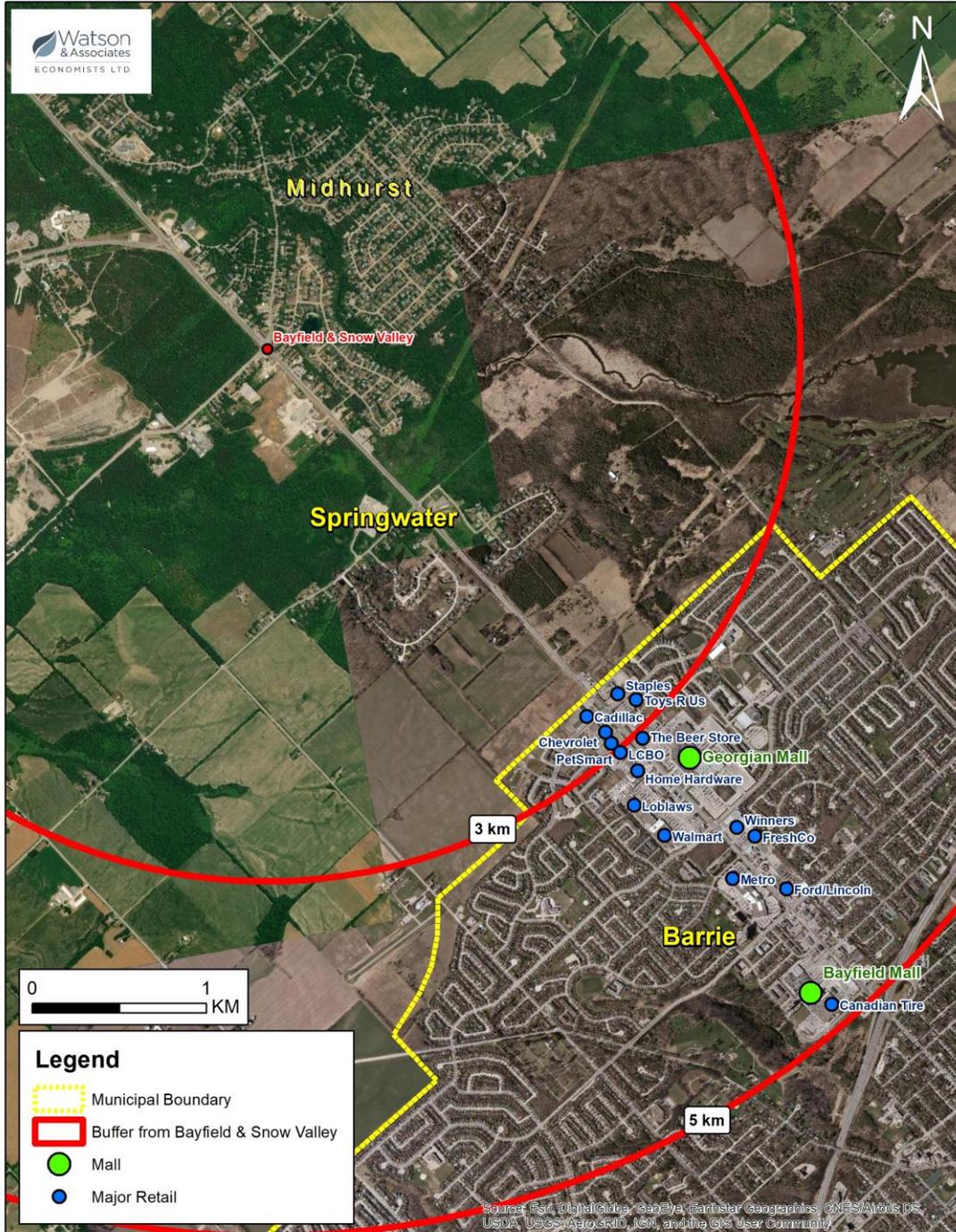
Note: Only relevant small settlement areas with retail uses are included which include those within the Township of Springwater and in proximity to the Township.

<sup>1</sup>The measurement of Gross Leasable Area is an estimate for the surrounding market areas based on Google Earth Imagery, Simcoe County Building Footprint GIS data, and shopping centre site plans. Commercial space includes vacant and occupied space. A wide-range of commercial uses are included: traditional retail uses, food services, service commercial and automotive uses (fuel station and automotive dealerships). Non-commercial uses within purpose-built retail buildings are included (e.g. medical offices, institutional uses). Hotel/motels and accommodation space and commercial uses within industrial buildings are not included.

<sup>2</sup>Drive-Time analysis is an approximate drive-time based on ArcMap GIS analysis. Drive-times have been rounded to 5 minute increments.



Figure 17  
Midhurst Urban Area and City of Barrie Bayfield Corridor  
Commercial Uses within Bayfield Corridor





## 3.2 Local Retail and Commercial Service Use Structure

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### 3.2.1 Local Commercial Overview

As previously discussed, the settlement areas of Midhurst and Elmvale are the primary focus areas for P.R.E. over the current planning horizon of the Official Plan and are planned to be the Township's only fully municipally serviced settlement areas. There are approximately 235 ha of P.R.E. lands within the settlement areas of Midhurst and Elmvale.<sup>1</sup> The following is a brief overview.

#### 3.2.1.1 Elmvale

##### Overview of Urban Settlement Area

The urban settlement area of Elmvale is one of the Township's settlement areas and has the largest supply of retail and commercial space. Elmvale has a historic downtown core with restaurants, personal services, offices, and Non-Food Store Retailers (N.F.S.R.) offering a small mix of comparison products. Elmvale has the Township's only grocery store (Foodland). Commercial businesses within Elmvale benefit from the seasonal trade due to location on a regional highway that provides an opportunity to intercept seasonal traffic between Highway 400 and large tourism areas (Wasaga Beach and the shoreline within the Township of Tiny). Elmvale competes with the Town of Wasaga Beach and Town of Midland in providing retail and commercial services to residents and cottage owners within the Township of Tiny.

##### Population-Related Employment Designations

The following provides a brief description of the P.R.E. land designations within the settlement area of Elmvale.

- **General Commercial:** generally, includes the lands within the downtown core of Elmvale and along the Yonge Street corridor. The General Commercial designation provides for a wide range of retail and service commercial uses. The majority of the occupied and developed commercial uses within Elmvale are on lands designated General Commercial.

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<sup>1</sup> Township of Springwater Growth Management Strategy, August 2018, p. 37.



The permitted retail and service commercial uses include personal services, recreational and tourism uses, entertainment uses, community facilities, business and professional offices, eating establishments, service shops, and medical services.<sup>1</sup>

The Elmvale Urban Settlement Area also provides the opportunity to accommodate General Commercial uses within residential areas that extend from the existing commercial core. General Commercial uses within the transition areas provide the opportunity for select forms of general commercial development in addition to the residential uses permitted without an O.P. Amendment.<sup>2</sup>

- **Highway Commercial:** includes a small portion of Elmvale’s designated commercial lands on the western periphery of the urban area. Highway Commercial uses include commercial extensive uses, and uses that serve the vehicular traffic such as automobile service stations, public garages, automobile sales agencies, eating establishments, custom workshops, motels, and accessory retail uses to the aforementioned. The land commercial extensive uses include construction and building supply yards, commercial nurseries, commercial/industrial vehicle, and farm implement dealers (on a limited basis).<sup>3</sup>
- **Institutional:** the urban settlement area of Elmvale includes large tracts of land designated for institutional uses which currently accommodates schools, retirement homes and recreational uses. It is important to recognize that existing institutional uses are also accommodated within commercial facilities, as well as on lands designated for residential lands.

### 3.2.1.2 *Midhurst*

#### Overview of Urban Settlement Area

Midhurst is an urban settlement area situated north of the City of Barrie. Bayfield Street, a major retail corridor within the City of Barrie, is within a 5-minute drive time of the urban settlement area of Midhurst and provides a range of comparison retail stores (stores that attract residents beyond a local area). Midhurst does not have a downtown

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<sup>1</sup> Township of Springwater Official Plan, Policy Section 11, p. 4.

<sup>2</sup> Ibid., Policy Section 8, p. 22.

<sup>3</sup> Ibid., Policy Section 11, p. 4.



core. The retail and commercial base is comprised of three small retail plazas and highway-oriented retail uses. Midhurst accommodates the majority of the Township of Springwater's institutional employment with large sites that accommodate the County of Simcoe administration offices, as well as the offices for the Simcoe Muskoka Catholic District School Board and the Simcoe County School Board Springwater Administration Centre. Other institutional uses include an ambulance station and a public library. The City of Barrie owns and operates a large sports complex within Midhurst.

### Growth Planned

The urban settlement area of Midhurst is anticipated to accommodate a large portion of the Township's population over the next 10 to 20 years. The Midhurst Secondary Plan, the planning area for the Midhurst settlement area, includes plans to accommodate up to 24,000 persons by 2023 and up to 37,500 people at full buildout.<sup>1</sup> The planned population by 2031 would actually exceed the Township of Springwater's forecast contained in the provincial policy document, A Place to Grow, Growth Plan for the Greater Golden Horseshoe (G.G.H.), 2019.<sup>2</sup> Due to the enactment of a "Special Rule" within the *Places to Grow Act*, permitted development applications for up to 300 ha of land within the Midhurst Secondary Plan are able to proceed through the rezoning and draft plan of subdivision approval stages, provided a list of criteria are met, totalling 4,595 residential units.<sup>3</sup> In addition, in 2017 the Ontario Municipal Board (O.M.B.) approved an additional population allocation of 2,961 residents, which comprises a portion of the County's 20,000 Population Allocation Program under the 2006 Growth Plan.<sup>4</sup>

Midhurst is anticipated to accommodate a larger portion of the Township's employment due to the significant residential development planned for Midhurst. At the time of this study, the required work to complete the registrations was still underway, including environmental assessment approval and coordinated phasing among landowners. The

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<sup>1</sup> Township of Springwater Growth Management Strategy, August 2018 prepared by WSP, p. iv.

<sup>2</sup>Amendment 1 to A Place to Grow, Growth Plan for the G.G.H., June 2020, proposes to remove the Schedule 7 Growth Forecasts for the lower-tier municipalities within Simcoe County.

<sup>3</sup> Township of Springwater Official Plan, Growth Management Strategy, August 2018, prepared by WSP, p. 10.

<sup>4</sup> Ibid.



first development includes the phasing of approximately 3,800 households in Neighbourhoods 1 and 2. It is anticipated that, if all required studies and registrations are completed, home construction could potentially begin by 2022.<sup>1</sup>

### Intensification Opportunities

The Bayfield Street corridor within Midhurst is a major arterial road that connects to Bayfield Street within the City of Barrie, as previously mentioned, a major retail and commercial service corridor. The Midhurst Bayfield Street corridor is envisioned to accommodate intensification and high-order retail and commercial services. Due to highway restrictions (restrictions re number of highway entrances) and the nature of the high-speed road, the Bayfield Street corridor likely does not have the potential to accommodate a traditional main street downtown. The potential for intensification within the Bayfield Street corridor would likely include the opportunity to create large blocks of complexes that would become a destination for locals and travellers, rather than just a thoroughfare.<sup>1</sup> Providing a central place for residents to meet and the ability to intercept regional commercial trade is a key opportunity to support economic development and employment growth for the Township of Springwater.

It is intended that phasing of the future redevelopment of the corridor will be dependent on the extension of municipal water and wastewater servicing. Redeveloping the corridor in phases may help ensure that each phase is substantially built out before releasing the next phase. This would prevent leap-frogging and support walkability within each phase during the short term.<sup>2</sup>

With respect to attracting residential development, the corridor benefits from its proximity to the City of Barrie and two Simcoe County Link bus routes which provide service from Elmvale, Collingwood, Georgian College, and the Hospital in the City of Barrie.

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<sup>1</sup> Based on discussions with the Township of Springwater and WSP, June 30, 2020.

<sup>2</sup> Based on discussions with the Township of Springwater and WSP, June 30, 2020.



## Population-Related Employment Designations

The following provides a brief description of the P.R.E. land designations within the settlement area of Midhurst. Figure 18 provides a map of the designated land-uses within the Midhurst Secondary Plan.

- **Commercial/Mixed Use:** the designation generally includes all existing uses, business and professional office, retail stores, hotels, restaurants, banks, personal service uses, private and commercial schools, public parks and open space linkages, public or private sector utilities and storm water management, transportation facilities, day care centres, and places of worship.<sup>1</sup>

Existing uses within the commercial/mixed use designation primarily include low-density residential uses and commercial extensive highway land uses; however, future uses are envisioned to include a wide range of uses to accommodate P.R.E. uses.

- **Administration and Government Uses:** the principal uses permitted within the administration and government use designation include all existing uses, professional offices related to government services, schools and institutions, day care centres, public parks and open space linkages, public or private sector utilities and storm water management, and transportation facilities.

Permitted retail and service commercial uses include personal services, recreational and tourism uses, entertainment uses, community facilities, business and professional offices, eating establishments, service shops, and medical services.<sup>2</sup>

- **Schools and Other Institutional Uses:** these uses are indicated on the Midhurst Secondary Plan with a symbol.<sup>3</sup>

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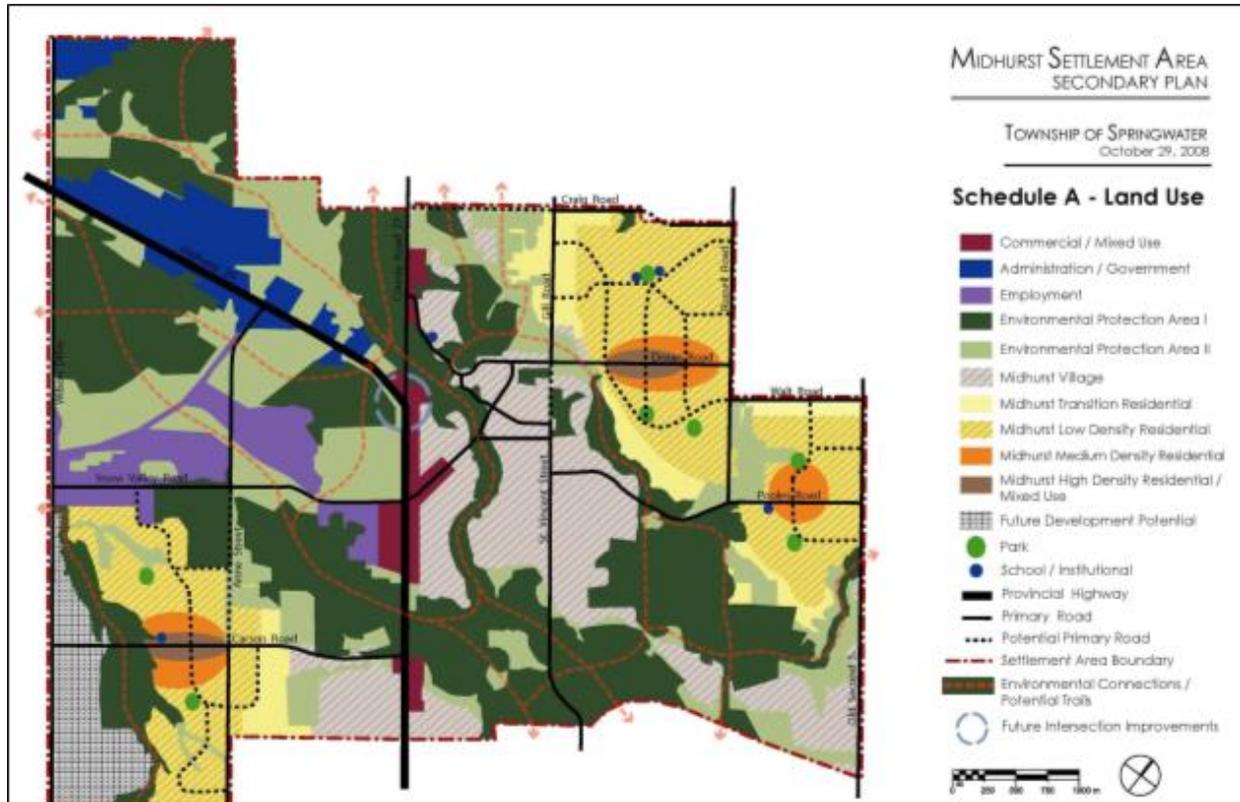
<sup>1</sup> Township of Springwater Official Plan, Midhurst Secondary Plan, p. 19.

<sup>2</sup> Ibid.

<sup>3</sup> Township of Springwater Official Plan, Midhurst Secondary Plan, p. 19.



Figure 18  
Township of Springwater  
Midhurst Secondary Plan Area



### 3.2.1.3 Hillsdale

The settlement area of Hillsdale has a small portion of the Township's built and occupied P.R.E. lands, including approximately 11,000 sq.ft. (1,000 sq.m.) of commercial built space, an elementary school, and a fire hall. Elmvale and, to a lesser extent, Craighurst to the east provide convenient access to retail and service commercial uses for residents within Hillsdale.

### 3.2.1.4 Other Settlement Areas

There are small convenience stores and automotive service uses throughout the Township. The Elmvale Zoo and Snow Valley Resort are key tourism attractions within the Township of Springwater that draw visitors to the area and offer employment opportunities to local residents.



### 3.3 Trade Area Delineation (Midhurst and Elmvale)

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The delineation of a trade area is the initial step in determining the market demand for commercial space in an area. The delineated trade area represents the extent of the farthest distance the majority of consumers are willing to travel to purchase retail goods and services. The size of the trade area depends on the mix of goods and services offered in the area, its proximity to competing markets, trade area barriers, mobility, and traffic flow. Generally, there are two types of trade areas: convenience and destination/comparison-based trade areas. The latter trade area is more expansive and competitive, while the former is more localized and serves the everyday needs of the local customer and drive-by motorist. The existing commercial base of the Township is primarily convenience based. Looking forward, it is expected, given the population growth anticipated, that the Township's commercial base will require a greater market depth of retail and commercial service offering over the long term (i.e. to 2031).

Provided below is a summary of the trade area delineation of the Midhurst and Elmvale trade areas.

#### 3.3.1.1 *Elmvale Visitor Origins*

Elmvale has a more established commercial base compared to Midhurst. Watson utilized ping cellular phone data from a third-party provider.<sup>1</sup> Cellular pings are signals that are made periodically from cell phones to nearby cell towers. Each ping includes the cell phone's unique identifier (similar to an internet IP address). Third-party data providers are able to provide privacy-compliant customer data that identifies the number of unique visitors to a given retail site, including the frequency of visits over a time period and the origin of the visitor by postal code. Ping cellular data has become a common data source in understanding customer origins in the retail industry, replacing licence plate surveys.

The ping cellular data provided interesting insights into the patterns of visitors to Elmvale. Figure 18 provides a map of visitors who have visited Elmvale at least three times over the course of a four-year period (2016 to 2019) based on the "evening" location of the mobile device (typically the home). Data was compiled based on the Foodland grocery store and the north side of Queen Street in downtown Elmvale. The

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<sup>1</sup> uberMedia



data by the third-party provider screens out on-site employees and vehicular traffic. The sample represents over 4,000 unique devices. As illustrated on the map, Elmvale attracts visitors from across southern Ontario, primarily within the Georgian Bay Area and the Greater Toronto Area (G.T.A.). Visitors from beyond the G.G.H. represent a small share of visitors.

Figure 18  
Home Location of Visitors to Downtown Elmvale, 2016 and 2019<sup>1</sup>

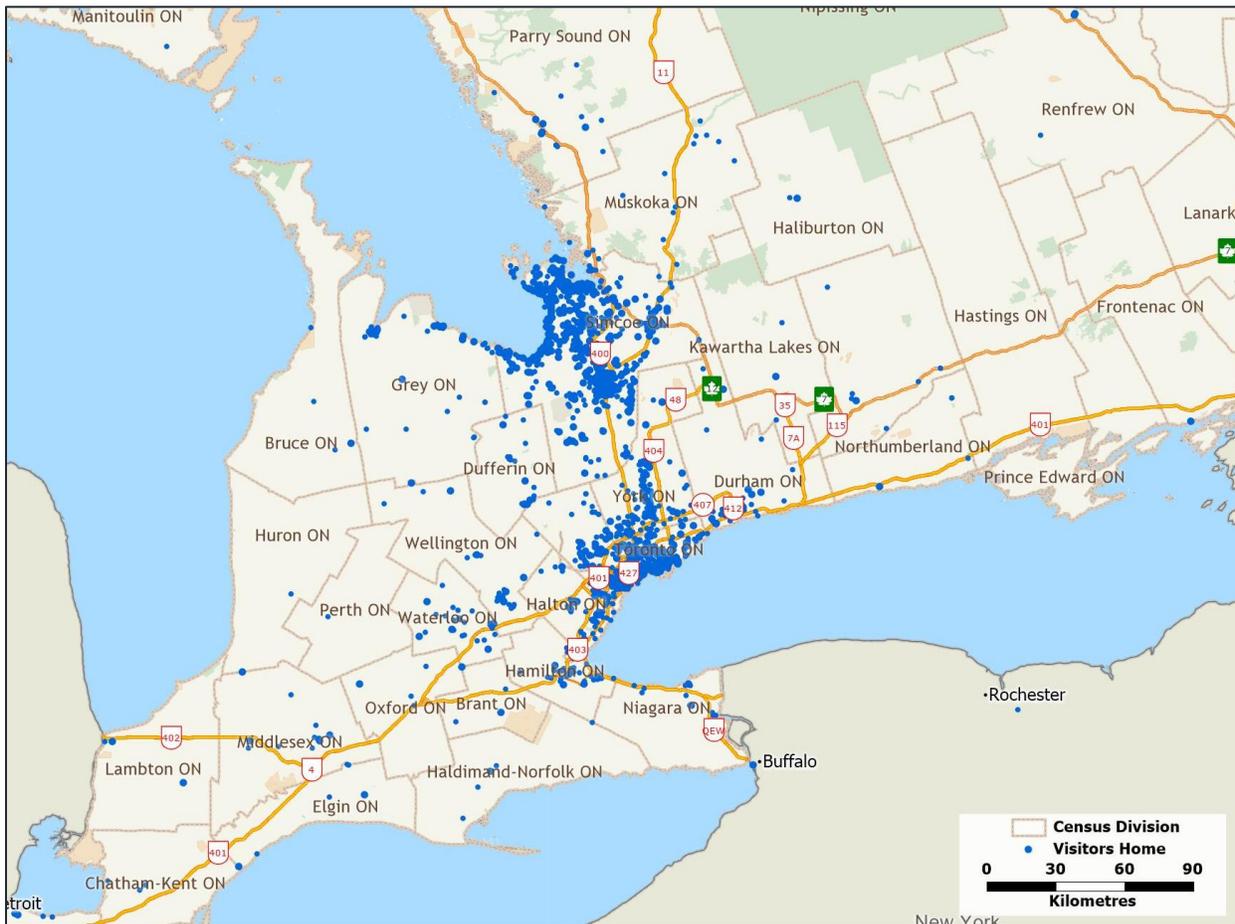


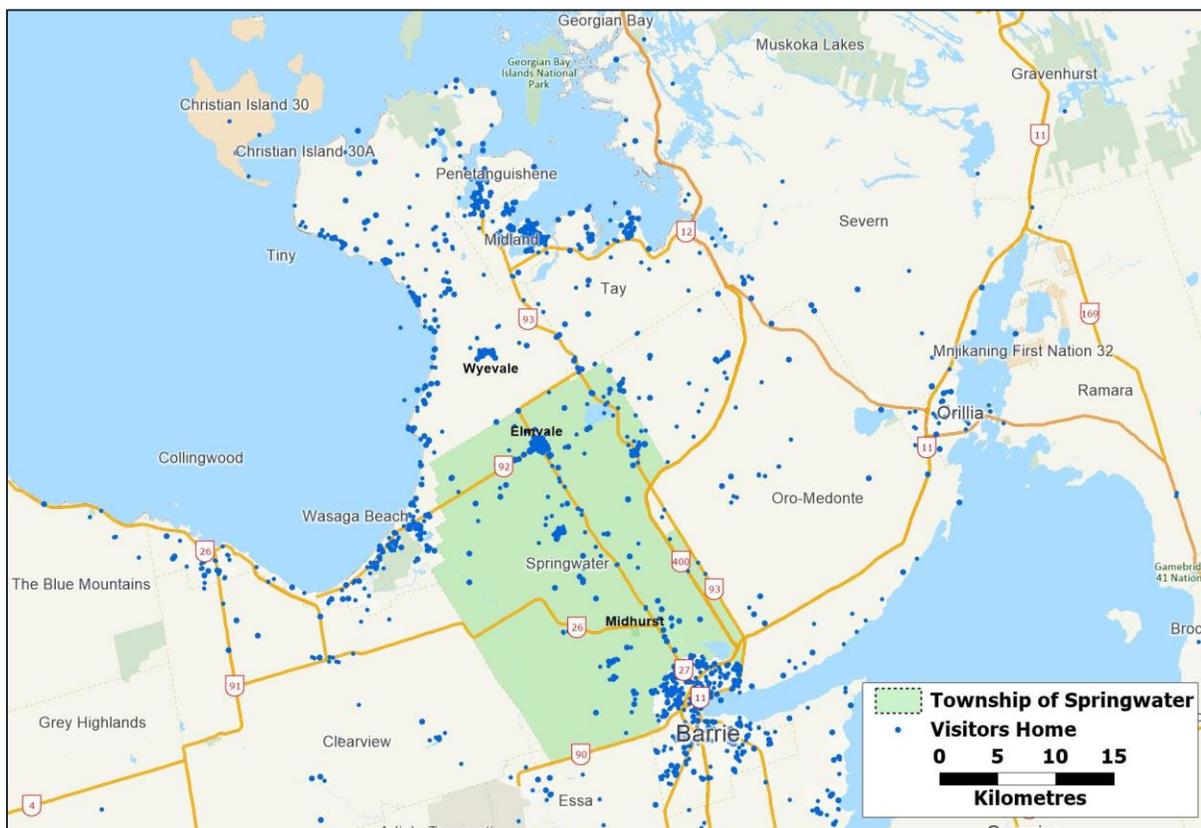
Figure 19 provides a more zoomed-in map of visitors to Elmvale. The urban settlement area of Elmvale, the southern shoreline of Tiny Township and Wyevale (Township of Tiny) represent a key concentration of customers (relative to population size and

<sup>1</sup> Data obtained by uberMedia Inc. Dots on map reflect the “evening” location (typically home) of visits to the site area, the site area is the Foodland grocery store and the north-side of Queen Street in downtown Elmvale.



number of visitors). It is interesting to note how disperse the origin of visitors and that the City of Barrie represents the largest segment of customers to Elmvale, representing nearly half the visitors, which is likely due to a combination of commuting traffic and intercepting recreational visitors to the Georgian Bay Area (Town of Wasaga Beach and Township of Tiny). It is important to recognize that ping cellular data only provides an indication of visitors to an area and does not provide an indication of the share of sales from an area.<sup>1</sup> Nonetheless, the ping cellular data points to the importance of the seasonal market and the potential to capture trade from visitors.

Figure 19  
Home Location of Visitors to Downtown Elmvale, 2016 and 2019



### 3.3.1.2 Trade Area Delineation

As illustrated in Figure 20, the Township of Springwater has been divided into two trade areas – Elmvale Trade Area and Midhurst Trade Area. The Elmvale Trade Area has

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<sup>1</sup> Due to temporary stores closure issues, a telephone or internet survey was not utilized for this study.

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been extended to include the southern portion of the Township of Tiny (represented as the shaded green area on the map). The Midhurst Trade Area includes the southern portion of the Township, south of Horseshoe Valley Road. The trade area delineation also considers the proximity to surrounding urban areas. It is estimated that the Elmvale Trade Area competes with the Town of Wasaga Beach and the Town of Midland. The settlement areas of Apto, Phelpston, and Hillsdale are within the Elmvale Trade Area. The Midhurst Trade Area is estimated to have a significant outflow of retail spending of local residents to the City of Barrie and to a lesser extent, the urban area of Angus. The Midhurst Trade Area includes the settlement areas of Midhurst, Centre Vespra, Snow Valley, Anten Mills, and Minesing.

Figure 20  
Midhurst Trade Area and Elmvale Trade Area  
Trade Area Components

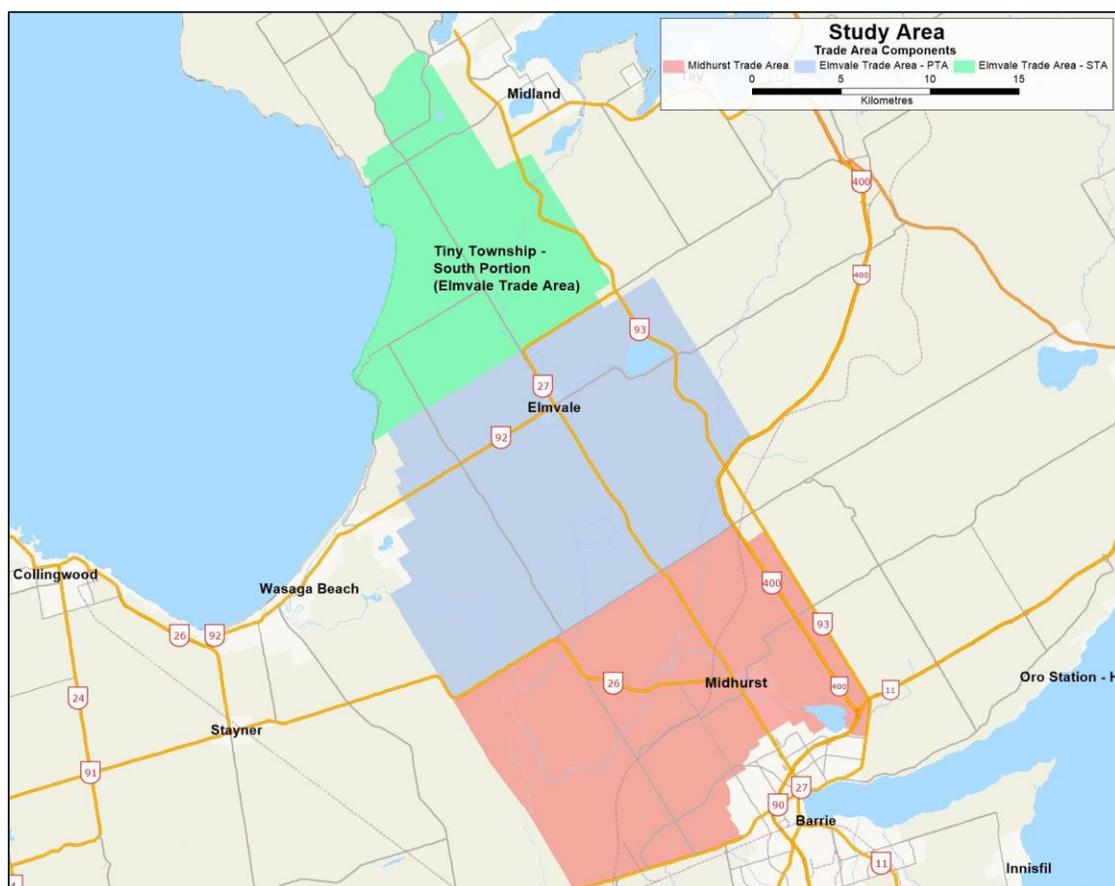


Figure 21 provides a summary of the trade area population components of the Midhurst and Elmvale trade areas. The forecast population was derived from the Township of



Springwater Growth Management Strategy<sup>1</sup> and background work used to prepare the development charges background study forecasts for the Township of Springwater and the Township of Tiny.<sup>2</sup> As summarized in Figure 21, a forecast has been provided from 2020 to 2031 and to Buildout/20 years. Buildout primarily reflects the estimated full buildout of the Midhurst Secondary Plan and estimated timing. A buildout forecast is provided to illustrate the magnitude of retail and service commercial needs beyond an 11-year period.

As summarized in Figure 21, it is estimated that the population of Midhurst Trade Area will reach a population of approximately 26,400 by 2031 and a buildout population of approximately 35,100, while the Elmvale Trade Area will reach a population of 17,500 by 2031 and a population of 18,800 at the approximate buildout (note that a 20-year horizon was used for the portion within the Township of Tiny).

**Figure 21**  
**Elmvale Trade Area and Midhurst Trade Area**  
**Trade Area Population Components**

Location		Population				
		2011	2016	2020	2031	Estimate Buildout/20 Years
Township of Springwater		18,800	19,600	22,700	37,800	47,600
Elmvale: P.T.A.	A	7,900	8,000	8,500	11,400	12,500
Elmvale: S.T.A. (southern portion of the Township of Tiny)	B	5,700	5,900	6,000	6,100	6,300
Elmvale: Trade Area	C = A + B	13,600	13,900	14,500	17,500	18,800
Midhurst: Trade Area	D	10,900	11,600	14,200	26,400	35,100

Figure have been rounded.

Seasonal population is not included in above figure.

Source: Derived from Statistics Canada, 2011 to 2016 Census by Watson & Associates Economists Ltd.

Population forecast derived from background for the Township of Tiny Development Charges Background Study, February 28, 2020 by Watson & Associates Economists Ltd.

Forecasts and population estimates for 2020 are from background work for the Township of Springwater and the Township of Tiny Development Charges Background Studies by Watson & Associates Economists Ltd.

<sup>1</sup> Township of Springwater Growth Management Strategy, August 2018, prepared by WSP.

<sup>2</sup> Based on the Township of Springwater Development Charges Background Study, 2018 and the Township of Tiny Development Charges Background Study, 2020 prepared by Watson & Associates Economists Ltd.



### 3.4 Occupied Commercial and Institutional Space Inventory

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Figures 22 through to 23 provide a summary of the existing occupied and vacant retail space within the Township of Springwater as of June 2020. As summarized in Figure 22, the Township of Springwater has approximately 233,000 sq.ft. (21,600 sq.m.) of occupied retail and service commercial space and 48,000 sq.ft. (4,500 sq.m.) of vacant retail space. As summarized in Figure 23, the Township has a high vacancy rate of approximately 17%. A healthy vacancy rate in a balanced market is typically between 5% to 10%. The vacant space within the Township of Springwater is largely concentrated within the urban settlement area of Elmvale. As summarized in Figure 23, the Township of Springwater's retail base is largely oriented towards local servicing retail uses, including food stores, health and personal care stores, and personal services. A small portion of its Gross Leasable Area (G.L.A.)<sup>1</sup> associated with comparison type retailers, N.F.S.R., building supplies and outdoor supplies stores represent 11% of the G.L.A. within the Township of Springwater primarily due to the retail base along Bayfield Street within Midhurst.

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<sup>1</sup> Gross Leasable Area (G.L.A.) includes the portion of a building that would be leased to a retail and commercial tenant. Generally, most of the gross floor area commercial floors space within the Township of Springwater is the G.L.A. The buildings space to accommodate elevators/internal stairwells, lobby areas and common areas is considered non-G.L.A. floor space.



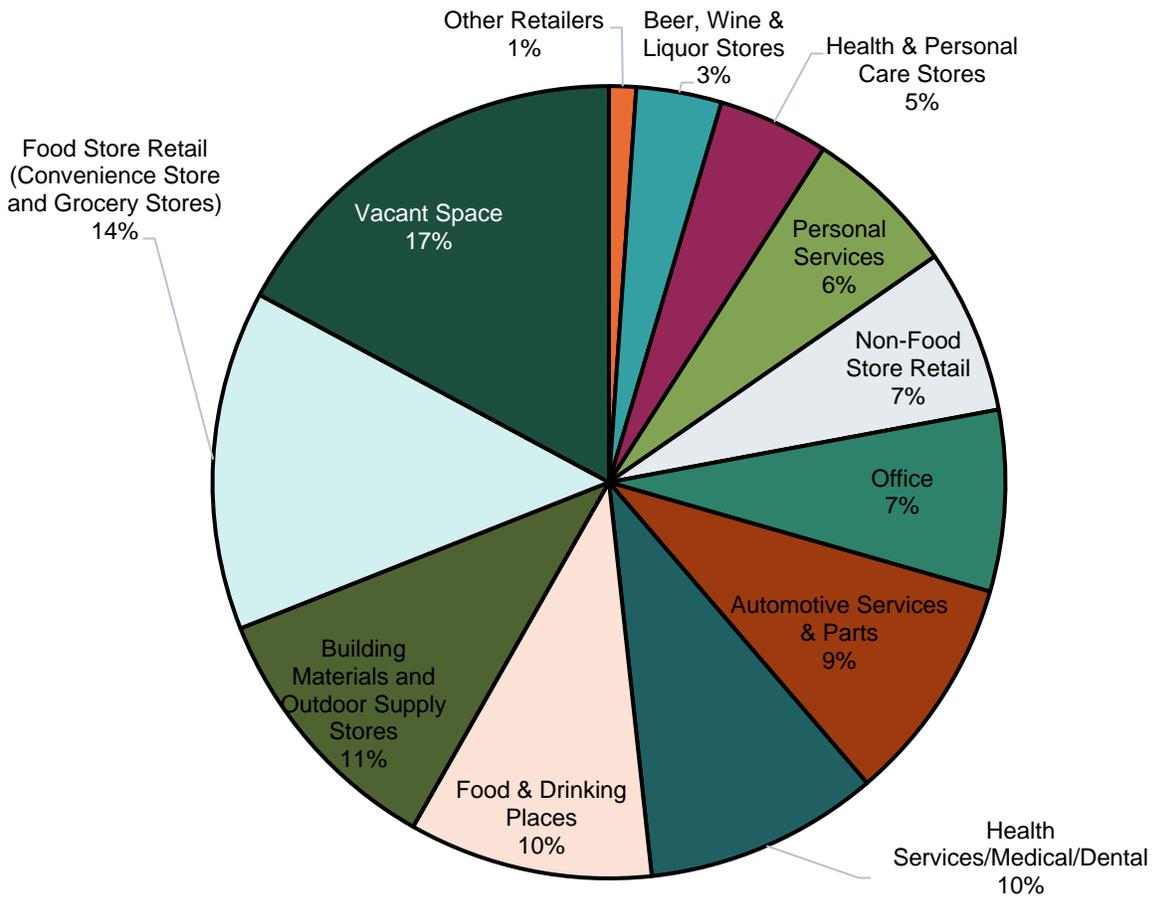
**Figure 22**  
**Township of Springwater**  
**Occupied and Vacant Commercial Space,**  
**Gross Leasable Area (G.L.A.) (sq.ft.) as of June 2020**

Commercial Use Category	Midhurst	Elmvale	Hillsdale	Apto	Phelpston	Total
Food Store Retail (Convenience Store and Grocery Stores)	4,600	29,800	2,300	0	2,300	39,000
Health & Personal Care Stores	3,000	9,700	0	0	0	12,700
Beer, Wine & Liquor Stores	0	9,800	0	0	0	9,800
Non-Food Store Retail	2,000	16,900	0	0	0	18,900
Food & Drinking Places (Restaurants/Bars)	5,600	22,400	0	0	0	28,000
Building Materials and Outdoor Supply Stores	16,600	13,700	0	0	0	30,300
Other Retailers	0	3,100	0	0	0	3,100
Personal Services (e.g. salon, travel agency, dry cleaning)	6,700	10,900	0	0	0	17,600
Health Services/Medical/Dental (excludes medical clinics)	11,500	15,400	0	0	0	26,900
Office (e.g. Legal, Finance, Insurance and Real Estate)	8,200	12,600	0	0	0	20,800
Automotive Services & Parts (e.g. gas stations and auto repair)	7,600	13,200	3,300	2,000	0	26,100
<b>Total Occupied Retail and Commercial Space</b>	<b>65,800</b>	<b>157,500</b>	<b>5,600</b>	<b>2,000</b>	<b>2,300</b>	<b>233,200</b>
<b>Total Occupied Retail and Commercial Space (%)</b>	<b>28%</b>	<b>68%</b>	<b>2%</b>	<b>1%</b>	<b>1%</b>	<b>100%</b>
<b>Vacant Space</b>	<b>16,700</b>	<b>26,600</b>	<b>5,000</b>	<b>0</b>	<b>0</b>	<b>48,300</b>
<b>Total Retail and Commercial Space</b>	<b>82,500</b>	<b>184,100</b>	<b>10,600</b>	<b>2,000</b>	<b>2,300</b>	<b>281,500</b>
<b>Total Retail and Commercial Space (%)</b>	<b>29%</b>	<b>65%</b>	<b>4%</b>	<b>1%</b>	<b>1%</b>	<b>100%</b>

Source: Watson & Associates Economists Ltd. based on site visits in June 2020.



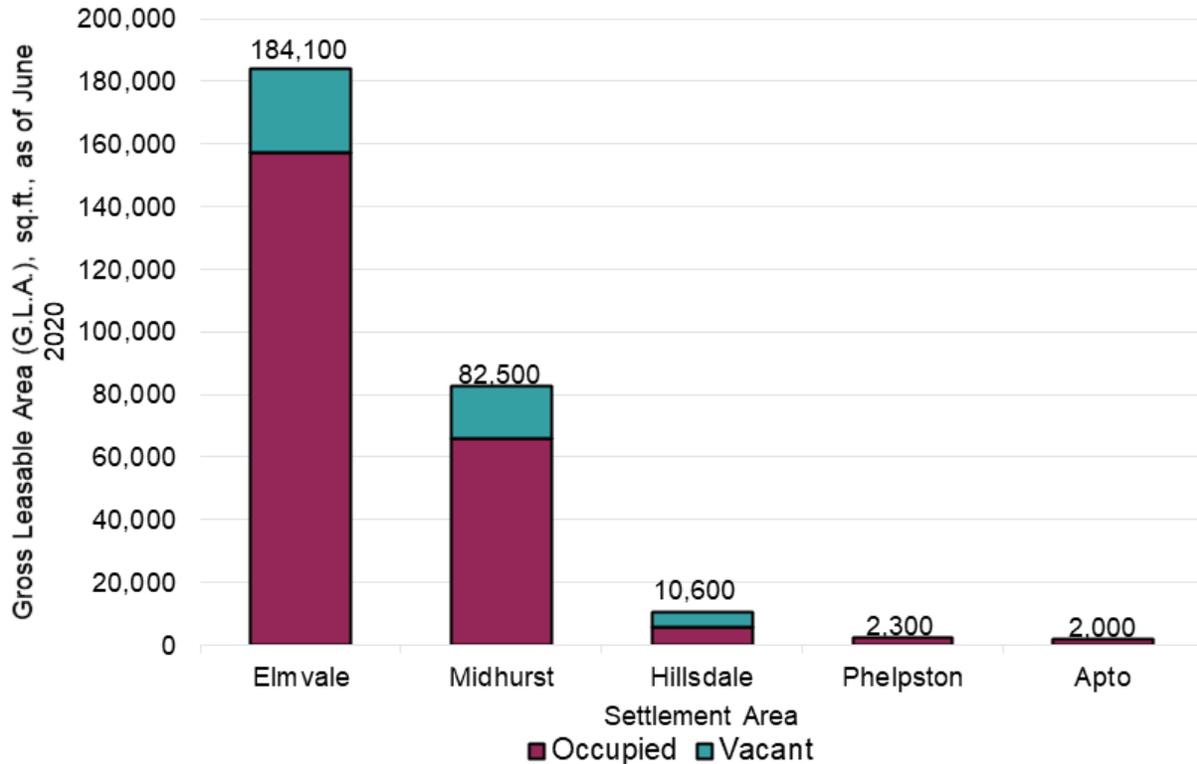
Figure 23  
Township of Springwater  
Occupied and Vacant Commercial Space,  
Percentage of Gross Leasable Area (G.L.A.) by Commercial Use Category,  
as of June 2020



Source: Watson & Associates Economists Ltd. based on site visits in June 2020.



Figure 24  
Township of Springwater  
Occupied and Vacant Commercial Space,  
Percentage of Gross Leasable Area (G.L.A.) by Settlement Area,  
as of June 2020



Source: Watson & Associates Economists Ltd. based on site visits in June 2020.



Recent New Construction Plaza, 70 Yonge Street, Elmvale



## **3.5 Urban Area Comparator Analysis: Retail and Service Commercial Space**

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### ***3.5.1 Urban Area Comparator Per Capita Retail and Service Commercial Space Analysis***

An analysis of the retail and service commercial market in fourteen urban areas was prepared to compare the existing per capita retail and commercial space and to provide an indication of the types of retail and commercial uses expected as the Midhurst urban settlement area expands to accommodate a population base of over 30,000 persons. The urban areas were selected based on similar characteristics, including an average household income higher than the provincial average, proximity to a large C.M.A., a large commuting population, and a population of up to 50,000. The majority of the data was obtained from recent data compiled by Watson, while the remaining data was based on a geographic information system (G.I.S.) review using building footprints and business directory/employment data.

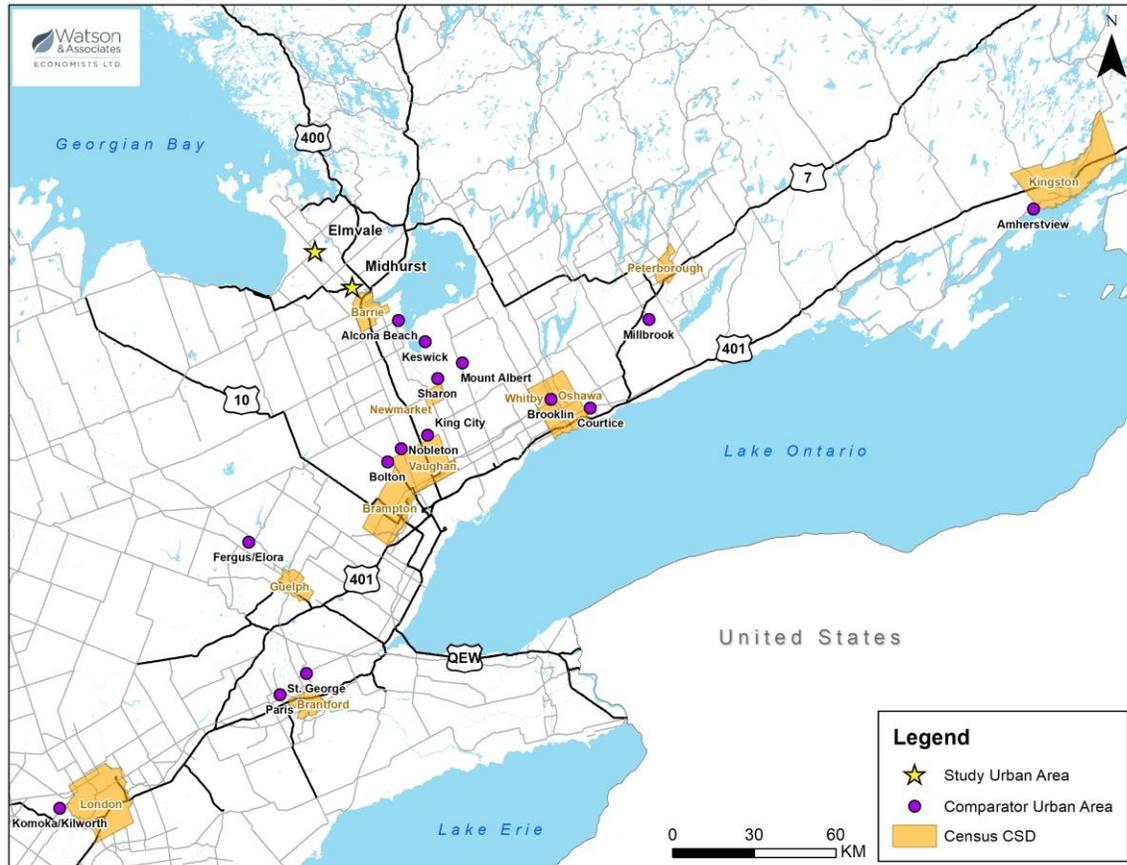
The following urban areas were selected for review:

- Paris (County of Brant)
- St. George (County of Brant)
- Bolton (Town of Caledon)
- Millbrook (Township of Cavan-Monaghan)
- Kilworth/Komoka (Township of Middlesex Centre)
- Amherstview (Loyalist Township)
- Fergus/Elora (Township of Centre Wellington)
- Keswick (Town of Georgina)
- Nobleton (Township of King)
- Sharon (Township of East Gwillimbury)
- Mount Albert (Township of East Gwillimbury)
- Alcona Beach (Town of Innisfil)
- Brooklin (Town of Whitby)
- Courtice (Municipality of Clarington)

Figure 25 provides a map of the urban area comparators within southern Ontario.



Figure 25  
Southern Ontario  
Map of Urban Area<sup>1</sup> Comparators



As summarized in Figure 26, the G.L.A. sq.ft. ranges from 1.7 million sq.ft. within the urban area of Bolton (Caledon) and 59,000 sq.ft. within the urban areas of St. George (Brant) and Sharon (East Gwillimbury). Urban areas with a population of under 5,000 have a G.L.A. sq.ft. range of approximately 59,000 sq.ft. to 197,000 sq.ft. The urban settlement areas of Midhurst and Elmvale have retail and commercial service space within this range.

Figure 27 summarizes the average retail and commercial space per resident (per capita) by urban area. The range of retail and commercial space per capita ranges from 14 sq.ft. per resident in Amherstview (Loyalist Township, near the City of Kingston) to

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<sup>1</sup> Urban area generally refers to a settlement area, terminology will defer according to the respective Municipalities' terminology.

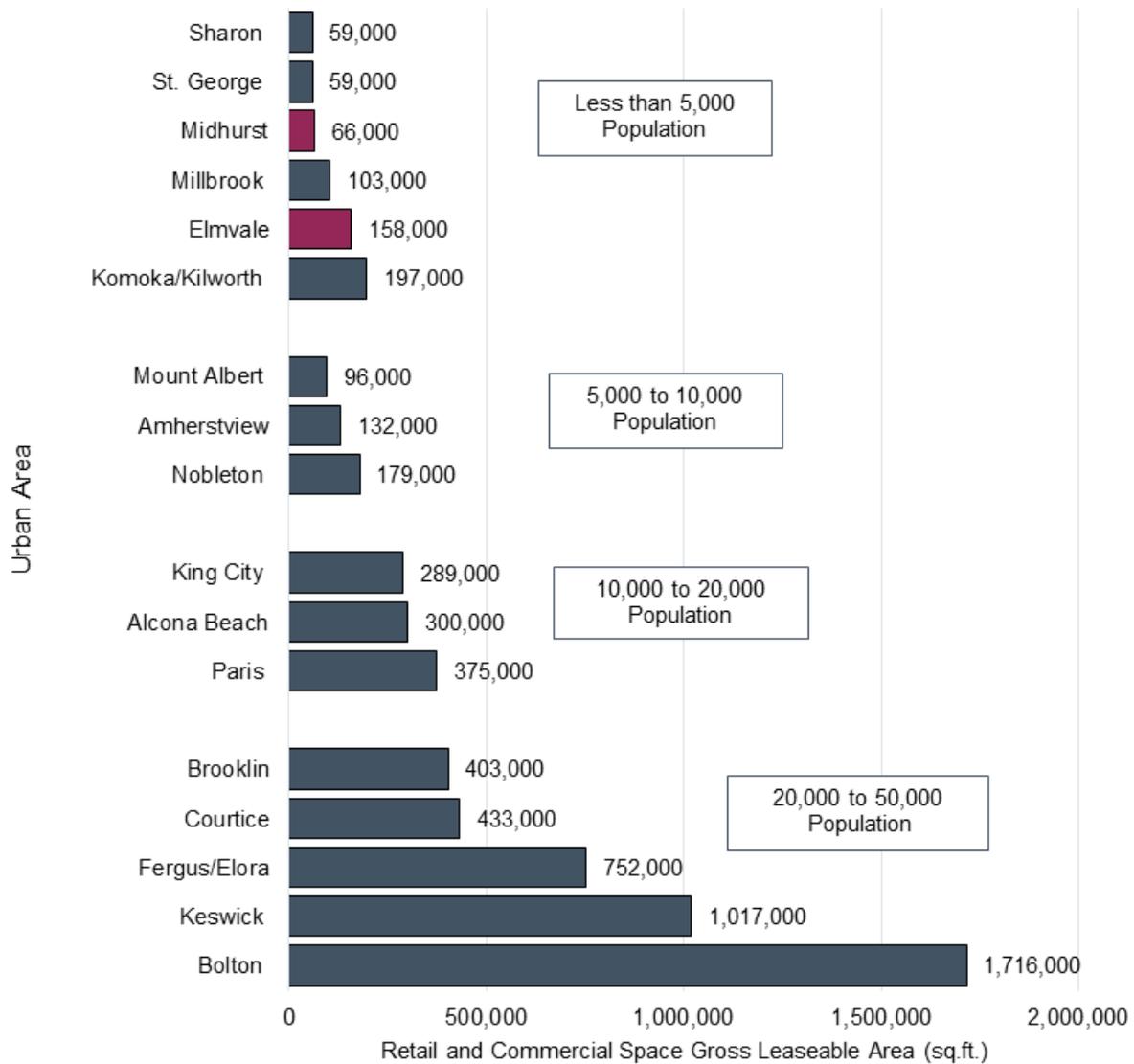
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59 sq.ft. within the urban area of Bolton (Town of Caledon). The Elmvale urban settlement area has a very high retail and service space per capita at approximately 59 sq.ft. per resident. The high per capita suggests that the urban area of Elmvale attracts a customer base larger than its urban area population which re-enforces the seasonal commercial trade of Elmvale as previously discussed. The urban area of Midhurst has a retail and service commercial space per capita at approximately 21 sq.ft. per resident. By 2031, it is anticipated that Midhurst will support a similar retail and service commercial sq.ft. space per capita, however it is anticipated that the Midhurst urban area will include a broader range of retail uses that serve the local and trade area population of Midhurst. The retail and commercial service opportunities would be likely limited to food stores, beverage stores (beer, wine and liquor stores), health and personal care uses, food services, personal services, office and institutional uses. Opportunities for N.F.S.R. are anticipated to have limited market support given the proximity to the Barrie Bayfield Corridor which offers a wide-range of N.F.S.R. uses.



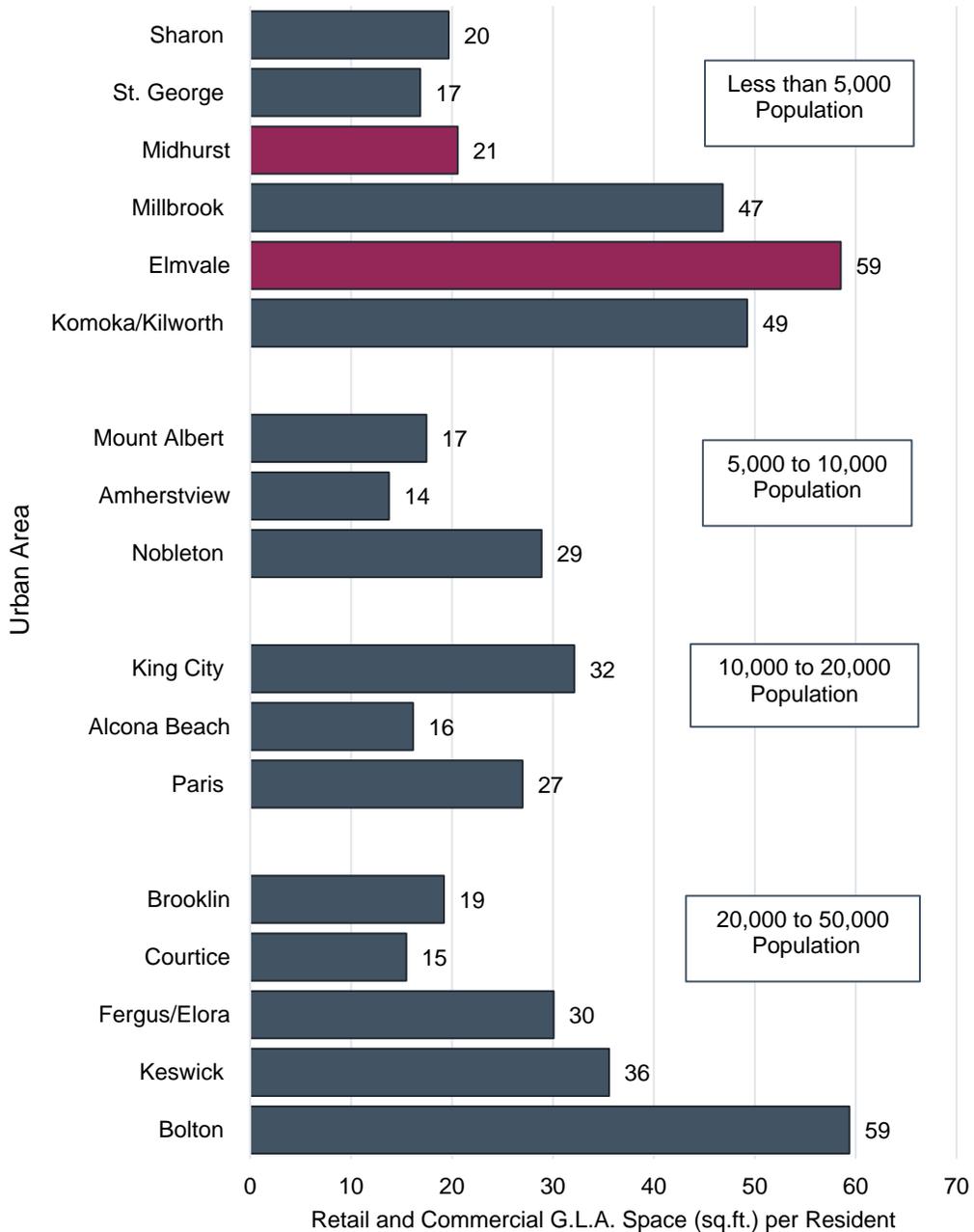
**Figure 26**  
**Urban Area Comparators**  
**Retail and Commercial Space G.L.A. (sq.ft.) Comparisons by Population Size**



Source: Based on previous work prepared by Watson and a desktop review utilizing employment surveys and G.I.S. building footprint data and previous work prepared by Watson & Associates Economists Ltd. Data for Keswick is derived from the Town of Georgina, Keswick Secondary Plan, Commercial Employment Land Supply by UrbanMetrics, December 2019.



**Figure 27**  
**Urban Area Comparators**  
**Retail and Commercial Space Per Capita Comparisons by Population Size**



Source: Based on previous work prepared by Watson and a desktop review utilizing employment surveys and G.I.S. building footprint data and previous work prepared by Watson & Associates Economists Ltd. Data for Keswick is derived from the Town of Georgina, Keswick Secondary Plan, Commercial Employment Land Supply by UrbanMetrics, December 2019.



### **3.5.2 Examples of Commercial Built-forms and Average Floor Space Per Worker (F.S.W.) Metrics**

Figure 28 provides three examples of representative retail and commercial service developments within the urban area comparators reviewed. The three examples include a grocery anchored retail plaza (King City, Township of King), a commercial complex (Bolton, Town of Caledon) and a mixed-use development (Mayfield West, Town of Caledon). These developments represent ranges of employment density, building coverage, and retail and commercial space tenant mix.

Key highlights include the following:

- The average employment density of a grocery-anchored retail plaza is approximately 50 to 55 jobs/net ha, while an office complex with a large portion of office space can have a density of 180 jobs/net ha; and
- The average service space (uses that sell services or items to be consumed on-site) typically accounts for at least 35% of the retail G.L.A. space of a commercial site.

Figure 29 provides average F.S.W. by retail category that will be used to estimate employment yield based on the forecast additional retail and commercial service demand analysis. The average F.S.W. ranges from 275 sq.ft. per worker in financial, insurance, and real estate (F.I.R.E.) and other office uses to 935 sq.ft. per worker in furniture and home furnishing stores. While hotel and motel uses are provided as an illustration in Figure 29, it is important to note that the retail and service commercial space demand analysis does not include a review of uses in this category due to the unique market demand requirements.

It is important to recognize that retail uses primarily comprised of local serving retail uses would likely have a lower F.S.W. (i.e. more employment density), while retail and commercial services oriented towards regional serving uses would likely have a higher F.S.W. due to store requirements for inventory.



**Figure 28**  
**Examples of Commercial Developments**  
**Density and Retail and Commercial Category Mix**

<b>Kings Ridge King City (Township of King) Grocery Anchored Gateway Plaza</b>		
Land Area (hectares) (developed portion measured)	5.5	
Gross Floor Area (sq.ft.), Total Occupied	117,800	
Estimated Employment (occupied)	290	
Floor Space Per Worker (employment/sq.ft.)	405	
Employment Density (jobs/ha)	53	
<b>Gross Floor Area Details</b>		<b>%</b>
Food Store Retail (sq.ft.)	50,000	42%
Health & Personal Care Stores (sq.ft.)	0	0%
Non-Food Store Retail (sq.ft.)	0	0%
Beer, Wine, Liquor (sq.ft.)	6,000	5%
Personal Services (sq.ft.)	27,200	23%
Offices (sq.ft.)	18,300	16%
Restaurants (sq.ft.)	15,100	13%
Automotive Services (sq.ft.)	1,200	1%
<b>Total Occupied Space</b>	<b>117,800</b>	<b>100%</b>

Source: Based on site visits by Watson & Associates Economists Ltd. and InfoCanada Business Directory information.



<b>Bolton Royal Courtyards Bolton (Town of Caledon) Office/Retail Complex</b>			
Land Area (hectares)	1.5		
Gross Floor Area (sq.ft.), Total Occupied	73,800		
Estimated Employment (occupied)	268		
Floor Space Per Worker (employment/sq.ft.)	275		
Employment Density (jobs/ha)	180		
<b>Gross Floor Area Details</b>		<b>%</b>	
Food Store Retail (sq.ft.)	0	0%	
Health & Personal Care Stores (sq.ft.)	5,000	7%	
Non-Food Store Retail (sq.ft.)	3,000	4%	
Beer, Wine, Liquor (sq.ft.)	0	0%	
Personal Services (sq.ft.)	24,800	34%	
Offices (sq.ft.)	31,000	42%	
Restaurants (sq.ft.)	10,000	14%	
Automotive Services (sq.ft.)	0	0%	
<b>Total Occupied Space</b>	<b>73,800</b>	<b>100%</b>	

Source: Based on site visits by Watson & Associates Economists Ltd. and InfoCanada Business Directory information.



<b>MacDougall/Kennedy Road Mixed Use Mayfield West (Town of Caledon) Mixed-Use</b>			
Land Area (hectares)	0.2		
Gross Floor Area (sq.ft.), Total Occupied	9,000		
Estimated Employment (occupied)	40		
Floor Space Per Worker (employment/sq.ft.)	225		
Employment Density (jobs/ha)	190		
<b>Gross Floor Area Details</b>		<b>%</b>	
Food Store Retail (sq.ft.)	1,400	16%	
Health & Personal Care Stores (sq.ft.)	1,200	13%	
Non-Food Store Retail (sq.ft.)	0	0%	
Beer, Wine, Liquor (sq.ft.)	0	0%	
Personal Services (sq.ft.)	1,400	16%	
Offices (sq.ft.)	3,200	36%	
Restaurants (sq.ft.)	1,800	20%	
Automotive Services (sq.ft.)	0	0%	
<b>Total Occupied Space</b>	<b>9,000</b>	<b>100%</b>	

Source: Based on site visits by Watson & Associates Economists Ltd. and InfoCanada Business Directory information.





Figure 29  
Sample of Comparable Markets<sup>1</sup>  
Sample of Average Floor Space Per Worker by Retail Category

Retail and Commercial Services Establishment by Category	Average F.S.W. of Establishment (sq.ft.)	Average Size of Establishment (sq.ft.)	Average Employees per Establishment
<b>Local Serving Retail Uses</b>			
Grocery Stores	480	30,000	83
Convenience Stores	600	1,800	3
Personal Services	585	2,900	5
Health & Personal Care Stores	375	3,700	10
Liquor, Beer and Wine Stores	550	6,500	12
Restaurants	400	2,300	6
<b>Non-Food Stores (Comparison Retailers)</b>			
Furniture & Home Furnishings	935	9,000	10
Home Improvement & Building Supplies	745	10,000	13
General Merchandise	630	29,000	46
Clothing and Accessories Stores	410	4,800	12
Non-Food Store Average	645		
<b>Services</b>			
Recreational & Entertainment	930	5,000	5
F.I.R.E., Banks and Business Services	275	2,900	11
Medical and Dental	300	3,400	12
Services Average	300		
<b>Automotive</b>			
Automotive Dealerships	700	14,000	20
Gas Stations	330	1,000	3
<b>Accommodations</b>			
Hotels and Motels	1,650	33,000	20

Source: Watson & Associates Economists Ltd. based on a survey of comparable markets. Based on data on urban areas within the County of Brant, Town of Caledon, Municipality of Chatham-Kent, County of Wellington, Region of Halton and Township of Cavan-Monaghan.

<sup>1</sup> The F.S.W. data in this figure includes other comparable markets than previously discussed. Based on data on urban areas within the County of Brant, Municipality of Chatham-Kent, Town of Caledon, County of Wellington, Region of Halton, and Township of Cavan-Monaghan.



# Chapter 4

## Population-Related Employment Land Supply and Demand Analysis



## 4. Population-Related Employment Land Supply and Demand Analysis

The following chapter provides a review of the P.R.E. land supply and demand analysis, including the following components:

- An analysis of market-supportable additional retail and service commercial space;
- A summary of market potential based on anticipated consumer spending and estimates on capture rates (outflow and inflow);
- A summary of key metrics to generate employment estimates, including floor space per worker, building coverage, and employment density;
- A summary of the employment land supply by O.P. designation and status (developed/vacant);
- A summary of the P.R.E. land needs for Midhurst and Elmvale by 2031; and
- A review of intensification opportunities within the Midhurst and Elmvale urban settlement areas.

### 4.1 Population-Related Employment Demand Analysis

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#### ***4.1.1 Market Supportable Additional Retail and Service Commercial Space, Midhurst and Elmvale Urban Settlement Areas***

Figures 26 through 28 provide a summary of the demand for retail and commercial service space G.L.A. for the urban areas of Midhurst and Elmvale to 2031 and at estimated urban buildout.<sup>1</sup> As previously mentioned, the demand analysis extends to buildout to illustrate the magnitude for commercial growth between 2031 and the buildout of the Midhurst Secondary Plan. Further, extending the demand forecast out to urban buildout provides direction on the types of retail and commercial services that could be supported beyond an 11-year time frame.

It is important to note that the retail and commercial service space G.L.A. demand analysis also includes a provision of an additional 35% of G.L.A. space for non-retail

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<sup>1</sup> Buildout refers to the approximate timing of the buildout of the Midhurst and Hillsdale Secondary Plan Areas and is based upon the Township of Springwater 2018 Development Charges Background Study.



uses, such as office and institutional uses, as these uses are also accommodated within retail purpose-built buildings.<sup>1</sup> It is also important to note that the demand has not been adjusted for intensification opportunities in Figures 27 and 28.

The commercial demand analysis was prepared based on the following components:

- As previously discussed, a detailed retail and commercial space inventory within the Township of Springwater was completed by retail and commercial service category<sup>2</sup> which was utilized to understand the current market conditions. Additional details on the retail and commercial space inventory is contained in Appendix B;
- A review of the regional commercial context and local commuting patterns, as discussed earlier in the report, was used to rationalize the delineation of the trade areas, as well as to establish the outflow and inflow of spending from inside and outside the study areas (Midhurst and Elmvale);
- The average retail expenditure per capita was calculated for the trade areas (Midhurst and Elmvale) based on the income relationship between the Province and the study areas, and an expenditure regression analysis. The expenditure regression analysis calculates the relationship of household income and household spending at the provincial level. Data was obtained from Statistics Canada on average house expenditure by key retail categories and household income quintiles. Appendix C provides tables and graphs from the expenditure regression analysis. It is important to recognize that income levels have an impact on the need for additional commercial space; and
- An analysis of key commercial metrics, including F.S.W., building coverage, and average service space allocation was prepared based on a review of comparable urban areas in Ontario as identified previously in this report.

Key highlights of the retail and commercial service space demand forecast include the following:

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<sup>1</sup> Share of institutional and office G.L.A. is based on a review of comparator municipalities.

<sup>2</sup> Provided in Appendix B, and an inventory organized by developed parcel is provided in Appendix F.



- As summarized in Figures 26a and 26b, over the forecast horizon, the market expenditure potential of the Midhurst trade area exceeds Elmvale trade area due to anticipated population growth.
- The urban settlement area of Midhurst has the potential to support an additional 144,000 sq.ft. (13,400 sq.m.) G.L.A of retail and commercial space today (2020), primarily due to the lack of local serving retail uses. This is an estimated of unmet demand of G.L.A. that is currently not operating within the urban settlement area of Midhurst (in addition to the 66,000 sq.ft. (6,100 sq.m.) of retail and commercial service space already operating within the Midhurst urban settlement area).
- As summarized in Figure 27, it is anticipated by 2031 that Midhurst has the potential to support an additional new incremental retail and commercial base of 286,000 sq.ft./26,600 sq.m. (in addition to the estimated 66,000 sq.ft. (6,100 sq.m.) of the retail and commercial service space currently operating in Midhurst). The new incremental retail and commercial space requirement would increase from 286,000 sq.ft.(26,600 sq.m.) in 2031 to 389,000 sq.ft. (36,100 sq.m.) by buildout (between 2031 and buildout the net incremental retail and commercial space is 103,000 sq.ft./9,600 sq.m.).
- While Midhurst currently has vacant building space of approximately 17,000 sq.ft. (1,600 sq.m.) G.L.A., a large portion of that vacant space is likely unable to support the types of retail and commercial service space that is required to support market demand. A large portion of the vacant building space is comprised of ageing buildings (including an abandon motel) which requires extensive retrofitting and due to the work required to meet the needs of prospective commercial uses, may be considered obsolete for today's needs.
- Elmvale is forecast to add approximately a new increment retail and commercial service space of 62,000 sq.ft. (5,800 sq.m.) of retail and commercial service space by 2031. Over the 2031 and buildout period, Elmvale is anticipated to have market support for an additional 17,000 sq.ft. (1,600 sq.m.) of G.L.A.
- Utilizing a building coverage (ratios of building space to lot) of 25%, the retail and commercial space G.L.A. forecast would require approximately 11 net ha within Midhurst and 2 net ha within Elmvale by 2031.
- It is anticipated that the vacant building space within Elmvale (27,000 sq.ft./2,500 sq.m.) could potentially accommodate the a portion of the warranted additional retail and commercial space that is currently unmet as of 2020, as well as demand for 2031 and at buildout. Further, the additional G.L.A. demand could be accommodated through expansions of existing facilities. As a result, the



demand for additional commercial is anticipated to be limited within the Elmvale urban settlement area.

- It is estimated that the G.L.A. forecast would accommodate approximately 600 employees within Midhurst and 130 employees within Elmvale by 2031.<sup>1</sup>
- The average density of new retail and commercial lands is anticipated to achieve an average density of 56 jobs/net ha within Midhurst and Elmvale by 2031 based on an average building coverage ratio of 25%.
- The density average assumes a greater mix of office uses compared to the existing commercial base. As a comparison, the average employment density of retail and commercial services development on lands designated for commercial uses within Midhurst is estimated at 25 jobs/ha and 50 jobs/ha within Elmvale.<sup>2</sup>

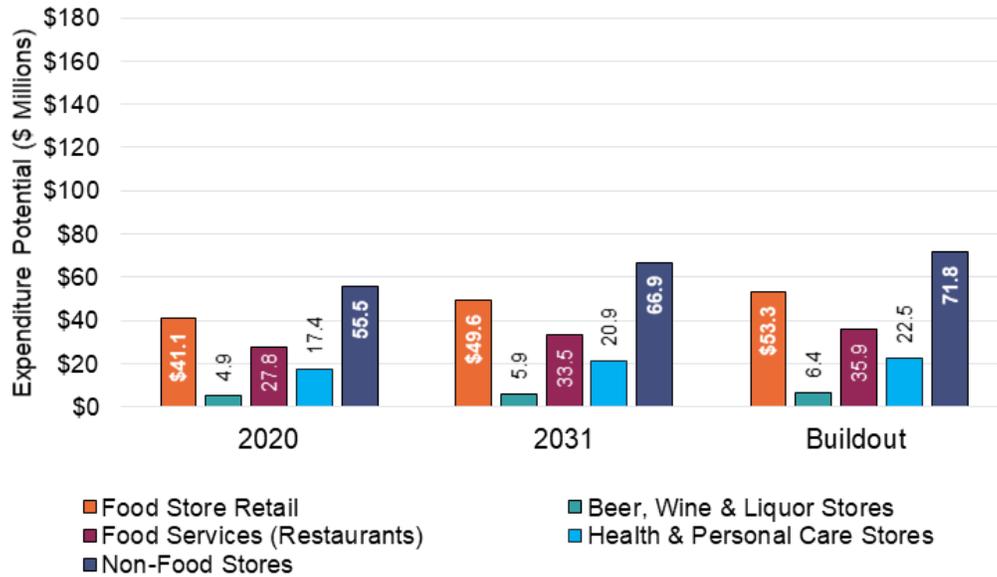
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<sup>1</sup> Based on average F.S.W. of 480 sq.ft. per employee. The average F.S.W. average is based on the G.L.A. forecast by retail and commercial by category, and applying an average F.S.W. by retail and commercial services use.

<sup>2</sup> It is important to note that this density figure only includes retail and commercial services (i.e. excludes other P.R.E. employment uses). Institutional uses within Elmvale decrease the overall P.R.E. average, while institutional uses within Midhurst increase the overall P.R.E. average. Details on density are discussed further in this chapter.

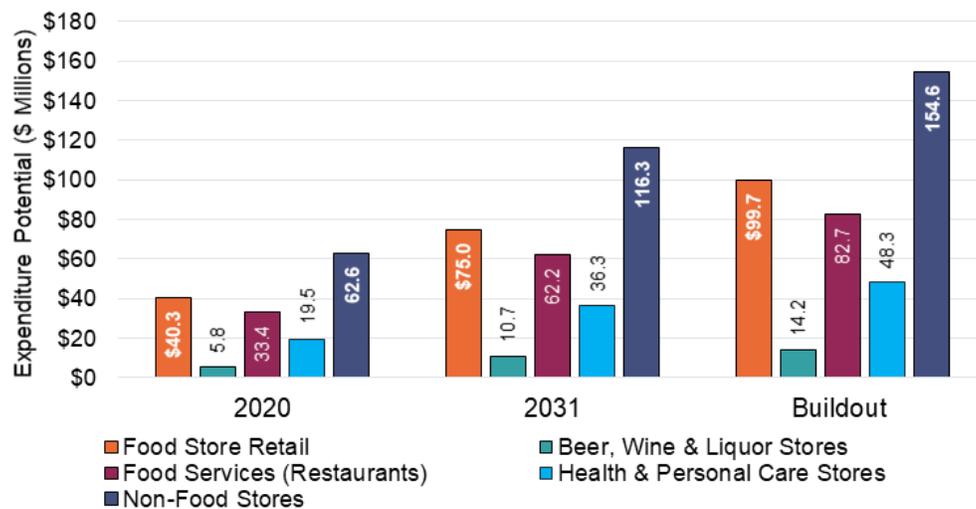


Figure 26a  
Elmvale Trade Area  
Expenditure Potential (\$ Millions, 2020 Dollars)



Source: Watson & Associates Economists Ltd.

Figure 26b  
Midhurst Trade Area  
Expenditure Potential (\$ Millions, 2020 Dollars)



Source: Watson & Associates Economists Ltd.



**Figure 27**  
**Midhurst Urban Settlement Area**  
**Market Warranted Additional G.L.A. and Associated Land Requirement**

<b>Retail and Commercial G.L.A. Space Requirement (sq.ft.)</b>			
<b>Retail and Commercial Service Category</b>	<b>2020</b>	<b>2031</b>	<b>Buildout</b>
Food Store Retail	17,000	36,000	49,000
Beer, Wine & Liquor Stores	5,000	8,000	11,000
Food Services (Restaurants)	25,000	52,000	72,000
Health & Personal Care Stores	10,000	22,000	30,000
Non-Food Stores	37,000	69,000	92,000
Personal Services (additional 25%)	36,000	71,000	97,000
Office & Institutional Services (additional 10%)	14,000	28,000	38,000
<b>Total</b>	<b>144,000</b>	<b>286,000</b>	<b>389,000</b>

		<b>Land Requirement, Net ha</b>	
<b>Building Coverage</b>		<b>2031</b>	<b>Buildout</b>
@20% Building Coverage		13.3	18.1
@25% Building Coverage		10.6	14.5
@30% Building Coverage		8.8	11.9
@35% Building Coverage		7.5	10.2

		<b>Estimated Employment</b>	
<b>Retail and Commercial Service Category</b>	<b>Floor Space Per Worker Assumptions</b>	<b>2031</b>	<b>Buildout</b>
Food Store Retail	480	80	100
Beer, Wine & Liquor Stores	550	10	20
Food Services (Restaurants)	400	130	180
Health & Personal Care Stores	375	60	80
Non-Food Stores	645	110	140
Personal Services	585	120	170
Office & Institutional Services	300	90	130
		<b>600</b>	<b>820</b>

<b>Estimated Employment Density (jobs/net ha)</b>		
<b>Estimated Density (jobs/net ha)</b>	<b>2031</b>	<b>Buildout</b>
@20% Building Coverage	45	45
@25% Building Coverage	56	57
@30% Building Coverage	68	69
@35% Building Coverage	80	80

Source: Watson & Associates Economists Ltd.

Note this is based on the market support for “additional” retail and commercial space. The existing retail and commercial space as of June 2020 has already been deducted from the figures. Further details on the forecast of market expenditure potential is provided in Appendix D, while Appendix E provides further details on the additional warranted market demand for retail and service commercial space.



**Figure 28**  
**Elmvalle Urban Settlement Area**  
**Market Warranted Additional G.L.A. and Associated Land Requirement and Density**

<b>Retail and Commercial G.L.A. Space Requirement (sq.ft.)</b>			
<b>Retail and Commercial Service Category</b>	<b>2020</b>	<b>2031</b>	<b>Buildout</b>
Food Store Retail	0	7,000	10,000
Beer, Wine & Liquor Stores	0	2,000	3,000
Food Services (Restaurants)	0	11,000	14,000
Health & Personal Care Stores	6,000	9,000	10,000
Non-Food Stores	0	11,000	14,000
Personal Services (additional 25%)	2,000	16,000	20,000
Office & Institutional Services (additional 10%)	1,000	6,000	8,000
<b>Total</b>	<b>9,000</b>	<b>62,000</b>	<b>79,000</b>

<b>Building Coverage</b>	<b>Land Requirement, Net ha</b>	
	<b>2031</b>	<b>Buildout</b>
@20% Building Coverage	2.9	3.7
@25% Building Coverage	2.3	2.9
@30% Building Coverage	1.9	2.4
@35% Building Coverage	1.6	2.1

<b>Retail and Commercial Service Category</b>	<b>Floor Space Per Worker Assumptions</b>	<b>Estimated Employment</b>	
		<b>2031</b>	<b>Buildout</b>
Food Store Retail	480	10	20
Beer, Wine & Liquor Stores	550	0	10
Food Services (Restaurants)	400	30	40
Health & Personal Care Stores	375	20	30
Non-Food Stores	645	20	20
Personal Services	585	30	30
Office & Institutional Services	300	20	30
<b>Total Employment Estimate</b>		<b>130</b>	<b>180</b>

<b>Estimated Density (jobs/net ha)</b>	<b>Estimated Employment Density (jobs/net ha)</b>	
	<b>2031</b>	<b>Buildout</b>
@20% Building Coverage	45	49
@25% Building Coverage	56	61
@30% Building Coverage	68	74
@35% Building Coverage	80	87

Source: Watson & Associates Economists Ltd.

Note this is based on the market support for “additional” retail and commercial space. The existing retail and commercial space as of June 2020 has already been deducted from the figures. Further details on the forecast of market expenditure potential is provided in Appendix D, while Appendix E provides further details on the additional warranted market demand for retail and service commercial space.



#### **4.1.2 Total Retail and Commercial Service Base at 2031, Midhurst and Elmvale Urban Settlement Areas**

Figure 29 summarizes the retail and service commercial G.L.A. and employment at 2031 for Midhurst and Elmvale. This figure provides the existing retail and commercial service space and employment, and the incremental G.L.A. forecast as summarized in the previous figures (Figures 27 and 28).

Key highlights include:

- Based on the trade area population forecast of 26,400 persons by 2031,<sup>1</sup> the Midhurst urban settlement area has the potential to support a retail and commercial service base of 352,000 sq.ft. (32,700 sq.m.)<sup>2</sup> with an employment base of 750 employees; and
- Based on the trade area population forecast of 17,500 persons by 2031,<sup>3</sup> the Elmvale urban settlement area has the potential to support a retail and commercial base of 220,000 sq.ft. (20,400 sq.m.) and 490 employees.

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<sup>1</sup> As previously discussed, the trade area includes the southern portion of the Township, south of Horseshoe Valley Road.

<sup>2</sup> Existing base of 66,000 sq.ft. as of 2020 + 286,000 sq.ft. of additional retail and commercial service space between 2020 to 2031 = 352,000 sq.ft. at 2031.

<sup>3</sup> As previously discussed, the trade area includes the northern portion of the Township (north of Horseshoe Valley Road), as well as the southern portion of the Township of Tiny.



Figure 29  
Midhurst and Elmvale  
Summary Retail and Service Commercial Space G.L.A. (sq.ft.)  
2020 to 2031

Urban Settlement Area	Retail and Commercial Service Space, G.L.A. (sq.ft.)				Annual Increase, 2020-2031 (sq.ft.)
	2020	2031	2020-2031	% G.L.A. Increase	
Midhurst	66,000	352,000	286,000	433%	26,000
Elmvale	158,000	220,000	62,000	39%	6,000
Midhurst and Elmvale	224,000	572,000	348,000	155%	32,000

Urban Settlement Area	Retail and Commercial Service Space, Employment				Annual Increase, 2020-2031 Employees
	2020	2031	2020-2031	% Employment Increase	
Midhurst	150	750	600	400%	55
Elmvale	360	490	130	36%	12
Midhurst and Elmvale	510	1,240	730	143%	66

Source: Watson & Associates Economists Ltd.

Notes: Employment and G.L.A. for 2020 is based on existing built and occupied inventory. Employment and G.L.A. for 2031 is based on the retail and commercial service demand analysis.

## 4.2 Population-Related Employment Land Supply

### 4.2.1 Total Designated Population-Related Employment Lands within Midhurst and Elmvale Urban Settlement Areas

As summarized in Figure 30, the urban settlement areas of Midhurst and Elmvale have approximately 235 ha of lands designated for P.R.E. uses<sup>1</sup> which include vacant lands, existing developed non-residential lands, and lands currently occupied for residential uses. This summary illustrates the ultimate potential to accommodate P.R.E. uses on designated lands and that a large portion of the designated P.R.E. lands are vacant (156 ha). It is estimated that approximately 27% of the P.R.E. lands are developed (63 ha). Of the remaining vacant P.R.E. land, approximately 87% ( $118 / 156 = 76\%$ ) is designated for institutional uses while 24% ( $38 / 156 = 24\%$ ) is designated for commercial and mixed-uses.<sup>2</sup> It is important to note that a portion of the P.R.E. is also

<sup>1</sup> Population-related employment lands include the following designations within the Township of Springwater's Official Plan: General Commercial, Commercial/Mixed Use, Highway Commercial, Administration/Government, Institutional and lands that are developed as commercial or institutional outside of Employment Areas.

<sup>2</sup> A downward adjustment to the vacant land supply has not been made to account for local roads and infrastructure.



accommodated on other designated lands, including lands designated for residential and employment lands uses.

**Figure 30**  
**Midhurst and Elmvale Urban Settlement Areas**  
**All Designated<sup>1</sup> Population-Related Employment Lands**

Population-Related Employment Lands (Elmvale and Midhurst)	Total Designated, ha <sup>1</sup>		Total Non-Residential Developed (occupied and vacant buildings), ha <sup>2</sup>		Developed as % Designated	Total Residential Developed, ha <sup>3</sup>	Remaining Vacant, ha <sup>4</sup>	
	A	B = A / 235	C	D = C / A			F	G = A - (C+F)
Commercial & Mixed-Use / General Commercial	83	35%	29	35%	35%	16	38	46%
Institutional/Administration	152	65%	34	23%	23%	0	118	77%
Total Land Area, ha	235	100%	63	27%	27%	16	156	66%

<sup>1</sup>Derived from the Township of Springwater Growth Management Strategy, August 2018 prepared by WSP, p.37 and reviewed based on G.I.S. data.

<sup>2</sup>Derived from GIS data received from the Township of Springwater and fieldwork by Watson & Associates Economists Ltd. Includes parcels with non-residential buildings (vacant and occupied buildings).

<sup>3</sup>It is estimated that 103 parcels have residential buildings on lands designated for P.R.E. uses.

<sup>4</sup>Based on G.I.S., aerial imagery and fieldwork by Watson & Associates Economists Ltd.

Note: Remaining vacant lands does not account for land required for internal infrastructure for subdivision of new parcels and roads.

Source: Watson & Associates Economists based on data from the Township of Springwater and the Township of Springwater Growth Management Strategy, 2018.

## **4.2.2 Existing Population-Related Employment Lands Average Employment Density on All Parcels**

Figure 31 summarizes the average employment density of all non-residential uses on occupied/developed P.R.E. lands within the urban areas of Midhurst and Elmvale. An inventory of P.R.E. density by parcel is provided in Appendix F. Additional site details on parcels within the Bayfield Street Corridor is provided in Appendix G.

Key findings include:

- The average combined employment density on lands designated for P.R.E. within Midhurst and Elmvale is estimated at approximately 28 jobs/net ha. It is important to note that the average density includes all buildings on designated P.R.E. lands, which impacts the average density;
- The P.R.E. density within Midhurst is estimated at 30 jobs/net ha, while the average P.R.E. density within the urban area of Elmvale is estimated at 26 jobs/net ha;

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<sup>1</sup> Includes occupied and vacant parcels.



- The higher employment density average within Midhurst relative to Elmvale is largely due to employment associated with the County of Simcoe administration offices and two school board offices within Midhurst; and
- The average employment density within the Bayfield Street Corridor in Midhurst is estimated at approximately 22 jobs/net ha and includes parcels with industrial uses (6 parcels, totalling 5 net ha), a commercial self-storage facility (0.4 ha), and auto-oriented uses (3 parcels, totalling 3 net ha) which have a low average employment density.

Figure 31  
Midhurst and Elmvale Urban Settlement Areas  
Employment Density on Designated Population-Related Employment Lands  
All Occupied Parcels, as of June 2020<sup>1</sup>

Midhurst and Elmvale Urban Settlement Areas	All Developed and <u>Occupied</u> Non-Residential Buildings on Designated P.R.E. Lands <sup>1</sup>				
	G.L.A. (sq.ft.) <sup>2</sup>	Employment <sup>3</sup>	F.S.W.	Land Area, Net ha <sup>4</sup>	Employment Density (Net jobs/ha)
	A	B	C = A / B	D	E = B / D
Midhurst Bayfield Street Corridor	173,000	285	607	13	22
Rest of Midhurst	290,000	550	527	15	37
<b>Total Midhurst</b>	<b>463,000</b>	<b>835</b>	<b>554</b>	<b>28</b>	<b>30</b>
Elmvale	403,000	670	601	26	26
<b>Midhurst and Elmvale</b>	<b>866,000</b>	<b>1,505</b>	<b>575</b>	<b>54</b>	<b>28</b>

Source: Watson & Associates Economists Ltd.

Note: Figures have been rounded.

<sup>1</sup>Includes all non-residential developed lands that are designated: Mixed-use Commercial, General Commercial, Institutional and Administration.

<sup>2</sup>Based on inventory by Watson & Associates Economists Ltd., June 2020.

<sup>3</sup>Based on InfoCanada Business Directory database, May 2020.

<sup>4</sup>Based on MPAC G.I.S. parcel based data received from the Township of Springwater, April 2020.

### **4.2.3 Existing Average Employment Density, Parcels Occupied by Institutional, Retail and Commercial Services Uses**

As previously discussed, there are industrial uses on occupied parcels that are designated for population-related uses (specifically within Midhurst) and, as a result, impact the average density on P.R.E. density. Figure 32 provides a summary of the

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<sup>1</sup> Excludes parcels developed with residential uses.



average employment density on parcels that are occupied by P.R.E. uses (institutional/commercial uses).

Key highlights include:

- The average employment density on institutional and commercial sites is approximately 29 jobs/net ha which is higher than the overall P.R.E. land average of 28 jobs/net ha;
- The density of retail and commercial service sites within the Midhurst Urban Area is 25 jobs/net ha and reflects low order highway-oriented retail and commercial service uses. The average employment density is typical of low-order retail and commercial areas in other markets, which includes automotive dealerships, automotive repair uses, building materials/outdoor supply retailers, self storage buildings, and gas stations, which typically have land extensive requirements;
- Based on the commercial demand forecast previously summarized, it is anticipated that new retail and commercial service uses within Midhurst would achieve a higher density for retail and commercial service sites of 56 jobs/net ha;
- The average density of retail and commercial service sites within the Elmvale Urban Settlement Area is 50 jobs/net ha. Elmvale's density is higher than Midhurst given its greater diversity of retail and commercial service sites, including a low share of low-order commercial uses; and
- The average institutional density is 38 jobs/net ha within Midhurst primarily due to the high employment density average associated with the County of Simcoe administration offices and two school board administration offices.



Figure 32  
Midhurst and Elmvale Urban Settlement Areas  
Employment Density on Designated Population-Related Employment Lands  
Retail and Service Commercial and Institutional Uses as of June 2020

Location	Employment Density, jobs/net ha		
	Retail and Commercial Service Sites	Institutional Sites	Total Population-Related Uses
Midhurst Urban Settlement Area	25	38	34
Elmvale Urban Settlement Area	50	16	26
Elmvale and Midhurst Urban Settlement Areas	39	26	29

Source: Watson & Associates Economists Ltd., June 2020.

#### **4.2.4 Total Population-Related Employment Land Needs, 2031**

Figure 33 provides a summary of the P.R.E. land supply and the forecast employment forecast<sup>1</sup> to be accommodated on P.R.E. lands to 2031. As previously discussed, it is estimated that the warranted additional retail and service commercial space would generate an employment increment of 730 employees on approximately 13 ha of land designated for P.R.E. The remaining P.R.E. of 1,420 includes institutional and other commercial uses. The existing designated P.R.E. lands have the capacity to accommodate all the forecast P.R.E. with a remaining surplus of 95 ha. The surplus is primarily due to the supply of designated lands within Midhurst. Beyond 2031, designated P.R.E. lands have the potential to accommodate P.R.E. employment growth over an additional 19 to 24 years (i.e. 2031 to 2050 or 2031 to 2055), assuming a P.R.E. land absorption rate of 4 to 5 ha of P.R.E. land developed annually.<sup>2</sup> The actual timing of the buildout of the P.R.E. land supply would depend on the pace of population

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<sup>1</sup> Population-related employment forecast is based on the Township of Springwater Growth Management Strategy and has been adjusted for estimated growth that has occurred since 2016.

<sup>2</sup> The P.R.E. annual land absorption forecast over the 2020 to 2031 horizon. Assuming a similar absorption rate of 4 to 5 ha of P.R.E. lands absorbed annually, the P.R.E. land supply has the potential to accommodate P.R.E. growth for an additional 19 to 24 years.



growth beyond 2031. It is important to note that no adjustments for P.R.E. have been made to account for P.R.E. that could be accommodate through intensification.<sup>1</sup>

**Figure 33**  
**Midhurst and Elmvale Urban Settlement Areas**  
**Population-Related Employment Land Supply and Demand to 2031**

Population-Related Employment Use		2020 to 2031 Employment	Employment Density (jobs/net ha)	Land Area, net Ha
Total Population-Related Employment <sup>1</sup>	A = B + C	2,150	36	60
Retail & Service Commercial Sites <sup>2</sup>	B	730	56	13
Remaining Population-Related Uses <sup>3</sup>	C	1,420	30	47
Land Supply as of 2020	D = E + F			156
Commercial and Mixed-Use	E			38
Institutional	F			118
Population-Related Employment Land Surplus	G = D - A			95

<sup>1</sup> Forecast is based on the Township of Springwater Growth Management Strategy and adjusted for estimated growth that has occurred since 2016.

<sup>2</sup> Based on retail and service commercial analysis prepared by Watson & Associates Economists Ltd.

<sup>3</sup> Includes institutional and other commercial uses not include in the retail & service commercial uses.

Source: Watson & Associates Economists Ltd.

#### **4.2.5 Potential Intensification Opportunities for Population-Related Employment Uses**

There are significant opportunities for intensification within the Midhurst and Elmvale urban settlement areas, including the following types of intensification:

- Redevelopment on underutilized sites, primarily within the Bayfield Street Corridor within the Midhurst urban areas;
- Commercial Rental Units (C.R.U.s) building site pads on large retail sites;
- Additional retail and commercial uses through the conversion of residential housing on lands designated for commercial and mixed use;

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<sup>1</sup> Including expansion of existing facilities, redevelopment on existing designated population-related employment lands and development on underutilized lands.



- Opportunities to accommodate further institutional development on lands that currently accommodate the County of Simcoe offices and school board offices; and
- Opportunities to accommodate additional retail and service commercial within vacant C.R.U.s and buildings.

The following provides a brief description of the opportunities within Midhurst and Elmvale to accommodate P.R.E. growth through intensification.

#### 4.2.5.1 *Redevelopment on Underutilized Lands*

The most significant opportunity for intensification is on lands designated for commercial/mixed-use within the Bayfield Street Corridor in the Midhurst urban area. As previously discussed, these lands primarily contain low-order commercial and industrial uses with an average employment density of 22 jobs/net ha. Recent developments include a high-order service commercial plaza and a two-story medical office building near the intersection of Bayfield Street and Carson Road.<sup>1</sup>



Recently Developed Service Commercial Use within the Midhurst Bayfield Street Corridor, Bayfield Street/Carson Road.

While residents within the Midhurst urban settlement area are in proximity to the Bayfield Street retail corridor within the City of Barrie,<sup>2</sup> the section of Bayfield Street within the Midhurst urban area has the potential to accommodate retail and commercial uses that would form a central gathering place for the residents of Midhurst. Other than two regional malls, the Bayfield Street corridor within Barrie does not have a distinct area that attracts leisure shopping or small office uses. The Barrie Bayfield Street corridor primarily includes big-box retailers, automotive services, and quick-serve

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<sup>1</sup> The average employment density of these two developments is 50 jobs/ha. With an employment yield of 80 employees on less than 2 ha of land.

<sup>2</sup> The City of Barrie Bayfield Street retail corridor is within 3 kilometres from the intersection of Snow Valley Road and Bayfield Street in Midhurst.



restaurants. The Midhurst Bayfield Street Corridor also offers the opportunity to intercept regional commercial trade originating from the north along Bayfield Street.

There are approximately 15 net ha of designated lands within the Midhurst Bayfield Street Corridor currently accommodating low-order retail uses (e.g. building supplies stores), retail sites with low building coverage, and industrial uses. Based on commercial metrics previously discussed,<sup>1</sup> the Midhurst Bayfield Street Corridor could accommodate up to 408,000 sq.ft. (37,900 sq.m.) of retail and commercial service development and 870 employees<sup>2</sup> which includes more than the demand for retail and commercial service space within Midhurst to 2031 and to buildout (the completion of the development phases of the Midhurst Secondary Plan).

While the Midhurst Bayfield Corridor has the potential to accommodate a large share of the retail and commercial growth through intensification within the Midhurst urban area, it should be recognized that growth pressures within the Barrie C.M.A. and the need to accommodate land-extensive commercial uses. Land-extensive commercial uses are typically attracted to regional roads on the outskirts of a large City (such as Barrie) and include uses such as automotive dealerships, heavy equipment sales and service, recreational uses (trampoline parks, swimming academies, and recreational complexes) and building supplies stores. These uses generally have a low density and building coverage and provide limited opportunity to serve the everyday needs of local residents. Despite the growth pressures for low-order commercial uses within the Barrie C.M.A., it is important to recognize that it is possible to achieve a higher yield on less sites with multi-storey developments, similar to the Bolton Royal Courtyards (Town of Caledon), an example of a development previously discussed.<sup>3</sup>

Further details on sites within the Midhurst Bayfield Corridor are provided in Appendix G including parcel size, tenants, G.F.A., building coverage, and employment density.

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<sup>1</sup> Average F.S.W., employment density, building coverage, and commercial G.L.A. demand driven by estimated future consumer spending.

<sup>2</sup> Based on a density of 58 jobs/net ha, an F.S.W. assumption of 475 employees per sq.ft. and a building coverage ratio of 25%.

<sup>3</sup> Royal Courts in Bolton (Caledon) is a two-storey development (78,000 sq.ft./7,200 sq.m. G.L.A.) with a central public gathering space and includes 270 employees on 1.5 net ha of land.



#### **4.2.5.2 Vacant Building Space**

As previously discussed, the Midhurst and Elmvale urban settlement areas have approximately 43,000 sq.ft. (4,000 sq.m.) G.L.A. of vacant retail space.<sup>1</sup> The vacant building space within Elmvale, totalling approximately 27,000 sq.ft. (2,500 sq.m.), includes a range of retail building space in the downtown area and along the Yonge Street corridor. The retail and commercial service space demand analysis anticipates modest opportunities for additional retail and commercial service space in Elmvale due to the vacant building space. While Midhurst has approximately 17,000 sq.ft. (1,600 sq.m.) of retail space, the vacant space includes a more limited range of retail and commercial service options. A large portion of the vacant space within Midhurst includes two older buildings (1285 Bayfield Street North and 705 Bayfield Street North (vacant motel building)).

#### **4.2.5.3 Residential Housing Converted to Retail and Commercial Service Uses on Designated Population-Related Employment Lands**

In the early stages of high population growth in small urban areas, designated commercial sites with residential housing are attractive for a range of commercial service uses, including small offices, medical offices, restaurants, hair salons and banks. King City (King Township) and Brooklin (Town of Whitby) are examples of urban areas where commercial growth was accommodated in residential housing at the beginning of high population growth. It is estimated that urban settlement areas of Midhurst and Elmvale have approximately 12 net ha and 4 net ha of designated P.R.E. land, respectively, that is currently used for residential purposes.

The opportunity for commercial development through the conversion of housing units to commercial uses could accommodate the demand for commercial growth in the short term within the urban settlement area of Midhurst. As residential growth progresses within the Midhurst Secondary Plan Area, however, there will be a need for more conventional commercial developments to accommodate a range of retail and service commercial uses.

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<sup>1</sup> Further details on the vacant building space is provided in Appendix B (Occupied and Vacant Retail and Commercial Service Space) and Appendix G (Midhurst Bayfield Street Corridor Sites). Township of Springwater total vacant commercial space is 48,000 sq.ft./4,500 sq.m. which includes vacant space in the Hillsdale settlement area.



#### *4.2.5.4 Additional C.R.U.s on Existing Retail and Commercial Sites*

The opportunities for additional commercial development through Commercial Rental Unit (C.R.U.) pad development on existing retail and commercial sites in Midhurst and Elmvale is more limited relative to other comparable urban areas. C.R.U. development typically occurs on large retail sites that are anchored usually by a grocery store, home improvement store, general merchandise store, or drug store. As such, Watson anticipates minimal new retail development in this form over the 2031 and buildout planning horizon.



Example of small C.R.U.s. Walmart anchored retail site, SmartCentres, McEwan Dr., Bolton (Caledon), ON

#### *4.2.5.5 Opportunities to Accommodate Institutional Development on Existing Developed Lands*

It is recognized that a number of institutional sites could accommodate additional institutional growth, including schools, places of worship, public facilities (libraries, recreational buildings), the Barrie Sports Complex, and large public administration sites accommodating the County of Simcoe and the two school board offices. Further, it is also recognized that additional lands required to support institutional demand are dependent on other factors, including student enrollments, place of worship membership, regional growth, and municipal capital plans.



# Chapter 5

## Conclusions



## 5. Conclusions

The urban settlement areas of Midhurst and Elmvale have the capacity to accommodate the forecast Population-Related Employment (P.R.E.) of 2,150 jobs by 2031 on designated lands with a remaining land area surplus of 95 ha. The surplus is primarily due to the supply of designated lands within Midhurst. Beyond 2031, designated P.R.E. lands have the potential to accommodate P.R.E. employment growth over an additional 19 to 24 years (i.e. 2031 to 2050 or 2031 to 2055), assuming a P.R.E. land absorption rate of 4 to 5 ha of P.R.E. land developed annually.<sup>1</sup> The actual timing of the buildout of the P.R.E. land supply would depend on the pace of population growth beyond 2031.<sup>2</sup>

As previously discussed, approximately 2,150 P.R.E. jobs are forecast on designated lands by 2031. Key highlights of the P.R.E. land requirements by 2031 include the following:

- It is estimated that the warranted additional retail and service commercial space would generate an employment increment of 730 employees on approximately 13 ha of lands designated for P.R.E. The remaining P.R.E. of 1,420 employees, comprised of institutional and other commercial uses would require approximately 47 ha of lands designated for P.R.E.
- The density average for P.R.E. is forecast at 36 jobs/net ha, an increase from the existing density of 28 jobs/net ha on P.R.E. lands.
- The density of retail commercial service sites is forecast at 30 jobs/net ha for institutional sites and 56 jobs/net ha for retail and service commercial sites. The commercial density average assumes a greater mix of office uses compared to the existing commercial base.
- Total land requirement to accommodate P.R.E. uses by 2031 is approximately 60 hectares which is less than the designated land vacant supply of 156 hectares.

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<sup>1</sup> The P.R.E. annual land absorption forecast over the 2020 to 2031 horizon. Assuming a similar absorption rate of 4 to 5 ha of P.R.E. lands absorbed annually, the P.R.E. land supply has the potential to accommodate P.R.E. growth for an additional 19 to 24 years.

<sup>2</sup> It is important to note that no adjustments for P.R.E. have been made to account for P.R.E. that could be accommodate through intensification.



Further details are provided on retail and service commercial uses. Retail and service commercial uses are a core component of P.R.E. are driven by the local population base and associated consumer spending levels. A forecast of floor retail and service commercial space requirements has been provided by 2031 and by estimated population buildout of Elmvale and Midhurst Urban Settlement Areas. Key highlights are summarized below:

#### Elmvale Urban Settlement Area

- The urban settlement area of Elmvale has the market potential to support an additional 144,000 sq.ft. G.L.A. (13,400 sq.m.) of retail and commercial space today, primarily due to the lack of local serving retail uses.
- The Elmvale urban settlement area is forecast to have market support of approximately 62,000 sq.ft. (5,800 sq.m.) of new retail and commercial service G.L.A. space by 2031, with an additional 17,000 sq.ft. (1,600 sq.m.) of G.L.A. space between 2031 and buildout;
- Utilizing a building coverage (ratios of building space to lot) of 25%, the retail and commercial space G.L.A. forecast would require approximately 2 net ha by 2031 and 3 net ha over a buildout<sup>1</sup> horizon.

#### Midhurst Urban Settlement Area

- The Midhurst urban settlement area has the market potential to support an additional 144,000 sq.ft. G.L.A. (13,400 sq.m.) of retail and commercial space today, primarily due to the lack of local serving retail uses.
- By 2031, it is anticipated that Midhurst has the market potential to support a new additional retail and commercial space incremental of 286,000 sq.ft.(26,600 sq.m.).
- Over the 2031 to buildout period, the Midhurst urban settlement area has the market support for an additional 103,000 sq.ft. (9,600 sq.m.) of G.L.A. by buildout.

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<sup>1</sup> Buildout of the Elmvale Urban Settlement Area.



- Utilizing a building coverage (ratios of building space to lot) of 25%, the retail and commercial space G.L.A. forecast would require approximately 11 net ha within Midhurst by 2031 and 15 net ha over a buildout<sup>1</sup> horizon.

While the Midhurst Bayfield Corridor has the potential to accommodate a large share of the retail and commercial growth through intensification within the Midhurst urban settlement area, it should be recognized that growth pressures within the Barrie C.M.A. and the need to accommodate land-extensive commercial uses. Despite the growth pressures for low-order commercial uses within the Barrie C.M.A., it is important to recognize that it is possible to achieve a higher yield on less sites with multi-storey developments.

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<sup>1</sup> Buildout of the Midhurst Urban Settlement Area.



# Appendices



# Appendix A

## Definitions



## Appendix A: Definitions

**Automotive Services:** includes gas stations, auto repair, auto dealerships (new and used), RV sales, car washes, and collision centres.

**Comparison Retailers:** a term that generally refers to non-food store retail (N.F.S.R.) retailers. These retailers typically cluster with other similar businesses so customers can examine and evaluate products. Comparison retailers generally attract customers on a less frequent basis.

**Home Improvement and Building Supplies Stores:** a subset of N.F.S.R. stores, and includes paint stores, spa/pool stores, hardware stores, and outdoor and garden centres.

**Food Store Retail (F.S.R.):** includes grocery stores, convenience stores, bakeries, and specialty food stores.

**Health and Personal Care Stores:** a subset of N.F.S.R. stores, and includes pharmacy/drug store, nutrition supplement stores, optician stores, and health equipment supply stores.

**Local Retail Uses:** retailers that are visited on a frequent basis and are generally close to the customer's home.

**Non-Food Store (N.F.S.R.):** includes retailers that primarily sell durable goods: apparel, furniture, electronics, and general merchandise. Home improvement stores and building supplies stores (e.g. home improvement stores, paint stores, spa/pool supplies, etc.) and health and personal care stores (e.g. pharmacy/drug stores) which are N.F.S.R. stores, have been further broken down in the inventory.

**Office and Institutional Services within Retail Buildings:** includes banks, insurance branches, law offices, accounting offices, professional offices, and dental/medical offices operating within retail buildings.

**Personal Services:** includes commercial services operating with a storefront and open to the public, and include the following: dry cleaners, hair/nail salons, spas, travel agencies, laundry services, weight loss centres, tattoo parlours, and tanning salons.



# Appendix B

## Occupied and Vacant Retail and Commercial Built Space Inventory



## Appendix B-1: Township of Springwater Occupied and Vacant Retail and Commercial Built Space

Commercial Use Category	Midhurst	Elmvale	Hillsdale	Apto	Phelpston	Total	Retail Category (%)
Food Store Retail (Convenience Store and Grocery Stores)	4,600	29,800	2,300	0	2,300	39,000	17%
Health & Personal Care Stores	3,000	9,700	0	0	0	12,700	5%
Beer, Wine & Liquor Stores	0	9,800	0	0	0	9,800	4%
Non-Food Store Retail	2,000	16,900	0	0	0	18,900	8%
Food & Beverage (Restaurants)	5,600	22,400	0	0	0	28,000	12%
Building Materials and Outdoor Supply Stores	16,600	13,700	0	0	0	30,300	13%
Other Retailers	0	3,100	0	0	0	3,100	1%
Personal Services (e.g. salon, travel agency, dry cleaning)	6,700	10,900	0	0	0	17,600	8%
Health Services/Medical/Dental (excludes Medical Clinics)	11,500	15,400	0	0	0	26,900	12%
Office (e.g. Legal, Finance, Insurance and Real Estate)	8,200	12,600	0	0	0	20,800	9%
Automotive Services & Parts (e.g. gas stations and auto repair)	7,600	13,200	3,300	2,000	0	26,100	11%
<b>Total Occupied Retail and Commercial Space</b>	<b>65,800</b>	<b>157,500</b>	<b>5,600</b>	<b>2,000</b>	<b>2,300</b>	<b>233,200</b>	<b>100%</b>
<b>Total Occupied Retail and Commercial Space (%)</b>	<b>28%</b>	<b>68%</b>	<b>2%</b>	<b>1%</b>	<b>1%</b>	<b>100%</b>	<b>83%</b>
Vacant Space	16,700	26,600	5,000	0	0	48,300	17%
<b>Total Retail and Commercial Space</b>	<b>82,500</b>	<b>184,100</b>	<b>10,600</b>	<b>2,000</b>	<b>2,300</b>	<b>281,500</b>	
<b>Total Retail and Commercial Space (%)</b>	<b>29%</b>	<b>65%</b>	<b>4%</b>	<b>1%</b>	<b>1%</b>	<b>100%</b>	<b>100%</b>

Source: Watson & Associates Economists Ltd. based on site visits in June 2020.



## Appendix B-2: Occupied and Vacant Commercial Built Space – Midhurst and Elmvale by Sub-Area

Retail Category	Midhurst & Elmvale	Retail Category (%)	Midhurst Urban Area				Elmvale Urban Area			
			Bayfield Street Corridor	Rest of Midhurst	Total Midhurst	Occupied Retail Category (%)	Downtown Elmvale	Rest of Elmvale	Total Elmvale	Occupied Retail Category (%)
<b>Food Store Retail</b>	<b>34,400</b>	<b>13%</b>	<b>4,600</b>	<b>0</b>	<b>4,600</b>	<b>7%</b>	<b>25,700</b>	<b>4,100</b>	<b>29,800</b>	<b>19%</b>
Convenience Stores and Specialty Stores	16,400	6%	4,600	0	4,600	7%	7,700	4,100	11,800	7%
Grocery Stores	18,000	7%	0	0	0	0%	18,000	0	18,000	11%
<b>Health &amp; Personal Care Stores</b>	<b>12,700</b>	<b>5%</b>	<b>0</b>	<b>3,000</b>	<b>3,000</b>	<b>5%</b>	<b>5,000</b>	<b>4,700</b>	<b>9,700</b>	<b>6%</b>
Pharmacy/Drug Stores	8,000	3%	0	0	0	0%	5,000	3,000	8,000	5%
Beauty supplies, optical stores, health supplement stores	1,700	1%	0	0	0	0%	0	1,700	1,700	1%
<b>Beer, Wine &amp; Liquor Stores</b>	<b>9,800</b>	<b>4%</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0%</b>	<b>4,700</b>	<b>5,100</b>	<b>9,800</b>	<b>6%</b>
<b>Non-Food Store Retail</b>	<b>18,900</b>	<b>7%</b>	<b>0</b>	<b>2,000</b>	<b>2,000</b>	<b>3%</b>	<b>14,900</b>	<b>2,000</b>	<b>16,900</b>	<b>11%</b>
Furniture & Electronics Stores	10,300	4%	0	0	0	0%	8,300	2,000	10,300	7%
Clothing & Accessories Stores	0	0%	0	0	0	0%	0	0	0	0%
Sports, Hobby, Book & Toy Stores	5,600	2%	0	0	0	0%	5,600	0	5,600	4%
General Merchandise Stores	3,000	1%	0	2,000	2,000	3%	1,000	0	1,000	1%
<b>Food &amp; Drinking Places (Restaurants/Bars)</b>	<b>28,000</b>	<b>11%</b>	<b>5,600</b>	<b>0</b>	<b>5,600</b>	<b>9%</b>	<b>9,000</b>	<b>13,400</b>	<b>22,400</b>	<b>14%</b>
<b>Building Materials and Outdoor Supply Stores</b>	<b>30,300</b>	<b>11%</b>	<b>16,600</b>	<b>0</b>	<b>16,600</b>	<b>25%</b>	<b>1,200</b>	<b>12,500</b>	<b>13,700</b>	<b>9%</b>
Home Improvement Stores	12,500	5%	0	0	0	0%	0	12,500	12,500	8%
Outdoor/Garden Supplies	0	0%	0	0	0	0%	0	0	0	0%
Building Materials (e.g. sale of pools, windows/doors)	17,800	7%	16,600	0	16,600	25%	1,200	0	1,200	1%
<b>Other Retailers</b>	<b>3,100</b>	<b>1%</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0%</b>	<b>0</b>	<b>3,100</b>	<b>3,100</b>	<b>2%</b>
<b>Personal Services</b> (e.g. salon, travel agency, dry cleaning)	<b>17,600</b>	<b>7%</b>	<b>5,800</b>	<b>900</b>	<b>6,700</b>	<b>10%</b>	<b>5,900</b>	<b>5,000</b>	<b>10,900</b>	<b>7%</b>
<b>Health Services/Medical/Dental</b> (excludes Medical Clinics)	<b>26,900</b>	<b>10%</b>	<b>0</b>	<b>11,500</b>	<b>11,500</b>	<b>17%</b>	<b>5,400</b>	<b>10,000</b>	<b>15,400</b>	<b>10%</b>
<b>Office</b> (e.g. Legal, Finance, Insurance and Real Estate)	<b>20,800</b>	<b>8%</b>	<b>8,200</b>	<b>0</b>	<b>8,200</b>	<b>12%</b>	<b>5,900</b>	<b>6,700</b>	<b>12,600</b>	<b>8%</b>
<b>Total Retail and Commercial Services, excluding automotive</b>	<b>202,500</b>	<b>76%</b>	<b>40,800</b>	<b>17,400</b>	<b>58,200</b>	<b>88%</b>	<b>77,700</b>	<b>66,600</b>	<b>144,300</b>	<b>92%</b>
<b>Automotive Services &amp; Parts</b> (e.g. gas stations and auto repair)	<b>20,800</b>	<b>8%</b>	<b>7,600</b>	<b>0</b>	<b>7,600</b>	<b>12%</b>	<b>0</b>	<b>13,200</b>	<b>13,200</b>	<b>8%</b>
<b>Total Retail and Commercial Services, including automotive</b>	<b>223,300</b>	<b>84%</b>	<b>48,400</b>	<b>17,400</b>	<b>65,800</b>	<b>100%</b>	<b>77,700</b>	<b>79,800</b>	<b>157,500</b>	<b>100%</b>
<b>Vacant Space</b>	<b>43,300</b>	<b>16%</b>	<b>16,700</b>	<b>0</b>	<b>16,700</b>	<b>20%</b>	<b>17,800</b>	<b>8,800</b>	<b>26,600</b>	<b>14%</b>
<b>Total Retail and Commercial Services, including automotive</b>	<b>266,600</b>	<b>100%</b>	<b>65,100</b>	<b>17,400</b>	<b>82,500</b>	<b>100%</b>	<b>95,500</b>	<b>88,600</b>	<b>184,100</b>	<b>100%</b>

Source: Watson & Associates Economists Ltd. based on site visits in June 2020.



# Appendix C

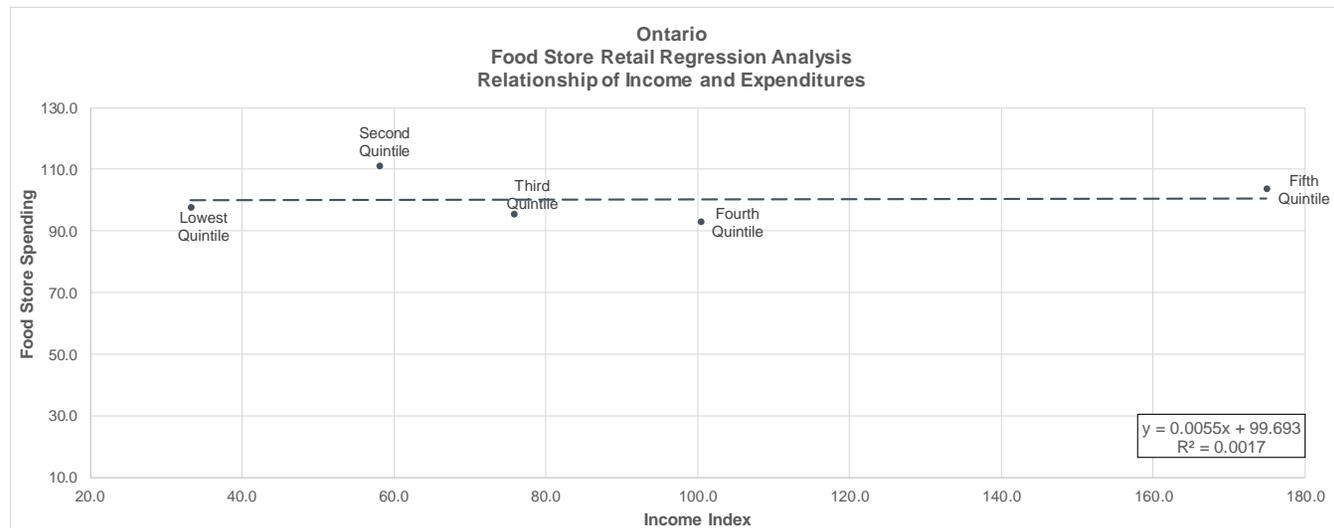
## Provincial Expenditures Analysis and Income Regression Analysis, 2017



# Appendix C-1: Food Store Expenditures Analysis

## Ontario Food Store Uses Expenditures Analysis

Household Spending Data		Lowest Quintile	Second Quintile	Third Quintile	Fourth Quintile	Highest Quintile	All Quintiles
		Less than \$33,230	Between 33,230 to \$58,850	Between \$58,850 to \$89,710	Between \$89,10 to \$142,500	Over \$142,500	
Average Household Size	A	1.59	2.13	2.64	3.08	3.42	2.57
Average Household Income before Tax	B	\$19,470	\$45,580	\$73,710	\$113,910	\$220,390	\$94,690
Average Household Income per capita	C = B / A	\$12,250	\$21,400	\$27,920	\$36,980	\$64,440	\$36,840
Income Index	D = C / \$36,840 x 100	33.3	58.1	75.8	100.4	174.9	100.0
<b>Food Store Uses</b>							
Food Store, Household Total Spending	E	\$3,490	\$5,300	\$5,660	\$6,420	\$7,930	\$5,760
Average Food Store Expenditure per capita	F = E / A	\$2,190	\$2,490	\$2,140	\$2,080	\$2,320	\$2,240
Food Store as Percentage of Income (%)	G = F / C	18%	12%	8%	6%	4%	6%
Average Food Store Expenditure, Ratio Ontario Index	H = F / \$2,240	97.8	111.2	95.5	92.9	103.6	100.0



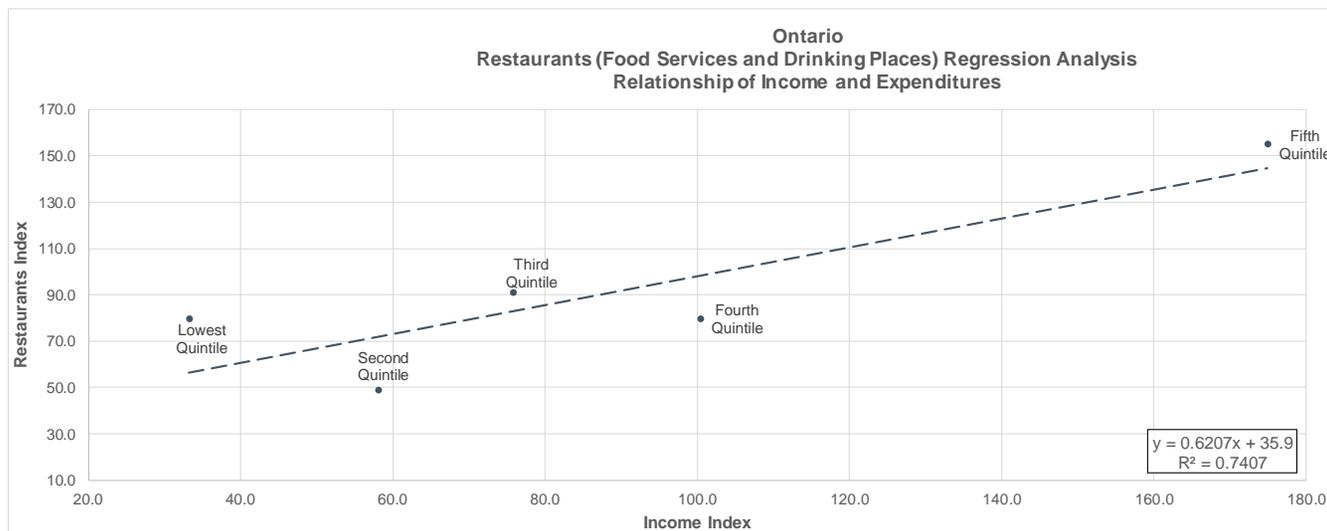
Source: Derived from Statistics Canada. Custom data table requests and Table 11-10-0223-01 Household spending by household income quintile by Waston & Associates Economists Ltd.



# Appendix C-2: Food Services Expenditures Analysis

## Ontario Food Services Expenditures Analysis

Household Spending Data		Lowest Quintile	Second Quintile	Third Quintile	Fourth Quintile	Highest Quintile	All Quintiles
		Less than \$33,230	Between 33,230 to \$58,850	Between \$58,850 to \$89,710	Between \$89,10 to \$142,500	Over \$142,500	
Average Household Size	A	1.59	2.13	2.64	3.08	3.42	2.57
Average Household Income before Tax	B	\$19,470	\$45,580	\$73,710	\$113,910	\$220,390	\$94,690
Average Household Income per capita	C = B / A	\$12,250	\$21,400	\$27,920	\$36,980	\$64,440	\$36,840
Income Index	D = C / \$36,840 x 100	33.3	58.1	75.8	100.4	174.9	100.0
<b>Food Store Uses</b>							
Restaurants (Food Services and Drinking Places), Household Total Spending	E	\$1,680	\$1,380	\$3,200	\$3,250	\$7,040	\$3,420
Average Restaurants Expenditure per capita	F = E / A	\$1,060	\$650	\$1,210	\$1,060	\$2,060	\$1,330
Restaurants as Percentage of Income (%)	G = F / C	9%	3%	4%	3%	3%	4%
Average Restaurants Expenditure, Ratio Ontario Index	H = F / \$2,240	79.7	48.9	91.0	79.7	154.9	100.0



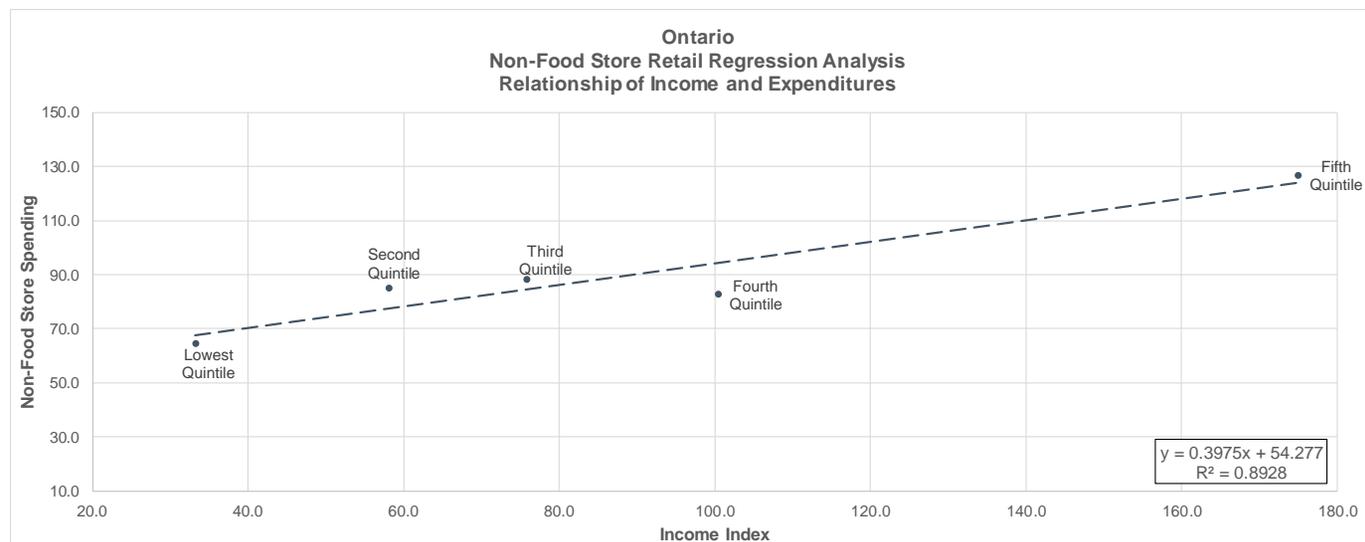
Source: Derived from Statistics Canada. Custom data table requests and Table 11-10-0223-01 Household spending by household income quintile by Waston & Associates Economists Ltd.



# Appendix C-3: Non-Food Store Expenditures Analysis

## Ontario Non-Food Store Uses Expenditures Analysis

Household Spending Data		Lowest Quintile	Second Quintile	Third Quintile	Fourth Quintile	Highest Quintile	All Quintiles
		Less than \$33,230	Between 33,230 to \$58,850	Between \$58,850 to \$89,710	Between \$89,10 to \$142,500	Over \$142,500	
Average Household Size	A	1.59	2.13	2.64	3.08	3.42	2.57
Average Household Income before Tax	B	\$19,470	\$45,580	\$73,710	\$113,910	\$220,390	\$94,690
Average Household Income per capita	C = B / A	\$12,250	\$21,400	\$27,920	\$36,980	\$64,440	\$36,840
Income Index	D = C / \$36,840 x 100	33.3	58.1	75.8	100.4	174.9	100.0
<b>Non-Food Store Uses</b>							
Non-Food Store, Household Total Spending	E	\$1,300	\$2,290	\$2,960	\$3,240	\$5,500	\$3,260
Average Non-Food Store Expenditure per capita	F = E / A	\$820	\$1,080	\$1,120	\$1,050	\$1,610	\$1,270
Non-Food Store as Percentage of Income (%)	G = F / C	7%	5%	4%	3%	2%	3%
Average N.F.S.U. Expenditure, Ratio Ontario Index	H = F / \$3,260	64.6	85.0	88.2	82.7	126.8	100.0



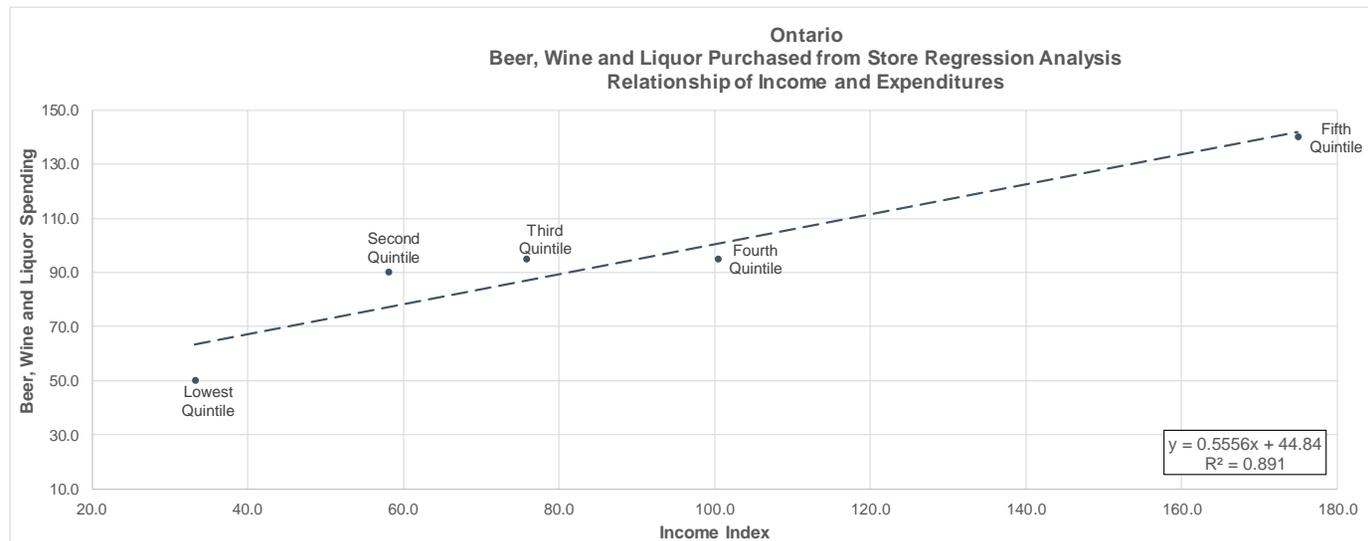
Source: Derived from Statistics Canada. Custom data table requests and Table 11-10-0223-01 Household spending by household income quintile by Waston & Associates Economists Ltd.



# Appendix C-4: Beer, Wine and Liquor Store Expenditures Analysis

## Ontario Beer, Wine and Liquor Stores Purchased from Store

Household Spending Data		Lowest Quintile	Second Quintile	Third Quintile	Fourth Quintile	Highest Quintile	All Quintiles
		Less than \$33,230	Between 33,230 to \$58,850	Between \$58,850 to \$89,710	Between \$89,10 to \$142,500	Over \$142,500	
Average Household Size	A	1.59	2.13	2.64	3.08	3.42	2.57
Average Household Income before Tax	B	\$19,470	\$45,580	\$73,710	\$113,910	\$220,390	\$94,690
Average Household Income per capita	C = B / A	\$12,250	\$21,400	\$27,920	\$36,980	\$64,440	\$36,840
Income Index	D = C / \$36,840 x 100	33.3	58.1	75.8	100.4	174.9	100.0
<b>Beer, Wine and Liquor Stores</b>							
Beer Wine and Liquor Stores, Household Total Spending	E	\$160	\$390	\$510	\$570	\$970	\$520
Average B.W.L. Expenditure per capita	F = E / A	\$100	\$180	\$190	\$190	\$280	\$200
B.W.L. as Percentage of Income (%)	G = F / C	1%	1%	1%	1%	0%	1%
Average B.W.L. Expenditure, Ratio Ontario Index	H = F / \$2,240	50.0	90.0	95.0	95.0	140.0	100.0



Source: Derived from Statistics Canada. Custom data table requests and Table 11-10-0223-01 Household spending by household income quintile by Waston & Associates Economists Ltd.



# Appendix D

## Market Expenditure Potential Forecasts



# Appendix D-1: Midhurst Trade Area – Market Expenditure Potential

**Midhurst Trade Area  
Study Area Expenditure Potential (2020 Dollars)**

Midhurst Trade Area		2020	2031	Buildout
Population	A	14,200	26,400	35,100
Food Store (Supermarket, Specialty Food Stores & Convenience) per captia expenditure	B	\$2,840	\$2,840	\$2,840
Food Store Total Expenditure (\$ Million)	$C = A \times B$	\$40.3	\$75.0	\$99.7
Beer, Wine & Liquor Stores (B.W.L.)	D	\$405	\$405	\$405
B.W.L. Total Expenditure (\$ Million)	$E = A \times D$	\$5.8	\$10.7	\$14.2
Food Services and Drinking Places (Restaurants)	F	\$2,355	\$2,355	\$2,355
Restaurants Total Expenditure (\$ Million)	$G = A \times F$	\$33.4	\$62.2	\$82.7
Health and Personal Care Stores	H	\$1,375	\$1,375	\$1,375
Health and Personal Care Stores (\$ Million)	$I = A \times H$	\$19.5	\$36.3	\$48.3
Non-Food Store Retail Uses/Comparison Retailers	J	\$4,405	\$4,405	\$4,405
Non-Food Store Retail Uses (\$ Million)	$K = A \times J$	\$62.6	\$116.3	\$154.6
Other Retailers	L	\$1,505	\$1,505	\$1,505
Other Retailers (\$ Million)	$M = A \times L$	\$21.4	\$39.7	\$52.8
<b>Total Expenditure Potential (\$ Million)</b>		<b>\$183.0</b>	<b>\$340.2</b>	<b>\$452.3</b>

Source: Watson & Associates Economists Ltd.



## Appendix D-2: Elmvale Trade Area – Primary Trade Area Market Expenditure Potential

Elmvale Trade Area - Springwater North  
Study Area Expenditure Potential (2020 Dollars)

Midhurst Trade Area		2020	2031	Buildout
Population	A	8,500	11,400	12,500
Food Store (Supermarket, Specialty Food Stores & Convenience) per capita expenditure	B	\$2,835	\$2,835	\$2,835
Food Store Total Expenditure (\$ Million)	$C = A \times B$	\$24.1	\$32.3	\$35.4
Beer, Wine & Liquor Stores (B.W.L.)	D	\$335	\$335	\$335
B.W.L. Total Expenditure (\$ Million)	$E = A \times D$	\$2.8	\$3.8	\$4.2
Food Services and Drinking Places (Restaurants)	F	\$1,885	\$1,885	\$1,885
Restaurants Total Expenditure (\$ Million)	$G = A \times F$	\$16.0	\$21.5	\$23.6
Health and Personal Care Stores	H	\$1,185	\$1,185	\$1,185
Health and Personal Care Stores (\$ Million)	$I = A \times H$	\$10.1	\$13.5	\$14.8
Non-Food Store Retail Uses/Comparison Retailers	J	\$3,785	\$3,785	\$3,785
Non-Food Store Retail Uses (\$ Million)	$K = A \times J$	\$32.2	\$43.1	\$47.3
Other Retailers	L	\$1,295	\$1,295	\$1,295
Other Retailers (\$ Million)	$M = A \times L$	\$11.0	\$14.8	\$16.2
<b>Total Expenditure Potential (\$ Million)</b>		<b>\$96.2</b>	<b>\$129.0</b>	<b>\$141.5</b>

Source: Watson & Associates Economists Ltd.



## Appendix D-3: Elmvale Trade Area – Secondary Trade Area Market Expenditure Potential

Elmvale Trade Area - Tiny Township South  
Study Area Expenditure Potential (2020 Dollars)

Midhurst Trade Area		2020	2031	Buildout
Population	A	6,000	6,100	6,300
Food Store (Supermarket, Specialty Food Stores & Convenience) per capita expenditure	B	\$2,835	\$2,835	\$2,835
Food Store Total Expenditure (\$ Million)	$C = A \times B$	\$17.0	\$17.3	\$17.9
Beer, Wine & Liquor Stores (B.W.L.)	D	\$345	\$345	\$345
B.W.L. Total Expenditure (\$ Million)	$E = A \times D$	\$2.1	\$2.1	\$2.2
Food Services and Drinking Places (Restaurants)	F	\$1,965	\$1,965	\$1,965
Restaurants Total Expenditure (\$ Million)	$G = A \times F$	\$11.8	\$12.0	\$12.4
Health and Personal Care Stores	H	\$1,215	\$1,215	\$1,215
Health and Personal Care Stores (\$ Million)	$I = A \times H$	\$7.3	\$7.4	\$7.7
Non-Food Store Retail Uses/Comparison Retailers	J	\$3,890	\$3,890	\$3,890
Non-Food Store Retail Uses (\$ Million)	$K = A \times J$	\$23.3	\$23.7	\$24.5
Other Retailers	L	\$1,330	\$1,330	\$1,330
Other Retailers (\$ Million)	$M = A \times L$	\$8.0	\$8.1	\$8.4
<b>Total Expenditure Potential (\$ Million)</b>		<b>\$69.5</b>	<b>\$70.6</b>	<b>\$73.0</b>

Source: Watson & Associates Economists Ltd.



# Appendix E

## Detailed Market Warranted Additional G.L.A. Space Tables by Category



# Appendix E-1: Market-Supportable Additional Food Store G.L.A. Space

Figure E-1a  
Midhurst Urban Settlement Area

Midhurst Trade Area <sup>1</sup>		2020	2031	Buildout
Population		14,200	26,400	35,100
Food Store Expenditure per capita		\$2,840	\$2,840	\$2,840
Food Store Total Expenditure (\$ Million)		\$40.3	\$75.0	\$99.7
<b>Existing</b>				
Existing Food Store G.L.A. (sq.ft.)		4,600		
Midhurst Capture Rate (%)	4%	\$1.6		
Inflow (%)	15%	\$0.3		
Total Current Sales @ \$400/sq.ft.	\$400	\$1.8		
<b>Residual Sales &amp; G.L.A./Forecast Additional G.L.A. Space</b>				
Midhurst Capture Rate (%)	20%	\$8.1	\$15.0	\$19.9
Inflow (%)	7%	\$0.6	\$1.2	\$1.6
Total Sales		\$8.7	\$16.2	\$21.5
Minus Existing Sales		\$1.8	\$1.8	\$1.8
Residual		\$6.9	\$14.4	\$19.7
Potential Food Store G.L.A. (sq.ft.)	\$400	17,000	36,000	49,000
Potential Food Store G.L.A. (sq.ft.)	\$450	15,000	32,000	44,000
Potential Food Store G.L.A. (sq.ft.)	\$500	14,000	29,000	39,000

<sup>1</sup>Includes Midhurst urban area and southern portion of Springwater Township.

Figure E-1b  
Elmvale Urban Settlement Area

Elmvale Trade Area <sup>1</sup>		2020	2031	Buildout
Population		14,500	17,500	18,800
Food Store Expenditure per capita		\$2,835	\$2,835	\$2,835
Food Store Total Expenditure (\$ Million)		\$41.1	\$49.6	\$53.3
<b>Existing</b>				
Existing Food Store G.L.A. (sq.ft.)		29,800		
Elmvale Capture Rate (%)	25%	\$10.3		
Inflow (%)	23%	\$3.1		
Total Current Sales @ \$450/sq.ft.	\$450	\$13.4		
<b>Residual Sales &amp; G.L.A./Forecast Additional G.L.A. Space</b>				
Elmvale Capture Rate (%)	25%	\$10.3	\$12.4	\$13.3
Inflow (%)	23%	\$3.1	\$3.7	\$4.0
Total Sales		\$13.4	\$16.1	\$17.3
Minus Existing Sales		\$13.4	\$13.4	\$13.4
Residual		\$0	\$2.7	\$3.9
Potential Food Store G.L.A. (sq.ft.)	\$400	0	7,000	10,000
Potential Food Store G.L.A. (sq.ft.)	\$450	0	6,000	9,000
Potential Food Store G.L.A. (sq.ft.)	\$500	0	5,000	8,000

<sup>1</sup>Includes Elmvale urban area, northern portion of Springwater Township and southern portion of Tiny Township.



# Appendix E-2: Market Supportable Additional Food Services G.L.A. Space

Figure E-2a  
Midhurst Urban Settlement Area

Midhurst Trade Area <sup>1</sup>		2020	2031	Buildout
Population		14,200	26,400	35,100
Food Services (Restaurants) Expenditure per capita		\$2,355	\$2,355	\$2,355
Restaurants Total Expenditure (\$ Millions)		\$33.4	\$62.2	\$82.7
<b>Existing</b>				
Existing Restaurants G.L.A. (sq.ft.)		5,600		
Midhurst Capture Rate (%)	6%	\$1.9		
Inflow (%)	15%	\$0.3		
Total Current Sales @ \$400/sq.ft.	\$400	\$2.2		
<b>Residual Sales &amp; G.L.A./Forecast Additional G.L.A. Space</b>				
Midhurst Capture Rate (%)	25%	\$8.4	\$15.5	\$20.7
Inflow (%)	13%	\$1.3	\$2.3	\$3.1
Total Sales		\$9.6	\$17.9	\$23.8
Minus Existing Sales		\$2.2	\$2.2	\$2.2
Residual		\$7.4	\$15.6	\$21.5
Potential Restaurants G.L.A. (sq.ft.)	\$300	25,000	52,000	72,000
Potential Restaurants G.L.A. (sq.ft.)	\$350	21,000	45,000	61,000
Potential Restaurants G.L.A. (sq.ft.)	\$400	18,000	39,000	54,000

<sup>1</sup>Includes Midhurst urban area and southern portion of Springwater Township.

Figure E-2b  
Elmvale Urban Settlement Area

Elmvale Trade Area <sup>1</sup>		2020	2031	Buildout
Population		14,500	17,500	18,800
Food Services (Restaurants) Expenditure per capita		\$1,918	\$1,913	\$1,912
Restaurants Total Expenditure (\$ Millions)		\$27.8	\$33.5	\$35.9
<b>Existing</b>				
Existing Restaurants G.L.A. (sq.ft.)		22,400		
Elmvale Capture Rate (%)	25%	\$7.0		
Inflow (%)	22%	\$2.0		
Total Current Sales @ \$400/sq.ft.	\$400	\$9.0		
<b>Residual Sales &amp; G.L.A./Forecast Additional G.L.A. Space</b>				
Elmvale Capture Rate (%)	30%	\$7.0	\$10.0	\$10.8
Inflow (%)	22%	\$2.0	\$2.2	\$2.4
Total Sales		\$9.0	\$12.3	\$13.2
Minus Existing Sales		\$9.0	\$9.0	\$9.0
Residual		\$0.0	\$3.3	\$4.2
Potential Restaurants G.L.A. (sq.ft.)	\$300	0	11,000	14,000
Potential Restaurants G.L.A. (sq.ft.)	\$350	0	9,000	12,000
Potential Restaurants G.L.A. (sq.ft.)	\$400	0	8,000	10,000

<sup>1</sup>Includes Elmvale urban area, northern portion of Springwater Township and southern portion of Tiny Township.



# Appendix E-3: Market Supportable Additional Health & Personal Care Stores G.L.A. Space

Figure E-3a  
Midhurst Urban Settlement Area

Midhurst Trade Area <sup>1</sup>		2020	2031	Buildout
Population		14,200	26,400	35,100
Health & Personal Care Stores Expenditure per capita		\$1,375	\$1,375	\$1,375
Health & Personal Care Total Expenditure (\$ Millions)		\$19.5	\$36.3	\$48.3
<b>Existing</b>				
Existing Health & Personal Care Stores G.L.A. (sq.ft.)		3,000		
Midhurst Capture Rate (%)	8%	\$1.6		
Inflow (%)	13%	\$0.2		
Total Current Sales @ \$600/sq.ft.	\$600	\$1.8		
<b>Residual Sales &amp; G.L.A./Forecast Additional G.L.A. Space</b>				
Midhurst Capture Rate (%)	35%	\$6.8	\$12.7	\$16.9
Inflow (%)	15%	\$1.2	\$2.2	\$3.0
Total Sales		\$8.0	\$14.9	\$19.9
Minus Existing Sales		\$1.8	\$1.8	\$1.8
Residual		\$6.2	\$13.1	\$18.1
Potential Health & Personal Care Stores G.L.A. (sq.ft.)	\$600	10,000	22,000	30,000
Potential Health & Personal Care Stores G.L.A. (sq.ft.)	\$650	10,000	20,000	28,000
Potential Health & Personal Care Stores G.L.A. (sq.ft.)	\$700	9,000	19,000	26,000

<sup>1</sup>Includes Midhurst urban area and southern portion of Springwater Township.

Figure E-3b  
Elmvale Urban Settlement Area

Elmvale Trade Area <sup>1</sup>		2020	2031	Buildout
Population		14,500	17,500	18,800
Health & Personal Care Stores Expenditure per capita		\$1,197	\$1,195	\$1,195
Health & Personal Care Total Expenditure (\$ Millions)		\$17.4	\$20.9	\$22.5
<b>Existing</b>				
Existing Health & Personal Care Stores G.L.A. (sq.ft.)		9,700		
Elmvale Capture Rate (%)	25%	\$4.3		
Inflow (%)	25%	\$1.5		
Total Current Sales @ \$600/sq.ft.	\$600	\$5.8		
<b>Residual Sales &amp; G.L.A./Forecast Additional G.L.A. Space</b>				
Elmvale Capture Rate (%)	40%	\$6.9	\$8.4	\$9.0
Inflow (%)	25%	\$2.4	\$2.8	\$3.1
Total Sales		\$9.3	\$11.2	\$12.0
Minus Existing Sales		\$5.8	\$5.8	\$5.8
Residual		\$3.5	\$5.4	\$6.2
Potential Health & Personal Care Stores G.L.A. (sq.ft.)	\$600	6,000	9,000	10,000
Potential Health & Personal Care Stores G.L.A. (sq.ft.)	\$650	5,000	8,000	10,000
Potential Health & Personal Care Stores G.L.A. (sq.ft.)	\$700	5,000	8,000	9,000

<sup>1</sup>Includes Elmvale urban area, northern portion of Springwater Township and southern portion of Tiny Township.



# Appendix E-4: Market Supportable Additional Non-Food Store G.L.A. Space

Figure E-4a  
Midhurst Urban Settlement Area

Midhurst Trade Area <sup>1</sup>		2020	2031	Buildout
Population		14,200	26,400	35,100
Non-Food Store Expenditure per capita		\$4,405	\$4,405	\$4,405
Non-Food Store Total Expenditure (\$ Millions)		\$62.6	\$116.3	\$154.6
<b>Existing</b>				
Non-Food Stores G.L.A. (sq.ft.)		2,000		
Midhurst Capture Rate (%)	0.1%	\$0.1		
Inflow (%)	84%	\$0.3		
Total Current Sales @ \$200/sq.ft.	\$200	\$0.4		
<b>Residual Sales &amp; G.L.A./Forecast Additional G.L.A. Space</b>				
Midhurst Capture Rate (%)	18%	\$11.3	\$20.9	\$27.8
Inflow (%)	8%	\$1.0	\$1.9	\$2.5
Total Sales		\$12.3	\$22.8	\$30.3
Minus Existing Sales		\$0.4	\$0.4	\$0.4
Residual		\$11.9	\$22.4	\$29.9
Potential Non-Food Store G.L.A. (sq.ft.)	\$325	37,000	69,000	92,000
Potential Non-Food Store G.L.A. (sq.ft.)	\$350	34,000	64,000	86,000
Potential Non-Food Store G.L.A. (sq.ft.)	\$375	32,000	60,000	80,000

<sup>1</sup>Includes Midhurst urban area and southern portion of Springwater Township.

Figure E-4b  
Elmvale Urban Settlement Area

Elmvale Trade Area <sup>1</sup>		2020	2031	Buildout
Population		14,500	17,500	18,800
Non-Food Store Expenditure per capita		\$3,828	\$3,822	\$3,820
Non-Food Store Total Expenditure (\$ Millions)		\$55.5	\$66.9	\$71.8
<b>Existing</b>				
Non-Food Stores G.L.A. (sq.ft.)		16,900		
Elmvale Capture Rate (%)	10%	\$5.6		
Inflow (%)	12%	\$0.8		
Total Current Sales @ \$375/sq.ft.	\$375	\$6.3		
<b>Residual Sales &amp; G.L.A./Forecast Additional G.L.A. Space</b>				
Elmvale Capture Rate (%)	20%	\$11.1	\$13.4	\$14.4
Inflow (%)	13%	\$1.7	\$2.0	\$2.2
Total Sales		\$12.8	\$15.4	\$16.5
Minus Existing Sales		\$6.3	\$6.3	\$6.3
Residual		\$6.4	\$9.0	\$10.2
Potential Non-Food Store G.L.A. (sq.ft.)	\$325	20,000	28,000	31,000
Potential Non-Food Store G.L.A. (sq.ft.)	\$350	18,000	26,000	29,000
Potential Non-Food Store G.L.A. (sq.ft.)	\$375	17,000	24,000	27,000

<sup>1</sup>Includes Elmvale urban area, northern portion of Springwater Township and southern portion of Tiny Township.



# Appendix E-5: Market Supportable Additional Beer, Wine & Liquor Store G.L.A. Space

Figure E-5a  
Midhurst Urban Settlement Area

Midhurst Trade Area <sup>1</sup>		2020	2031	Buildout
Population		14,200	26,400	35,100
Beer, Wine and Liquor Expenditure per capita		\$405	\$405	\$405
B.W.L. Total Expenditure (\$ Millions)		\$5.8	\$10.7	\$14.2
<b>Existing</b>				
Existing B.W.L. G.L.A. (sq.ft.)		0		
Midhurst Capture Rate (%)	0%	\$0.0		
Inflow (%)	0%	\$0.0		
Total Current Sales @ \$0/sq.ft.	\$0	\$0.0		
<b>Residual Sales &amp; G.L.A./Forecast Additional G.L.A. Space</b>				
Midhurst Capture Rate (%)	68%	\$3.9	\$7.3	\$9.7
Inflow (%)	5%	\$0.2	\$0.4	\$0.5
Total Sales		\$4.1	\$7.6	\$10.1
Minus Existing Sales		\$0.0	\$0.0	\$0.0
Residual		\$4.1	\$7.6	\$10.1
Potential B.W.L. G.L.A. (sq.ft.)	\$900	5,000	8,000	11,000
Potential B.W.L. G.L.A. (sq.ft.)	\$950	4,000	8,000	11,000
Potential B.W.L. G.L.A. (sq.ft.)	\$1,000	4,000	8,000	10,000

<sup>1</sup>Includes Midhurst urban area and southern portion of Springwater Township.

Figure E-5b  
Elmvale Urban Settlement Area

Elmvale Trade Area <sup>1</sup>		2020	2031	Buildout
Population		14,500	17,500	18,800
Beer, Wine and Liquor Expenditure per capita		\$339	\$338	\$338
B.W.L. Total Expenditure (\$ Millions)		\$4.9	\$5.9	\$6.4
<b>Existing</b>				
Existing B.W.L. G.L.A. (sq.ft.)		9,800		
Elmvale Capture Rate (%)	95%	\$4.7		
Inflow (%)	40%	\$3.2		
Total Current Sales @ \$800/sq.ft.	\$800	\$7.8		
<b>Residual Sales &amp; G.L.A./Forecast Additional G.L.A. Space</b>				
Elmvale Capture Rate (%)	95%	\$4.7	\$5.6	\$6.0
Inflow (%)	40%	\$3.2	\$3.8	\$4.0
Total Sales		\$7.8	\$9.4	\$10.1
Minus Existing Sales		\$7.8	\$7.8	\$7.8
Residual		\$0	\$1.6	\$2.3
Potential B.W.L. G.L.A. (sq.ft.)	\$900	0	2,000	3,000
Potential B.W.L. G.L.A. (sq.ft.)	\$950	0	2,000	2,000
Potential B.W.L. G.L.A. (sq.ft.)	\$1,000	0	2,000	2,000

<sup>1</sup>Includes Elmvale urban area, northern portion of Springwater Township and southern portion of Tiny Township.



# Appendix F

## Population-Related Employment Land Density Sample – Midhurst and Elmvale Urban Settlement Areas

## Elmvale and Midhurst Developed Population-Related Employment Land Inventory, 2020

Urban Area	OBJECTID_1	Official Plan Designation	Status	Business Name	Address	Estimated Employees	Total Vacant Non-Residential Estimated Sq.ft.	Total Occupied Non-Residential Estimated Sq.ft.	Total Non-Residential Estimated Sq.ft.	Included in Retail and Commercial Analysis	Midhurst Bayfield Street Corridor	Institutional Use	Main Sector Use	Estimated Employment Density (jobs/ha)	Land Area (ha)
Midhurst	54	Commercial / Mixed Use	Developed	Multi-Tenant Plaza	1179 Bayfield Street North	25	3,000	11,500	14,500	Yes	Yes		Commercial	59	0.42
Midhurst	65	Commercial / Mixed Use	Developed	Oil Tech of Midhurst	1152 Bayfield Street North	4	0	5,600	5,600	Yes	Yes		Automotive	3	1.49
Midhurst	171	Commercial / Mixed Use	Developed	Multi-Tenant Buildings (2)	1004 Carson Road	50	2,000	9,200	11,200	Yes	Yes		Retail	48	1.05
Midhurst	192	Commercial / Mixed Use	Developed	Baywood Animal Hospital	8 Finlay Mill Road	10	0	5,000	5,000	Yes	Yes		Health & Personal Care	59	0.17
Midhurst	214	Commercial / Mixed Use	Developed	Barrie Fibreglass Pools	1139 Bayfield Street North	5	0	1,800	1,800	Yes	Yes		Building Materials	32	0.16
Midhurst	216	Commercial / Mixed Use	Developed	93.1 Fresh Radio	1125 Bayfield Street North	15	0	10,000	10,000	Yes	Yes		Office	21	0.71
Midhurst	245	Commercial / Mixed Use	Developed	Coby Windows and Doors	1005 Snow Valley Road	9	0	11,000	11,000	Yes	Yes		Building Materials	35	0.26
Midhurst	59	Environmental Protection II	Developed	Taekwondo(vacant)/Linda's/IceCreamHut/Pool&Patio	1027 Bayfield Street North	18	1,000	6,300	7,300	Yes	Yes		Retail	32	0.56
Midhurst	60	Environmental Protection II	Developed	Husky Station and vacant space	1013 Bayfield Street North	4	1,000	2,200	3,200	Yes	Yes		Automotive	11	0.36
Midhurst	273	Highway Commercial	Developed	Ultramar Gas Station	657 Bayfield Street North	2	0	1,900	1,900	Yes	Yes		Automotive	5	0.44
Midhurst	52	Commercial / Mixed Use	Developed	Madison Taylor Interior Designer	14 Finlay Mill Road	2	0	900	900	Yes			Other Commercial	11	0.19
Midhurst	130	Commercial / Mixed Use	Developed	Midhurst Family Eye Care	23 Finlay Mill Road	4	0	2,100	2,100	Yes			Health & Personal Care	25	0.16
Midhurst	63	Commercial / Mixed Use	Developed	Currie Truck Centre	2 Currie Drive	70	0	40,000	40,000		Yes		Industrial	22	3.22
Midhurst	64	Commercial / Mixed Use	Developed	Auto Trim Design And Sign	5 Currie Drive	4	0	3,700	3,700		Yes		Industrial	19	0.21
Midhurst	174	Commercial / Mixed Use	Developed	Mason's Masonry	1319 Bayfield Street North	4	0	6,300	6,300		Yes		Industrial	7	0.55
Midhurst	193	Commercial / Mixed Use	Developed	Springwater Medical Building	1017 Carson Road	30	0	12,000	12,000		Yes	Yes	Health Services	55	0.55
Midhurst	201	Commercial / Mixed Use	Developed	Servpro	1237 Bayfield Street North	15	0	20,000	20,000		Yes		Industrial	23	0.66
Midhurst	222	Commercial / Mixed Use	Developed	Chill Out Rentals	1099 Bayfield Street North	2	0	1,000	1,000		Yes		Industrial	5	0.38
Midhurst	249	Commercial / Mixed Use	Developed	Storage Units	1063 Snow Valley Road	2	0	12,000	12,000		Yes		Industrial	5	0.40
Midhurst	271	Highway Commercial	Developed	Barrie North Paramedic Station	667 Bayfield Street North	10	0	5,600	5,600		Yes	Yes	Institutional - Other	64	0.16
Midhurst	48	Commercial / Mixed Use	Developed	Barrie North Winter Tennis	41 Spence Avenue	6	0	4,000	4,000		Yes	Yes	Recreational/Public Facility	2	2.65
Midhurst	50	Commercial / Mixed Use	Developed	Springwater Trailers And Equipment	26 Spence Avenue	5	0	2,400	2,400		Yes		Industrial	13	0.38
Midhurst	53	Commercial / Mixed Use	Developed	Springwater Public Library - Midhurst Branch	12 Finlay Mill Road	3	0	4,800	4,800		Yes	Yes	Recreational/Public Facility	10	0.31
Midhurst	184	Commercial / Mixed Use	Developed	J Design & Build (Home Office?)	5 Finlay Mill Road	2	0	3,000	3,000		Yes		Industrial	8	0.24
Midhurst	191	Commercial / Mixed Use	Developed	GUC Gray Utility Contracting	10 Finlay Mill Road	2	0	1,400	1,400		Yes		Industrial	21	0.10
Midhurst	700		Developed		705 Bayfield Street North					Yes					
Midhurst	90	Commercial / Mixed Use	Developed	Rush Hydraulic Pneumatic Inc	11571 County Road 27	8	0	3,000	3,000				Industrial	22	0.37
Midhurst	61	Administration	Developed	County of Simcoe	1110 Highway 26	300	0	150,000	150,000			Yes	Public Administration	92	3.26
Midhurst	62	Administration	Developed	Simcoe County District School Board	1170 Highway 26	130	0	66,000	66,000			Yes	Public Administration	37	3.54
Midhurst	235	Administration	Developed	Simcoe County Archives	1149 Highway 26	25	0	18,000	18,000			Yes	Public Administration	14	1.85
Midhurst	49	Commercial / Mixed Use	Developed	Midhurst Health Services	30 Spence Avenue	10	0	4,200	4,200			Yes	Health Services	18	0.57
Midhurst	177	Midhurst Village	Developed	Forest Hill Public School	16 Doran Road	60	0	38,000	38,000			Yes	Institutional	25	2.40

## Elmvale and Midhurst Developed Population-Related Employment Land Inventory, 2020

Urban Area	OBJECTID_1	Official Plan Designation	Status	Business Name	Address	Estimated Employees	Vacant Non-Residential Estimated Sq.ft.	Occupied Non-Residential Estimated Sq.ft.	Total Non-Residential Estimated Sq.ft.	Included in Retail and Commercial Analysis	Midhurst Bayfield Street Corridor	Institutional Use	Main Sector Use	Estimated Employment Density (jobs/ha)	Land Area (ha)
Elmvale	1	General Commercial	Developed	Whitfield's Pharmacy - Guardian Pharmacy	16 Queen Street West	10	0	5,000	5,000	Yes			Retail	117	0.09
Elmvale	2	General Commercial	Developed	Jacks on Queen	18 Queen Street West	2	0	1,500	1,500	Yes			Retail	46	0.04
Elmvale	3	General Commercial	Developed	Healing Hands - Massage Therapy	36 Queen Street West	2	0	900	900	Yes			Health & Personal Care	64	0.03
Elmvale	4	General Commercial	Developed	Vacant (former coffee shop)	2 Queen Street West	7	1,900	0	1,900	Yes			Vacant Building Space	161	0.04
Elmvale	5	General Commercial	Developed	Brent Advantage Homes & Law Office	4 Queen Street West	1	0	1,000	1,000	Yes			Office	22	0.05
Elmvale	6	General Commercial	Developed	Be-Still Bridge of Bookstore	6 Queen Street West	1	0	900	900	Yes			Retail	48	0.02
Elmvale	7	General Commercial	Developed	Classique Dimension Family Hair Care	8 Queen Street West	3	0	1,300	1,300	Yes			Health & Personal Care	128	0.02
Elmvale	8	General Commercial	Developed	Heacock John H (Lawyer)	12 Queen Street West	2	0	1,000	1,000	Yes			Office	82	0.02
Elmvale	9	General Commercial	Developed	Bounce Back Physio	22 Queen Street West	3	0	3,200	3,200	Yes			Health & Personal Care	87	0.03
Elmvale	10	General Commercial	Developed	Main St Market Bazaar	24 Queen Street West	1	0	1,000	1,000	Yes			Retail	24	0.04
Elmvale	11	General Commercial	Developed	The Tiny Art Shack	34 Queen Street West	1	0	1,500	1,500	Yes			Retail	14	0.07
Elmvale	12	General Commercial	Developed	Ian Vasey Professional Col/Raymond Jones	42 Queen Street West	5	0	1,900	1,900	Yes			Office	69	0.07
Elmvale	13	General Commercial	Developed	Foodland	14 Yonge Street North	45	0	18,000	18,000	Yes			Retail	137	0.33
Elmvale	14	General Commercial	Developed	The Beer Store	58 Queen Street West	4	0	4,700	4,700	Yes			Retail	39	0.10
Elmvale	17	General Commercial	Developed	Pharmasave (3,000), Subway, Home (1,500) Hardware Design Ctr (1,500)	70 Yonge Street South	16	0	5,700	5,700	Yes			Retail	66	0.24
Elmvale	19	General Commercial	Developed	Vacant (2,500) (frm. Watson Sports)	5 Queen Street East	1	2,500	0	2,500	Yes			Vacant Building Space	10	0.10
Elmvale	20	General Commercial	Developed	Circle K	1 Yonge Street South	5	0	3,600	3,600	Yes			Retail	45	0.11
Elmvale	21	General Commercial	Developed	Life's a Slice	13 Yonge Street South	3	0	1,200	1,200	Yes			Retail	44	0.07
Elmvale	23	General Commercial	Developed	Jennifers Grooming	9 Queen Street East	2	0	1,500	1,500	Yes			Personal Services	89	0.02
Elmvale	26	General Commercial	Developed	Palace Tavern/Pizza Forno Kiosk	13 Queen Street West	2	0	3,800	3,800	Yes			Retail	19	0.11
Elmvale	28	General Commercial	Developed	G&S Computers & Vacant (1,000 sq.ft)	9 Queen Street West	4	1,000	2,000	3,000	Yes			Retail	39	0.10
Elmvale	29	General Commercial	Developed	Darlene's Hair Design	19 Queen Street West	3	0	1,500	1,500	Yes			Personal Services	63	0.05
Elmvale	30	General Commercial	Developed	Clayton Chiropractic & A New Leaf- Sarah Joy Covey	21 Queen Street West	3	0	1,300	1,300	Yes			Health & Personal Care	49	0.06
Elmvale	31	General Commercial	Developed	Steelers Restaurant & Pub	23 Queen Street West	20	0	2,200	2,200	Yes			Retail	627	0.03
Elmvale	32	General Commercial	Developed	Vacant (3,300 sq.ft.)	29 Queen Street West	2	3,300	0	3,300	Yes			Vacant Building Space	32	0.06
Elmvale	34	General Commercial	Developed	Country Diner (1,000) & Hearing Centre (1,000)	10 Yonge Street South	5	0	2,000	2,000	Yes			Retail	63	0.08
Elmvale	36	General Commercial	Developed	Liberty Tax Canada (1,500), Service Ontario (1,500), 1 vacant unit (1,500)	40 Yonge Street South	5	1,500	3,000	4,500	Yes			Retail	43	0.12
Elmvale	39	General Commercial	Developed	McDonalds (4,000), Vacant(1,500), Convenience Store (1,500), Remax (1,000)	24 Yonge Street South	42	1,500	6,500	8,000	Yes			Retail	94	0.45
Elmvale	40	General Commercial	Developed	Ace Grill (2,000), Clover Variety (1,000), B2s Pizza (1,000)	34 Yonge Street South	11	0	4,000	4,000	Yes			Retail	69	0.16

## Elmvale and Midhurst Developed Population-Related Employment Land Inventory, 2020

Urban Area	OBJECTID_1	Official Plan Designation	Status	Business Name	Address	Estimated Employees	Total Vacant Non-Residential Estimated Sq.ft.	Total Occupied Non-Residential Estimated Sq.ft.	Total Non-Residential Estimated Sq.ft.	Included in Retail and Commercial Analysis	Midhurst Bayfield Street Corridor	Institutional Use	Main Sector Use	Estimated Employment Density (jobs/ha)	Land Area (ha)
Elmvale	41	General Commercial	Developed	Beacock's Auto Service	46 Yonge Street South	4	0	2,200	2,200	Yes			Automotive	33	0.12
Elmvale	42	General Commercial	Developed	Solly Family Dentistry	58 Yonge Street South	12	0	5,000	5,000	Yes			Health & Personal Care	82	0.15
Elmvale	43	General Commercial	Developed	Tim Hortons	68 Yonge Street South	39	0	2,700	2,700	Yes			Retail	163	0.24
Elmvale	44	General Commercial	Developed	Elm Flower Shoppe	52 Yonge Street South	2	0	3,100	3,100	Yes			Retail	16	0.12
Elmvale	45	General Commercial	Developed	Carquest Auto Parts - Elmvale Auto Supply	141 Queen Street West	5	0	3,000	3,000	Yes			Automotive	22	0.23
Elmvale	46	General Commercial	Developed	The Corner Cut (Hair Salon)	2 Queen Street East	3	0	1,400	1,400	Yes			Personal Services	59	0.05
Elmvale	47	General Commercial	Developed	The Wicker Place	3 Yonge Street North	4	0	6,300	6,300	Yes			Retail	30	0.13
Elmvale	55	General Commercial	Developed	OK Tire	7 Yonge Street North	5	0	3,000	3,000	Yes			Automotive	72	0.07
Elmvale	66	General Commercial	Developed	Elmvale Rental Supply	121 Yonge Street South	3	0	2,200	2,200	Yes			Building Materials	3	1.12
Elmvale	67	General Commercial	Developed	Home Hardware Building Centre	121 Simcoe County Rd 27	20	0	11,000	11,000	Yes			Building Materials	32	0.62
Elmvale	71	General Commercial	Developed	DLC Key Mortgage Partners	10 Queen Street West	4	0	2,000	2,000	Yes			Office	182	0.02
Elmvale	72	General Commercial	Developed	Elmvale Eye Care	14 Queen Street West	4	0	1,700	1,700	Yes			Health & Personal Care	89	0.04
Elmvale	74	General Commercial	Developed	The Village Shoppe	26 Queen Street West	4	0	1,700	1,700	Yes			Retail	119	0.03
Elmvale	75	General Commercial	Developed	Kimberley's Cafe	28 Queen Street West	4	0	1,800	1,800	Yes			Retail	58	0.07
Elmvale	77	General Commercial	Developed	Elmvale Bakery	32 Queen Street West	5	0	4,400	4,400	Yes			Retail	61	0.08
Elmvale	80	General Commercial	Developed	Elmvale Diner	46 Queen Street West	4	0	1,200	1,200	Yes			Retail	67	0.06
Elmvale	131	General Commercial	Developed	Elmvale Veterinary Hospital	69 Yonge Street South	6	0	4,000	4,000	Yes			Health & Personal Care	16	0.38
Elmvale	134	General Commercial	Developed	Yummi Yummi Treats	25 Queen Street West	2	0	1,000	1,000	Yes			Retail	75	0.03
Elmvale	141	General Commercial	Developed	Canada Post	18 Stone Street	5	0	2,500	2,500	Yes			Industrial	44	0.11
Elmvale	164	General Commercial	Developed	Car Wash	135 Queen Street West	2	0	3,000	3,000	Yes			Automotive	11	0.18
Elmvale	178	General Commercial	Developed	ECC - Cleadon Hall Collectibles	10 Queen Street East	2	0	2,000	2,000	Yes			Retail	119	0.02
Elmvale	261	General Commercial	Developed	The Cheese Guy	77 Yonge Street South	2	0	1,600	1,600	Yes			Retail	12	0.16
Elmvale	68	General Commercial	Developed	Springwater Lanes Bowling/Bourgeois Elmvale	120 Yonge Street North	7	0	7,700	7,700	Yes			Recreational	7	0.96
Elmvale	58	Urban Residential	Developed	LCBO	10 Shaw St	3	0	5,200	5,200	Yes			Retail	16	0.19
Elmvale	76	General Commercial	Developed	The Laundromat	30 Queen Street West	2	0	3,000	3,000	Yes			Other Commercial	26	0.08
Elmvale	155	General Commercial	Developed	Food Bank (social services)	62 Yonge Street South	5	0	3,000	3,000			Yes	Institutional	52	0.10
Elmvale	179	General Commercial	Developed	Elmvale Community Church	12 Queen Street East	2	0	2,100	2,100			Yes	Institutional	59	0.03
Elmvale	92	General Commercial	Developed	Elmvale Public Library	50 Queen St W	10	0	6,000	6,000			Yes	Institutional	160	0.06
Elmvale	106	General Commercial	Developed	Catholic Teachers Association	20 Yonge Street South	7	0	2,700	2,700			Yes	Institutional	93	0.08
Elmvale	15	Institutional	Developed	Recreational	14 George Street	5	0	32,000	32,000			Yes	Recreational/Public Facility	7	0.70
Elmvale	16	Institutional	Developed	Church	20 Yonge Street North	2	0	5,600	5,600			Yes	Place of Worship	18	0.11

## Elmvale and Midhurst Developed Population-Related Employment Land Inventory, 2020

Urban Area	OBJECTID_1	Official Plan Designation	Status	Business Name	Address	Estimated Employees	Total Vacant Non-Residential Estimated Sq.ft.	Total Occupied Non-Residential Estimated Sq.ft.	Total Non-Residential Estimated Sq.ft.	Included in Retail and Commercial Analysis	Midhurst Bayfield Street Corridor	Institutional Use	Main Sector Use	Estimated Employment Density (jobs/ha)	Land Area (ha)
Elmvale	136	General Commercial	Developed	Elmvale Community Hall, Springwater Health Service	33 Queen Street West	20	0	13,500	13,500			Yes	Institutional	47	0.43
Elmvale	22	General Commercial	Developed	Lynn Stone Funeral Homes Inc	15 Yonge Street South	4	0	5,500	5,500			Yes	Institutional - Other	26	0.16
Elmvale	27	General Commercial	Developed	Elmvale Health Care Centre	12 Stone Street	11	0	9,200	9,200			Yes	Health Services	99	0.11
Elmvale	38	General Commercial	Developed	Royal Canadian Legion Branch 262	7 John Street	2	0	6,000	6,000			Yes	Recreational/Public Facility	6	0.33
Elmvale	18	Institutional	Developed	St. John's Church	27 Yonge Street South	4	0	3,900	3,900			Yes	Place of Worship	36	0.11
Elmvale	24	Institutional	Developed	Sara Vista Long Term Care Home	27 Simcoe Street	65	0	22,000	22,000			Yes	Place of Worship	25	2.58
Elmvale	25	Institutional	Developed	Huronian Centennial Elementary School	28 Simcoe Street	34	0	35,000	35,000			Yes	School	8	4.49
Elmvale	37	Institutional	Developed	Elmvale District High School	25 Lawson Avenue	45	0	50,000	50,000			Yes	School	13	3.59
Elmvale	114	Institutional	Developed	Elmvale Adult Day Program	23 Yonge Street South	8	0	4,400	4,400			Yes	Institutional - Other	55	0.15
Elmvale	158	Institutional	Developed	Coronation Masonic Hall Inc	71 Queen Street West	1	0	2,000	2,000			Yes	Recreational/Public Facility	29	0.03
Elmvale	180	Institutional	Developed	Our Lady of Lourdes Separate School	34 Kerr St	35	0	22,000	22,000			Yes	School	14	2.51
Elmvale	264	Institutional	Developed	Our Lady of Lourdes Roman Catholic Church	106 Yonge St N	1	0	1,700	1,700			Yes	Place of Worship	1	1.14
Elmvale	118	General Commercial	Developed	Pine Rock Mechanical Services	37 Yonge Street South	5	0	2,000	2,000				Industrial	45	0.11
Elmvale	265	General Commercial	Developed	Hapamp Ltd (Utility contractor)	100 Yonge Street North	20	0	2,000	2,000				Industrial	22	0.91
Elmvale	93	General Commercial	Developed	Red Brick Kitchens and Bath	54 Queen Street West	3	0	1,200	1,200				Industrial	51	0.06
Elmvale	35	General Commercial	Developed	Superior Facility Services	8 Yonge Street South	8	0	4,000	4,000				Industrial	105	0.08
Elmvale	137	General Commercial	Developed	Bell Station	59 Queen Street West	2	0	2,400	2,400				Industrial	17	0.12
Elmvale	108	General Commercial	Developed	Developed Industrial	17 Thurlow Street	5	0	2,000	2,000				Industrial	142	0.04
<b>Total</b>						<b>1,504</b>	<b>18,700</b>	<b>866,000</b>	<b>884,700</b>					<b>28</b>	<b>54</b>

Source: Watson & Associates Economists Ltd., June 2020.



# Appendix G

## Midhurst Bayfield Street Corridor Sites

# Analysis of Developed Sites within Bayfield Street Corridor

<b>Site 245</b>				
<b>1005 Snow Valley Road</b>		West Side of Bayfield Street		
Snow Valley Road/Bayfield Street, SW				
Type:	Single-Tenant			
Entrance to Bayfield Street:	No			
Gross Floor Area (sq.ft.):	11,000			
Leasable Units (Count):	1			
Occupied Space (sq.ft.):	11,000			
Vacant Space (sq.ft.):	0			
Vacant Rate (%):	0%			
Land Area (hectares):	0.26			
Building Coverage (%):	39%			
Employment:	9			
Density (net jobs/ha):	35			
Floor Space per Worker (F.S.W.)	1,220			
Image Source: Google Earth				
Tenants:	Category	Employment	Sq.ft.	F.S.W.
Coby Windows and Doors	Building Materials	9	11,000	1,220
Total		9	11,000	1,220



<b>Site 65</b>				
<b>1152 Bayfield Street North</b>		West Side of Bayfield Street		
Snow Valley Road/Bayfield Street, SW				
Type:	Single-Tenant			
Entrance to Bayfield Street:	Yes			
Gross Floor Area (sq.ft.):	5,600			
Leasable Units (Count):	1			
Occupied Space (sq.ft.):	5,600			
Vacant Space (sq.ft.):	0			
Vacant Rate (%):	0%			
Land Area (hectares):	1.49			
Building Coverage (%):	3%			
Employment:	4			
Density (net jobs/ha):	3			
Floor Space per Worker (F.S.W.)	1,400			
Image Source: Google Earth				
Tenants:	Category	Employment	Sq.ft.	F.S.W.
Midhurst Oil Tech	Automotive Services	4	5,600	1,400
Laydown Yard	n/a	unknown	n/a	n/a
Total		4	5,600	1,400



# Analysis of Developed Sites within Bayfield Street Corridor

Site 63	
<b>2 Currie Drive</b>	
Snow Valley Road/Bayfield Street, SW West Side of Bayfield Street	
Type:	Single-Tenant
Entrance to Bayfield Street:	No
Gross Floor Area (sq.ft.):	40,000
Leasable Units (Count):	1
Occupied Space (sq.ft.):	40,000
Vacant Space (sq.ft.):	0
Vacant Rate (%):	0%
Land Area (hectares):	3.22
Building Coverage (%):	12%
Employment:	70
Density (net jobs/ha):	22
Floor Space per Worker (F.S.W.)	570



Image Source: Google Earth

Tenants:	Category	Employment	Sq.ft.	F.S.W.
Currie Truck Centre	Industrial	70	40,000	570
<b>Total</b>		<b>70</b>	<b>40,000</b>	<b>570</b>

Site 64	
<b>2 Currie Drive</b>	
Snow Valley Road/Bayfield Street, SW West Side of Bayfield Street	
Type:	Single-Tenant
Entrance to Bayfield Street:	No
Gross Floor Area (sq.ft.):	3,700
Leasable Units (Count):	1
Occupied Space (sq.ft.):	3,700
Vacant Space (sq.ft.):	0
Vacant Rate (%):	0%
Land Area (hectares):	0.21
Building Coverage (%):	17%
Employment:	4
Density (net jobs/ha):	19
Floor Space per Worker (F.S.W.)	925



Image Source: Google Earth

Tenants:	Category	Employment	Sq.ft.	F.S.W.
Auto Trim & Design	Industrial	4	3,700	925
<b>Total</b>		<b>4</b>	<b>3,700</b>	<b>925</b>

# Analysis of Developed Sites within Bayfield Street Corridor

<b>Site 5</b>				
<b>7 Currie Drive</b>		West Side of Bayfield Street		
Snow Valley Road/Bayfield Street, SW				
Type:	Recreational			
Entrance to Bayfield Street:	No			
Gross Floor Area (sq.ft.):	5,100			
Leasable Units (Count):	1			
Occupied Space (sq.ft.):	5,100			
Vacant Space (sq.ft.):	0			
Vacant Rate (%):	0%			
Land Area (hectares):	2.85			
Building Coverage (%):	2%			
Employment:	6			
Density (net jobs/ha):	2			
Floor Space per Worker (F.S.W.)	850			
Image Source: Google Earth				
Tenants:	Category	Employment	Sq.ft.	F.S.W.
Barrie Soccer Club	Recreational	6	5,100	850
Total		6	5,100	850



<b>Site 201</b>				
<b>1237 Bayfield Street North</b>		East Side of Bayfield Street		
Snow Valley Road/Bayfield Street, NE				
Type:	Multi-Tenant			
Entrance to Bayfield Street:	Yes			
Gross Floor Area (sq.ft.):	20,000			
Leasable Units (Count):	2			
Occupied Space (sq.ft.):	20,000			
Vacant Space (sq.ft.):	0			
Vacant Rate (%):	0%			
Land Area (hectares):	0.66			
Building Coverage (%):	28%			
Employment:	15			
Density (net jobs/ha):	23			
Floor Space per Worker (F.S.W.)	1,335			
Image Source: Google Earth				
Tenants:	Category	Employment	Sq.ft.	F.S.W.
ServPro - Building 1	Construction	15	8,000	1,335
ServPro - Building 2	Construction		12,000	
Total		15	20,000	1,335



# Analysis of Developed Sites within Bayfield Street Corridor

<b>Site 54</b>	
<b>1179 Bayfield Street North</b>	
Snow Valley Road/Bayfield Street, NE East Side of Bayfield Street	
Type:	Non-Anchor Plaza
Entrance to Bayfield Street:	Yes
Gross Floor Area (sq.ft.):	14,500
Leasable Units (Count):	7
Occupied Space (sq.ft.):	11,500
Vacant Space (sq.ft.):	3,000
Vacant Rate (%):	21%
Land Area (hectares):	0.42
Building Coverage (%):	32%
Employment:	25
Density (net jobs/ha):	59
Floor Space per Worker (F.S.W.):	460



Image Source: Watson & Associates Economists Ltd.

Tenants:	Category	Employment	Sq.ft.	F.S.W.
Circle K	Food Store	5	4,600	920
Elements Salon & Spa (2 units)	Personal Services	7	3,800	545
Canton Chinese Restaurant	Restaurant	4	1,600	400
Subway Restaurant	Restaurant	9	1,500	165
<b>Total</b>		<b>25</b>	<b>11,500</b>	<b>460</b>

<b>Site 214</b>	
<b>1139 Bayfield Street North</b>	
Snow Valley Road/Bayfield Street, NE East Side of Bayfield Street	
Type:	Single-Tenant
Entrance to Bayfield Street:	Yes
Gross Floor Area (sq.ft.):	1,800
Leasable Units (Count):	1
Occupied Space (sq.ft.):	1,800
Vacant Space (sq.ft.):	0
Vacant Rate (%):	0%
Land Area (hectares):	0.16
Building Coverage (%):	11%
Employment:	5
Density (net jobs/ha):	32
Floor Space per Worker (F.S.W.):	360



Image Source: Google Earth

Tenants:	Category	Employment	Sq.ft.	F.S.W.
Barrie Fabric Glass Pools	Building Materials	5	1,800	360
<b>Total</b>		<b>5</b>	<b>1,800</b>	<b>360</b>

# Analysis of Developed Sites within Bayfield Street Corridor

<b>Site 216</b>	
<b>1179 Bayfield Street North</b>	
Snow Valley Road/Bayfield Street, NE East Side of Bayfield Street	
Type:	Single-Tenant
Entrance to Bayfield Street:	Yes
Gross Floor Area (sq.ft.):	10,000
Leasable Units (Count):	1
Occupied Space (sq.ft.):	10,000
Vacant Space (sq.ft.):	0
Vacant Rate (%):	0%
Land Area (hectares):	0.71
Building Coverage (%):	13%
Employment:	15
Density (net jobs/ha):	21
Floor Space per Worker (F.S.W.)	665



Image Source: Google Earth

Tenants:	Category	Employment	Sq.ft.	F.S.W.
93.1 Fresh FM Radio	Office	15	10,000	665
<b>Total</b>		<b>15</b>	<b>10,000</b>	<b>665</b>

<b>Site 10</b>	
<b>1060 Bayfield Street North</b>	
Snow Valley Road/Bayfield Street, SW West Side of Bayfield Street	
Type:	Single-Tenant
Entrance to Bayfield Street:	Yes
Gross Floor Area (sq.ft.):	15,000
Leasable Units (Count):	1
Occupied Space (sq.ft.):	0
Vacant Space (sq.ft.):	15,000
Vacant Rate (%):	100%
Land Area (hectares):	0.79
Building Coverage (%):	18%
Employment:	0
Density (net jobs/ha):	0
Floor Space per Worker (F.S.W.)	0



Image Source: Google Earth

Note: Recently approved for redesignation to commercial.

Tenants:	Category	Employment	Sq.ft.	F.S.W.
Vacant Commercial (former landscaping operation)	Vacant	0	0	0
<b>Total</b>		<b>0</b>	<b>0</b>	<b>0</b>

# Analysis of Developed Sites within Bayfield Street Corridor

<b>Site 59</b>				
<b>1027 Bayfield Street North</b>				
Carson Road/Bayfield Street, NE		East Side of Bayfield Street		
Type:	Multi-Tenant			
Entrance to Bayfield Street:	Yes			
Gross Floor Area (sq.ft.):	7,300			
Leasable Units (Count):	4			
Occupied Space (sq.ft.):	6,300			
Vacant Space (sq.ft.):	1,000			
Vacant Rate (%):	14%			
Land Area (hectares):	0.56			
Building Coverage (%):	12%			
Employment:	18			
Density (net jobs/ha):	32			
Floor Space per Worker (F.S.W.)	350			
Image Source: Watson & Associates Economists Ltd.				
Tenants:	Category	Employment	Sq.ft.	F.S.W.
Ice Cream Kiosk	Restaurant	2	500	250
Linda's Restaurant	Restaurant	5	2,000	400
Barrie Pool & Patio	Building Materials	11	3,800	345
Vacant Unit (1,000 sq.ft.)				
<b>Total</b>		<b>18</b>	<b>6,300</b>	<b>350</b>

<b>Site 60</b>				
<b>1013 Bayfield Street North</b>				
Carson Road/Bayfield Street, NE		East Side of Bayfield Street		
Type:	Service Station			
Entrance to Bayfield Street:	Yes			
Gross Floor Area (sq.ft.):	3,200			
Leasable Units (Count):	2			
Occupied Space (sq.ft.):	2,200			
Vacant Space (sq.ft.):	1,000			
Vacant Rate (%):	31%			
Land Area (hectares):	0.36			
Building Coverage (%):	8%			
Employment:	4			
Density (net jobs/ha):	11			
Floor Space per Worker (F.S.W.)	550			
Image Source: Google Earth				
Tenants:	Category	Employment	Sq.ft.	F.S.W.
Husky Gas Station	Automotive Services	4	2,000	500
Vacant Unit (1,000 sq.ft.)				
<b>Total</b>		<b>4</b>	<b>2,000</b>	<b>500</b>

# Analysis of Developed Sites within Bayfield Street Corridor

<b>Site 171</b>	
<b>1004 Carson Road</b>	
Carson Road/Bayfield Street, SE East Side of Bayfield Street	
Type:	Multi-Tenant
Entrance to Bayfield Street:	No
Gross Floor Area (sq.ft.):	11,200
Leasable Units (Count):	2
Occupied Space (sq.ft.):	9,200
Vacant Space (sq.ft.):	2,000
Vacant Rate (%):	18%
Land Area (hectares):	1.05
Building Coverage (%):	10%
Employment:	50
Density (net jobs/ha):	48
Floor Space per Worker (F.S.W.)	185



Image Source: Google Earth

Tenants:	Category	Employment	Sq.ft.	F.S.W.
Kapty & Associates	Office	4	2,000	500
Noble Insurance	Office	14	2,200	155
Status Salon	Personal Services	5	2,000	400
Exit Lifestyle Realty	Office	27	4,000	148
Vacant Unit (2,000 sq.ft.)				
<b>Total</b>		<b>50</b>	<b>10,200</b>	<b>204</b>

<b>Site 193</b>	
<b>1017 Carson Road</b>	
Carson Road/Bayfield Street, SW West Side of Bayfield Street	
Type:	Medical Centre
Entrance to Bayfield Street:	No
Gross Floor Area (sq.ft.):	12,000
Leasable Units (Count):	unknown
Occupied Space (sq.ft.):	12,000
Vacant Space (sq.ft.):	0
Vacant Rate (%):	0%
Land Area (hectares):	0.55
Building Coverage (%):	20%
Employment:	30
Density (net jobs/ha):	55
Floor Space per Worker (F.S.W.)	400



Image Source: Watson & Associates Economists Ltd.

Tenants:	Category	Employment	Sq.ft.	F.S.W.
PharmaChoice	Health & Personal Care	5	unknown	
Springwater Dental	Health Services	5	unknown	
Other Health Care Uses	Health Services	20	unknown	
<b>Total</b>		<b>30</b>	<b>12,000</b>	<b>400</b>

# Analysis of Developed Sites within Bayfield Street Corridor

<b>Site 209</b>	
<b>1285 Bayfield Street North</b>	
Highway 26/Bayfield Street, SE	East Side of Bayfield Street
Type:	Single-Tenant
Entrance to Bayfield Street:	Yes
Gross Floor Area (sq.ft.):	6,200
Leasable Units (Count):	2
Occupied Space (sq.ft.):	0
Vacant Space (sq.ft.):	6,200
Vacant Rate (%):	100%
Land Area (hectares):	0.53
Building Coverage (%):	11%
Employment:	0
Density (net jobs/ha):	0
Floor Space per Worker (F.S.W.):	0



Image Source: Google Earth

Tenants:	Category	Employment	Sq.ft.	F.S.W.
Vacant				
Total		0	0	0

<b>Site 16</b>	
<b>26 Spence Ave</b>	
Highway 26/Bayfield Street, SE	East Side of Bayfield Street
Type:	Single-Tenant
Entrance to Bayfield Street:	No
Gross Floor Area (sq.ft.):	2,400
Leasable Units (Count):	2
Occupied Space (sq.ft.):	2,400
Vacant Space (sq.ft.):	0
Vacant Rate (%):	0%
Land Area (hectares):	0.38
Building Coverage (%):	6%
Employment:	3
Density (net jobs/ha):	8
Floor Space per Worker (F.S.W.):	0



Image Source: Google Earth

Tenants:	Category	Employment	Sq.ft.	F.S.W.
Springwater Trailers and Equipment	Construction	3	2,400	800
Total		3	2,400	800

# Analysis of Developed Sites within Bayfield Street Corridor

<b>Site 174</b>	
<b>1319 Bayfield Street North</b>	
Highway 26/Bayfield Street, SE	East Side of Bayfield Street
Type:	Single-Tenant
Entrance to Bayfield Street:	Yes
Gross Floor Area (sq.ft.):	6,300
Leasable Units (Count):	1
Occupied Space (sq.ft.):	6,300
Vacant Space (sq.ft.):	0
Vacant Rate (%):	0%
Land Area (hectares):	0.55
Building Coverage (%):	11%
Employment:	4
Density (net jobs/ha):	7
Floor Space per Worker (F.S.W.)	1,575



Image Source: Google Earth

Tenants:	Category	Employment	Sq.ft.	F.S.W.
Mason's Masonry	Construction	4	6,300	1,575
Total		4	6,300	1,575

<b>Site 18</b>	
<b>41 Spence Avenue</b>	
Highway 26/Bayfield Street, NE	East Side of Bayfield Street
Type:	Recreational Lands
Entrance to Bayfield Street:	No
Gross Floor Area (sq.ft.):	4,500
Leasable Units (Count):	n/a
Occupied Space (sq.ft.):	4,500
Vacant Space (sq.ft.):	0
Vacant Rate (%):	0%
Land Area (hectares):	2.65
Building Coverage (%):	2%
Employment:	6
Density (net jobs/ha):	2
Floor Space per Worker (F.S.W.)	750



Image Source: Google Earth

Tenants:	Category	Employment	Sq.ft.	F.S.W.
Barrie North Winter Tennis	Recreational Lands	6	4,500	750
Total		6	4,500	750

# Analysis of Developed Sites within Bayfield Street Corridor

Site 192				
8 Finley Mill Road				
East of Snow Valley Road and Bayfield Street Intersection				
Type:	Single-Tenant			
Entrance to Bayfield Street:	No			
Gross Floor Area (sq.ft.):	5,000			
Leasable Units (Count):	1			
Occupied Space (sq.ft.):	5,000			
Vacant Space (sq.ft.):	0			
Vacant Rate (%):	0%			
Land Area (hectares):	0.17			
Building Coverage (%):	28%			
Employment:	10			
Density (net jobs/ha):	59			
Floor Space per Worker (F.S.W.)	500			
Image Source: Google Earth				
Tenants:	Category	Employment	Sq.ft.	F.S.W.
Baywood Animal Hospital	Health Services	10	5,000	500
Total		10	5,000	500

