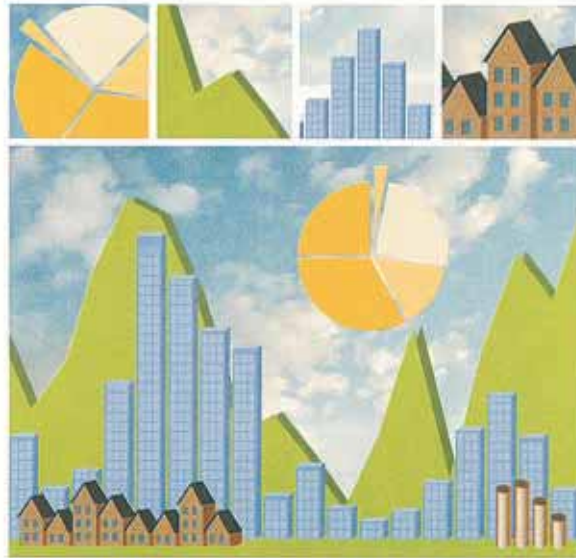


Retail Market Opportunity and Impact Analysis Holborn Lands, Town of Collingwood (Revised)



CLAYTON
RESEARCH

**Retail Market Opportunity
and Impact Analysis
Holborn Lands, Town of
Collingwood (Revised)**

Prepared for:

Holborn Property Investments Inc.

Prepared by:

Clayton Research Associates Limited

1580 Kingston Road Toronto Ontario M1N 1S2

Phone: (416) 699-5645 Fax: (416) 699-2252

clayton@clayton-research.com

www.clayton-research.com

November 28, 2006

EXECUTIVE SUMMARY

Clayton Research was retained by Holborn Property Investments Inc. ("Holborn") to provide retail market research and consulting advice regarding a site located in the Town of Collingwood.

Clayton Research was asked to prepare a market analysis assessing the opportunity for and impact of a proposed retail development and provide guidance as to the retail mix that could potentially be accommodated at this location, recognizing existing and planned area developments and the Town's planning policies and directions. This report also assesses the implications of the Holborn proposal for employment land needs in Collingwood.

This report is a revised version of the earlier report of the same name. This revised report incorporates changes recommended by Malone Given Parsons, the peer reviewer retained by the Town of Collingwood.

Development Proposal

Holborn is proposing to develop its 43.26 acre parcel for approximately 482,965 sq. ft. of retail commercial floor space, including an 85,430 sq. ft. Home Depot store which is a permitted use on the industrially designated lands. The intention is to create a power centre tenanted mostly with mid-sized new format retailers that will complement the existing retail facilities in the Town.

The amount of retail commercial floor space being requested requiring the redesignation of industrial lands is 397,535 sq. ft. (482,965 sq. ft. less the 85,430 sq. ft. Home Depot).

Holborn is intending to develop a power centre targeting mid-sized new format retailers (having a minimum size of 3,000 sq. ft. of retail floor space). However, it is recognized that a component of smaller commercial retail outlets is required as well for the viability of the project and to service shoppers. As a general guideline, Holborn is proposing to develop approximately 20 percent of the total floor space excluding the Home Depot (the 397,535 sq. ft.) with retail commercial outlets with less than 3,000 sq. ft. of floor space.

Site Description and Evaluation

The lands under consideration in this study are the former Harding Carpet lands and are located to the south of the recently built Wal-Mart store in the Town of Collingwood. The lands abut the southern boundary of the Town's existing Western Commercial Node.

The subject lands are very suitable for the power centre uses being proposed.

Trade Area Description and Analysis

The Trade Area for Collingwood retail facilities and the subject lands is divided into two components: the Primary Trade Area and the Secondary Trade Area. The Trade Area for the subject site is delineated as follows:

- The Primary Trade Area consisting of the Town of Collingwood; and
- The Secondary Trade Area consisting of the Town of The Blue Mountains (formerly Town of Thornbury and Township of Collingwood), the former Township of Osprey (now part of the Municipality of Grey Highlands), the Township of Clearview (formerly the Township of Nottawasaga and the Township of Sunnidale), and the Town of Wasaga Beach.

Strong population growth is forecast to continue in the Trade Area. The Trade Area's permanent population is anticipated to increase from 52,815 persons in 2001 to 67,112 persons in 2010, 71,920 persons in 2013 and 78,360 persons in 2017. Growth is expected to be centred in the Secondary Trade Area, most notably in the Town of Blue Mountains and the Town of Wasaga Beach. The seasonal population in the Trade Area is expected to increase by 16,590 persons from an estimated 22,350 persons in 2001 to 38,940 in 2017.

There is approximately 126,700 sq. ft. of vacant commercial space located in the Town of Collingwood, resulting in an overall vacancy rate of approximately 6.9 percent (5.1 percent without the vacant former Canadian Tire Store). The vacancy rate in the Downtown is a relatively low 4.6 percent. These levels of vacancies are consistent with a healthy retail market place.

Inflows of shoppers to the Downtown and Western Commercial Node from outside the defined Trade Area are quite similar with the Downtown attracting somewhat more vehicles from beyond the Trade Area. Shoppers with permanent residences outside the Trade Area account for 27.6 percent

of all shoppers. The fact that the Downtown is drawing relatively more of its shoppers from outside the Trade Area than the Western Commercial Node is another indicator of a healthy retail market in the Downtown.

The telephone survey of Trade Area residents shows that:

- Collingwood residents do most of their food store shopping in Collingwood (91.0 percent of supermarket spending), however, in places such as Wasaga Beach and Clearview Township, less than one-third of food spending by residents is done in Collingwood;
- For Department Stores, the Zellers and Wal-Mart stores in Collingwood are accounting for 77.5 percent of the Department Store spending by Collingwood residents and just over half of the spending by Secondary Trade Area residents; and
- For Home Improvement Stores and all Non-Food Stores other than Department Stores, there are sizeable leakages of spending to stores outside the Trade Area, mainly in Barrie. Over a third of spending by Collingwood residents and about 60 percent of spending by Secondary Trade Area residents are in stores outside the Trade Area.

Competition from Wasaga Beach

Recently, Wasaga Beach has emerged as a threat to Collingwood's retail hegemony in its Trade Area with three large-scale retail anchors built or planned, and ample lands available to accommodate further retail expansion. While Collingwood, because of its size and location, is the preferred location for smaller box and related retailers wanting to locate near big box anchors, there is a danger that they could locate in Wasaga Beach by default if Collingwood does not have available sites. Expansion of lands in the Western Commercial Node is essential to ward off this erosion of Collingwood's retail commercial potential to Wasaga Beach. The Holborn lands are the prime expansion lands for the Western Commercial Node.

Market Opportunity Analysis for the Subject Lands

The actual tenant mix by category of store on the subject lands will be a function of retailer interest in the Collingwood market and the subject lands and their assessment of the competitive strength of existing retailers as well as underlying market opportunity. The amount of retail floor space to be built on the subject lands is expected to exceed the opportunity identified through the residual market analysis.

The retail opportunities for the subject lands include a supermarket with about 55,000 sq. ft. of floor space, 20,000 sq. ft. of Specialty Food floor space, 238,000 sq. ft. of Non-Food Type Merchandise floor space and about 85,000 sq. ft. of Service and Restaurant floor space. The total floor space, excluding the Home Improvement Centre, is about 398,000 sq. ft.

Potential Retail Commercial Tenant Mix for the Subject Lands

	Phase 1	Phase 2	Phase 3	Total
	<i>Square Feet (Gross Leasable Floor Area)</i>			
Supermarket	25,000	20,000	10,000	55,000
Specialty Food	10,000	5,000	5,000	20,000
Non-Food Type Merchandise ¹				
Clothing and Accessories Stores	22,500	17,500	15,000	55,000
Furniture, Home Furnishings & Electronic Stores	40,000	10,000	15,000	65,000
Pharmacies & Personal Care Stores	10,000	5,000	5,000	20,000
Miscellaneous Retail Stores	38,000	30,000	30,000	98,000
Total Non-Food Type Merchandise	110,500	62,500	65,000	238,000
Services (including Restaurants)	35,000	30,000	20,000	85,000
Total (w ithout Home Improvement Centre)	180,500	117,500	100,000	398,000
Home Improvement Centre	85,000	0	0	85,000
Total (w ith Home Improvement Centre)	265,500	117,500	100,000	483,000

¹ Excludes Department Stores and Home and Auto Supply Stores.

All figures are rounded to the nearest thousand.

Source: Clayton Research Based On Residual Analysis Figures 14-23 and Concept Tenant Mix

IMPACT ANALYSES

Retail Impact Analysis by Store Category

The proposed retail centre on the subject lands will enhance the retail experience of Trade Area residents by enriching the array of stores available to them in Collingwood. Additional square footage in Clothing and Accessories, Furniture, Home Furnishings, Electronics and Miscellaneous Retail will reduce the instance of local shoppers going to places like Barrie to shop for higher order goods and also enhance Collingwood's role as a regional shopping destination.

Development of the proposed retail centre in phases, as proposed, is shown to have a minimal impact on existing retail stores in Collingwood as a whole.

Implications for Retail Nodes in Collingwood

Commercial development on the Holborn Lands is expected to have a minimal effect on Collingwood's Downtown. The projected impact to sales of existing stores in the Downtown are not at a level where the viability of the Downtown comes into question. Sales in Food and Non-Food retail stores in the Downtown are projected to decrease by less than 10 percent in the first year of operation and then show gradual improvement moving forward. Any impact on the services component of the retail commercial function of the Downtown is expected to be modest.

The proposal is not of a scale to affect the viability of surrounding retailers in the Western Commercial Node as a group. The subject lands will act as an integral part of the Western Commercial Node. The proposed retail centre will enhance the regional attractiveness and solidify the position of the Western Commercial Node as the premiere Shopping Node in the entire Trade Area, especially vis-à-vis Wasaga Beach. Existing retailers will also have the ability to tap into the added draw of the area.

It is anticipated that development on the Holborn lands will not materially impact the viability and sales performance of retailers in Collingwood's Other Retail Nodes as well. These nodes will continue to serve as neighbourhood convenience retail areas and also as specialized retail areas with high concentrations of stores or services in certain categories.

Implications for Employment Land Needs in Collingwood

It is evident that the current supply of vacant employment (industrial) land greatly exceeds a 20 year supply, as required under the *2005 Provincial Policy Statement*. Thus, there is ample room for the redesignation of lands to uses deemed suitable by the Town.

The redesignation of the 35 acres of the subject lands (excluding the Home Depot site) to regional retail uses does not affect this conclusion:

- At an absorption of 3 acres per year, the 313 acres of remaining vacant employment land represents a 104.3 years supply; and
- At absorption of 4 acres per year, the 313 acres of remaining vacant employment land represents a 78.3 years supply.

TABLE OF CONTENTS

	Page
EXECUTIVE SUMMARY	i
1 INTRODUCTION	1
1.1 Description of Subject Lands and Retail Development Proposal	1
1.2 Purpose and Scope of this Opportunities and Impact Analysis	3
1.3 Time Horizon for Retail Analysis	5
1.4 Suitability of Subject Lands for the Proposed Retail Commercial Uses	5
1.5 Structure of the Report	6
1.6 Caveat	7
2 TRADE AREA ANALYSIS	8
2.1 Trade Area	8
2.2 Existing and Future Population of the Trade Area	9
2.3 Trade Area Retail Facilities	12
2.4 Study Area Expenditure Potential	20
3 HIGHLIGHTS FROM LICENCE PLATE AND CONSUMER TELEPHONE SURVEYS	26
3.1 Licence Plate Surveys	26
3.2 Telephone Survey of Trade Area Households	28
3.3 Customer Intercept Surveys	29
4 MARKET OPPORTUNITY ANALYSIS FOR THE SUBJECT LANDS	31
4.1 Subject Lands' Market Opportunity Methodology	31
4.2 Food Store Market Opportunity	32
4.3 Home Improvement and Non-Food Stores Market Opportunity	37
4.4 Assessment of Market Opportunity for Subject Lands	55
5 IMPACT ANALYSES	57
5.1 Retail Impact Analysis By Store Category	57
5.2 Implications for Retail Nodes in Collingwood	66
5.3 Implications for Employment Land Needs in Collingwood	73

TABLE OF CONTENTS (CONT'D)

**APPENDIX A: BASE PER CAPITA RETAIL EXPENDITURE IN THE
PRIMARY AND SECONDARY TRADE AREA**

**APPENDIX B: FLOOR SPACE RETAIL INVENTORY IN THE TOWN
OF COLLINGWOOD**

**APPENDIX C: LICENCE PLATE SURVEYS OF COLLINGWOOD
SHOPPERS**

**APPENDIX D: TELEPHONE SURVEY OF PRIMARY AND
SECONDARY TRADE AREA RESIDENTS**

1 INTRODUCTION

Clayton Research was retained by Holborn Property Investments Inc. ("Holborn") to provide retail market research and consulting advice regarding a site located in the Town of Collingwood.

Clayton Research was asked to prepare a market analysis assessing the opportunity for and impact of a proposed retail development and provide guidance as to the retail mix that could potentially be accommodated at this location, recognizing existing and planned retail facilities and the Town's planning policies and directions.

Clayton Research was asked to assess the implications of the Holborn proposal for future employment land needs in Collingwood.

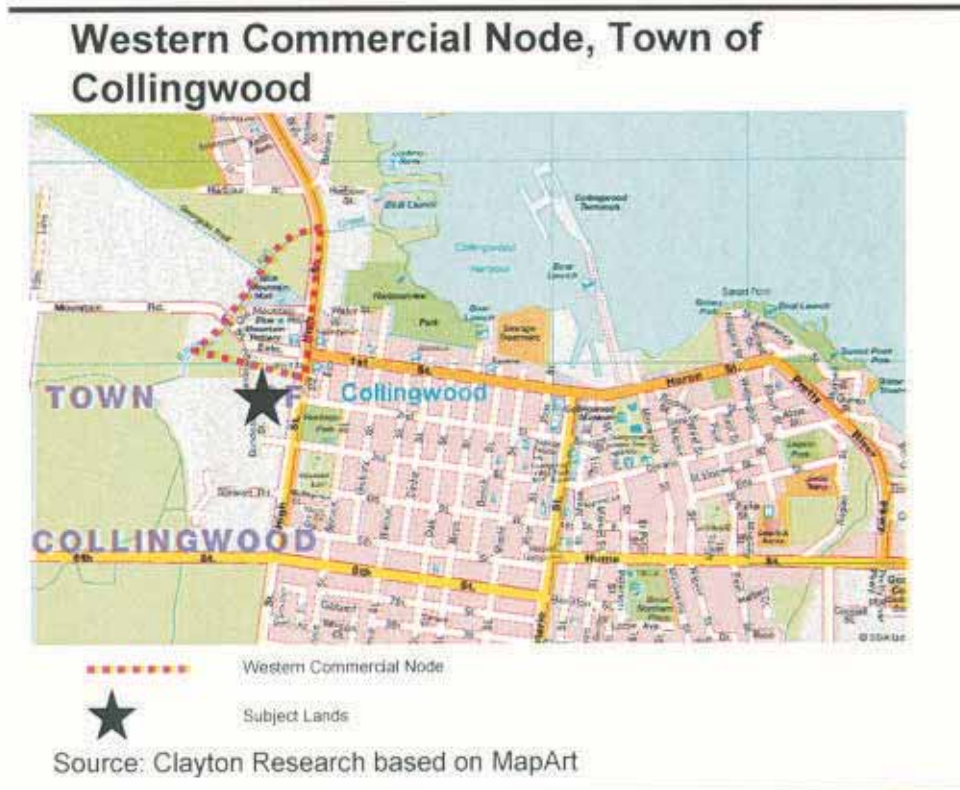
This report is a revised version of the earlier report of the same name. This revised report incorporates changes recommended by Malone Given Parsons, the peer reviewer retained by the Town of Collingwood.

1.1 DESCRIPTION OF SUBJECT LANDS AND RETAIL DEVELOPMENT PROPOSAL

1.1.1 Site Description

The lands under consideration in this study are the former Harding Carpet lands and are located to the south of the recently built Wal-Mart store in the Town of Collingwood. Figure 1 shows the location of these lands (the "subject lands") which abut High Street on the west, a short distance south of Highway 26/First Street. The lands are located at the southern boundary of the Town's existing Western Commercial Node.

Figure 1



The subject lands are known municipally as 20 High Street and are currently designated and zoned industrial.

1.1.2 Development Proposal

Holborn is proposing to develop its 43.26 acre parcel for approximately 482,965 sq. ft. of retail commercial floor space, including an 85,430 sq. ft. Home Depot store which is a permitted use on the industrially designated lands. The intention is to create a power centre tenanted mostly with mid-sized new format retailers that will complement the existing retail facilities in the Town. The bulk of the commercial retail space is expected to be in outlets having 3,000 sq. ft. or more of floor space. "Retail Commercial" is interpreted here as including both retail outlets (stores selling goods to the public) and services such as restaurants.

One of the anchor tenants in the proposed power centre will be the Home Depot, an operator of Home Improvement Centres, which has a new 85,430 sq. ft. store under construction in the northeast quadrant of the subject lands, adjacent to High Street. While the Home Depot will be a tenant of the power centre, it is not part of the Holborn application as a Home Improvement Centre is an existing permitted use on the subject lands. A second proposed anchor is a Supermarket.

The amount of retail commercial floor space requiring the redesignation of industrial lands is 397,535 sq. ft., (482,965 sq. ft. less the 85,430 sq. ft. Home Depot).

Holborn is intending to develop a power centre targeting mid-sized new format retailers having a minimum size of 3,000 sq. ft. of retail floor space. However, it is recognized that a component of smaller commercial retail outlets is required as well for the viability of the project and to service shoppers. As a general guideline, Holborn is proposing to develop approximately 20 percent of the total floor space excluding the Home Depot (the 397,535 sq. ft.) with retail commercial outlets with less than 3,000 sq. ft. of floor space.

1.2 PURPOSE AND SCOPE OF THIS OPPORTUNITIES AND IMPACT ANALYSIS

The analysis here is intended to address the requirements of the Town's Official Plan for a market impact study, one of the studies which are to accompany an application for a retail development outside the Downtown. The scope of the analysis takes into account specifications outlined by the Town's peer reviewer of market impact studies.

1.2.1 Official Plan Requirement for a Market Impact Study

Section 4.4.3.7(2) of the *2004 Town of Collingwood Official Plan* requires all applications for retail developments outside the Downtown to provide a market impact study that contains the following:

Market Impact Studies demonstrating that the proposed development is justified on the basis of market demand and that the planned function of Collingwood's other retail locations, especially the Downtown Core¹, will not be prejudiced, and providing the following information:

- a) *identification of the specific type and size of retail facility that is projected to be justified, and basis for such projection due to population growth, spending patterns, and other relevant factors;*

¹ The terms "Downtown" and "Downtown Core" as referenced in this report refer to the same geographical area.

- b) *provision of updated information on the performance of Collingwood's retail sector as a basis for undertaking, as an integral part of the market studies, an impact analysis of the proposed development on the Downtown Core and Western Commercial Node;*
- c) *information which provides satisfactory evidence that the proposed development is warranted and appropriate from the perspectives of both market justification and*
- d) *impact on the planned function of the Downtown Core and the Western Commercial Node; and,*
- e) *sufficient detail to enable identification of the specific requirements, limitations and safeguards which, in the event of approval, should be included as part of the Official Plan or Zoning By-law amendments, or provided through site plans and agreements, or otherwise made a condition of approval.*

Approval of the application for the subject lands would extend the Western Commercial Node to the south.

1.2.2 Peer Reviewer Requirements

A letter from Mr. Lee Parsons, a partner with Malone Given Parsons Ltd., and the Town's peer review consultant for market impact studies, dated November 29, 2005 to Mr. Gordon H. Russell, the Town's Director of Planning & Development, stated that Holborn should submit a comprehensive market study that encompassed the following:

- *A clear description of the project and proposed tenants;*
- *A detailed inventory of commercial space located in Collingwood and the Trade Area;*
- *A review of active development proposals and consideration of such proposals in the impact analysis;*
- *Consumer origin licence plate surveys and/or customer intercept surveys in the Downtown and Western Commercial Node to establish a current Trade Area and confirm the proportion of trade attributable to inflow from beyond the Trade Area;*

- *A statistically valid household survey to determine current spending patterns;*
- *An update of current population and retail expenditure generated by permanent residents and seasonal residents residing within the Trade Area, as well as forecasts based on anticipated growth in population and real spending;*
- *Analysis of additional retail space warranted in Collingwood for each major retail category;*
- *A forecast of existing and future retail sales (by major retail category) for the Downtown, First Street, the Western Commercial Node, and other commercial space, before and after the introduction of the proposed commercial space at the Harding Carpet site together with future retail space associated with un-built, but designated commercial land;*
- *Forecast of potential impact by major retail category on the Downtown, First Street, the Western Commercial Node and other commercial space located within the Town; and*
- *An evaluation of the market and planning implications of any potential impact effects.*

This report addresses these requirements with one small change. For the impact analysis of the Holborn proposal, the focus is on the two major retail nodes in the Town, the Downtown Core and the Western Commercial Node per the Official Plan. The First Street node is combined with all other commercial retail nodes in the Town.

1.3 TIME HORIZON FOR RETAIL ANALYSIS

The year 2005 is the base year for the retail analysis. The first full year of operation of retail floor space on the subject lands is assumed to be 2010. The analysis also covers the years 2013 and 2017.

1.4 SUITABILITY OF SUBJECT LANDS FOR THE PROPOSED RETAIL COMMERCIAL USES

The subject lands are very suitable for the power centre uses being proposed.

The subject lands abut the newly-developed areas of the Western Commercial Node, which include a Wal-Mart discount department store and an A&P Supermarket. The lands are well-located with frontage on High Street and will have access to the First Street Extension via an extended Cambridge Street.

With Wal-Mart and A&P now in place, the supply of lands in the Western Commercial Node has been virtually exhausted and more land is required. The *Town of Collingwood Commercial Policy Review* (January 2005) identifies expansion of the Western Commercial Node as the most appropriate first priority. The report cites several advantages of expanding the Western Commercial Node to include the subject lands including: the subject lands are under a single ownership, they are the easiest site to functionally integrate into the Western Commercial Node, and the fact that High Street would likely become a major access point from the south when the Highway 26 By-Pass is ultimately built.

1.5 STRUCTURE OF THE REPORT

This report contains four chapters in addition to the Introduction:

- Chapter 2 describes the Trade Area for the proposed power centre, provides a population forecast for the Trade Area, documents the existing and potential future retail floor space inventory in Collingwood and the rest of the Trade Area, and estimates current and future potential spending by Trade Area residents;
- Chapter 3 presents the “high level” findings of the licence plate surveys and the consumer telephone survey conducted as part of the research for this analysis;
- Chapter 4 contains the retail market opportunity analysis for the subject site; and
- Chapter 5 presents the analysis of impacts from the proposed retail development of the subject site for the Town as a whole and, particularly, for the Downtown and the remainder of the Western Commercial Node. It also assesses the impact of the redesignation of the subject lands from industrial on the employment land needs of the Town.

Four appendices are included in the report:

- Appendix A provides the base population and retail expenditure data underpinning the retail market opportunities analysis;

- Appendix B provides the results of the survey that quantifies the existing commercial retail floor space inventory in Collingwood;
- Appendix C describes the licence plate surveys undertaken for selected retail areas within Collingwood; and
- Appendix D describes the telephone survey of a sample of households living in the Primary and Secondary Trade Area of Collingwood.

1.6 CAVEAT

This report relies on information from a variety of secondary sources. While every effort is made to ensure the accuracy of the data, we cannot guarantee the complete accuracy of the information used in this report from these secondary sources.

This report is intended to be used for the purposes outlined herein and is not to be relied upon by any other party without the prior written authorization of Clayton Research Associates Limited.

2 TRADE AREA ANALYSIS

This chapter describes the Trade Area used in this analysis, outlines the existing and projected future population for the Trade Area, documents the existing and potential future retail floor space inventory for Collingwood and the other municipalities within the Trade Area, and estimates current and future spending by Trade Area residents.

2.1 TRADE AREA

The Trade Area is the geographical area from which retail facilities in Collingwood could normally expect to derive the majority of their sales volume – both from permanent and seasonal residents. The geographical extent of the Trade Area is a function of:

- The pattern of accessibility and driving times created by the current and future road networks;
- The type, scale and character of existing area retail facilities and the proposed development; and
- The scale, accessibility and merchandising strength of competitive facilities.

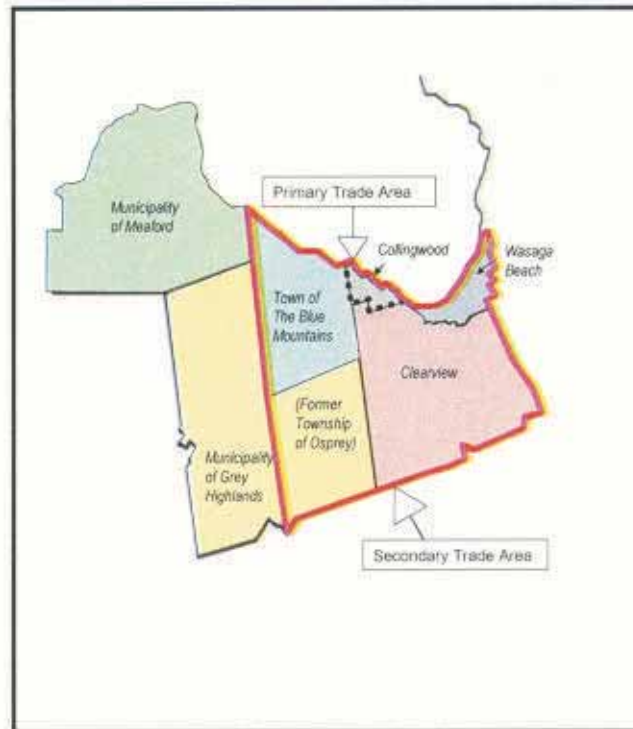
The remaining sales will originate from outside the Trade Area including tourists and other visitors, and people working but not residing in the Trade Area.

The Trade Area for Collingwood retail facilities and the subject lands is divided into two components: the Primary Trade Area and the Secondary Trade Area. The Trade Area for the subject site is delineated as follows (see Figure 2):

- The Primary Trade Area consisting of the Town of Collingwood; and
- The Secondary Trade Area consisting of the Town of The Blue Mountains (formerly Town of Thornbury and Township of Collingwood), the former Township of Osprey (now part of the Municipality of Grey Highlands), the Township of Clearview (formerly the Township of Nottawasaga and the Township of Sunnidale), and the Town of Wasaga Beach.

Figure 2

Boundaries of Primary and Secondary Trade Area



Source: Clayton Research

Both components of the Trade Area have been delineated based on the *1995 Market Analysis*² and the *2005 Commercial Policy Review* (Report 1) prepared by Malone Given Parsons, and the licence plate and consumer telephone surveys undertaken as part of the research for this report.

2.2 EXISTING AND FUTURE POPULATION OF THE TRADE AREA

The population forecasts in this analysis are consistent with those contained in the *2005 Commercial Policy Review* conducted for the Town of Collingwood, supplemented by information in the *1995 Market Analysis* conducted for the Town by Malone Given Parsons and a report prepared by Clayton Research in 2004 entitled *Market Opportunity and Impact Analysis, Proposed Wal-Mart Store, Town of Collingwood*.

² Malone Given Parsons Ltd., *Town of Collingwood Comprehensive Commercial Review – Report 1: Market Opportunities and Options*, November 17, 1995.

The population analysis distinguishes between residents having their permanent homes in the Trade Area and people with seasonal homes in the Trade Area.

2.2.1 Adjustment for Population Undercount

For purpose of retail market analyses, the permanent resident population reported by the Census of Canada typically is adjusted to account for residents missed at the time when the Census was conducted. The Trade Area permanent population is adjusted using the Simcoe County and Grey County undercount factors (3.9 percent and 3.8 percent, respectively) estimated from the Census of Canada 2001 population counts and Statistics Canada final postcensal 2001 population estimates.³ The undercount factors are assumed to remain constant during the 2001-2017 period.

2.2.2 Trade Area Permanent Population

Figure 3 shows the historical and forecast population for the Primary and Secondary Trade Areas.

During the 1996-2001 period, strong population growth was experienced in the Trade Area as a whole. The Trade Area's unadjusted population increased from 44,615 persons in 1996 to 50,836 persons in 2001:

- The Primary Trade Area (Town of Collingwood) population increased by about 443 persons between 1996 and 2001. Based on its 2001 population of 16,039 persons, the Primary Trade Area has the largest single population concentration in the Trade Area (about 32 percent of the total Trade Area population) and represents the largest market centre for the surrounding areas; and
- The Secondary Trade Area's unadjusted population increased significantly by about 5,800 persons between 1996 and 2001. The largest growth centres in the 1996-2001 period were the Town of Wasaga Beach (3,721 persons), the Township of Clearview (1,389 persons), and the Town of The Blue Mountains (449 persons).

³ The final postcensal estimate of the 2001 population in Simcoe and Grey Counties was obtained from Statistics Canada, *Annual Demographic Statistics 2003*, Catalogue No. 91-213-XPB.

Figure 3

Trade Area Permanent and Seasonal Population Forecast, 1996-2017

	Unadjusted		Adjusted ¹				
	1996 Census	2001 Census	2001 Census	2005 Persons	2010	2013	2017
Permanent Residents							
Primary Trade Area							
Town of Collingwood	15,596	16,039	16,665	17,959	19,577	20,400	21,400
Secondary Trade Area							
Town of The Blue Mountains	5,667	6,116	6,350	7,890	9,815	10,980	12,540
Former Township of Osprey ²	2,247	2,466	2,560	2,776	3,046	3,200	3,400
Township of Clearview	12,407	13,796	14,335	15,001	15,834	16,420	17,260
Town of Wasaga Beach	8,698	12,419	12,905	15,543	18,841	20,920	23,760
Subtotal	29,019	34,797	36,150	41,210	47,535	51,520	56,960
Total Permanent Residents	44,615	50,836	52,815	59,169	67,112	71,920	78,360
Seasonal Residents							
Total Trade Area			22,350	25,950	30,450	33,880	38,940
Total Trade Area	44,615	50,836	75,165	85,119	97,562	105,800	117,300

¹ Adjusted for undercount of 3.9% for Simcoe County municipalities and 3.8% for Grey County municipal

² Former Township of Osprey is now part of the Municipality of Grey Highlands.

Source: Clayton Research based on Census of Canada data, and Malone Given Parsons Ltd., *Town of Collingwood Commercial Policy Review*, January 2005

Strong population growth is forecast to continue in the Trade Area. The Trade Area adjusted population is anticipated to increase from 52,815 persons in 2001 to 67,112 persons in 2010, 71,920 persons in 2013 and 78,360 persons in 2017 (see Figure 3):

- The Primary Trade Area population is expected to increase by about 4,735 persons from 16,665 in 2001 to 21,400 persons by 2017; and
- The Secondary Trade Area population is expected to increase significantly by about 20,810 persons from 36,150 persons in 2001 to approximately 56,960 persons by 2017. The largest growth centres in the Secondary Trade Area through 2001-2017 period are expected to be the Town of Wasaga Beach (10,855 persons) and the Town of The Blue Mountains (6,190 persons) followed by the Township of Clearview (2,925 persons).

2.2.3 Trade Area Seasonal Population

The *2005 Commercial Policy Review* contains an estimate and a forecast of seasonal residential population growth in the Trade Area.⁴

Under this forecast, seasonal population in the Trade Area increases by an average of 900 persons per year over the 2001-2017 period. In total, the seasonal population in the Trade Area is expected to increase by 16,590 persons from an estimated 22,350 persons in 2001 to 38,940 in 2017 (see Figure 3).

2.3 TRADE AREA RETAIL FACILITIES

2.3.1 Town Of Collingwood

A survey was conducted in May 2006 to determine the amount of retail floor space by store category and retail node in the Town of Collingwood. The compilation of the floor space inventory was done by The Dalvay Group, a firm specializing in such work. The survey is described in more detail in Appendix B.

The major categories of retail stores in Collingwood are based on the North American Industrial Classification System (NAICS), which has been adopted by Canada, the United States and Mexico. Personal services floor space such as restaurants, chartered bank branches and hairdressers has also been tabulated, though the subsequent retail opportunity and impact analyses is limited to retail floor space.

The retail space inventory disaggregates the floor space according to the eight retail nodes the Town has identified within its boundaries.

Figure 4 presents the inventory of retail and service floor space in the Town as of May 2006. Both occupied and vacant floor space are measured. The locations of the referenced nodes are shown on Figure 5.

⁴ Malone Given Parsons Ltd., *Town of Collingwood Commercial Policy Review* – January, 2005, p. 24.

Figure 4

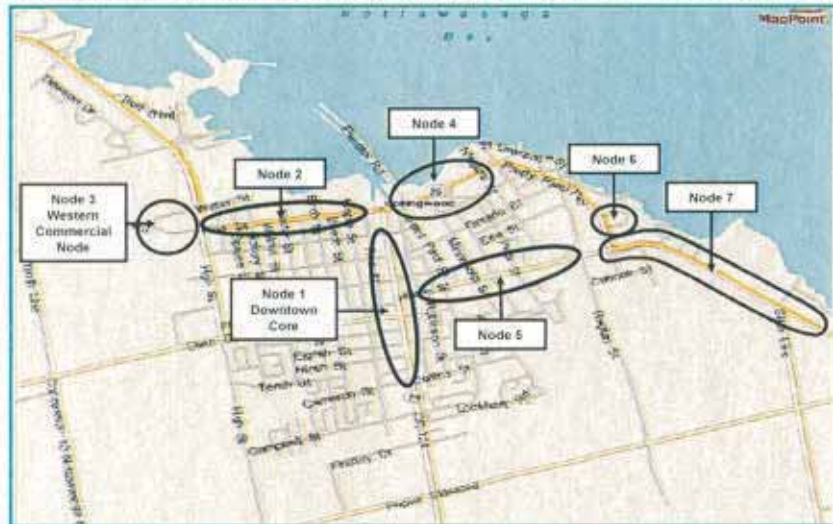
Inventory of Existing Retail and Service Floor Space, Town of Collingwood, May 2006

	Retail Nodes								Total Collingwood
	Downtown Core Node 1	First Street Node 2	Western Commercial Node 3	Huron Street Node 4	Hume Street Node 5	Ronell Crescent Node 6	Hwy. 26 Node 7	Other Node 8	
Food and Convenience Type Merchandise (FCTM)	<i>Sq. Ft. of Gross Leasable Floor Area</i>								
Supermarket	81,781	0	62,000	0	0	0	0	0	143,781
Warehouse Membership Club (Food)	0	0	0	0	0	0	0	0	0
Other Food Stores	11,700	8,100	0	0	1,400	0	2,300	2,500	26,000
Subtotal	93,481	8,100	62,000	0	1,400	0	2,300	2,500	169,781
Non-Food Type Merchandise (NFTM)									
General Merchandise									
Department Stores	0	0	205,300	0	0	0	0	0	205,300
Warehouse Membership Club (Non-Food)	0	0	0	0	0	0	0	0	0
Home and Auto Supply	0	0	57,700	0	0	0	0	0	57,700
Other General Merchandise	3,000	0	6,700	0	0	0	0	0	9,700
Clothing & Accessories	61,400	1,000	16,300	0	0	0	0	0	78,700
Furniture, Home Furnishings & Electronics	22,200	17,600	45,000	1,100	3,700	2,500	62,400	0	154,500
Pharmacies & Personal Care	17,900	1,200	3,200	0	2,400	0	0	0	24,700
All Other Retailers	66,400	40,200	12,700	1,700	2,600	1,000	4,800	12,500	141,900
Subtotal	170,900	60,000	346,900	2,800	8,700	3,500	67,200	12,500	672,500
Home Improvement (HI)									
Building and Outdoor Home Supply	10,900	400	10,500	0	32,100	2,000	0	18,800	74,700
Other Retailers Not Included Above and Services¹									
Other Retail	23,400	15,100	2,800	1,500	30,900	25,300	34,400	12,500	145,900
Services	338,700	119,200	33,300	35,400	67,400	15,200	26,000	23,700	658,900
Subtotal	362,100	134,300	36,100	36,900	98,300	40,500	60,400	36,200	804,800
Total Occupied Space (Sq.Ft.)	637,381	202,800	455,500	39,700	140,500	46,000	129,900	70,000	1,721,781
Percent Distribution (%)	37.0	11.8	26.5	2.3	8.2	2.7	7.5	4.1	100.0
Vacant Space (Sq. Ft.)	30,700	17,800	27,500	32,100	4,400	7,500	5,500	1,200	126,700
Vacancy Rate (%)	4.6%	8.1%	5.7%	44.7%	3.0%	14.0%	4.1%	1.7%	6.9%
Total Floor Space (Sq.Ft.)	668,081	220,600	483,000	71,800	144,900	53,500	135,400	71,200	1,848,481

¹ Includes Beer, Wine & Liquor, Automotive, Services: Eating and Drinking, Services: Personal and Services: Other
 Source: Clayton Research based information in Appendix B

Figure 5

Primary Trade Area Retail Nodes, Town of Collingwood



Source: Clayton Research based on information from Malone Given Parsons' *Town of Collingwood Comprehensive Commercial Review – Report 1: Market Opportunities and Options*, November 17, 1995

The Downtown (Node 1) accommodates approximately 37.0 percent (637,381 sq. ft.) of all the occupied existing retail and service floor space in the Downtown. The Western Commercial Node (Node 3), which includes the Collingwood Centre (previously known as the Blue Mountain Mall) accommodates approximately 26.5 percent (455,500 sq. ft.) of all occupied commercial space. The remaining nodes accommodate the remaining approximately 36.5 percent (628,900 sq. ft.) of occupied space.

2.3.1.1 Downtown (Node 1)

The Downtown is extensive in terms of floor space for services, which account for 53.1 percent of all occupied floor space in the node. This is equivalent to 51.4 percent of the Town's total space devoted to Services. The Downtown contains approximately 637,381 sq. ft. of occupied commercial space in total. Approximately 93,500 sq. ft. of the occupied space in the Downtown is occupied by Food Stores, including 81,781 sq. ft. of Supermarket uses. The Downtown also contains a further 181,800 sq. ft. of Non-Food Type Merchandise (NFTM) Stores and Home Improvement floor space, which represents approximately 24.3 percent of all Non-Food Type Merchandise related retail space in Collingwood.

The Downtown is characterized by a wider variety of smaller retail stores, which provide "specialized and thematic shopping to local residents, full time and seasonal residents of the surrounding region, and tourist visitors"⁵.

The bulk of the retail commercial and service outlets in the Downtown are small in size. Of the 88 outlets, 70, or 80 percent, occupy less than 3,000 sq. ft. of floor space (see Appendix B-3).

Expansion in retail floor space in other in other parts of the Town of Collingwood, namely in the Western Commercial Node, has not adversely affected vacancies in the Downtown. The overall vacancy rate of 4.6 percent in the Downtown is virtually unchanged from 1995 when it stood at 5 percent.⁶

2.3.1.2 Western Commercial Node (Node 3)

The Western Commercial Node is the major retail shopping node within the Town with 346,900 sq. ft. of Non-Food Type Merchandise and 82,000 sq. ft. of Supermarket floor space.

Over the last 5 years the Collingwood Centre (formerly the Blue Mountain Mall) has been re-merchandised and has undergone a series of expansions. In 2001, the Zeller's store completed a 31,000 sq. ft. expansion, and in 2004, a new 57,700 sq. ft. Canadian Tire store commenced operation. Since that time an additional approximately 28,000 sq. ft. of retail space has been added to the mall, and a further 5,000 sq. ft. is planned to open in late 2006. A 12,000 sq. ft. expansion of the Canadian Tire store is also anticipated.⁷

In addition, a freestanding 37,700 sq. ft. A&P Supermarket was completed at First Street and High Street several years ago, and a 115,000 sq. ft. Wal-Mart store has recently opened up to the east of the A&P.

2.3.1.3 Other Nodes

The Other Retail nodes, including First Street, Huron Street, Hume Street, Ronnell Crescent and Highway 26, accommodate a range of retail and service space. There is approximately 628,900 sq. ft. of occupied Food Store,

⁵ Malone Given Parsons Ltd., *Town of Collingwood Commercial Policy Review, Report 1: Opportunities and Options*, January 2005, page 11.

⁶ Malone Given Parsons Ltd., *Town of Collingwood Commercial Policy Review, Report 1: Opportunities and Options*, January 2005, page 11.

⁷ *Riocan Real Estate Investment Trust Renewal Annual Information Form*, March 27, 2006.

Non-Food Store and Personal Service floor space located throughout the rest of Collingwood. Within the rest of Collingwood, there is approximately 14,300 sq. ft. of Specialty Food Store space and approximately 208,000 sq. ft. of Non-Food Store space. There are no Supermarkets or Department Stores located within the other nodes.

According to the 2006 inventory, the largest Home Improvement Centres within the Town of Collingwood are both located along Hume Street in Node 5: the RONA Building Supply Centre is approximately 13,200 sq. ft. in size and the Haven's Home Building Centre (Home Hardware) is approximately 18,900 sq. ft. Another Home Hardware store is located on County Road 124, just south of Collingwood.

2.3.1.4 Vacant Retail and Service Floor Space

According to the May 2006 inventory survey, there is approximately 126,700 sq. ft. of vacant commercial space located in the Town of Collingwood, resulting in an overall vacancy rate of approximately 6.9 percent (5.1 percent without the vacant former Canadian Tire Store). This level of vacancies is consistent with a healthy retail market place.

The largest concentration of vacant commercial space, approximately 32,100 sq. ft., can be found along Huron Street (Node 4). This vacant space is as a result of the former Canadian Tire store. Not including Huron Street, the highest vacancy rate can be found along Ronnell Crescent (Node 6), which has approximately 7,500 sq. ft. of vacant space and a vacancy rate of 14.0 percent.

There is relatively less vacant commercial space located in the Downtown and the Western Commercial Node. According to the 2006 inventory, there is approximately 30,700 sq. ft. of vacant space in the Downtown, a vacancy rate of only 4.6 percent. The vacancy rate in the Western Commercial Node is slightly higher at 5.7 percent; however, it is likely that some of the 27,500 sq. ft. of vacant space found in the inventory is a result of the recent additions to the Collingwood Centre.

2.3.1.5 Proposed Retail Developments in Collingwood

There are a number of active proposals to add more retail square footage in Collingwood. These range from projects that are already under construction to projects that are proposed with no activity on site. The projects listed below are assumed open and operating for the purposes of this analysis:

- A 20,000 sq. ft. Staples Business Depot store is under construction in the Western Commercial node on the site of the former Blue Mountain pottery plant. The site is being redeveloped with a section of the existing warehouse being demolished to make way for the Staples store and a Galaxy Theatre. Sears currently operates an appliance and mattress dealer store on site and this will remain;
- RONA has been pursuing municipal approvals to construct a 54,453 sq. ft. Home Improvement outlet at High Street & Sixth Street. While approvals have not been finalized as of the date of this report, they are likely forthcoming in the short term;
- Canadian Tire will be going ahead with a 12,000 sq. ft. expansion of their store in the Collingwood Centre Mall located in the Western Commercial node; and
- Sobeys has submitted an application to open a supermarket in the former Canadian Tire building located at 39 Huron Street, in Node 4. It is expected the Supermarket will have about 32,000 sq. ft. of floor space. Upon opening at this location, Sobeys will likely close their 17,000 sq. ft. Price Chopper store in Downtown Collingwood.

In addition to the confirmed projects listed above, there are a number of proposals to add retail space to Collingwood. Because of their size or questionable status, the following projects are not included in the analysis:

- On the northeast corner of Simcoe County Road 124 and Poplar Sideroad is a 6.4-acre parcel proposed for a hardware store. As of May 2006 the site was still planned for a Home Hardware Store; however no site plan had been approved; and
- Limited commercial space is also planned for two mixed-use projects. Both the Shipyards, located along the Collingwood Harbour, and Admiral Collingwood Place have plans for about 35,000 sq. ft. of "Downtown Core"⁸ commercial uses. Because of their limited size and uncertain timing, these projects are not assumed open for purpose of the analysis in this report.

⁸ Under the 2004 *Town of Collingwood Official Plan* the Downtown Core designation allows for "all forms of retail and service commercial facilities" (Section. 4.4.4.1).

2.3.2 Secondary Trade Area

2.3.2.1 Wasaga Beach

In 1999 a market study was prepared by John Winter Associates Limited in order to provide direction to the Town of Wasaga Beach with respect to demand for commercial lands. The 1999 report stated that the Town of Wasaga Beach had a commercial space inventory of about 367,000 sq. ft. at that time. Based on discussions with planning staff in Wasaga Beach, approximately 130,000 sq. ft. of commercial space has since been added to this inventory since 1999. Major additions include a 25,000 sq. ft. IGA replacement store and, more significantly, Loblaws opened an 81,000 sq. ft. Real Canadian Superstore in June 2005.

In addition to those projects already completed, there are a number of projects currently under construction, confirmed or proposed in Wasaga Beach. The following projects were assumed open and operating for the purpose of the analysis in this report:

- A 122,000 sq. ft. Wal-Mart store is under construction at River Rd (Hwy #92) & Main St in the east end of Wasaga Beach;
- Approximately 80,000 sq. ft. of retail space in small pads is either under construction or in the approvals phase on lands beside the Wal-Mart development. While no tenants have been confirmed, it is assumed this will build out with a mix of services (including restaurants and banks) and other smaller retailers;
- Canadian Tire has confirmed plans to construct a 50,000 sq. ft. store adjacent to the Real Canadian Superstore at 45th and Mosley Streets in the centre of Wasaga Beach. Construction is slated to begin by the end of 2006 with opening planned in 2007; and
- A small 15,000 sq. ft. plaza is under construction on lands on the north side of Mosley Street at 45th Street.

In addition to the above, there are sites being actively marketed for lease in Wasaga Beach. In total, there is in excess of 86,000 sq. ft of space being marketed on two separate vacant sites:

- 75,000 sq. ft. on lands across from Real Canadian Superstore and future Canadian Tire at 45th St and Knox Ave currently in approvals phase; and
- 11,000 sq. ft on the Tenaglia site on Mosley at 29th Street.

In addition to sites that are in the approvals phase and being actively marketed, Wasaga Beach does have a sizable inventory of vacant commercial lands within its borders as well:

- 37.6-acre site designated District Commercial at the intersection of Hwy #26 and Mosley Street at the west entrance to Town; and
- 12.5-acre site designated District Commercial just south of the Real Canadian Superstore and Canadian Tire site on 45th Street south of Mosley Street.

Figure 6 outlines the inventory of commercial space in Wasaga Beach and lists projects that are under construction, confirmed or actively marketed. In addition, the supply of vacant commercial lands is also shown.

Figure 6

	Floor Space			Vacant Commercially Designated Lands (Acres)
	Current Inventory	Under Construction or Approved	Active Application	
		<i>Square Feet</i>		
1999 Inventory ¹	366,779	-	-	-
Miscellaneous Additions Including IGA Replacement ²	50,000	-	-	-
Wasaga Beach Centre (SEC 45th/Mosley) ³		-	-	-
Real Canadian Superstore	81,000	-	-	-
Canadian Tire	-	50,000	-	-
Vacant Ty-Corp Lands	-	-	-	12.5
Stonebridge by the Bay ³				
Wal-Mart	-	122,000	-	-
Phase 1 Retail Pads	-	30,000	-	-
Other Planned Retail Phases	-	-	50,000	-
North Side of Mosley Street at 45th ³	-	15,000	-	-
Marocco (NWC Knox/45th) ³	-	-	75,000	-
Tenaglia ³	-	-	10,656	-
District Commercial Lands (Hwy #26) ³	-	-	-	37.6
Total	497,779 +	217,000 +	135,656 =	850,435
				50.0

¹ Based on 1999 Wasaga Beach Market Study - John Winter Associates Ltd.

² Based on Discussions With Wasaga Beach Planning Staff

³ Based on data gathered through discussions with developers, Town staff and Town of Wasaga Beach website

The market study conducted for Collingwood does not explicitly consider the active applications for commercial development or possible future development on vacant designated sites. The additional square footage to be built on sites that have active applications would not be able to accommodate large format big box retail outlets. These sites will most likely be developed as either strip plazas or pad developments to diversify the

retail and service offering in Wasaga Beach and will likely compete with the existing inventory in Wasaga Beach.

Timing of development on the two large District Commercial sites will depend on what happens in Collingwood. If additional big box retail space is accommodated in Collingwood, it is unlikely that the Wasaga Beach sites would be developed before 2017, the horizon year for our analysis. If Collingwood's offering is not expanded, then prospects for development on these lands is brighter. Our view is that new format retailers perceive Collingwood to be a more suitable location for new stores; however, not being able to accommodate them in Collingwood will increase the likelihood that they could locate in Wasaga Beach as an alternative.

2.3.2.2 Rest of Secondary Trade Area

Based on discussions with planning staff at the Township of Clearview, there is a proposal to develop a 4 acre commercially zoned site on Highway #26 at the north end of Stayner. No further information was provided. Given the limited size of the site and the fact that Stayner orients more towards Wasaga Beach than Collingwood, this proposal was not assumed in the analysis conducted for the Holborn lands.

There is no new commercial activity to note in both Osprey Township and the Town of The Blue Mountains.

2.4 STUDY AREA EXPENDITURE POTENTIAL

This section estimates the current and future expenditure potential of Trade Area residents by retail category based on combining future population and per capita expenditure estimates for Food, Non-Food and Home Improvement Stores to the year 2017. The study area expenditure potential is a key input for the market opportunity analysis in Chapter 4.

The retail and opportunity analyses are conducted only for retail floor space. The analyses do not include ancillary floor space for services such as restaurants.

2.4.1 Expenditure Potential Methodology

Figure 7 shows the expenditure potential for study area residents, both permanent and seasonal, in retail facilities regardless of location, i.e., whether the spending is done in stores within or outside the Trade Area. The

retail spending is categorized by Food and Convenience Type Merchandise (FCTM), Non-Food Type Merchandise (NFTM) and Home Improvement (HI) potential spending by study area residents. The study area potential expenditure is based on:

- The 2005 Trade Area per capita expenditure by retail category which is estimated by adjusting Ontario's expenditure per capita base for differences in income between the province and the Trade Area using income indexes. The 2005 sales for Ontario are estimated based on information from Statistics Canada's Retail Trade Survey (see Appendix A-3). The income indexes are calculated based on information from the 2001 Census of Canada (see Appendix A-1);
- Annual real growth rates of 0.5 percent for FCTM and 1.5 percent for NFTM and HI are applied to the 2005 Trade Area per capita expenditures to obtain the 2010, 2013 and 2017 per capita expenditure forecasts (see Appendix A-2);
- The total potential expenditure by study area residents is calculated by multiplying the forecast population by the per capita expenditure; and
- For the seasonal population, it is assumed that approximately one third of the seasonal residents' annual spending is potential spending for the Trade Area.

Figure 8 shows the percent distribution of Department Store, Home Improvement (HI) and Other Non-Food Type Merchandise (NFTM) potential spending by major categories including Home and Auto Supply Stores (Canadian Tire), Clothing and Accessories Stores, Furniture, Home Furnishing and Electronic Stores, Pharmacies and Personal Care Stores and Miscellaneous Retailers. The potential retail spending in each category is based on the total expenditure potential for Non-Food Type Merchandise and Home Improvement spending in the study area and the calculated distribution is shown in Figure 9.

Figure 7

Trade Area Permanent and Seasonal Population Expenditure Potential By Type of Store, 2005 - 2017

	2005	2010	2013	2017
Food & Convenience Type Merchandise (FCTM)				
Primary Trade Area (Collingwood)				
Population (Persons)	17,959	19,577	20,400	21,400
FCTM Expenditure/Capita (\$)	<u>1,900</u>	<u>1,948</u>	<u>1,978</u>	<u>2,017</u>
FCTM Potential (\$millions)	34.1	38.1	40.3	43.2
Secondary Trade Area				
Population (Persons)	41,210	47,535	51,520	56,960
FCTM Expenditure/Capita (\$)	<u>1,909</u>	<u>1,957</u>	<u>1,986</u>	<u>2,026</u>
FCTM Potential (\$millions)	78.6	93.0	102.3	115.4
Trade Area FCTM Potential (\$millions)	112.8	131.2	142.7	158.6
Seasonal Potential				
Population (Persons)	25,950	30,450	33,880	38,940
FCTM Expenditure/Capita (\$)	<u>1,920</u>	<u>1,969</u>	<u>1,999</u>	<u>2,039</u>
FCTM Potential (\$millions)	49.8	60.0	67.7	79.4
Total Seasonal FCTM Available (33.3%)(millions) ¹	16.6	20.0	22.5	26.4
Non-Food Type Merchandise & Home Improvement (NFTM + HI)				
Primary Trade Area (Collingwood)				
Population (Persons)	17,959	19,577	20,400	21,400
NFTM + HI Expenditure/Capita (\$)	<u>4,509</u>	<u>4,857</u>	<u>5,079</u>	<u>5,391</u>
NFTM + HI Potential (\$millions)	81.0	95.1	103.6	115.4
Secondary Trade Area				
Population (Persons)	41,210	47,535	51,520	56,960
NFTM + HI Expenditure/Capita (\$)	<u>4,642</u>	<u>5,011</u>	<u>5,244</u>	<u>5,571</u>
NFTM + HI Potential (\$millions)	191.3	238.2	270.2	317.3
Trade Area NFTM + HI Potential (\$millions)	272.3	333.3	373.8	432.7
Seasonal Potential				
Population (Persons)	25,950	30,450	33,880	38,940
NFTM + HI Expenditure/Capita (\$)	<u>4,809</u>	<u>5,181</u>	<u>5,417</u>	<u>5,750</u>
NFTM + HI Potential (\$millions)	124.8	157.8	183.5	223.9
Total Seasonal NFTM + HI Available (33.3%)(millions) ¹	41.6	52.5	61.1	74.6

¹ Based on Malone Given Parsons Ltd., *Town of Collingwood Commercial Policy Review*, January 2005.

Note: Forecast in 2005 constant dollars.

Source: Clayton Research based on data from Figure 3 and Appendix A-2

Figure 8

Trade Area Permanent and Seasonal Population Expenditure Potential for Non-Food Type Merchandise (NFTM) & Home Improvement (HI) Type of Stores, 2005 - 2017

	2005	2010	2013	2017
Primary Trade Area				
NFTM Potential (\$millions)				
Department stores	15.4	19.0	20.7	23.1
Non Department Store NFTM				
Home & Auto Supply	4.9	6.7	7.3	8.1
Clothing & Accessories	11.3	12.4	13.5	15.0
Furniture, Home Furnishings & Electronics	13.0	13.3	14.5	16.2
Pharmacies & Personal Care	11.3	12.8	14.0	15.6
All Other Retailers ¹	14.6	16.6	14.0	20.2
Subtotal Non Dept Store NFTM	55.1	61.8	63.2	75.0
Home Improvement (HI)	10.5	14.3	15.5	17.3
Total NFTM + HI Potential (\$millions)	81.0	95.1	99.5	115.4
Secondary Trade Area				
NFTM Potential (\$millions)				
Department stores	36.4	47.6	54.0	63.5
Non Department Store NFTM				
Home & Auto Supply	11.5	16.7	18.9	22.2
Clothing & Accessories	26.8	31.0	35.1	41.3
Furniture, Home Furnishings & Electronics	30.6	33.3	37.8	44.4
Pharmacies & Personal Care	26.8	32.2	36.5	42.8
All Other Retailers ¹	34.4	41.7	47.3	55.5
Subtotal Non Dept Store NFTM	130.1	154.8	175.6	206.3
Home Improvement (HI)	24.9	35.7	40.5	47.6
Total NFTM + HI Potential (\$millions)	191.3	238.2	270.2	317.3
Seasonal Potential				
NFTM Potential (\$millions)				
Department stores	23.7	31.6	36.7	44.8
Non Department Store NFTM				
Home & Auto Supply	7.5	11.0	12.8	15.7
Clothing & Accessories	17.5	20.5	23.9	29.1
Furniture, Home Furnishings & Electronics	20.0	22.1	25.7	31.3
Pharmacies & Personal Care	17.5	21.3	24.8	30.2
All Other Retailers ¹	22.5	27.6	32.1	39.2
Subtotal Non Dept Store NFTM	84.9	102.5	119.3	145.5
Home Improvement (HI)	16.2	23.7	27.5	33.6
Total NFTM + HI Potential (\$millions)	124.8	157.8	183.5	223.9
Total Seasonal NFTM + HI Available (33.3%) (\$millions)	41.2	52.1	60.6	73.9

¹ Includes Non Department Store General Merchandise with the exception of Home and Auto Supply store and Other Retailers as defined by Statistics Canada.

² Malone Given Parsons Ltd., *Town of Collingwood Commercial Policy Review*, January 2005.

Note: Forecast in 2005 constant dollars.

Source: Clayton Research based on data from Figure 7 and Appendix A-2

Figure 9

Percentage Distribution of Spending Potential by Store Category for Trade Area Residents

Primary and Secondary Trade Areas	2005	2010	2013	2017
	<i>Percent</i>			
Supermarkets	87.0	87.0	87.0	87.0
Specialty Food Stores	13.0	13.0	13.0	13.0
Total FCTM	100.0	100.0	100.0	100.0
Department Stores	19.0	20.0	20.0	20.0
Home & Auto Supply	6.0	7.0	7.0	7.0
Clothing & Accessories	14.0	13.0	13.0	13.0
Furniture, Home Furnishings & Electronics	16.0	14.0	14.0	14.0
Pharmacies & Personal Care	14.0	13.5	13.5	13.5
Miscellaneous Retailers ¹	18.0	17.5	17.5	17.5
Home Improvement	13.0	15.0	15.0	15.0
Total NFTM + HI	100.0	100.0	100.0	100.0
Seasonal Potential				
Supermarkets	89.0	89.0	89.0	89.0
Specialty Food Stores	11.0	11.0	11.0	11.0
Total FCTM	100.0	100.0	100.0	100.0
Department Stores	19.0	20.0	20.0	20.0
Home & Auto Supply	6.0	7.0	7.0	7.0
Clothing & Accessories	14.0	13.0	13.0	13.0
Furniture, Home Furnishings & Electronics	16.0	14.0	14.0	14.0
Pharmacies & Personal Care	14.0	13.5	13.5	13.5
Miscellaneous Retailers ¹	18.0	17.5	17.5	17.5
Home Improvement	13.0	15.0	15.0	15.0
Total NFTM + HI	100.0	100.0	100.0	100.0

¹ Includes Non Department Store General Merchandise with the exception of Home and Auto Supply store and Other Retailers as defined by Statistics Canada.

Source: Clayton Research based on data from Figure 8 and Appendix A-2

2.4.2 Food and Convenience Type Merchandise (FCTM) Expenditure Potential

The Primary Trade Area FCTM per capita expenditure is estimated at \$1,900 in 2005 increasing to \$1,948 in 2010, \$1,978 in 2013 and \$2,017 in 2017 expressed in terms of 2005 constant dollars (see Figure 7). The Secondary Trade Area FCTM per capita is estimated at \$1,909 in 2005 increasing to \$2,026 in 2017. The total FCTM expenditure potential for residents in both the Primary and Secondary Trade Areas is estimated at approximately \$112.8 million in 2005 increasing to \$131.2 million in 2010, \$142.7 million in 2013 and \$158.6 million in 2017.

An additional estimated \$16.6 million in 2005, \$20.0 million in 2010, \$22.5 million in 2013 and \$26.4 million in 2017 in FCTM spending is forecast to be available from the seasonal residents of the Trade Area.

2.4.3 Non-Food Type Merchandise (NFTM) and Home Improvement (HI) Expenditure Potential

The Primary Trade Area NFTM + HI per capita expenditure is estimated at \$4,509 in 2005 increasing to \$4,857 in 2010, \$5,079 in 2013 and \$5,391 in 2017 expressed in terms of 2005 constant dollars (see Figure 7). The Secondary Trade Area NFTM + HI per capita is estimated at \$4,632 in 2005 increasing to \$5,538 in 2017. The total NFTM + HI expenditure potential for residents in both the Primary and Secondary Trade Areas is estimated at approximately \$271.93 million in 2005 increasing to \$332.3 million in 2010, \$372.4 million in 2013 and \$430.8 million in 2017. These estimates include spending in Department Stores, other Non-Department Store NFTM Stores and Home Improvement Stores.

An additional estimated \$41.6 million in 2005, \$52.5 million in 2010, \$61.1 million in 2013 and \$74.6 million in 2017 in NFTM + HI spending is forecast to be available from the seasonal residents of the Trade Area.

2.4.4 Non-Food + HI Type Merchandise Expenditure Potential by Store Category

Department Stores accounted for the single largest share of NFTM + HI expenditure by type of store for Primary and Secondary Trade Area residents. With the exception of Home and Auto Supply Stores, the shares of potential spending accounted for each of the other store types are quite similar (see Figure 9).

3 HIGHLIGHTS FROM LICENCE PLATE AND CONSUMER TELEPHONE SURVEYS

As part of the research for this report, two surveys were conducted by The Dalvay Group of automobiles parked at retail facilities in Collingwood and a telephone survey was undertaken by Foundation Research Group Inc. for a sample of households living in the Trade Area. Technical details of these surveys are presented in Appendices C and D.

Highlights of these surveys relevant to the subsequent retail commercial opportunities analysis are presented here. Results of customer intercept surveys conducted as part of the 1995 *Town of Collingwood Commercial Strategy Study* which provided additional insights into the shopping contribution of seasonal residents and tourist and other visitors are presented as well.

3.1 LICENCE PLATE SURVEYS

The intent of the licence plate surveys was to confirm the boundaries of the Collingwood Trade Area utilized in previous studies and to provide insight into what is referenced to in the retail studies' literature as inflow spending – that is, spending in Collingwood by people who are not permanent residents of the Trade Area.

Two separate licence plate surveys were conducted:

- The first survey was conducted during the last week of the ski season (last weekend in March 2006) and was limited to automobiles parked in the Downtown along Hurontario Street and at the Loblaws Store. The idea was to contrast seasonal versus permanent residents shopping downtown at the time compared to a later period when there would be fewer seasonal shoppers; and
- The second survey (last weekend in April 2006) was a more comprehensive survey encompassing automobiles parked at the Wal-Mart, A&P, Canadian Tire and Collingwood Centre retail facilities as well as the two downtown locations covered in the first survey.

According to Figure 10, the majority of shoppers in both licence plate surveys were from the Primary and Secondary Trade Area. The difference in the inflow of shoppers to Downtown Collingwood between the first and

second survey could be attributed partially to the fact that the first survey was conducted during ski season, and so it is expected that it would included more seasonal shoppers.

Figure 10

Licence Plate Surveys of Downtown Shoppers, March and April 2006

<u>Place of Residence</u>	<u>March</u>	<u>April</u>
	<i>Percent</i>	
Primary Trade Area	36.5	38.2
Secondary Trade Area	28.1	31.6
Outside of Trade Area	<u>35.4</u>	<u>30.2</u>
Total	100.0	100.0

Source: Clayton Research based on Appendix C

Figure 11 shows that the residence of shoppers in the Downtown and Western Commercial Core surveyed in the second licence survey are quite similar with the Downtown attracting somewhat more vehicles from beyond the Trade Area. Shoppers with permanent residences outside the Trade Area accounted for about 27.6 percent of all shoppers.

Figure 11

Licence Plate Survey of Collingwood Shoppers, April 2006

<u>Place of Residence</u>	<u>Downtown Core</u>	<u>Western Commercial Node</u>	<u>Total Collingwood</u>
	<i>Percent</i>		
Primary Trade Area	38.2	41.2	40.2
Secondary Trade Area	31.6	32.6	32.2
Outside of Trade Area	<u>30.2</u>	<u>26.2</u>	<u>27.6</u>
Total	100.0	100.0	100.0

Source: Clayton Research based on Appendix C

The "Outside of Trade Area" shoppers include an unknown number of seasonal residents. In the retail opportunities analysis, the shares of retail sales in Collingwood stores attributed to inflows are reduced from what is shown in Figure 11 to remove an estimate of seasonal residents since these residents are treated separately (see Section 2.2.3 in Chapter 2 for a discussion of the seasonal population).

The fact that the Downtown is drawing relatively more of its shoppers from outside the Trade Area than the Western Commercial Node is an indication of a healthy retail market in the downtown.

The detailed survey showing results from each separate municipality within the Trade Area is attached in Appendix C.

3.2 TELEPHONE SURVEY OF TRADE AREA HOUSEHOLDS

A survey of 850 households residing in the Primary and Secondary Trade Area was undertaken by Foundation Research Group Inc. in May 2006 to determine where Trade Area residents shop for various categories of stores. This information is input into both the market opportunity and impact analyses. The survey results are important for ascertaining the amount of retail spending by Trade Area residents now flowing outside the Trade Area to places like Barrie. Appendix D provides more information on this survey.

Figure 12 highlights the current shopping behaviour of Trade Area residents by broad categories of stores.

Figure 12 Retail Spending Patterns of Trade Area Residents by Type of Store, 2006

Store Type and Location	Place of Residence						Total Secondary Trade Area	Total Total Trade Area
	Primary Trade Area	Blue Mountains	Osprey	Clearview	Wasaga Beach	Percent		
FCTM								
Supermarkets & Specialty Food								
Primary Trade Area	88.8	49.8	54.9	28.1	19.3	30.4	51.8	
Secondary Trade Area	5.0	26.1	10.5	49.4	72.4	51.3	34.3	
Outside Trade Area	6.2	24.1	34.6	22.5	8.3	18.3	13.9	
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
NFTM								
Department Stores								
Primary Trade Area	77.5	66.4	81.7	45.1	48.7	52.0	59.9	
Secondary Trade Area	0.1	0.2	0.0	0.0	0.1	0.1	0.1	
Outside Trade Area	22.4	33.4	18.3	54.9	51.2	48.0	40.0	
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
All Other NFTM Stores								
Primary Trade Area	61.2	37.0	41.7	22.8	26.9	28.3	38.0	
Secondary Trade Area	2.4	12.8	6.7	6.6	15.6	10.9	8.4	
Outside Trade Area	36.4	50.2	51.6	70.6	57.6	60.9	53.6	
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Home Improvement Stores (HI)								
Primary Trade Area	59.7	33.3	5.8	7.0	13.2	12.0	23.6	
Secondary Trade Area	5.1	14.2	26.1	28.2	31.2	27.8	22.4	
Outside Trade Area	35.2	52.4	68.1	64.8	55.6	60.1	54.1	
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
TOTAL								
Primary Trade Area	69.1	41.5	44.1	23.3	25.7	28.5	40.7	
Secondary Trade Area	3.0	13.9	9.7	16.7	26.0	19.1	14.3	
Outside Trade Area	27.9	44.6	46.3	60.0	48.3	52.4	45.0	
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	

FCTM = Food and Convenience Type Merchandise

NFTM = Non-Food Type Merchandise

Source: Clayton Research based on information in Appendix D

Highlights of the survey findings by category of store indicate the following:

- Collingwood residents do most of their food store shopping in Collingwood (88.8 percent of Supermarket spending) with only 30.4 percent of Secondary Trade Area residents shopping in Collingwood. The weakest penetration was in Clearview and Wasaga Beach (28.1

& 19.3 percent respectively). It is likely that the new Real Canadian Superstore in Wasaga Beach reduced Collingwood's Supermarket draw from these municipalities in the eastern portion of the Secondary Trade Area;

- For Department Stores, the Zellers and Wal-Mart stores in Collingwood are accounting for 77.5 percent of the department store spending by Collingwood residents and just over half of the spending by Secondary Trade Area residents. There is department store business outflow to Barrie from the eastern portion of the Secondary Trade Area from the municipalities of Wasaga Beach and Clearview; and
- For Other Non-Food type stores and Home Improvement Stores, there are sizeable leakages of spending to stores outside the Trade Area, mainly in Barrie. Over a third of spending by Collingwood residents and about 60 percent of spending by Secondary Trade Area residents are in stores outside the Trade Area.

3.3 CUSTOMER INTERCEPT SURVEYS

The customer intercept surveys done as part of the research for the 1995 *Town of Collingwood Commercial Strategy Study* provide some insight into the importance of seasonal residents as well as tourists and other visitors to Collingwood retailers.

The consumer intercept surveys showed different expenditure patterns between seasons – with seasonal residents' total expenditure increasing significantly in the winter and summer periods (see Figure 13):

- During the spring period, Trade Area residents accounted for 86.4 percent of total expenditures. Seasonal residents accounted for an additional 6.0 percent and tourists and other visitors for 7.5 percent of total spending;
- In the winter period, this pattern changed. Seasonal residents accounted for a larger percent of business (9.2 percent), as did tourists and visitors at 16.6 percent; and
- In the summer period, this pattern also changed. Seasonal residents accounted for an even larger percent of business, 11.9 percent, with tourists and visitors slightly more at 14.5 percent.

This survey demonstrated that tourists and other visitors are especially important to Collingwood retail in the winter and summer seasons. This

spending is treated as part of the "inflow" spending in the retail market opportunities analysis in the next chapter.

Figure 13

**Distribution of Total Expenditure By Origin of Consumer -
Consumer Intercept Surveys Results**

	<u>Winter</u>	<u>Spring</u>	<u>Summer</u>
Distribution of Recorded Expenditures - By Origin of Consumer		<i>Percent</i>	
Primary Trade Area	47.5	56.5	48.4
Secondary & Tertiary Trade Area	<u>26.7</u>	<u>30.0</u>	<u>25.1</u>
Subtotal Trade Area	74.2	86.4	73.5
Seasonal Residents	9.2	6.0	11.9
Tourists & Visitors	<u>16.6</u>	<u>7.5</u>	<u>14.5</u>
Subtotal	25.8	13.6	26.5
Total Customers	100.0	100.0	100.0

Source: Clayton Research based on information from Malone Given Parsons, *Town of Collingwood, Commercial Strategy Study*, November 1995, Appendix D

4 MARKET OPPORTUNITY ANALYSIS FOR THE SUBJECT LANDS

This chapter analyzes the market opportunity for retail space for the subject lands given the spending by permanent and seasonal residents of the Trade Area, estimated spending inflows from customers living outside the Trade Area, sales performance levels by type of store and the competitive environment. It ends with a discussion of the stores which are candidates for the subject lands and considers phasing of the retail development.

4.1 SUBJECT LANDS' MARKET OPPORTUNITY METHODOLOGY

The market opportunity analysis for the subject lands has been conducted as follows:

- First, local shares are applied to the Primary Trade Area, each individual municipality within the Secondary Trade Area and seasonal potential expenditure presented in Figure 7, based on the results of the household survey that was conducted for this report, to determine the ability of Collingwood stores to capture a portion of the Trade Area expenditure. It is recognized that residents of the Trade Area spend part of their retail dollars in stores outside the Trade Area;
- Second, inflows are added, based on the results of the licence plate surveys conducted for this report, to the total Trade Area sales of Collingwood stores to account for the expenditure by customers residing outside of the Trade Area. The combination of spending from the Primary Trade Area, Secondary Trade Area and seasonal residents, along with the inflows results in the total sales available for retail facilities located within Collingwood;
- Third, the performance of existing retail stores located in Collingwood (sales per sq. ft. of retail floor space) is calculated based on the total estimated 2005 sales potential, and the amount (sq. ft.) of each type of retail store currently located in Collingwood;
- Fourth, the impact of new retail projects identified in Section 2.3 which will occur prior to development on the Holborn lands are factored in to create an adjusted retail base. As shown within the detail in each category under the "2005 adjusted" column, these new projects will alter local shares and distribution of spending and set the basis for assigning shares for new retail square footage on the Holborn lands from 2010 onwards; and

- Lastly, the opportunity for additional retail space in Collingwood by store type is calculated by subtracting the total amount of supportable space from the existing and confirmed inventory of floor space to determine the amount of new space warranted over and above the existing and confirmed space. This is referred to as residual additional space warranted and it excludes any consideration of possible sales transfers from existing to new stores.

The market opportunity analysis is done for the following broad categories of stores:

- Food and Convenience Type Merchandise Supermarkets (FCTM);
- Home Improvement Stores (HI); and
- Non-Food Type Merchandise, Non-Food Stores (NFTM) – all stores within the scope of this study excluding Supermarkets, and Home Improvement Stores. The stores are then disaggregated between Department Stores and all other NFTM Stores excluding Department Stores.

4.2 FOOD STORE MARKET OPPORTUNITY

4.2.1 Supermarkets

According to Figure 14, the sales for Supermarkets in Collingwood are estimated at \$65.6 million for 2005, based on the Supermarket share of FCTM spending, the Town's share of Supermarket spending in the Trade Area, the estimated population of seasonal residents and estimated spending inflows from outlying areas. The Supermarket potential sales are forecast to increase by approximately 50 percent to \$98.9 million in 2017.

The Supermarket share of FCTM spending for the Primary Trade Area is based on the results of the consumer telephone survey. In the Primary Trade Area, Supermarket shares are estimated at 87.0 percent of sales in 2005, and are expected to remain at this level through 2010-2017. The Supermarket share for the Secondary Trade Area is estimated at 85.0 percent in 2005 and in subsequent years, while the Supermarket share for the seasonal population is estimated to hold at 89.0 percent over the study period.

Based on the results of the household survey of Collingwood Trade Area households conducted for this analysis, it is estimated that in 2005 Supermarkets located within the Town captured approximately 91.0 percent

of Supermarket spending in the Primary Trade Area. This share is expected to increase slightly to 92.5 percent for the period of 2010-2017. Within the Secondary Trade Area, Collingwood Supermarkets captured anywhere from 19.5 percent (Wasaga Beach) to 57.1 percent (Osprey) of Supermarket spending in the Secondary Trade Area. Prior to development on the Holborn lands, Collingwood's share of supermarket spending in the Secondary Trade Area is expected to grow slightly in the western areas due to the opening of the new Price Chopper in town, but Collingwood's share of supermarket spending is expected to decline in the eastern portion as a result of the new Wal-Mart store in Wasaga Beach, which will have a sizeable food component. With the addition of new supermarket floor space on the Holborn lands by 2010, Collingwood's share of supermarket sales in the Secondary Trade Area is expected to rise slightly in each of the municipalities.

Inflow spending is estimated to remain fairly consistent over the study period, ranging from 16.0 percent in 2005, based on the results of the licence plate survey, to 18.0 percent in 2013-2017.

Based on an industry norm sales performance of approximately \$475 per sq. ft., the Town of Collingwood could support an additional 26,666 sq. ft. rising to 70,154 sq. ft. of Supermarket space over the 2010-2017 period, without sales transfers from existing Supermarkets.

Figure 14

Supermarket Sales Potential and Store Performance, Trade Area, 2005-2017

	2005	2005 adjusted*	2010	2013	2017
Primary Trade Area FCTM Potential (\$millions)	34.1	34.1	38.1	40.3	43.2
Supermarket Share of FCTM potential	87.0%	87.0%	87.0%	87.0%	87.0%
Supermarket Potential (\$millions)	29.7	29.7	33.2	35.1	37.6
Collingwood Stores Share @	91.0%				
(\$millions)	91.5%	27.2			
	92.5%		30.7	32.5	34.7
Blue Mountains FCTM Potential (\$millions)	15.4	15.4	19.7	22.3	26.0
Supermarket Share of FCTM Potential	85.0%	85.0%	85.0%	85.0%	85.0%
Supermarket Potential (\$millions)	13.1	13.1	16.7	19.0	22.1
Collingwood Stores Share @	55.9%	7.3			
(\$millions)	57.5%	7.5			
	60.0%		10.0		
	62.5%			11.9	13.8
Osprey FCTM Potential (\$millions)	5.2	5.2	5.9	6.3	6.8
Supermarket Share of FCTM Potential	85.0%	85.0%	85.0%	85.0%	85.0%
Supermarket Potential (\$millions)	4.5	4.5	5.0	5.4	5.8
Collingwood Stores Share @	57.1%	2.5			
(\$millions)	60.0%	2.7			
	62.5%		3.1		
	65.0%			3.5	3.8
Clearview FCTM Potential (\$millions)	28.6	28.6	30.9	32.5	34.9
Supermarket Share of FCTM Potential	85.0%	85.0%	85.0%	85.0%	85.0%
Supermarket Potential (\$millions)	24.3	24.3	26.3	27.7	29.7
Collingwood Stores Share @	27.7%	6.7			
(\$millions)	25.0%	6.1			
	27.5%		7.2		
	30.0%			8.3	8.9
Wasaga Beach FCTM Potential (\$millions)	29.4	29.4	36.6	41.2	47.8
Supermarket Share of FCTM Potential	85.0%	85.0%	85.0%	85.0%	85.0%
Supermarket Potential (\$millions)	25.0	25.0	31.1	35.1	40.6
Collingwood Stores Share @	19.5%	4.9			
(\$millions)	15.0%	3.8			
	17.5%		5.4		
	20.0%			7.0	8.1
Seasonal Population FCTM Potential (\$millions)	49.8	49.8	60.0	67.7	79.4
Supermarket Share of FCTM Potential	89.0%	89.0%	89.0%	89.0%	89.0%
Supermarket Potential (\$millions)	44.4	44.4	53.4	60.3	70.7
Seasonal Spending	33.3%	14.8	14.8	20.1	23.5
Collingwood Store Share @	45.0%	6.6	6.6		
(\$millions)	47.5%		8.4		
	50.0%			10.0	11.8
Total Potential Sales From Trade Area (\$millions)	55.1	53.9	65.0	73.2	81.1
Plus Inflow @	16.0%	10.5	10.3		
(\$millions)	17.0%		13.3		
	18.0%			16.1	17.8
Total Potential Sales (\$millions)	65.6	64.1	78.3	89.2	98.9
Estimated Sales Performance of Existing Supermarket Space (Sales per Sq. Ft.)	143,781	\$ 456			
Estimated Sales Performance of Existing Supermarket Space (Sales per Sq. Ft.)*	160,781	\$ 399			
Residual Supermarket Expenditures Available (\$ Millions)			\$ 12.7	\$ 23.6	\$ 33.3
Warranted Additional Supermarket Space @	450 \$/Sq. Ft.		28,147	52,448	74,052
(Sq. Ft.)	475 \$/Sq. Ft.		26,666	49,687	70,154
	500 \$/Sq. Ft.		25,332	47,203	66,647

*assumes Price Chopper relocation in Collingwood and impact of new Wal-Mart in Wasaga Beach with significant food component

Note: Forecast in 2005 constant dollars.

FCTM = Food and Convenience Type Merchandise

Source: Clayton Research

4.2.2 Specialty Foods

According to Figure 15, the sales for Specialty Food Stores in Collingwood are estimated at \$10.3 million for 2005, based on the Specialty Food share of FCTM spending, the Town's share of Specialty Food spending in the Trade Area, the estimated population of seasonal residents and estimated spending inflows from outlying areas. The Specialty Food potential sales are forecast to increase by approximately 55 percent to \$16.1 million in 2017.

The Specialty Food share of FCTM spending for the Primary Trade Area is based on the results of the consumer telephone survey. In the Primary Trade Area, Specialty Food shares are estimated at 13.0 percent of sales in 2005, and are expected to remain at this level through 2010-2017. The Specialty Food share for the Secondary Trade Area is estimated at 85.0 percent in 2005 and in subsequent years, while the Specialty Food share for the seasonal population is estimated to hold at 89.0 percent over the study period.

Based on the results of the survey of Collingwood Trade Area households conducted for this analysis, it is estimated that the distribution of spending in specialty food stores follows a similar pattern to that of supermarkets. In 2005 Food Stores located within the Town captured approximately 91.0 percent of Specialty Food spending in the Primary Trade Area. This share is expected to increase slightly to 92.5 percent for the period of 2010-2017. Similarly, in the Secondary Trade Area, Specialty Food shares for Collingwood are expected to increase slightly over the 2010-2017 period as a result of the addition of new square footage on the Holborn lands.

Inflow spending is estimated to remain fairly consistent over the study period, ranging from 16.0 percent in 2005, based on the results of the licence plate survey, to 18.0 percent in 2013-2017.

Based on an industry norm sales performance of approximately \$300 per sq. ft., the Town of Collingwood could support an additional 7,855 sq. ft. rising to 19,398 sq. ft. of Specialty Food Store space over the 2010-2017 period, without sales transfers from existing Specialty Food Stores.

Figure 15

Specialty Food Sales Potential and Store Performance, Trade Area, 2005-2017

		2005	2005 adjusted*	2010	2013	2017
Primary Trade Area FCTM Potential (\$millions)		34.1	34.1	38.1	40.3	43.2
Specialty Food Share of FCTM potential		13.0%	13.0%	13.0%	13.0%	13.0%
Specialty Food Potential (\$millions)		4.4	4.4	5.0	5.2	5.6
Collingwood Stores Share @	91.0%	4.0	4.0			
(\$millions)	92.5%			4.6	4.9	5.2
Blue Mountains FCTM Potential (\$millions)		15.4	15.4	19.7	22.3	26.0
Specialty Food Share of FCTM potential		15.0%	15.0%	15.0%	15.0%	15.0%
Specialty Food Potential (\$millions)		2.3	2.3	3.0	3.4	3.9
Collingwood Stores Share @	55.9%	1.3	1.3			
(\$millions)	60.0%			1.8		
	62.5%				2.1	2.4
Osprey FCTM Potential (\$millions)		5.2	5.2	5.9	6.3	6.8
Specialty Food Share of FCTM potential		15.0%	15.0%	15.0%	15.0%	15.0%
Specialty Food Potential (\$millions)		0.8	0.8	0.9	0.9	1.0
Collingwood Stores Share @	57.1%	0.4	0.4			
(\$millions)	62.5%			0.6		
	65.0%				0.6	0.7
Clearview FCTM Potential (\$millions)		28.6	28.6	30.9	32.5	34.9
Specialty Food Share of FCTM potential		15.0%	15.0%	15.0%	15.0%	15.0%
Specialty Food Potential (\$millions)		4.3	4.3	4.6	4.9	5.2
Collingwood Stores Share @	27.7%	1.2	1.2			
(\$millions)	30.0%			1.4		
	32.5%				1.6	1.7
Wasaga Beach FCTM Potential (\$millions)		29.4	29.4	36.6	41.2	47.8
Specialty Food Share of FCTM potential		15.0%	15.0%	15.0%	15.0%	15.0%
Specialty Food Potential (\$millions)		4.4	4.4	5.5	6.2	7.2
Collingwood Stores Share @	19.5%	0.9	0.9			
(\$millions)	20.0%			1.1		
	22.5%				1.4	1.6
Seasonal Population FCTM Potential (\$millions)		49.8	49.8	60.0	67.7	79.4
Specialty Food Share of FCTM potential		11.0%	11.0%	11.0%	11.0%	11.0%
Specialty Food Potential (\$millions)		5.5	5.5	6.6	7.4	8.7
Seasonal Spending	33.3%	1.8	1.8	2.2	2.5	2.9
Collingwood Stores Share @	45.0%	0.8	0.8			
(\$millions)	50.0%			1.1		
	55.0%				1.4	1.6
Total Potential Sales from Trade Area (\$millions)		8.6	8.6	10.5	11.9	13.2
Plus Inflow @	16.0%	1.6	1.6			
(\$millions)	17.0%			2.1		
	18.0%				2.6	2.9
Total Potential Sales (\$millions)		10.3	10.3	12.6	14.5	16.1
Estimated Sales Performance of Existing Specialty Food Space (Sales per Sq. Ft.)	26,000	\$ 396	\$ 396			
Residual Specialty Food Expenditures Available (\$ Millions)				\$ 2.4	\$ 4.2	\$ 5.8
Warranted Additional Specialty Food Space @ (Sq. Ft.)	275 \$/Sq. Ft.			8,570	15,360	21,162
	300 \$/Sq. Ft.			7,855	14,080	19,398
	325 \$/Sq. Ft.			7,251	12,997	17,906

* no adjustment made due to assumption of no competitive activity for Specialty Food stores

Note: Forecast in 2005 constant dollars.

FCTM = Food and Convenience Type Merchandise

Source: Clayton Research

4.3 HOME IMPROVEMENT AND NON-FOOD STORES MARKET OPPORTUNITY

For the purposes of the analysis, Home Improvement Stores (HI) and all other Non-Food Stores (NFTM) are grouped together to form one sector, called NFTM + HI. This analysis considers new Home Improvement Centres and a diverse array of Non-Food Store types, which in some cases leads to overlap in product lines, which should be recognized in determining impact.

4.3.1 Home Improvement Market Opportunity

According to Figure 16, the sales potential for Home Improvement Store floor space in Collingwood is estimated at \$12.2 million for 2005, and is forecast to increase to approximately \$47.7 million in 2017.

The Home Improvement share of NFTM + HI spending for the Trade Area is based on results of the telephone survey. In the Trade Area as a whole, the Home Improvement share is 13.0 percent of total NFTM + HI spending in 2005 and is expected to increase to 15.0 percent through the 2010-2017 period. The opening of two big-box Home Improvement Centres in Collingwood (RONA and Home Depot), increases the Home Improvement share of total NFTM + HI spending given the wide range of products offered in these stores, including home furnishings and appliances. This in turn will reduce the NFTM + HI share of other retail categories analyzed here.

According to the consumer survey, in 2005 Home Improvement Stores located within the Town captured approximately 59.7 percent of spending in Home Improvement Stores by the Primary Trade Area population. With the introduction of Home Depot and RONA, this share is expected to increase to 90.0 percent by 2010 and remain at this level until 2017. Collingwood stores captured varying percentages of Home Improvement sales within the Secondary Trade Area, ranging from a low of 5.8 percent in Osprey to 33.3 percent in The Blue Mountains. Current low shares in the Secondary Trade Area are expected to increase significantly by 2010-2017, to about 40.0 percent in Wasaga Beach and Clearview, 60.0 percent in Osprey and 75.0 percent in The Blue Mountains as a result of the opening of Home Depot and RONA.

The inflow sales from outside of the Trade Area are estimated to increase from 10.0 percent in 2005 based on the results of the licence plate survey, to 25.0 percent by 2010-2017.

Based on an industry norm sales performance of approximately \$275 per sq. ft., the Town of Collingwood could support an additional 116,378 sq. ft. rising to 167,735 sq. ft. of Home Improvement store space over the 2010-2017 period without sales transfers from existing stores. The new Home Depot and RONA stores will accommodate this additional demand.

Figure 16

Home Improvement Potential Sales and Performance, Trade Area, 2005-2017

	2005	2010*	2013	2017
Primary Trade Area NFTM And HI Potential (\$millions)	81.0	95.1	103.6	115.4
HI Store Share	13.0%	15.0%	15.0%	15.0%
HI Store Potential (\$millions)	10.5	14.3	15.5	17.3
Collingwood Share @ (\$millions)	59.7% 90.0%	6.3	12.8	14.0
Blue Mountains NFTM And HI Potential (\$millions)	41.9	56.2	65.7	79.7
HI Store Share	13.0%	15.0%	15.0%	15.0%
HI Store Potential (\$millions)	5.5	8.4	9.9	12.0
Collingwood Share @ (\$millions)	33.3% 75.0%	1.8	6.3	7.4
Osprey NFTM And HI Potential (\$millions)	12.1	14.3	15.8	17.8
HI Store Share	13.0%	15.0%	15.0%	15.0%
HI Store Potential (\$millions)	1.6	2.2	2.4	2.7
Collingwood Share @ (\$millions)	5.8% 60.0%	0.1	1.3	1.4
Clearview NFTM And HI Potential (\$millions)	68.5	77.9	84.5	94.3
HI Store Share	13.0%	15.0%	15.0%	15.0%
HI Store Potential (\$millions)	8.9	11.7	12.7	14.1
Collingwood Share @ (\$millions)	7.0% 40.0%	0.6	4.7	5.1
Wasaga Beach NFTM And HI Potential (\$millions)	68.7	89.7	104.2	125.6
HI Store Share	13.0%	15.0%	15.0%	15.0%
HI Store Potential (\$millions)	8.9	13.5	15.6	18.8
Collingwood Share @ (\$millions)	13.2% 40.0%	1.2	5.4	6.3
Seasonal Population NFTM And HI Potential (\$millions)	124.8	157.8	183.5	223.9
HI Store Share	13.0%	15.0%	15.0%	15.0%
HI Store Potential (\$millions)	16.2	23.7	27.5	33.6
Seasonal Spending	33.3%	5.4	7.9	9.2
Collingwood Share @ (\$millions)	40.0% 75.0%	2.2	5.9	6.9
Total Potential Sales From Trade Area (\$millions)	12.2	36.4	41.0	47.7
Plus Inflow @ (\$millions)	10.0% 25.0%	1.4		
	25.0%		9.1	10.2
Total Potential Sales (\$millions)	13.5	45.5	51.2	59.6
Estimated Sales Performance of Existing Collingwood HI Store Space (Sales per Sq. Ft.)	74,700	\$ 181		
Residual HI Store Expenditures Available (\$millions)		\$ 32.0	\$ 37.7	\$ 46.1
Warranted HI Store Space @ (Sq. Ft.)	250 \$/Sq. Ft.	128,015	150,914	184,509
	275 \$/Sq. Ft.	116,378	137,195	167,735
	300 \$/Sq. Ft.	106,679	125,762	153,757

* HI share of total DSTM/Hi expenditure assumed to increase as a result of new RONA & Home Depot stores in Collingwood

Note: Forecast in 2005 constant dollars.

HI = Home Improvement.

Source: Clayton Research

4.3.2 Department Stores

According to Figure 17, the existing sales for Department Stores in Collingwood are estimated at \$45.1 million for 2005, and the potential sales are forecast to increase to approximately \$55.6 million in 2017.

The Department Store share of NFTM + HI spending for the Primary Trade Area is estimated at 19.0 percent in 2005, and increases to 20.0 percent over the study period, as a result of projected sales growth in the existing Wal-Mart store and the introduction of a new Wal-Mart store in Wasaga Beach. The Department Store share of total NFTM + HI spending for the Secondary Trade Area and Seasonal Population are estimated to be the same as in the Primary Trade Area.

According to the consumer survey, in 2005 Department Stores located within the Town captured approximately 77.5 percent of Department Store spending by residents of the Primary Trade Area. This share is expected to remain stable over the in 2010-2017 period despite the introduction of the new Wal-Mart in Wasaga Beach. Collingwood Department Stores captured anywhere from 45.1 percent (Clearview) to 81.7 percent (Osprey) of department store spending in the Secondary Trade Area. With the opening of Wal-Mart in Wasaga Beach prior to any activity on the Holborn lands, there will be a significant impact on Collingwood's share of Department Store sales in the Secondary Trade Area, namely the eastern area around Wasaga Beach and Clearview. Collingwood's share of Department Store spending in Clearview is expected to drop from 45.1 percent to 30.0 percent and in Wasaga Beach, the share is projected to drop from 48.7 percent to 10.0 percent. The share of the Seasonal Population Department Store expenditure is expected to drop from 60.0 percent to 35.0 percent.

The inflow sales from outside of the Trade Area are estimated to remain stable at about 20.0 percent to 2017.

Based on an industry norm sales performance of approximately \$450 per sq. ft., the Town of Collingwood could not support any additional Department store space in 2010 without transfers from existing store volume. By 2013, the Town could support an additional 6,917 sq. ft. rising to 23,335 sq. ft. of Department Store space over the 2013-2017 period without sales transfers from existing stores.

Figure 17

Department Store Potential Sales and Performance, Trade Area, 2005-2017						
		2005	2005 adjusted*	2010	2013	2017
Primary Trade Area NFTM And HI Potential (\$millions)		81.0	81.0	95.1	103.6	115.4
Department Store Share		19.0%	21.0%	20.0%	20.0%	20.0%
Dept Store Potential (\$millions)		15.4	17.0	19.0	20.7	23.1
Collingwood Stores Share @	77.5%	11.9	13.2			
	77.5%			14.7		
	77.5%				16.1	17.9
Blue Mountains NFTM And HI Potential (\$millions)		41.9	41.9	56.2	65.7	79.7
Department Store Share		19.0%	21.0%	20.0%	20.0%	20.0%
Dept Store Potential (\$millions)		8.0	8.8	11.2	13.1	15.9
Collingwood Stores Share @	66.4%	5.3				
(\$millions)	65.0%		5.7			
	65.0%			7.3		
	65.0%				8.5	10.4
Osprey NFTM And HI Potential (\$millions)		12.1	12.1	14.3	15.8	17.8
Department Store Share		19.0%	21.0%	20.0%	20.0%	20.0%
Dept Store Potential (\$millions)		2.3	2.5	2.9	3.2	3.6
Collingwood Stores Share @	81.7%	1.9				
(\$millions)	80.0%		2.0			
	80.0%			2.3		
	80.0%				2.5	2.8
Clearview NFTM And HI Potential (\$millions)		68.5	68.5	77.9	84.5	94.3
Department Store Share		19.0%	21.0%	20.0%	20.0%	20.0%
Dept Store Potential (\$millions)		13.0	14.4	15.6	16.9	18.9
Collingwood Stores Share @	45.1%	5.9				
(\$millions)	30.0%		4.3			
	30.0%			4.7		
	30.0%				5.1	5.7
Wasaga Beach NFTM And HI Potential (\$millions)		68.7	68.7	89.7	104.2	125.6
Department Store Share		19.0%	21.0%	20.0%	20.0%	20.0%
Dept Store Potential (\$millions)		13.1	14.4	17.9	20.8	25.1
Collingwood Stores Share @	48.7%	6.4				
(\$millions)	10.0%		1.4			
	10.0%			1.8		
	10.0%				2.1	2.5
Seasonal Population NFTM And HI Potential (\$millions)		124.8	124.8	157.8	183.5	223.9
Department Store Share		19.0%	21.0%	20.0%	20.0%	20.0%
Dept Store Potential (\$millions)		23.7	26.2	31.6	36.7	44.8
Seasonal Spending	33.3%	7.9	8.7	10.5	12.2	14.9
Collingwood Stores Share @	60.0%	4.7				
(\$millions)	35.0%		3.1			
	35.0%			3.7		
	35.0%				4.3	5.2
Total Potential Sales From Trade Area (\$millions)		36.1	29.7	34.5	38.6	44.5
Plus Inflow @	20.0%	9.0	7.4			
(\$millions)	20.0%			8.6		
	20.0%				9.6	11.1
Total Potential Sales (\$millions)		45.1	37.2	43.1	48.2	55.6
Estimated Sales Performance of Existing Department Store Space (Sales per Sq. Ft.)	205,300	\$ 220	\$ 181			
Residual Dept Store Expenditures Available (\$millions)				\$ (2.0)	\$ 3.1	\$ 10.5
Warranted Department Store Space @ (Sq. Ft.)		400 \$/Sq. Ft.		(4,944)	7,782	26,252
		450 \$/Sq. Ft.		(4,395)	6,917	23,335
		500 \$/Sq. Ft.		(3,955)	6,225	21,001
*assumes new Wal-Mart store in Wasaga Beach						
Note: Forecast in 2005 constant dollars.						
Clayton Research						

4.3.3 Non-Food Stores Excluding Department Stores

According to Figure 18, the actual sales for Non-Food Stores, excluding Department Stores and Home Improvement Stores, in Collingwood are estimated at \$109.8 million for 2005, and potential sales are forecast to increase to \$185.5 million in 2017.

The Non-Department/Non-Home Improvement Store share of NFTM + HI spending for the Primary Trade Area is estimated at 68.0 percent in 2005, and is expected to decrease to 65.0 percent over the study period, as a result of the significant amount of new floor space being added in the Department Store and Home Improvement sector. Non-Department/Non-Home Improvement space to be built on the Holborn lands will counter-act this percentage decrease somewhat. Shares in the Secondary Trade Area and for the Seasonal Population are estimated to be the same as the Primary Trade Area.

According to the household survey, in 2005 Non-Department/Non-Home Improvement Stores located within the Town captured approximately 66.7 percent of spending in the Primary Trade Area. This share is expected to increase to 75.4 percent in 2010-2017 as new stores are added to Collingwood's retail store inventory. Collingwood stores also captured between 22.5 percent and 42.1 percent of Non-Department/Non-Home Improvement Store spending in the Secondary Trade Area, depending on the municipality. It is anticipated that additional Non-Department/Non-Home Improvement square footage will be built in Wasaga Beach on one the available sites mentioned earlier in this report. This will have the effect of limiting the market share upside for square footage in Collingwood as it will be more difficult to draw customers from Wasaga Beach and the eastern portion of the Secondary Trade Area. Accordingly, Collingwood's share in Wasaga Beach is expected to decline marginally from 24.2 percent currently to only 22.3 percent by 2017 despite the new stores in Collingwood. In Clearview, Collingwood's share is expected to increase marginally from 22.5 percent today to 25.3 percent in 2017.

The inflow sales, based on the results of the licence plate survey, are estimated to remain consistent over the study period, at about 22 to 23 percent.

Figure 18

Non-Food Type Merchandise, Excluding Department Stores, Potential Sales and Performance, Trade Area, 2005-2017

		2005	2005 adjusted*	2010	2013	2017
Primary Trade Area NFTM And HI Potential (\$millions)		81.0	81.0	95.1	103.6	115.4
Non-Department/Non-Home Improvement Store Share		68.0%	64.0%	65.0%	65.0%	65.0%
Non-Dept/Non-Home Improvement Store Potential (\$millions)		55.1	51.8	61.8	67.3	75.0
Collingwood Stores Share @	66.7%	36.7				
(\$millions)	68.8%		35.7			
	74.4%			46.0		
	75.4%				50.8	56.6
Blue Mountains NFTM And HI Potential (\$millions)		41.9	41.9	56.2	65.7	79.7
Non-Department/Non-Home Improvement Store Share		68.0%	64.0%	65.0%	65.0%	65.0%
Non-Dept/Non-Home Improvement Store Potential (\$millions)		28.5	26.8	36.5	42.7	51.8
Collingwood Stores Share @	40.4%	11.5				
(\$millions)	42.4%		11.4			
	47.8%			17.5		
	49.5%				21.2	25.7
Osprey NFTM And HI Potential (\$millions)		12.1	12.1	14.3	15.8	17.8
Non-Department/Non-Home Improvement Store Share		68.0%	64.0%	65.0%	65.0%	65.0%
Non-Dept/Non-Home Improvement Store Potential (\$millions)		8.3	7.8	9.3	10.2	11.5
Collingwood Stores Share @	42.1%	3.5				
(\$millions)	44.4%		3.5			
	51.0%			4.8		
	52.2%				5.3	6.0
Clearview NFTM And HI Potential (\$millions)		68.5	68.5	77.9	84.5	94.3
Non-Department/Non-Home Improvement Store Share		68.0%	64.0%	65.0%	65.0%	65.0%
Non-Dept/Non-Home Improvement Store Potential (\$millions)		46.6	43.9	50.6	54.9	61.3
Collingwood Stores Share @	22.5%	10.5				
(\$millions)	19.8%		8.7			
	24.1%			12.2		
	25.3%				13.9	15.5
Wasaga Beach NFTM And HI Potential (\$millions)		68.7	68.7	89.7	104.2	125.6
Non-Department/Non-Home Improvement Store Share		68.0%	64.0%	65.0%	65.0%	65.0%
Non-Dept/Non-Home Improvement Store Potential (\$millions)		46.7	44.0	58.3	67.7	81.6
Collingwood Stores Share @	24.2%	11.3				
(\$millions)	18.1%		8.0			
	21.2%			12.3		
	22.3%				15.1	18.2
Seasonal Population NFTM And HI Potential (\$millions)		124.8	124.8	157.8	183.5	223.9
Non-Department/Non-Home Improvement Store Share		68.0%	64.0%	65.0%	65.0%	65.0%
Non-Dept/Non-Home Improvement Store Potential (\$millions)		84.9	79.9	102.5	119.3	145.5
Seasonal Spending	33.3%	28.3	26.6	34.1	39.7	48.5
Collingwood Stores Share @	40.0%	11.3				
(\$millions)	37.9%		10.1			
	42.2%			14.4		
	43.4%				17.2	21.0
Total Potential Sales From Trade Area (\$millions)		84.8	77.2	107.2	123.6	143.0
Plus Inflow @ (\$millions)	22.8%	25.0	22.6	31.7	36.7	42.5
Total Potential Sales (\$millions)		109.8	99.8	138.9	160.2	185.5

Notes: Forecast in 2005 constant dollars.

Source: Clayton Research

The potential sales for Non-Food/Non-Home Improvement Stores, excluding Department Stores, have been broken down further. The categories used for the purpose of this analysis are:

- Home and Auto Supply Stores;
- Clothing and Accessories Stores;

- Furniture, Home Furnishings & Electronics Stores;
- Pharmacies and Personal Care Stores; and
- Miscellaneous Retail Stores.

4.3.3.1 Home and Auto Supply Stores

According to Figure 19, the actual sales for Home and Auto Supply Stores in Collingwood are estimated at \$19.0 million for 2005, and potential sales are forecast to increase to \$24.7 million in 2017.

The Home and Auto Supply Store share of NFTM + HI spending for the Primary Trade Area is estimated at 6.0 percent in 2005, and is expected to increase to 7.0 percent by the end of the study period. The Home and Auto Supply share for the Secondary Trade Area and the Seasonal Population is also expected to follow this trend. The expansion of the Canadian Tire in Collingwood and the construction of a new Canadian Tire store in Wasaga Beach will impact the Home & Auto Supply Store share of NFTM + HI given the wide array of goods sold in these stores. As a result of the Collingwood expansion and new store in Wasaga Beach, the Home & Auto Supply share of NFTM + HI is expected to rise from 6.0 percent to 7.0 percent.

According to the household survey, in 2005 Home and Auto Supply Stores located within the Town captured approximately 95.4 percent of Home and Auto Supply store spending in the Primary Trade Area. This share is expected to increase to 97.0 percent as a result of the expansion to the Collingwood Canadian Tire store. Collingwood stores also captured anywhere from 63.7 percent (Clearview) to 85.7 percent (Blue Mountains) of Home and Auto Supply store spending in the Secondary Trade Area. The new Canadian Tire store in Wasaga Beach will significantly impact the ability of Collingwood Home and Auto Supply Stores to penetrate into Wasaga Beach and a portion of Clearview. Figure 19 takes this into account when calculating residual sales.

The inflow sales from outside of the Trade Area, based on the results of the licence plate survey, are estimated to remain consistent over the study period, at about 25.0 percent.

Based on an industry norm sales performance of approximately \$275 per sq. ft., the Town of Collingwood could support an additional 517 sq. ft. rising to 20,572 sq. ft. of Home and Auto Supply Store space over the 2010-2017 period without sales transfers from existing stores.

Figure 19

Home and Auto Supply Stores, Potential Sales and Performance, Trade Area, 2005-2017

		2005	2005 adjusted*	2010	2013	2017
Primary Trade Area NFTM And HI Potential (\$millions)		81.0	81.0	95.1	103.6	115.4
Home & Auto Supply Store Share		6.0%	7.0%	7.0%	7.0%	7.0%
Home & Auto Supply Store Potential (\$millions)		4.9	5.7	6.7	7.3	8.1
Collingwood Stores Share @ (\$millions)	95.4%	4.6	5.5			
	97.0%			6.5	7.0	7.8
Blue Mountains NFTM And HI Potential (\$millions)		41.9	41.9	56.2	65.7	79.7
Home & Auto Supply Store Share		6.0%	7.0%	7.0%	7.0%	7.0%
Home & Auto Supply Store Potential (\$millions)		2.5	2.9	3.9	4.6	5.6
Collingwood Stores Share @ (\$millions)	85.7%	2.2	2.5			
	85.7%			3.4	3.9	4.8
Osprey NFTM And HI Potential (\$millions)		12.1	12.1	14.3	15.8	17.8
Home & Auto Supply Store Share		6.0%	7.0%	7.0%	7.0%	7.0%
Home & Auto Supply Store Potential (\$millions)		0.7	0.8	1.0	1.1	1.2
Collingwood Stores Share @ (\$millions)	78.3%	0.6	0.7			
	78.3%			0.8	0.9	1.0
Clearview NFTM And HI Potential (\$millions)		68.5	68.5	77.9	84.5	94.3
Home & Auto Supply Store Share		6.0%	7.0%	7.0%	7.0%	7.0%
Home & Auto Supply Store Potential (\$millions)		4.1	4.8	5.5	5.9	6.6
Collingwood Stores Share @ (\$millions)	63.7%	2.6	1.7			
	35.0%			1.9	2.1	2.3
Wasaga Beach NFTM And HI Potential (\$millions)		68.7	68.7	89.7	104.2	125.6
Home & Auto Supply Store Share		6.0%	7.0%	7.0%	7.0%	7.0%
Home & Auto Supply Store Potential (\$millions)		4.1	4.8	6.3	7.3	8.8
Collingwood Stores Share @ (\$millions)	80.0%	3.3	0.7			
	15.0%			0.9	1.1	1.3
Seasonal Population NFTM And HI Potential (\$millions)		124.8	124.8	157.8	183.5	223.9
Home & Auto Supply Store Share		6.0%	7.0%	7.0%	7.0%	7.0%
Home & Auto Supply Store Potential (\$millions)		7.5	8.7	11.0	12.8	15.7
Seasonal Spending	33.3%	2.5	2.9	3.7	4.3	5.2
Collingwood Stores Share @ (\$millions)	40.0%	1.0	0.7			
	25.0%			0.9	1.1	1.3
	25.0%					
Total Potential Sales From Trade Area (\$millions)		14.3	11.8	14.4	16.1	18.5
Plus Inflow @ (\$millions)	25.0%	4.8	3.9	4.8	5.4	6.2
Total Potential Sales (\$millions)		19.0	15.7	19.2	21.4	24.7
Estimated Sales Performance of Existing Collingwood Home & Auto Supply Store Space (Sales per Sq. Ft.)	57,700	\$ 330				
Estimated Sales Performance of Existing Collingwood Home & Auto Supply Space (Sales per Sq. Ft.)*	69,700		\$ 226			
Residual Home & Auto Supply Store Expenditures Available (\$millions)				\$ 0.1	\$ 2.4	\$ 5.7
Warranted Home & Auto Supply Space @ (Sq. Ft.)		250 \$/Sq. Ft.		569	9,593	22,629
		275 \$/Sq. Ft.		517	8,721	20,572
		300 \$/Sq. Ft.		474	7,995	18,857

*assumes new Canadian Tire in Wasaga Beach & 12,000 Sq. Ft. Expansion To Canadian Tire In Collingwood

Notes: Forecast in 2005 constant dollars.

NFTM (Non-food Type Merchandise) excludes home improvement stores.

Source: Clayton Research

4.3.3.2 Clothing and Accessories Stores

According to Figure 20, actual sales for Clothing and Accessories Stores in Collingwood are estimated at \$21.2 million for 2005, and potential sales are forecast to increase to \$37.2 million in 2017.

The Clothing and Accessories Store share of NFTM + HI spending for the Primary Trade Area is estimated at 14.0 percent in 2005, and falls to 13.0 percent over the 2010-2017 period. The Clothing and Accessories share of NFTM + HI for the Secondary Trade Area and Seasonal Population are estimated to be consistent with the shares for the Primary Trade Area. The continued sales growth of Wal-Mart in Collingwood and the opening of a new Wal-Mart in Wasaga Beach will impact the Clothing and Accessories share of NFTM + HI given the strength and popularity of the product selection in Wal-Mart. Prior to development on the Holborn lands, the Clothing and Accessories share of NFTM + HI is expected to drop from 14.0 percent to 12.5 percent, however it is expected to increase slightly to 13.0 percent from 2010-2017 as a result of new Clothing and Accessories square footage on the Holborn lands.

According to the household survey, in 2005, Clothing and Accessories Stores located within the Town captured approximately 53.0 percent of Clothing and Accessories Store spending in the Primary Trade Area. This share is expected to increase to 65.0 percent in 2017 as new stores are added to Collingwood's retail store inventory. Collingwood stores also captured anywhere from 21.0 percent (Wasaga Beach) to 60.0 percent (Osprey) of Clothing and Accessories spending in the municipalities that make up the Secondary Trade Area. Growth in this share is expected in the Town of The Blue Mountains and Osprey as a result of new square footage in Collingwood, while share growth in Wasaga Beach and Clearview will be less pronounced.

The inflow sales from outside of the Trade Area, based on the results of the licence plate survey, are estimated to remain consistent over the study period, at about 25.0 percent.

Based on an industry norm sales performance of approximately \$300 per sq. ft., the Town of Collingwood could support an additional 17,282 sq. ft. rising to 53,396 sq. ft. of Clothing and Accessories Store space over the 2010-2017 period without sales transfers from existing stores.

Figure 20

Clothing & Accessories Stores, Potential Sales and Performance, Trade Area, 2005-2017

		2005	2005 adjusted*	2010	2013	2017
Primary Trade Area NFTM And HI Potential (\$millions)		81.0	81.0	95.1	103.6	115.4
Clothing & Accessories Store Share		14.0%	12.5%	13.0%	13.0%	13.0%
Clothing & Accessories Store Potential (\$millions)		11.3	10.1	12.4	13.5	15.0
Collingwood Stores Share @	53.0%	6.0	5.4			
(\$millions)	60.0%			7.4		
	65.0%				8.8	9.7
Blue Mountains NFTM And HI Potential (\$millions)		41.9	41.9	56.2	65.7	79.7
Clothing & Accessories Store Share		14.0%	12.5%	13.0%	13.0%	13.0%
Clothing & Accessories Store Potential (\$millions)		5.9	5.2	7.3	8.5	10.4
Collingwood Stores Share @	31.0%	1.8	1.6			
(\$millions)	35.0%			2.6		
	40.0%				3.4	4.1
Osprey NFTM And HI Potential (\$millions)		12.1	12.1	14.3	15.8	17.8
Clothing & Accessories Store Share		14.0%	12.5%	13.0%	13.0%	13.0%
Clothing & Accessories Store Potential (\$millions)		1.7	1.5	1.9	2.0	2.3
Collingwood Stores Share @	60.0%	1.0	0.9			
(\$millions)	65.0%			1.2		
	67.5%				1.4	1.6
Clearview NFTM And HI Potential (\$millions)		68.5	68.5	77.9	84.5	94.3
Clothing & Accessories Store Share		14.0%	12.5%	13.0%	13.0%	13.0%
Clothing & Accessories Store Potential (\$millions)		9.6	8.6	10.1	11.0	12.3
Collingwood Stores Share @	27.9%	2.7				
(\$millions)	25.0%		2.1			
	30.0%			3.0		
	32.5%				3.6	4.0
Wasaga Beach NFTM And HI Potential (\$millions)		68.7	68.7	89.7	104.2	125.6
Clothing & Accessories Store Share		14.0%	12.5%	13.0%	13.0%	13.0%
Clothing & Accessories Store Potential (\$millions)		9.6	8.6	11.7	13.5	16.3
Collingwood Stores Share @	21.0%	2.0				
(\$millions)	20.0%		1.7			
	22.5%			2.6		
	25.0%				3.4	4.1
Seasonal Population NFTM And HI Potential (\$millions)		124.8	124.8	157.8	183.5	223.9
Clothing & Accessories Store Share		14.0%	12.5%	13.0%	13.0%	13.0%
Clothing & Accessories Store Potential (\$millions)		17.5	15.6	20.5	23.9	29.1
Seasonal Spending	33.3%	5.8	5.2	6.8	7.9	9.7
Collingwood Stores Share @	40.0%	2.3				
(\$millions)	37.5%		1.9			
	42.5%			2.9		
	45.0%				3.6	4.4
Total Potential Sales From Trade Area (\$millions)		15.9	13.7	19.8	24.1	27.9
Plus Inflow @ (\$millions)	25.0%	5.3	4.6	6.6	8.0	9.3
Total Potential Sales (\$millions)		21.2	18.3	26.3	32.1	37.2
Estimated Sales Performance of Existing Clothing & Accessories Store Space (Sales per Sq. Ft.)	78,700	\$ 269	\$ 232			
Residual Clothing & Accessories Store Expenditures Available (\$millions)				\$ 5.2	\$ 11.0	\$ 16.0
Warranted Clothing & Accessories Type Merchandise Space @ (Sq. Ft.)		275 \$/Sq. Ft.		18,853	39,878	58,251
		300 \$/Sq. Ft.		17,282	36,555	53,396
		325 \$/Sq. Ft.		15,953	33,743	49,289

*assumes impact of new Wal-Mart in Wasaga Beach, growth in Wal-Mart share of total NFTM + HI & allowance for new clothing store footage in Wasaga Beach as component of new retail sq. ft.

Notes: Forecast in 2005 constant dollars.

NFTM (Non-food Type Merchandise) excludes home improvement stores.

Source: Clayton Research

4.3.3.3 Furniture, Home Furnishings and Electronics Stores

According to Figure 21, the actual sales for Furniture, Home Furnishings and Electronics Stores in Collingwood are estimated at \$15.8 million for 2005, and potential sales are forecast to increase to \$31.6 million in 2017.

The Furniture, Home Furnishings and Electronics Store share of Non-Department Store NFTM spending for the Primary Trade Area is estimated at 16.0 percent in 2005 and is expected to decrease to 14.0 percent over the study period. The Furniture, Home Furnishings and Electronics shares for the Secondary Trade Area and seasonal population are estimated to be consistent with the shares for the Primary Trade Area. The opening of two big-box Home Improvement Centres and new square footage in Home & Auto Supply Stores will impact the Furniture, Home Furnishings and Electronics share of NFTM + HI given the significant furnishing and appliance offering in these stores. Even with new development of Furniture, Home Furnishings and Electronics Stores on the Holborn lands, it is expected that the share will remain the same until 2017 due to sales growth in the big-box stores.

According to the household survey, in 2005 Furniture, Home Furnishings and Electronics located within the Town captured approximately 43.1 percent of Furniture, Home Furnishings and Electronics Store spending in the Primary Trade Area. This share is expected to increase to 55.0 percent in 2010-2017 as new stores are added to Collingwood's retail store inventory. Collingwood stores also captured anywhere from 7.9 percent (Osprey) to 13.9 percent (Wasaga Beach) of Furniture, Home Furnishings and Electronics Store spending in the Secondary Trade Area. These shares are expected to increase to the range of 20.0-25.0 percent as the Furniture, Home Furnishings and Electronics Stores offering in Collingwood is improved.

The inflow sales from outside of the Trade Area, based on the results of the licence plate survey, are estimated to remain consistent over the study period, at about 25.0 percent.

Based on an industry norm sales performance of approximately \$250 per sq. ft., the Town of Collingwood could support an additional 33,800 sq. ft. rising to 63,170 sq. ft. of Furniture, Home Furnishings and Electronics Store space over the 2010-2017 period without sales transfers from existing stores.

Figure 21

Furniture, Home Furnishings & Electronic Stores, Potential Sales and Performance, Trade Area, 2005-

		2005	2005 adjusted*	2010	2013	2017
Primary Trade Area NFTM And HI Potential (\$millions)		81.0	81.0	95.1	103.6	115.4
Furniture, Home Furnishings & Electronic Store Share		16.0%	14.0%	14.0%	14.0%	14.0%
Furniture, Home Furnishings & Electronic Store Potential (\$millions)		13.0	11.3	13.3	14.5	16.2
Collingwood Stores Share @	43.1%	5.6	4.9			
(\$millions)	55.0%			7.3	8.0	8.9
Blue Mountains NFTM And HI Potential (\$millions)		41.9	41.9	56.2	65.7	79.7
Furniture, Home Furnishings & Electronic Store Share		16.0%	14.0%	14.0%	14.0%	14.0%
Furniture, Home Furnishings & Electronic Store Potential (\$millions)		6.7	5.9	7.9	9.2	11.2
Collingwood Stores Share @	11.6%	0.8	0.7			
(\$millions)	25.0%			2.0	2.3	2.8
Osprey NFTM And HI Potential (\$millions)		12.1	12.1	14.3	15.8	17.8
Furniture, Home Furnishings & Electronic Store Share		16.0%	14.0%	14.0%	14.0%	14.0%
Furniture, Home Furnishings & Electronic Store Potential (\$millions)		1.9	1.7	2.0	2.2	2.5
Collingwood Stores Share @	7.9%	0.2	0.1			
(\$millions)	25.0%			0.5	0.6	0.6
Clearview NFTM And HI Potential (\$millions)		68.5	68.5	77.9	84.5	94.3
Furniture, Home Furnishings & Electronic Store Share		16.0%	14.0%	14.0%	14.0%	14.0%
Furniture, Home Furnishings & Electronic Store Potential (\$millions)		11.0	9.6	10.9	11.8	13.2
Collingwood Stores Share @	10.2%	1.1	1.0			
(\$millions)	20.0%			2.2	2.4	2.6
Wasaga Beach NFTM And HI Potential (\$millions)		68.7	68.7	89.7	104.2	125.6
Furniture, Home Furnishings & Electronic Store Share		16.0%	14.0%	14.0%	14.0%	14.0%
Furniture, Home Furnishings & Electronic Store Potential (\$millions)		11.0	9.6	12.6	14.6	17.6
Collingwood Stores Share @	13.9%	1.5	1.3			
(\$millions)	20.0%			2.5	2.9	3.5
Seasonal Population NFTM And HI Potential (\$millions)		124.8	124.8	157.8	183.5	223.9
Furniture, Home Furnishings & Electronic Store Share		16.0%	14.0%	14.0%	14.0%	14.0%
Furniture, Home Furnishings & Electronic Store Potential (\$millions)		20.0	17.5	22.1	25.7	31.3
Seasonal Spending	33.3%	6.6	5.8	7.4	8.6	10.4
Collingwood Stores Share @	40.0%	2.7	2.3			
(\$millions)	50.0%			3.7	4.3	5.2
Total Potential Sales From Trade Area (\$millions)		11.8	10.3	18.2	20.4	23.7
Plus Inflow @ (\$millions)	25.0%	3.9	3.4	6.1	6.8	7.9
Total Potential Sales (\$millions)		15.8	13.8	24.2	27.2	31.6
Estimated Sales Performance of Existing Furniture, Home Furnishings & Electronic Store Space (Sales per Sq. Ft.)	154,500	\$ 102	\$ 89			
Residual Furniture, Home Furnishings & Electronic Store Expenditures Available (\$millions)				\$ 8.4	\$ 11.4	\$ 15.8
Warranted Furniture, Home Furnishings & Electronic Space @ (Sq. Ft.)	225 \$/Sq. Ft.			37,555	50,770	70,189
	250 \$/Sq. Ft.			33,800	45,693	63,170
	275 \$/Sq. Ft.			30,727	41,539	57,427

* assumes impact of new Home Improvement Stores, Office Supplies (Electronics) & Wal-Mart in Wasaga on Furnishings share of NFTM/Hi expenditure

Notes: Forecast in 2005 constant dollars.

NFTM (Non-food Type Merchandise) excludes home improvement stores.

Source: Clayton Research

4.3.3.4 Pharmacies and Personal Care Stores

According to Figure 22, the actual sales for Pharmacies and Personal Care Stores in Collingwood are estimated at \$24.7 million for 2005, and potential sales are forecast to increase to \$39.0 million in 2017.

The Pharmacies and Personal Care Store share of Non-Department store NFTM spending for the Primary Trade Area is estimated at 14.0 percent in 2005, and is projected to decline slightly to 13.5 percent over the remainder of the study period. The Pharmacies and Personal Care share for the Secondary Trade Area and the seasonal population is also estimated to be 14.0 percent, declining to 13.5 percent for the duration of the study period. The reason for the marginal decline is the impact of the new Wal-Mart as a retailer of pharmaceutical and personal care goods.

According to the household survey, in 2005 Pharmacies and Personal Care Stores located within the Town captured approximately 94.0 percent of Pharmacies and Personal Care Store spending in the Primary Trade Area. This share is expected to increase to 96.0 percent in 2010 as new stores are added to Collingwood's retail store inventory. Collingwood stores also captured anywhere from 20.9 percent (Wasaga Beach) to 52.9 percent (Osprey) of Pharmacies and Personal Care Store spending in the Secondary Trade Area and shares in each of the municipalities that form the area are expected to increase slightly in 2010-2017.

The inflow sales from outside of the Trade Area, based on the results of the licence plate survey, are estimated to remain consistent over the study period, at about 15.0 percent.

Based on an industry norm sales performance of approximately \$700 per sq. ft., the Town of Collingwood could support an additional 7,816 sq. ft. rising to 20,381 sq. ft. of Pharmacies and Personal Care Store space over the 2010-2017 period without sales transfers from existing stores.

Figure 22 Pharmacies & Personal Care Stores, Potential Sales and Performance, Trade Area, 2005-2017

		2005	2005 adjusted*	2010	2013	2017
Primary Trade Area NFTM And HI Potential (\$millions)		81.0	81.0	95.1	103.6	115.4
Pharmacies & Personal Care Store Share		14.0%	13.5%	13.5%	13.5%	13.5%
Pharmacies & Personal Care Store Potential (\$millions)		11.3	10.9	12.8	14.0	15.6
Collingwood Stores Share @	94.0%	10.7	10.3			
(\$millions)	96.0%			12.3	13.4	15.0
Blue Mountains NFTM And HI Potential (\$millions)		41.9	41.9	56.2	65.7	79.7
Pharmacies & Personal Care Share		14.0%	13.5%	13.5%	13.5%	13.5%
Pharmacies & Personal Care Store Potential (\$millions)		5.9	5.7	7.6	8.9	10.8
Collingwood Stores Share @	52.7%	3.1	3.0			
(\$millions)	55.0%			4.2	4.9	5.9
Osprey NFTM And HI Potential (\$millions)		12.1	12.1	14.3	15.8	17.8
Pharmacies & Personal Care Share		14.0%	13.5%	13.5%	13.5%	13.5%
Pharmacies & Personal Care Store Potential (\$millions)		1.7	1.6	1.9	2.1	2.4
Collingwood Stores Share @	52.9%	0.9	0.9			
(\$millions)	55.0%			1.1	1.2	1.3
Clearview NFTM And HI Potential (\$millions)		68.5	68.5	77.9	84.5	94.3
Pharmacies & Personal Care Share		14.0%	13.5%	13.5%	13.5%	13.5%
Pharmacies & Personal Care Store Potential (\$millions)		9.6	9.3	10.5	11.4	12.7
Collingwood Stores Share @	21.2%	2.0				
(\$millions)	20.0%		1.9			
	22.5%			2.4	2.6	2.9
Wasaga Beach NFTM And HI Potential (\$millions)		68.7	68.7	89.7	104.2	125.6
Pharmacies & Personal Care Share		14.0%	13.5%	13.5%	13.5%	13.5%
Pharmacies & Personal Care Store Potential (\$millions)		9.6	9.3	12.1	14.1	17.0
Collingwood Stores Share @	20.9%	2.0				
(\$millions)	20.0%		1.9			
	22.5%			2.7	3.2	3.8
Seasonal Population NFTM And HI Potential (\$millions)		124.8	124.8	157.8	183.5	223.9
Pharmacies & Personal Care Store Share		14.0%	13.5%	13.5%	13.5%	13.5%
Pharmacies & Personal Care Store Potential (\$millions)		17.5	16.8	21.3	24.8	30.2
Seasonal Spending	33.3%	5.8	5.6	7.1	8.3	10.1
Collingwood Stores Share @	40.0%	2.3				
(\$millions)	40.0%		2.2			
	42.5%			3.0	3.5	4.3
Total Potential Sales From Trade Area (\$millions)		21.0	20.1	25.7	28.7	33.1
Plus Inflow @	15.0%	3.7	3.5			
(\$millions)	15.0%			4.5	5.1	5.8
Total Potential Sales (\$millions)		24.7	23.6	30.2	33.8	39.0
Estimated Sales Performance of Existing Pharmacies & Personal Care Store Space (Sales per Sq. Ft.)	24,700	\$ 1,001	\$ 956			
Residual Pharmacy & Personal Care Store Expenditures Available (\$millions)				\$ 5.5	\$ 9.1	\$ 14.3
Warranted Pharmacies & Personal Care Space @ (Sq. Ft.)		650 \$/Sq. Ft.		8,417	13,938	21,948
		700 \$/Sq. Ft.		7,816	12,942	20,381
		750 \$/Sq. Ft.		7,295	12,079	19,022

*assumption is new pharmacy & personal care dept. in new Wal-Mart will impact traditional phrmacy share of NFTM + HI

Notes: Forecast in 2005 constant dollars.

NFTM (Non-food Type Merchandise) excludes home improvement stores.

Source: Clayton Research

4.3.3.5 Miscellaneous Retail Stores

The Miscellaneous Retail category includes all Non-Food Stores excluding Department Stores, Home Improvement and stores that fall within one of the categories discussed previously. This category includes, but is not limited to, Sporting Goods and Apparel Stores, Florists, Office Supplies and Stationery Stores, Pet and Pet Supply Stores, Records/Tapes/CDs Stores and Book Stores and News Dealers. For the purpose of the market opportunity and impact analysis contained in this report, Other General Merchandise Stores (e.g. Dollar Stores, Variety Stores and Warehouse Membership Clubs) have been included in the Miscellaneous Retail category.

According to Figure 23, the actual sales for all Miscellaneous Retail Stores in Collingwood are estimated at \$29.1 million for 2005, and potential sales are forecast to increase to \$53.1 million in 2017.

The Miscellaneous Retail Store share of NFTM + HI spending for the Primary Trade Area is estimated at 18.0 percent in 2005, and is expected to decrease to 17.5 percent by 2010-2017. The Miscellaneous Retail shares for the Secondary Trade Area and seasonal population are estimated to be consistent with the shares for the Primary Trade Area. Given the wide array of goods sold in their stores, Wal-Mart in Collingwood and the opening of a new Wal-Mart in Wasaga Beach, coupled with growth in Canadian Tire will impact the Miscellaneous Retail Store share of NFTM + HI. The opening of a Staples Business Depot store in the Western Commercial Node will improve the Office Supply Store offering in Collingwood though. Prior to development on the Holborn lands, the Miscellaneous Retail Store share of NFTM + HI is expected to drop from 18.0 percent to 17.0 percent, however it is expected to increase slightly to 17.5 percent from 2010-2017 as a result of new square footage on the Holborn lands.

According to the household survey, in 2005 Miscellaneous Retail Stores located within the Town captured approximately 67.5 percent of Miscellaneous Retail Store spending in the Primary Trade Area. This share is expected to increase to 75.0 percent over the 2010-2017 period. Collingwood stores also captured anywhere from 16.6 percent (Clearview) to 48.5 percent (Blue Mountains) of Miscellaneous Retail Store spending in the Secondary Trade Area in 2005, and these shares are expected to increase modestly in 2010-2017.

The inflow sales from outside of the Trade Area, based on the results of the licence plate survey, are estimated to remain consistent over the study period, at about 25.0 percent.

Based on an industry norm sales performance of approximately \$225 per sq. ft., the Town of Collingwood could support an additional 43,824 sq. ft. rising to 106,305 sq. ft. of Miscellaneous Retail Store space over the 2010-2017 period without sales transfers from existing stores.

Figure 23 Miscellaneous Retail, Potential Sales and Performance, Trade Area, 2005-2017

		2005	2005 adjusted*	2010	2013	2017
Primary Trade Area NFTM And HI Potential (\$millions)		81.0	81.0	95.1	103.6	115.4
Miscellaneous Retail Store Share		18.0%	17.0%	17.5%	17.5%	17.5%
Miscellaneous Retail Store Potential (\$millions)		14.6	13.8	16.6	18.1	20.2
Collingwood Stores Share @	67.5%	9.8				
(\$millions)	70.0%		9.6			
	75.0%			12.5		
	75.0%				13.6	15.1
Blue Mountains NFTM And HI Potential (\$millions)		41.9	41.9	56.2	65.7	79.7
Miscellaneous Retail Store Share		18.0%	17.0%	17.5%	17.5%	17.5%
Miscellaneous Retail Store Potential (\$millions)		7.5	7.1	9.8	11.5	13.9
Collingwood Stores Share @	48.5%	3.7				
(\$millions)	50.0%		3.6			
	55.0%			5.4		
	57.5%				6.6	8.0
Osprey NFTM And HI Potential (\$millions)		12.1	12.1	14.3	15.8	17.8
Miscellaneous Retail Store Share		18.0%	17.0%	17.5%	17.5%	17.5%
Miscellaneous Retail Store Potential (\$millions)		2.2	2.1	2.5	2.8	3.1
Collingwood Stores Share @	38.2%	0.8				
(\$millions)	42.5%		0.9			
	47.5%			1.2		
	50.0%				1.4	1.6
Clearview NFTM And HI Potential (\$millions)		68.5	68.5	77.9	84.5	94.3
Miscellaneous Retail Store Share		18.0%	17.0%	17.5%	17.5%	17.5%
Miscellaneous Retail Store Potential (\$millions)		12.3	11.6	13.6	14.8	16.5
Collingwood Stores Share @	16.6%	2.0				
(\$millions)	17.5%		2.0			
	20.0%			2.7		
	22.5%				3.3	3.7
Wasaga Beach NFTM And HI Potential (\$millions)		68.7	68.7	89.7	104.2	125.6
Miscellaneous Retail Store Share		18.0%	17.0%	17.5%	17.5%	17.5%
Miscellaneous Retail Store Potential (\$millions)		12.4	11.7	15.7	18.2	22.0
Collingwood Stores Share @	20.0%	2.5				
(\$millions)	20.0%		2.3			
	22.5%			3.5		
	25.0%				4.6	5.5
Seasonal Population NFTM And HI Potential (\$millions)		124.8	124.8	157.8	183.5	223.9
Miscellaneous Retail Store Share		18.0%	17.0%	17.5%	17.5%	17.5%
Miscellaneous Retail Store Potential (\$millions)		22.5	21.2	27.6	32.1	39.2
Seasonal Spending	33.3%	7.5	7.1	9.2	10.7	13.0
Collingwood Stores Share @	40.0%	3.0				
(\$millions)	40.0%		2.8			
	42.5%			3.9		
	45.0%				4.8	5.9
Total Potential Sales From Trade Area (\$millions)		21.9	21.3	29.2	34.3	39.8
Plus Inflow @	25.0%	7.3	7.1			
(\$millions)	25.0%			9.7		
	25.0%				11.4	13.3
Total Potential Sales (\$millions)		29.1	28.4	39.0	45.7	53.1
Estimated Sales Performance of Existing Miscellaneous Retail Store Space (Sales per Sq. Ft.)	151,600	\$ 192				
Estimated Sales Performance of Existing Miscellaneous Retail Store Space (Sales per Sq. Ft.)*	171,600		\$ 165			
Residual Miscellaneous Retail Store Expenditures Available (\$millions)				\$ 9.9	\$ 16.6	\$ 23.9
Warranted Miscellaneous Retail Space @ (Sq. Ft.)	200 \$/Sq. Ft.			49,302	82,919	119,593
	225 \$/Sq. Ft.			43,824	73,706	106,305
	250 \$/Sq. Ft.			39,441	66,335	95,675

*assumptions: - new 20,000 sq. ft. Staples office supplies store in Western Commercial node
- new retail space in Wasaga Beach will impact ability of Collingwood to draw Misc Retail customers from Wasaga & Clearview
- growth in Dept. store sector results in a reduction of Misc Retail as a proportion of total NFTM + HI

Notes: Miscellaneous Retail includes Other Retail as defined by Statistics Canada in addition to Non Department Store General Merchandise with the exception of Home and Auto Supply Stores
Forecast in 2005 constant dollars.
NFTM (Non-food Type Merchandise) excludes home improvement stores.

Source: Clayton Research

4.4 ASSESSMENT OF MARKET OPPORTUNITY FOR SUBJECT LANDS

4.4.1 Summary of Warranted Retail Space Excluding Sales Transfers

Figure 24 summarizes the residual new retail space warranted, by type, in the Town of Collingwood, without any consideration of the transfer of sales from existing stores. The total new floor space excluding the Home Improvement Centre warranted space in Collingwood rises from 137,761 sq. ft. in 2010 to 248,301 sq. ft. in 2013 and 376,711 sq. ft. in 2017.

Figure 24

Summary of Residual Market Opportunity Town of Collingwood, for Categories of Stores Considered in This Study¹ 2010-2017			
	2010	2013	2017
		<i>Square Feet</i>	
Supermarkets	26,666	49,687	70,154
Specialty Food Stores	7,855	14,080	19,398
Home Improvement Centres	116,378	137,195	167,735
Department Stores	-	6,917	23,335
Non-Food Type Merchandise Space²			
Home and Auto Supply Stores	517	8,721	20,572
Clothing and Accessories Stores	17,282	36,555	53,396
Furniture, Home Furnishings & Electronic Stores	33,800	45,693	63,170
Pharmacies & Personal Care Stores	7,816	12,942	20,381
Miscellaneous Retailers Stores ³	43,824	73,706	106,305
Non-Food Type Merchandise Space Total	103,239	177,617	263,824
Total Square Footage (with Home Improvement Centre)	254,138	385,496	544,447
Total Square Footage(without Home Improvement Centre)	137,761	248,301	376,711

¹ The retail market opportunity analysis excluded consideration of general merchandise stores excluding department stores and home and auto supply stores and some services, including restaurants.

² Excludes department store floor space.

³ Miscellaneous Retailers includes Non Department Store General Merchandise with the exception of Home and Auto Supply store and Other Retailers as defined by Statistics Canada.

Source: Clayton Research based on Figures 14-23

4.4.2 Forecast Retail Commercial Opportunity for the Subject Lands

The actual tenant mix by category of store on the subject lands will be a function of retailer interest in the Collingwood market and the subject lands and their assessment of the competitive strength of existing retailers as well as underlying market opportunity. Thus, the amount of retail floor space to be built on the subject lands is expected to exceed the opportunity identified through the residual market analysis. To the extent that this is the case, existing retailers will be affected through the loss of sales (sales transfers) to new stores. The impacts of these sales transfers on Collingwood retailers in general and on the Downtown specifically are examined in the next chapter.

The approximate shopping centre opportunity for the subject lands is shown in Figure 25.

The retail opportunities for the subject lands include a Supermarket with about 55,000 sq. ft. of floor space, 20,000 sq. ft. of Specialty Food space, 238,000 sq. ft. of Non-Food Type Merchandise floor space and about 85,000 sq. ft. of Service and Restaurant floor space. The total floor space, excluding the Home Improvement Centre, is about 398,000 sq. ft.

Figure 25 Potential Retail Commercial Tenant Mix for the Subject Lands

	Phase 1	Phase 2	Phase 3	Total
	<i>Square Feet (Gross Leasable Floor Area)</i>			
Supermarket	25,000	20,000	10,000	55,000
Specialty Food	10,000	5,000	5,000	20,000
Non-Food Type Merchandise ¹				
Clothing and Accessories Stores	22,500	17,500	15,000	55,000
Furniture, Home Furnishings & Electronic Stores	40,000	10,000	15,000	65,000
Pharmacies & Personal Care Stores	10,000	5,000	5,000	20,000
Miscellaneous Retail Stores	38,000	30,000	30,000	98,000
Total Non-Food Type Merchandise	110,500	62,500	65,000	238,000
Services (including Restaurants)	35,000	30,000	20,000	85,000
Total (without Home Improvement Centre)	180,500	117,500	100,000	398,000
Home Improvement Centre	85,000	0	0	85,000
Total (with Home Improvement Centre)	265,500	117,500	100,000	483,000

¹ Excludes Department Stores and Home and Auto Supply Stores.

All figures are rounded to the nearest thousand.

Source: Clayton Research Based On Residual Analysis Figures 14-23 and Concept Tenant Mix

5 IMPACT ANALYSES

This chapter considers the impact the development of the planned retail centre on the subject lands will have on the sales of existing retailers by retail store category in Collingwood. This information, in combination with the location of retail floor space by store category and by retail node, are used to reach conclusions about the implications of the proposed retail centre on the Downtown Node and the Western Commercial Node. The impact on all other commercial nodes is calculated as a residual.

This chapter also assesses the implications of the requested re-designation of employment land (traditionally called industrial land) on employment land needs in the Town, pursuant to the Province's 2005 *Provincial Policy Statement* and the *Growth Plan for the Greater Golden Horseshoe*.

5.1 RETAIL IMPACT ANALYSIS BY STORE CATEGORY

The impact analysis starts with the potential retail tenant mix on the subject lands and the phasing of development that is illustrated in Figure 25 in the previous chapter. While the exact retail mix on the subject lands will be known only when the retail centre has been fully leased, the floor space mix contained in Figure 25 is considered a reasonable approximation for the purpose of the impact analysis.

The impact analysis for each of the categories of retail stores looked at includes the following steps:

- The amount of new floor space being proposed for the subject lands and on other sites, if any, in Collingwood is tabulated and totalled for each of the years considered here – 2010, 2013 and 2017;
- An estimate of the industry norm sales per sq. ft. is applied to the total amount of new floor space – this yields a forecast of total sales anticipated to be generated by the new floor space in each of the forecast years;
- The total sales attributed to the new floor space is subtracted from the potential sales of all Collingwood store floor space, both existing and new, to calculate the sales remaining for existing stores (the potential sales of existing and new floor space by category of store are presented in Figures 14-23 in Chapter 4);

- The sales performance of existing stores (sales per sq. ft.) by dividing their sales by the amount of retail floor space is calculated in existing stores in each of the forecast years; and
- Future sales per sq. ft. in existing stores are compared with base year (2005) sales and the percentage difference in the future years' sales from base year sales is calculated – the larger any percent decline, the larger the impact of the new stores as a group.

The retail store impact analysis encompasses all the retail store categories being proposed for the subject lands, as presented in Figure 25. The impact analysis does not consider the proposed floor space for services, including restaurants. Services are considered ancillary to the power centre concept. They incorporate an array of possible uses, with restaurants being the largest component. The quantum of proposed service space is not such to significantly affect any single retail node in the Town.

5.1.1 Supermarkets

The impact analysis allows for new Supermarket floor space to be built on the former Canadian Tire site on Huron Street (in Retail Node 4). The new store is assumed to be in operation prior to 2010. It is expected that the new store will be a Price Chopper with about 32,000 sq. ft. of floor space. Since it is assumed that the existing Price Chopper store in Node 1 (the Downtown) will close when the new store opens, the net new floor space incorporated into the analysis is 17,000 sq. ft. A 55,000 sq. ft. Supermarket is also planned for the subject lands to be introduced in three phases bringing the total new Supermarket floor space by 2017 to 72,000 sq. ft. (see Figure 26). The initial phase would see a 25,000 sq. ft. supermarket.

The proposed new space is forecast to reduce average sales per sq. ft. of existing Supermarkets by 11.1 percent in 2010 when compared to the 2005 base year. By the year 2013, the decline in sales per sq. ft. for existing stores diminishes to 8.9 percent and by 2017, the sales decline is reduced further to 1.3 percent. Impacts of these magnitudes are not expected to adversely affect the viability of existing Supermarket operations.

It should be observed that in the event a new Price Chopper is not built on the former Canadian Tire store site, there would be a market opportunity for a 40,000 sq. ft. Supermarket on the subject lands prior in 2010, which could be tapped without imposing notable impacts on existing Supermarkets.

Figure 26

Impact Analysis, New Supermarket Space, Town of Collingwood, 2005-2017

	Base Year 2005	2010	2013	2017
New Floor Space				
Price Chopper Relocation (Incremental Sq. Ft.)		17,000	17,000	17,000
Subject Lands (Sq. Ft.)		25,000	45,000	55,000
Cumulative New Supermarket Floor Space (Sq. Ft.)		42,000	62,000	72,000
Average Sales Per Sq. Ft. (Industry Norm) (\$/Sq. Ft.)		475	475	475
Total Sales in New Supermarket Floor Space (\$millions)		20.0	29.5	34.2
Existing Floor Space				
Total Potential Sales, Collingwood Supermarkets (\$millions)	65.6	78.3	89.2	98.9
Sales In Existing Stores (Potential Sales Less Sales in New Stores) (\$millions)	65.6	58.3	59.8	64.7
Floor Space in Existing Supermarket (Sq. Ft.)	143,781	143,781	143,781	143,781
Sales Per Sq. Ft. in Existing Floor Space (\$)	456	406	416	450
Percent Change from 2005 Base Year (%)		(11.1)	(8.9)	(1.3)

Source: Clayton Research based data from Figure 14 and Industry norm sales per square foot for new stores

5.1.2 Specialty Food Stores

Some 20,000 sq. ft. of floor space accommodating Specialty Food Stores is assumed to be built in phases on the subject lands (see Figure 27), starting with 10,000 sq. ft in 2010. Potential Specialty Food tenants on the site include bulk food stores, specialty meats and convenience stores.

The reductions in the sales per square foot of existing Specialty Food Stores resulting from the new floor space are limited – a decline of 6.3 percent in 2010 when compared to base year 2005 sales, a 2.7 percent decline in 2013 and a 1.8 percent decline in 2017 compared to 2005 levels.

Figure 27

Impact Analysis, New Specialty Food Space, Town of Collingwood, 2005-2017

	Base Year 2005	2010	2013	2017
New Floor Space				
Subject Lands (Sq. Ft.)		10,000	15,000	20,000
Cumulative New Specialty Food Floor Space (Sq. Ft.)		10,000	15,000	20,000
Average Sales Per Sq. Ft. (Industry Norm) (\$/Sq. Ft.)		300	300	300
Total Sales in New Specialty Food Floor Space (\$millions)		3.0	4.5	6.0
Existing Floor Space				
Total Potential Sales, Collingwood Specialty Food Stores (\$millions)	10.3	12.6	14.5	16.1
Sales In Existing Stores (Potential Sales Less Sales in New Stores) (\$millions)	10.3	9.6	10.0	10.1
Floor Space in Existing Specialty Food Stores (Sq. Ft.)	26,000	26,000	26,000	26,000
Sales Per Sq. Ft. in Existing Floor Space (\$)	396	371	385	389
Percent Change from 2005 Base Year (%)		(6.3)	(2.7)	(1.8)

Source: Clayton Research based data from Figure 15 and Industry norm sales per square foot for new stores

5.1.3 Home Improvement Store

The new Home Depot store on the subject lands is under construction and is scheduled to open before the end of 2006. This store is a permitted use on industrial land. The Town's peer reviewer requested that the impact analysis for this study encompass the Home Depot store. This store has a floor area of 85,430 sq. ft. (see Figure 28). In addition to Home Depot, RONA has also sourced a site in Collingwood. If approvals for the approximately 55,000 sq. ft. store are finalized in a timely manner, RONA could open their store some time in 2008.

The biggest effect of the Home Depot and a possible RONA store would be to recapture Home Improvement spending now being done by Trade Area residents in other centres such as Barrie. As noted in Figure 11, over 35 percent of home improvement purchases by Town of Collingwood residents are made outside the Trade Area, in places such as Barrie. The outflow is even more pronounced in the Secondary Trade Area where anywhere from 52.4 percent to 68.1 percent of expenditures are made outside the Trade Area. Clearly the existing inventory of Home Improvement Stores is not suited to accommodate the demands in the Trade Area. Opening one and potentially two modern Home Improvement Centres would impact the existing stores but would also serve to recapture a significant amount of the outflow that is occurring now.

The analysis does indicate that in 2010, sales at existing Home Improvement Stores will be down 21.2 percent when compared to base year 2005 sales, however sales per square show significant improvement towards 2013 and 2017. The opening of the Home Depot store by itself would not reduce sales performance of existing Home Improvement Stores when comparing expected 2010 sales with current sales. However, the introduction of RONA would add more square footage that the residual analysis supports and thus creates a situation where existing Home Improvement Stores will have a lower sales volume in 2010 than they currently have.

Figure 28

Impact Analysis, New Home Improvement Store Space, Town of Collingwood, 2005-2017

	Base Year 2005	2010	2013	2017
New Floor Space				
Subject Lands - Home Depot (Sq. Ft.)		85,430	85,430	85,430
High St & Sixth - Rona (Incremental Sq. Ft.)		<u>41,333</u>	<u>41,333</u>	<u>41,333</u>
Cumulative New Home Improvement Floor Space (Sq. Ft.)		126,763	126,763	126,763
Average Sales Per Sq. Ft. (Industry Norm) (\$/Sq. Ft.)		275	275	275
Total Sales in New Home Improvement Floor Space (\$millions)		34.9	34.9	34.9
Existing Floor Space				
Total Potential Sales, Collingwood Home Improvement Stores (\$millions)	13.5	45.5	51.2	59.6
Sales in Existing Stores (Potential Sales Less Sales in New Stores) (\$millions)	13.5	10.7	16.4	24.8
Floor Space in Existing Home Improvement Stores (Sq. Ft.)	74,700	74,700	74,700	74,700
Sales Per Sq. Ft. in Existing Floor Space (\$)	181	143	219	332
Percent Change from 2005 Base Year (%)		(21.1)	21.2	83.3

Source: Clayton Research based data from Figure 16 and Industry norm sales per square foot for new stores

5.1.4 Clothing and Accessory Stores

Some 55,000 sq. ft. of floor space accommodating Clothing and Accessory Stores is assumed to be built on the subject lands (see Figure 29). The additional square footage would be phased in order to minimize impact on existing Clothing and Accessory Stores. The initial phase would be 22,500 sq. ft. in 2010.

The reductions in the sales per square foot of existing Clothing and Accessory Stores resulting from the new floor space are 7.4 percent in 2010 when compared to base year 2005 sales, 4.9 percent in 2013 and 2.3 percent in 2017.

Figure 29

Impact Analysis, New Clothing and Accessories Store Space, Town of Collingwood, 2005-2017

	Base Year 2005	2010	2013	2017
New Floor Space				
Subject Lands (Sq. Ft.)		22,500	40,000	55,000
Cumulative New Clothing and Accessories Floor Space (Sq. Ft.)		22,500	40,000	55,000
Average Sales Per Sq. Ft. (Industry Norm) (\$/Sq. Ft.)		300	300	300
Total Sales in New Clothing and Accessories Floor Space (\$millions)		6.8	12.0	16.5
Existing Floor Space				
Total Potential Sales, Collingwood Clothing and Accessories Stores (\$millions)	21.2	26.3	32.1	37.2
Sales in Existing Stores (Potential Sales Less Sales in New Stores)	21.2	19.6	20.1	20.7
Floor Space in Existing Stores (Sq. Ft.)	78,700	78,700	78,700	78,700
Sales Per Sq. Ft. in Existing Floor Space (\$)	269	249	256	263
Percent Change from 2005 Base Year (%)		(7.4)	(4.9)	(2.3)

Source: Clayton Research based data from Figure 20 and Industry norm sales per square foot for new stores

5.1.5 Furniture, Home Furnishings and Electronic Stores

It is assumed that the subject site could accommodate about 65,000 sq. ft. of floor space for Furniture, Home Furnishings and Electronic Stores (see Figure 30) to be introduced in phases, starting with 40,000 sq. ft in 2010.

The impact of this amount of new space on existing retailers is limited – with a decline in existing sales of 9.8 percent in 2010 when compared to base year 2005 sales, 6.8 percent in 2013 and only 2.9 percent in 2017.

Figure 30

Impact Analysis, Furniture, Home Furnishings & Electronics Store Space, Town of Collingwood, 2005-2017

	Base Year 2005	2010	2013	2017
New Floor Space				
Subject Lands (Sq. Ft.)		40,000	50,000	65,000
Cumulative New Home Furnishings & Electronics Floor Space (Sq. Ft.)		40,000	50,000	65,000
Average Sales Per Sq. Ft. (Industry Norm) (\$/Sq. Ft.)		250	250	250
Total Sales in New Home Furnishings & Electronics Floor Space (\$millions)		10.0	12.5	16.3
Existing Floor Space				
Total Potential Sales, Collingwood Home Furnishings & Electronics Stores (\$millions)	15.8	24.2	27.2	31.6
Sales in Existing Stores (Potential Sales Less Sales in New Stores) (\$millions)	15.8	14.2	14.7	15.3
Floor Space in Existing Stores (Sq. Ft.)	154,500	154,500	154,500	154,500
Sales Per Sq. Ft. in Existing Floor Space (\$)	102	92	95	99
Percent Change from 2005 Base Year (%)		(9.8)	(6.8)	(2.9)

Source: Clayton Research based data from Figure 21 and Industry norm sales per square foot for new stores

5.1.6 Pharmacies and Personal Care Stores

It is assumed that 20,000 sq. ft. of Pharmacy and Personal Care floor space will be accommodated on the subject lands (see Figure 31). Phasing of the additional Pharmacy and Personal Care floor space would see 10,000 sq. ft. opened in 2010 with an additional 5,000 sq. ft. added in 2013 and 2017.

A Pharmacy and Personal Care store is anticipated to reduce the sales per sq. ft. of existing Pharmacies and Personal Care Stores by about 6.2 percent in 2010 when compared to base year 2005 sales. The decline should be assessed within the context of the very healthy sales currently being achieved by the existing stores. The average sales per sq. ft. of existing stores would be 5.8 percent lower than their current level in 2013 and then exceed their current level by 1.1 percent in 2017.

Figure 31

	Impact Analysis, Pharmacies & Personal Care Store Space, Town of Collingwood, 2005-2017			
	Base Year 2005	2010	2013	2017
New Floor Space				
Subject Lands (Sq. Ft.)		10,000	15,000	20,000
Cumulative New Pharmacies and Personal Care Floor Space (Sq. Ft.)		10,000	15,000	20,000
Average Sales Per Sq. Ft. (Industry Norm) (\$/Sq. Ft.)		700	700	700
Total Sales in New Pharmacies and Personal Care Floor Space (\$millions)		7.0	10.5	14.0
Existing Floor Space				
Total Potential Sales, Collingwood Pharmacies and Personal Care Stores (\$millions)	24.7	30.2	33.8	39.0
Sales in Existing Stores (Potential Sales Less Sales in New Stores) (\$millions)	24.7	23.2	23.3	25.0
Floor Space in Existing Stores (Sq. Ft.)	24,700	24,700	24,700	24,700
Sales Per Sq. Ft. in Existing Floor Space (\$)	1,001	939	943	1,012
Percent Change from 2005 Base Year (%)		(6.2)	(5.8)	1.1

Source: Clayton Research based data from Figure 22 and Industry norm sales per square foot for new stores

5.1.7 Miscellaneous Retail Stores

The Miscellaneous Retail category includes, but is not limited to, Sporting Goods and Apparel Stores, Florists, Pet and Pet Supply Stores, Office Supplies and Stationery Stores, Records/Tapes/CDs Stores and Book Stores and News Dealers. Even with the opening of a 20,000 sq. ft. Staples Business Depot store in the Western Commercial node, the phased introduction of some 98,000 sq. ft. of space for Miscellaneous Retail Stores is assumed to be accommodated on the subject lands (see Figure 32). The initial phase is projected to be 38,000 sq. ft.

The impact of this proposed floor space on the sales per sq. ft. of existing retail floor space is forecast to be a decline of 6.0 percent in 2010 when compared to base year 2005 sales, with the impact declining to 3.5 percent in 2013 and sales at existing stores growing by 1.1 percent over their 2005 levels in 2017.

Figure 32

Impact Analysis, Miscellaneous Retailers Store Space, Town of Collingwood, 2005-2017

	Base Year 2005	2010	2013	2017
New Floor Space				
Subject Lands (Sq. Ft.)		38,000	68,000	98,000
Staples Business Depot		20,000	20,000	20,000
Cumulative New Miscellaneous Retailers Floor Space (Sq. Ft.)		58,000	88,000	118,000
Average Sales Per Sq. Ft. (Industry Norm) (\$/Sq. Ft.)		200	200	200
Total Sales in New Miscellaneous Retailers Floor Space (\$millions)		11.6	17.6	23.6
Existing Floor Space				
Total Potential Sales, Collingwood Miscellaneous Retailers Stores (\$millions)	29.1	39.0	45.7	53.1
Sales in Existing Stores (Potential Sales Less Sales in New Stores) (\$millions)	29.1	27.4	28.1	29.5
Floor Space in Existing Stores (Sq. Ft.)	151,600	151,600	151,600	151,600
Sales Per Sq. Ft. in Existing Floor Space (\$)	192	181	186	194
Percent Change from 2005 Base Year (%)		(6.0)	(3.5)	1.1

Source: Clayton Research based data from Figure 23 and Industry norm sales per square foot for new stores

5.1.8 Implications of the Retail Impact Analysis by Store Category

Development of the proposed retail centre in phases, as proposed, is shown to have a limited impact on existing retail stores in Collingwood as a whole.

While certain store categories in Collingwood will likely remain healthy as a result of both retail development of the Holborn lands and retail development elsewhere, there are some retail categories that are currently experiencing low sales per square foot volumes. These categories, discussed below may become vulnerable as new square footage comes on stream:

- Furniture, Home Furnishings and Electronics Stores; and
- Miscellaneous Retail Stores.

5.1.8.1 Implications for Furniture, Home Furnishings and Electronics Stores

The estimated sales per square foot levels for existing Furniture, Home Furnishings and Electronics Stores in Collingwood is a low \$102/sq. ft. Based on the analysis of residual Furniture, Home Furnishings and Electronics Stores sales presented in Figure 21, this level drops to \$89/sq. ft. as a result of the opening of the Home Depot and Business Depot stores. Given this

low existing sales base, some stores are vulnerable regardless of whether additional space is added on the Holborn lands.

Although there is over 150,000 sq. ft. of Furniture, Home Furnishings and Electronics floor space in Collingwood, more than half of the purchases that Collingwood residents currently make in this category are from outside Collingwood's Trade Area. Existing Furniture, Home Furnishings and Electronics Stores in Collingwood are not drawing customers in from the Secondary Trade Area to the same extent that other categories of stores in Collingwood are. The existing array of stores is not competitive with other markets or the offering in these stores is not complete, so residents have to travel elsewhere.

Furniture, Home Furnishings and Electronics space to be built on the Holborn lands will go a long way towards improving the offering in the Town and preventing outflow. The additional regional retail traffic the Holborn development would bring to Collingwood may provide an opportunity for some of the existing Furniture, Home Furnishings and Electronics Stores to upgrade their product offering and space to tap into this expanded market.

5.1.8.2 Implications for Miscellaneous Retail Stores

Current performance of the full range of Miscellaneous Retail Stores in Collingwood is rather low at \$192/sq. ft. The weakness of some existing retail categories in Collingwood is, in part, tied to the impact of residents leaving the Trade Area instead of shopping locally. Prior to the Holborn development, other new stores such as The Business Depot and the expansion of Canadian Tire in Collingwood will augment the current offering of Office Supplies/Stationery and Sporting Goods. While the goods offered in these stores overlaps with the offering of existing stores, the impact is projected to be mitigated as these new stores are projected to draw new shoppers to Collingwood that would have otherwise gone elsewhere.

While it is expected that new Miscellaneous Retail space to be built on the Holborn lands will have a net negative impact on existing Miscellaneous Retail Stores over the timeframe of the analysis, the effect it will have on drawing more customers to Collingwood is an essential theme.

Overall, the proposed retail centre on the subject lands will enhance the retail experience of Trade Area residents by enriching the array of stores available to them in Collingwood, thus reducing the need to go to places

like Barrie to shop for higher order goods. It will also enhance Collingwood's role as a regional shopping destination.

5.2 IMPLICATIONS FOR RETAIL NODES IN COLLINGWOOD

The analysis here addresses the issue of the nature of possible impacts of the proposed retail centre on the functioning of the two main existing retail nodes in the Town and, as a residual, the remainder of the commercial areas combined in the Town. The analysis focuses on Supermarkets, Services and Non-Food Stores (excluding Department Stores and Home Improvement) with a particular emphasis on Clothing and Accessory Stores. These are categories where there is expected to be overlap between the proposed retail centre and the other commercial nodes, most notably, the Downtown.

The impact analysis for retail nodes includes the following steps:

- The total estimated sales and inflow sales for existing stores in the Town of Collingwood for the base year (2005) was allocated among the stores in the various study Nodes. Sales were allocated based on total square footage but in some cases adjustments were made to address the following:
 - The strength of some retailers over others; and
 - Higher inflow for stores in the Western Commercial Node and Downtown as evidenced on the license plate surveys.
- For each of 2010, 2013 and 2017, the estimated potential total sales are redistributed to take into account the introduction of new retail establishments on the subject lands and elsewhere in Collingwood. The new retail establishments are assumed to perform at the industry norm sales per square foot levels referred to in this analysis. Impact on existing stores is calculated based the following factors:
 - Their proximity to new development; and
 - The degree to which new development will overlap with current product selection.
- The percentage change in base year (2005) sales per square foot, as indicated from the sales performance of the existing stores, is calculated to assess the impact of development on the subject lands over the 2010-2017 period.

5.2.1 Downtown (Node 1)

As noted in Figure 33, the Town of Collingwood has 143,781 sq. ft. of Supermarket space with over 55 percent of this space in the Downtown. The Downtown is expected to be affected by the assumed closure of the existing Price Chopper store with the opening of the new store in the Huron Street Node (Node 4) but this is not related to the proposed retail centre on the subject site. Assuming the Holborn lands are developed with a 25,000 sq. ft. Supermarket in 2010, the total supermarket inventory in Collingwood would be 185,481 sq. ft, with the 66,481 Loblaws store being the only Supermarket in the Downtown.

Figure 33 Supermarket Impact Analysis, 2005-2017

	Downtown		Western Commercial Node		Other Nodes		Total Collingwood
	Loblaws	Price Chopper (Existing)	A&P	Price Chopper	Price Chopper (New)	Subject Property	
2005							
Supermarket Space (Sq. Ft.)	66,481	15,300	37,700	24,300			143,781
Distribution Floor Space (%)	46.2%	10.6%	26.2%	16.9%			100.0%
Total Sales (\$ Millions)	\$ 29.6	\$ 9.2	\$ 17.3	\$ 9.4			\$ 65.6
Sales Performance (\$/Sq. Ft.)	\$ 446	\$ 600	\$ 459	\$ 389			\$ 456
2010							
Supermarket Space (Sq. Ft.)	66,481		37,700	24,300	32,000	25,000	185,481
Distribution Floor Space (%)	35.8%		20.3%	13.1%	17.3%	13.5%	100.0%
Total Sales (\$ Millions)	\$ 27.9		\$ 15.9	\$ 8.2	\$ 14.5	\$ 11.8	\$ 78.3
Sales Performance (\$/Sq. Ft.)	\$ 420		\$ 421	\$ 338	\$ 452	\$ 472	\$ 422
Impact on Base Year (\$/Sq. Ft.)	-5.8%		-8.4%	-13.1%			-7.5%
2013							
Supermarket Space (Sq. Ft.)	66,481		37,700	24,300	32,000	45,000	205,481
Distribution Floor Space (%)	32.4%		18.3%	11.8%	15.6%	21.9%	100.0%
Total Sales (\$ Millions)	\$ 29.1		\$ 15.9	\$ 8.5	\$ 14.4	\$ 21.4	\$ 89.2
Sales Performance (\$/Sq. Ft.)	\$ 437		\$ 421	\$ 351	\$ 449	\$ 475	\$ 434
Impact on Base Year (\$/Sq. Ft.)	-1.9%		-8.5%	-9.8%	-0.6%		-4.8%
2017							
Supermarket Space (Sq. Ft.)	66,481		37,700	24,300	32,000	55,000	215,481
Distribution Floor Space (%)	30.9%		17.5%	11.3%	14.9%	25.5%	100.0%
Total Sales (\$ Millions)	\$ 31.3		\$ 17.2	\$ 9.4	\$ 14.8	\$ 26.2	\$ 98.9
Sales Performance (\$/Sq. Ft.)	\$ 471		\$ 456	\$ 388	\$ 462	\$ 476	\$ 459
Impact on Base Year (\$/Sq. Ft.)	5.6%		-0.8%	-0.2%	2.3%		0.6%

Source: Clayton Research based on Appendix B and Figure 25

The phased opening of a new Supermarket on the Holborn lands is projected to have only a moderate impact on the Loblaws store in the Downtown with sales per square foot levels 5.8 percent below their current level in 2010, 1.9 percent below in 2013 and recovering to their current levels after 2013.

As noted in Figure 34, the Town of Collingwood has 78,700 sq. ft. of Clothing and Accessory floor space, with 61,400 sq. ft., or just under 80 percent of that total located in the Downtown. Given the high proportion of Collingwood's Clothing and Accessory Stores located Downtown, this category was analysed separately from the other Non-Food categories. Phasing of an additional 55,000 sq. ft. of Clothing and Accessory Store space to be built on the Holborn lands is projected to minimize the impact on the Downtown through the 2010-2017 study period. The Downtown Stores are expected to be impacted by 6.7 percent from 2010 and 4.8 percent in 2013 with sales per square foot projected to return to their current level by the end of the study period in 2017. The magnitude of the impact should be muted by the planned limitation on stores sized less than 3,000 sq. ft. on the subject lands (Appendix B-3 shows that most outlets in the Downtown have less than 3,000 sq. ft. of floor space).

Figure 34

Clothing and Accessories Store Impact Analysis

	Node 1 Downtown	Node 3 Western Node	Other Nodes	Subject Property	Total Collingwood
2005					
Clothing & Acces. Space (Sq. Ft.)	61,400	16,300	1,000		78,700
Distribution Floor Space (%)	78.0%	20.7%	1.3%		100.0%
Total Sales (\$ Millions)	\$ 16.8	\$ 4.1	\$ 0.3		\$ 21.2
Sales Performance (\$/Sq. Ft.)	\$ 274	\$ 252	\$ 252		\$ 269
2010					
Clothing & Acces. Space (Sq. Ft.)	61,400	16,300	1,000	22,500	101,200
Distribution Floor Space (%)	60.7%	16.1%	1.0%	22.2%	100.0%
Total Sales (\$ Millions)	\$ 15.7	\$ 3.7	\$ 0.2	\$ 6.8	\$ 26.3
Sales Performance (\$/Sq. Ft.)	\$ 256	\$ 229	\$ 185	\$ 300	\$ 260
Impact on Base Year (\$/Sq. Ft.)	-6.7%	-9.1%	-26.5%		-3.2%
2013					
Clothing & Acces. Space (Sq. Ft.)	61,400	16,300	1,000	40,000	118,700
Distribution Floor Space (%)	51.7%	13.7%	0.8%	33.7%	66.3%
Total Sales (\$ Millions)	\$ 16.0	\$ 3.8	\$ 0.2	\$ 12.0	\$ 32.1
Sales Performance (\$/Sq. Ft.)	\$ 261	\$ 230	\$ 213	\$ 301	\$ 271
Impact on Base Year (\$/Sq. Ft.)	-4.8%	-8.7%	-15.6%		0.7%
2017					
Clothing & Acces. Space (Sq. Ft.)	61,400	16,300	1,000	55,000	133,700
Distribution Floor Space (%)	45.9%	12.2%	0.7%	41.1%	58.9%
Total Sales (\$ Millions)	\$ 16.7	\$ 3.9	\$ 0.2	\$ 16.4	\$ 37.2
Sales Performance (\$/Sq. Ft.)	\$ 271	\$ 239	\$ 230	\$ 299	\$ 278
Impact on Base Year (\$/Sq. Ft.)	-1.1%	-5.0%	-8.9%		3.4%

Source: Clayton Research based on Appendix B and Figure 25

Figure 35 illustrates the combined impact of all remaining Non-Food Store space (Furniture & Electronics, Pharmacy & Personal Care and Miscellaneous Retail) to open on the Holborn Lands. With particular reference to the Downtown, sales per square foot levels for all Non-Food Store space are anticipated to decline by 8.9 percent in 2010 when weighed against current levels, but are projected to improve to 5.3 percent in 2013 and be only 0.9 percent below current levels in 2017.

Figure 35

Non-Food Store Impact Analysis¹

	Node 1 Downtown	Node 3 Western Node*	Other Nodes	Subject Property	Total Collingwood
2005					
Non-D/S NFTM Space (Sq. Ft.)	109,500	125,300	153,700		388,500
Distribution Floor Space (%)	28.2%	32.3%	39.6%		100.0%
Total Sales (\$ Millions)	\$ 26.3	\$ 30.1	\$ 32.2		\$ 88.7
Sales Performance (\$/Sq. Ft.)	\$ 240	\$ 240	\$ 209		\$ 228
2010					
Non-D/S NFTM Space (Sq. Ft.)	109,500	157,300	153,700	88,000	508,500
Distribution Floor Space (%)	21.5%	30.9%	30.2%	17.3%	100.0%
Total Sales (\$ Millions)	\$ 23.9	\$ 35.1	\$ 28.0	\$ 25.5	\$ 112.6
Sales Performance (\$/Sq. Ft.)	\$ 219	\$ 223	\$ 182	\$ 290	\$ 221
Impact on Base Year (\$/Sq. Ft.)	-8.9%	-7.0%	-12.9%		-3.0%
2013					
Non-D/S NFTM Space (Sq. Ft.)	109,500	157,300	153,700	133,000	553,500
Distribution Floor Space (%)	19.8%	28.4%	27.8%	24.0%	100.0%
Total Sales (\$ Millions)	\$ 24.9	\$ 36.4	\$ 28.4	\$ 38.5	\$ 128.1
Sales Performance (\$/Sq. Ft.)	\$ 227	\$ 231	\$ 185	\$ 289	\$ 231
Impact on Base Year (\$/Sq. Ft.)	-5.3%	-3.5%	-11.7%		1.4%
2017					
Non-D/S NFTM Space (Sq. Ft.)	109,500	157,300	153,700	183,000	603,500
Distribution Floor Space (%)	18.1%	26.1%	25.5%	30.3%	100.0%
Total Sales (\$ Millions)	\$ 26.0	\$ 38.9	\$ 30.4	\$ 53.0	\$ 148.3
Sales Performance (\$/Sq. Ft.)	\$ 238	\$ 247	\$ 197	\$ 290	\$ 246
Impact on Base Year (\$/Sq. Ft.)	-0.9%	3.0%	-5.7%		7.7%

¹ Excludes Supermarket, Home Improvement, Clothing & Accessories and Department Store Categories

* Includes Square Footage of Canadian Tire Expansion and New Staples Business Depot from 2010-2017

Source: Clayton Research based on Appendix B and Figure 25

The phased introduction on the Holborn lands of 85,000 sq. ft. of floor space for an array of uses classed as services, including restaurants, proposed for the subject lands is quite small when compared to the 362,100 sq. ft. of services floor space existing in the Downtown. This amount to less than 25 percent of the Downtown total. In addition, the proposed retail centre will have a limitation on the amount of space occupied by smaller outlets. Thus, any impact on the services component of the retail commercial function of the Downtown is expected to be modest.

Commercial development on the Holborn Lands is expected to have a minimal effect on Collingwood's Downtown. The projected impact to sales

of existing stores in the Downtown are not at a level where the viability of the Downtown comes into question.

5.2.2 Western Commercial Node (Node 3)

There is currently 62,000 sq. ft. of Supermarket space in the two existing Supermarkets in the Western Commercial node, A&P and Price Chopper. This amounts to over 40 percent of the current inventory of Supermarkets in Collingwood. The impact of an additional Supermarket on the Holborn Lands on A&P and Price Chopper is expected to be more pronounced than the impact on Supermarkets in other nodes because of proximity. Both A&P and Price Chopper are expected to see an impact of about 10 percent but would recover to their current sales level by 2017.

The impact on existing Clothing and Accessory Stores in the Western Commercial node is expected to be in the 8 to 9 percent range from 2010 to 2013 and then declining to about 5 percent in 2017.

The proposal for development of the Holborn lands for retail uses is not on a scale to affect the viability of existing retailers as a group. The subject lands will act as an integral part of the Western Commercial Node. The proposed retail centre will enhance the regional attractiveness of the Western Commercial node as it relates to the entire Trade Area, especially vis-à-vis Wasaga Beach. Existing retailers will have the ability to tap into the added draw of the area.

5.2.3 Other Collingwood Nodes

The remaining retail nodes in Collingwood provide specialized functions and do not have a complete selection of Food, Non-Food and Services as the Downtown and Western Commercial Nodes have. As shown in Figure 36, the other retail areas in Collingwood are strongly represented by Other Food Stores, Furniture, Home Furnishings and Electronics, Home Improvement Stores and Miscellaneous Retail.

Figure 36

Inventory of Non-Food and Home Improvement Square Footage In Collingwood's Other Retail Nodes, May 2006

	All Other Retail Nodes		Total Collingwood
	Sq. Ft.	% Of Collingwood Total	Sq. Ft.
Food And Convenience Type Merchandise (FCTM)			
Supermarket	0		143,781
Other Food Stores	14,300	55.0	26,000
Subtotal	14,300	8.4	169,781
Non-Food Type Merchandise (NFTM)			
General Merchandise			
Department Stores	0		205,300
Home and Auto Supply	0		57,700
Other General Merchandise	0		9,700
Clothing and Accessories	1,000	1.3	78,700
Furniture, Home Furnishings & Electronics	87,300	56.5	154,500
Pharmacies and Personal Care	3,600	14.6	24,700
Miscellaneous Retail	62,800	44.3	141,900
Subtotal	154,700	23.0	672,500
Home Improvement (HI)			
Building And Outdoor Home Supply	53,300	71.4	74,700
Total Occupied Space	222,300	24.2	916,981

Source: Clayton Research based on Information in Appendix B

Development of the Holborn lands is expected to have a minimal impact on existing Other Food Stores in the remaining nodes. Most of the square footage in this category is in convenience stores which serve the neighbourhoods where they're located and also pass-by traffic.

There are two furniture stores located in the Highway #26 Node (Node #7) with a combined floor space of 62,400 sq. ft. Additional Furniture square footage, if built on the Holborn lands is expected to impact these two stores. Conversely, these stores have the opportunity to benefit from the increased traffic that development on the Holborn site will bring in to Collingwood.

The introduction of Home Depot and potentially RONA to Collingwood represents a significant change in the network of Home Improvement stores in Collingwood and the entire Trade Area. As noted previously in Section 4.3.1., the residual analysis supports a Home Improvement Centre in excess of 116,000 sq. ft., meaning a store this size could be accommodated in 2010 without reducing the current sales levels of existing Home Improvement stores. While Home Depot is expected to have been in operation for at least three full years by 2010, the analysis shows that

existing stores would return to their current sales levels by 2010. If RONA opens as well, the amount of time required for existing stores to recover to their current sales levels will be extended beyond 2010. RONA, however, would likely close their existing store in the Hume Street Node (Node #5) upon opening the new store. The addition of one, and perhaps two big box Home Improvement Centres will attract customers from the Secondary Trade Area who are currently leaving the Trade Area to purchase Home Improvement products. While existing Home Improvement stores are expected to feel an immediate impact from Home Depot, an opportunity does exist to capture some of the expanded market potential that a large Home Improvement Centre, like Home Depot, would bring.

Given the wide range of store types in the Miscellaneous Retail category, it is not anticipated that new Miscellaneous Retail Stores on the Holborn lands would significantly impact sales in existing Miscellaneous Retail Stores as a group in the Other nodes. These stores would also have the chance to benefit from the increased traffic coming in to Collingwood.

It is anticipated that development on the Holborn lands will not materially impact the viability and sales performance of retailers in Collingwood's other retail nodes as a group. These nodes will continue to serve as neighbourhood convenience retail areas and also as specialized retail areas with high concentrations of stores in certain categories.

5.3 IMPLICATIONS FOR EMPLOYMENT LAND NEEDS IN COLLINGWOOD

The 2005 *Provincial Policy Statement* requires municipalities to designate sufficient lands for an appropriate range and mix of employment opportunities to meet projected needs for a time horizon of up to 20 years. It also states that a municipality may consider conversion of employment lands (industrial) lands for non-employment uses (regional retail facilities are not considered to be "employment generating" by the *Provincial Policy Statement*) through a comprehensive review where it has been demonstrated that the land is not required for employment purposes over the long term and there is a need for the conversion. The retail opportunities analysis has pinpointed a need for the retail commercial facilities being proposed on the subject lands.

This section assesses the portion of the subject lands not occupied by the Home Depot (the Home Depot is a permitted use on the subject lands), about 35 acres in total, in terms of what the redesignation of these lands

from industrial use implies for the overall employment land needs in Collingwood.

5.3.1 Historical Employment Land Absorption

An estimate of the absorption of employment (traditionally called industrial) land in Collingwood in the period since 1991 is derived using the value of industrial building permits issued and applying cost per sq. ft. and building/land coverage ratios. The results are contained in Figure 37.

Looking at average annual estimates, industrial land absorption was highest in the 1995-2000 period when some 3 to 4 acres were absorbed per year. For the 1991-1995 period, a period of weak economic activity in Ontario, average annual absorption was only about 0.5 acres per year. During the most recent period (2001-2005) absorption was a low, averaging only 1.3 acres or less per year on average. Generally this period was one of reasonable economic health in Ontario.

5.3.2 Future Employment Land Absorption

As part of its *Development Charges Background Study* for the Town in 2004, C.N. Watson & Associates forecast the amount of industrial floor space anticipated to be built in Collingwood up to the year 2024. These forecasts are converted to employment land absorption by applying building-to-land coverage ratios – ranging from 30 percent to 40 percent coverage (Figure 38).

The long-term absorption of employment land in the Town (for the 2004-2024 period) averages between 2.8 and 3.8 net acres per year. In the figure below these have been increased to 3-4 net acres per year to include a contingency to allow for uncertainties in the future on both the demand and supply side of the market.

Figure 37 Estimated Industrial Land Absorption, Town of Collingwood, 1991-2005

Year	Value of Industrial Building Permits Issued		Estimated Sq. Ft. ²	Estimated Industrial Land:		
	Current \$	Real \$ ¹		@ 30% Coverage	@ 35% Coverage <i>Acres</i>	@ 45% Coverage
1991	560,000	817,887	13,631	1.0	0.9	0.8
1992	148,000	217,365	3,623	0.3	0.2	0.2
1993	208,000	302,106	5,035	0.4	0.3	0.3
1994	124,000	174,504	2,908	0.2	0.2	0.2
1995	726,000	1,002,353	16,706	1.3	1.1	1.0
1996	1,112,000	1,492,900	24,882	1.9	1.6	1.4
1997	3,899,000	5,119,387	85,323	6.5	5.6	4.9
1998	4,306,000	5,614,477	93,575	7.2	6.1	5.4
1999	319,000	404,683	6,745	0.5	0.4	0.4
2000	1,766,000	2,191,643	36,527	2.8	2.4	2.1
2001	1,433,000	1,730,937	28,849	2.2	1.9	1.7
2002	1,222,000	1,411,157	23,519	1.8	1.5	1.3
2003	545,000	594,834	9,914	0.8	0.7	0.6
2004	614,000	634,789	10,580	0.8	0.7	0.6
2005	790,000	790,000	13,167	1.0	0.9	0.8
Average Annual						
1991-1995	353,200	502,843	8,381	0.6	0.5	0.5
1995-2000	2,280,400	2,964,618	49,410	3.8	3.2	2.8
2001-2005	920,800	1,032,344	17,206	1.3	1.1	1.0

¹ Current dollar building permit values are converted to real dollars by applying the implicit price deflator for non-residential construction for Ontario from Statistics Canada.

² Converted at \$60/ sq. ft. of construction costs.

Source: Clayton Research based on Statistics Canada data

Figure 38

Estimated Industrial Land Absorption, Town of Collingwood, 2004-2024

	<u>Industrial Floorspace</u> <i>Square Feet</i>	<u>Industrial Land at 30% Coverage</u>	<u>Industrial Land at 35% Coverage</u> <i>Net Acres</i>	<u>Industrial Land at 40% Coverage</u>
Total				
2001	3,275,000	251	215	188
2004	3,370,000	258	221	193
2009	3,675,000	281	241	211
2014	3,857,000	295	253	221
2024	4,353,000	333	286	250
Growth				
2001-2004	95,000	7	6	5
2004-2009	305,000	23	20	18
2009-2014	182,000	14	12	10
2014-2024	496,000	38	33	28
2001-2024	1,078,000	82	71	62
Average Annual Growth				
2001-2004	31,667	2.4	2.1	1.8
2004-2009	61,000	4.7	4.0	3.5
2009-2014	36,400	2.8	2.4	2.1
2014-2024	49,600	3.8	3.3	2.8
2004-2024	49,150	3.8	3.2	2.8

Source: Clayton Research based on C. N. Watson & Associates, Town of Collingwood, *Development Charge Background Study*, June 11, 2004

5.3.3 Supply of Vacant Employment Land

The most recent data provided identifies approximately 313 acres of vacant employment land in the Town of Collingwood.⁹ It should be noted that this total does not include the Holborn lands nor does it include the industrial designated property fronting High Street adjacent to the subject lands. When considering the 313 acres, there might be some gross acreages in the inventory but these are minimal so the inventory is treated as net acres (gross less internal roads).

5.3.4 Adequacy of the Vacant Supply of Employment Land

For the purposes of this analysis, it is assumed that the supply of vacant employment land in Collingwood is approximately 348 acres. This amount is the existing vacant industrial land inventory of 313 acres including the total Holborn site area of approximately 43 acres less the 8 acres for the Home Depot, which is a permitted use on industrial land. The years of supply represented by the amount of vacant industrial land is calculated by dividing

⁹ Town of Collingwood Economic Development Office – *Industrial Land Availability* – July 2006.

the supply of vacant land by the anticipated future absorption of employment land (3-4 acres per year). The results:

- At an absorption of 3 acres per year, the 348 acres of vacant land represents a 116 years supply of vacant land; and
- At an absorption of 4 acres per year, the 348 acres of vacant land represents an 87 years supply of vacant land.

It is evident that the current supply of vacant industrial land greatly exceeds a 20 year supply, as required under the *Provincial Policy Statement*. Thus, there is ample room for the redesignation of lands to use deemed suitable by the Town.

The redesignation of the 35 acres of the subject lands to regional retail uses does not affect this conclusion:

- At an absorption of 3 acres per year, the 313 acres of remaining vacant land represents a 104.3 years supply of vacant land; and
- At absorption of 4 acres per year, the 313 acres of remaining vacant land represents a 78.3 years supply of vacant land.

Appendix A
Base Per Capita Food, Non-Food and Home
Improvement Stores Expenditures in Primary and
Secondary Trade Area

Appendix A-1

Trade Area Income Per Capita, 2001

	2001 Census Population	Average Persons Per Unit	Average Household Income	Average Income per Capita
	<i>Persons</i>	<i>Persons</i>	<i>Dollars</i>	
Collingwood T (Primary Trade Area)	16,665	2.40	52,455	21,856
Income Index (%)				88.3
Town of The Blue Mountains	6,350	2.30	68,168	29,638
Osprey TP	2,560	2.90	59,520	20,524
Clearview TP	14,335	2.80	62,807	22,431
Wasaga Beach T	12,905	2.40	50,431	21,013
Total Secondary Trade Area	36,150	2.60	58,846	23,046
Income Index (%)				93.1
Total Trade Area	52,815	2.50	56,746	22,747
Income Index (%)				91.9
Province of Ontario	11,410,045	2.70	66,836	24,754
Income Index (%)				100.0

Source: Clayton Research based on Malone Given Parsons Ltd., *Town of Collingwood Commercial Policy Review*, January 2005

Appendix A-2
Trade Area Per Capita Expenditure, 2005-2017

	Year	Town Of Collingwood (PTA)	Town Of Blue Mountains (STA)	Osprey Township (STA)	Clearview Township (STA)	Town Of Wasaga Beach (STA)	Total Secondary Trade Area	Province of Ontario
Income Index (%)		88.3	119.7	82.9	90.6	84.9	93.1	100.0
Food and Convenience Type Merchandise (FCTM)								
Elasticity Index (%):		98.9	101.8	98.5	99.2	98.6	99.4	100.0
FCTM Expenditure/Capita (\$)	2005	1,900	1,955	1,891	1,904	1,894	1,909	1,920
Real Annual Growth in Expenditure/Capita = 0.50%	2010	1,948	2,004	1,939	1,952	1,942	1,957	1,969
	2013	1,978	2,034	1,968	1,982	1,971	1,986	1,999
	2015	1,997	2,054	1,988	2,002	1,991	2,006	2,019
	2017	2,017	2,075	2,008	2,022	2,011	2,026	2,039
0.5%								
Non-Food Type Merchandise (NFTM)								
Elasticity Index (%):		93.0	111.8	89.7	94.4	90.9	95.9	100.0
NFTM Expenditure/Capita (\$)	2005	3,890	4,679	3,755	3,948	3,804	4,010	4,183
Real Annual Growth in Expenditure/Capita = 1.5%	2010	4,190	5,040	4,045	4,253	4,098	4,320	4,507
	2013	4,382	5,271	4,229	4,447	4,285	4,717	4,713
	2015	4,514	5,430	4,357	4,582	4,415	4,654	4,855
	2017	4,650	5,594	4,489	4,720	4,548	4,795	5,002
1.5%								
Home Improvement (HI)								
Elasticity Index (%):		98.9	101.8	98.5	99.2	98.6	99.4	100.0
NFTM Expenditure/Capita (\$)	2005	619	637	616	620	617	622	626
Real Annual Growth in Expenditure/Capita = 1.5%	2010	667	686	664	668	665	670	674
	2013	697	717	694	699	695	700	705
	2015	718	739	715	720	716	722	726
	2017	740	761	736	742	738	743	748
1.5%								
Non-Food Type Merchandise + Home Improvement (NFTM + HI)								
Elasticity Index (%):		93.8	110.6	91.0	95.0	92.0	96.3	100.0
NFTM + HI Expenditure/Capita (\$)	2005	4,509	5,315	4,371	4,568	4,421	4,642	4,809
Real Annual Growth in Expenditure/Capita = 1.5%	2010	4,857	5,726	4,708	4,921	4,763	5,011	5,181
	2013	5,079	5,988	4,923	5,146	4,980	5,244	5,417
	2017	5,391	6,355	5,225	5,462	5,286	5,571	5,750
1.5%								

Notes:
 Ontario Sales Per Capita 2005 estimated based on information from Appendix A-3.
 FCTM Elasticity Index:
 $y = 91 + 0.09(x)$ where x equals income index
 NFTM Elasticity Index:
 $y = 40 + 0.60(x)$ where x equals income index
 HI Elasticity Index:
 $y = 91 + 0.60(x)$ where x equals income index
 * Malone Given Parsons Ltd., Town of Collingwood Commercial Policy Review, January 2005
 Source: Clayton Research based on information from Statistics Canada and Malone Given Parsons Ltd., Town of Collingwood Commercial Policy Review, January 2005

Appendix A-3

Total Retail Sales by Category, Ontario, 2005

	Total Sales	Sales Per Capita ¹	
	Millions	Dollars	Percent
Food and Convenience Type Merchandise (FCTM)			
Supermarket & Grocery Stores	21,441	1,710	89.0
All Other Food Stores	2,644	211	11.0
Total FCTM	24,085	1,920	100.0
Non-Food Type Merchandise (NFTM)¹			
General Merchandise Stores			
Department Stores ³	9,078	724	17.3
Other General Merchandise Stores ⁴	8,386	669	16.0
Subtotal General Merchandise	17,464	1,393	33.3
Apparel & Accessories Stores			
Clothing Stores	6,447	514	12.3
Shoe, Clothing Accessories and Jewellery Stores	2,144	171	4.1
Subtotal	8,591	685	16.4
Furniture, Furnishings and All Electronic Stores			
Furniture Stores	3,184	254	6.1
Home Furnishings Stores	2,062	164	3.9
Computer and Software Stores	451	36	0.9
Home Electronics and Appliance Stores	3,857	308	7.4
Subtotal	9,553	762	18.2
Pharmacies and Personal Care Stores	9,754	778	18.6
All Other Retailers	7,104	566	13.5
Total NFTM (excluding Home Improvement)	52,466	4,183	100.0
Home Improvement (HI) Stores²			
Home Centres and Hardware Stores	6,190	494	78.9
Specialized Building Materials and Garden Stores	1,656	132	21.1
Total Home Improvement	7,846	626	100.0

¹ Calculated based on data from Statistics Canada, *Retail Trade*, February 2006, Catalogue No. 63-005, Table 3-7.

² Ontario's 2005 population based on Statistics Canada, *Annual Demographic Statistics - 2005*, Catalogue No. 91-213, Table 1.1.

Ontario's Population Estimate as of 2005 12,541,410 persons

³ Based on information from Statistics Canada, *Retail Trade Survey*, May 2005.

⁴ Includes Warehouse and Membership Clubs, Home and Auto Supply Stores and Other General Merchandise Stores.

Source: Clayton Research based on information from Statistics Canada

Appendix B
Inventory of Retail Commercial Floor Space,
Town of Collingwood, May 2006

The firm of GEOmarketing Solutions Group Inc. conducted an on-site measurement of the complete inventory of at-grade floor space in Collingwood devoted to retail commercial and service uses. The inventory includes both occupied and vacant floor space tabulated by type of space (based on Statistics Canada's North American Industrial Classification System) (NAICS) clarification systems. The inventory is also shown for various retail commercial nodes in Collingwood:

- Appendix B-1 shows the inventory by retail commercial node and street addresses; and
- Appendix B-2 shows the inventory by retail commercial node and NAICS code.

Retail and Services Floor Space

In addition, the inventory retail commercial floor space in the Downtown is broken down by size of retail outlet in Appendix B-3.

Appendix B-1 – Inventory by Street Addresses and Node

		NAICS Code	Store Type	Rounded Floor Area
Node 1 - Downtown Core				
First Street				
1	Bulk Barn	445299	Other Specialty Food Stores	3,900
1	Collingwood Running Co.	448199	Athletic Clothing	700
	Vacant	n/a	Vacant	2,100
	Vacant	n/a	Vacant	700
Huron Street				
16	Passionate Kisses Too	45322	Gift, Novelty and Souvenir Stores	2,100
18	Vacant	n/a	Vacant	1,300
20	Vacant	n/a	Vacant	3,000
Hurontario Street - East Side				
5	Blue Ridge Meats	44521	Meat Markets	2,100
13	Tunnel Clothing	448199	All Other Clothing Stores	900
19	Tw eed & Hickory	44812	Women's Clothing Stores	1,700
19	Tw eed & Hickory	442298	Housew ares stores	1,300
25	Country Landing	44812	Women's Clothing Stores	5,100
33	Magic Mountain	44812	Women's Clothing Stores	2,600
35	Dollarvilla	452999	All Other General Merchandise Stores	3,000
43	Ms. Tique Jew elers	44831	Jew elery Stores	2,200
49	Three Huron Antiques	45331	Antiques	2,000
51	Shoe Heaven	44821	Shoe Stores	2,200
53	Gold Star Jew elery	44831	Jew elery Stores	1,300
53	Judy's Drapery & Clothing	442291	Window Treatment Stores (incl. Curtains, Draperies and Blinds)	1,300
55	Music Room	45122	Pre-Recorded Tape, CD and Record Stores	2,500
57	Saunders Office Supplies	45321	Office Supplies and Stationery Stores	3,200
65	360 Clothing	44814	Family Clothing Stores	3,300
69	Cottage Country Gifts	45112	Hobby, Toy and Game Stores	2,900
73	Becker Shoes	44821	Shoe Stores	3,400
75	BK Squared	44814	Family Clothing Stores	2,700
77	T&Y Jew elery	44831	Jew elery Stores	1,400
83	The Feminine Touch	44612	Cosmetics, Beauty Supplies	1,600
85	Clarkson's	44211	Furniture Stores	3,000
93	Christies	44814	Family Clothing Stores	6,200
115	Sandy White	44812	Women's Clothing Stores	1,900
119	Shoppers Drugmart	44611	Pharmacies and Drug Stores	5,600
127	Blue Mountain Music	45114	Musical Instrument and Supplies Stores	2,100
129	Robinson's Paint & Wallpaper	44412	Paint and Wallpaper Stores	4,700
133	Gabrielle Photography	44313	Camera and Photographic Supplies Stores	2,600
135	Play-It Again Sports	45331	Used Merchandise Stores	2,100
137	Gardens Nest	44422	Nursery and Garden Centers	1,300
143	La Boutique	44812	Women's Clothing Stores	1,600
145	Willow Wood Gallery	45392	Art Dealers	1,500
151	Uncle Buck's Buy Sell Trade	45331	Used Merchandise Stores	1,000
155	Crave Chocolate	445292	Confectionery and Nut Stores	700
161	Crave Candy	445292	Confectionery and Nut Stores	700
163	Blue Mountain Foundation For The Arts	45392	Art Dealers	2,000
167	Sports Unlimited	45111	Sporting Goods Stores (excl. athletic shoe retailing)	1,800
169	Stuart Ellis IDA Pharmasave	44611	Pharmacies and Drug Stores	7,800
179	CN III	45322	Gift, Novelty and Souvenir Stores	2,000
191	Color Your World	44412	Paint and Wallpaper Stores	2,000
201	Vacant	n/a	Vacant	1,800
203	Crabtree & Evelyn	442298	Housew ares stores	1,000
207	A Supply - The Uniform Shop	448199	All Other Clothing Stores	2,200

Appendix B-1 – Inventory by Street Addresses and Node (cont'd)

211	Blue Mountain Flowers	45311	Florists	1,100
239	Skelton Galleria	45392	Art Dealers	1,800
311	Elaine Dickieson Fashion	44812	Women's Clothing Stores	1,600
313	Blue Mountain Lock & Key	44413	Hardware Stores	400
	Cora Couture	44812	Women's Clothing Stores	1,700
	McMaster Crossing Bird Outfitters	44422	Nursery and Garden Centers	1,500
	Luna Sea	44812	Women's Clothing Stores	1,500
	Vacant	n/a	Vacant	1,100
	Vacant (Ex Duncan Express)	n/a	Vacant	1,900
Hurontario Street - West Side				
12	Loblaws	44511	Supermarket & Other Grocery	66,481
52	South West Imports	45322	Gift, Novelty and Souvenir Stores	1,800
54	Smart Flowers	45311	Florists	1,600
62	Out On A Whim	45322	Gift, Novelty and Souvenir Stores	1,900
64	Three Peas In A Pod	44813	Children's and Infants' Clothing Stores	1,700
66	Floral Renaissance	45311	Florists	1,700
76	The Four Seasons	44812	Women's Clothing Stores	1,800
78	Elemental Bath Body and Home Spa	44612	Cosmetics, Beauty Supplies	1,800
116	Carmen's Foto Source	44313	Camera and Photographic Supplies Stores	3,100
120	D.C. Taylor Jewelers	44831	Jewellery Stores	2,300
124	124 Hurontario	442298	Housewares stores	4,100
126	Cotton Ginny	44812	Women's Clothing Stores	2,700
126	Tabi	44812	Women's Clothing Stores	3,300
138	Metro Mode	442298	Housewares stores	2,100
140	The Graphic Warehouse	448199	All Other Clothing Stores	1,900
172	Georgian Frame Gallery	442292	Print and Picture Frame Stores	1,000
176	Blue Mountain Vacuum Center	44311	Cellular Phone Stores	700
186	Rafters Home Store	442298	Housewares stores	2,000
202	Vacant	n/a	Vacant	1,300
210	Balloon Expressions Party Store	453999	Party Supply Store	2,900
216	The Walk-in Closet	44812	Women's Clothing Stores	1,000
220	ASA Apparel	44814	Family Clothing Stores	1,400
222	Sporting Life	45111	Sporting Goods Stores (excl. athletic shoe retailing)	9,000
246	Collingwood Mobility Center	446199	Other Health and Personal Care Stores	1,100
302	Vacant	n/a	Vacant	6,900
	Exchange Vows Bridal Clinic	448199	Bridal Stores	1,100
	The Altered Native	45322	Gift, Novelty and Souvenir Stores	1,100
	Wheat & Honey Natural Foods	445299	Other Specialty Food Stores	1,700
	Vacant	n/a	Vacant	7,100
	Paula's Pantry&Gift	45322	Gift, Novelty and Souvenir Stores	1,300
Ontario Street				
9	Vacant	n/a	Vacant	400
11	Cover To Cover Used Books	45331	Used Merchandise Stores	900
	Salvation Army Thrift Store	45331	Used Merchandise Stores	9,700
Pine Street				
46	Huron Alarm	44413	Hardware Stores	1,000
48	Art Moderne	45331	Antiques	1,700
60	Dags & Willow Fine Cheese Gourmet Shop	445299	Cheese stores	2,600
	Page & Turners Book Store	45121	Book Stores and News Dealers	1,200
	Vacant	n/a	Vacant	1,500
Second Street				
11	A Splash of Color	45392	Art Dealers	600
22	Read It Again Books/Greyhound/Taxi	45331	Used Merchandise Stores	1,200
33	Here I Come Again	45331	Used Merchandise Stores	1,700
	Vacant	n/a	Vacant	1,100

Appendix B-1 – Inventory by Street Addresses and Node (cont'd)

St. Marie Street				
191	Price Chopper	44511	Supermarket & Other Grocery	15,300
	Vacant	n/a	Vacant	500
Node 2 - First Street				
Birch Street				
14	Great Lakes Trophies	45111	Sporting Goods Stores (excl. athletic shoe retailing)	1,000
First Street				
150	Thurs T's Ltd	448199	Leather (Including Suede) Clothing Stores	1,000
160	Vacant	n/a	Vacant	1,700
280	Swiss Canadian Bakery	445291	Baked Goods Stores	2,200
330	International Pool & Spa	453999	Hot-tubs and whirlpools	3,200
350	Rundel Electronic Motors & Pumps	44413	Hardware Stores	400
390	Vacant (Ex Don Cherry's)	n/a	Vacant	5,000
470	Fathom/Kamikaze	45111	Sporting Goods Stores (excl. athletic shoe retailing)	11,000
498	The Golf Shop/Ski Shop	45111	Sporting Goods Stores (excl. athletic shoe retailing)	2,600
510	Find's of All Kinds	45331	Antiques	2,000
550	Telus	44311	Cellular Phone Stores	1,600
550	Blue Mountain Shades & Shutters	442291	Window Treatment Stores (incl. Curtains, Draperies and Blinds)	1,200
560	Mac's	44512	Convenience Stores (excl. convenience stores)	2,200
560	M&M Meats	44521	Meat Markets	1,200
	Vacant (Ex Collingwood Home Comfort)	n/a	Vacant	1,700
Front Street				
175	Little Ed Ski & Bike Shop	45111	Sporting Goods Stores (excl. athletic shoe retailing)	2,400
211	Vacant	n/a	Vacant	1,700
225	Vacant	n/a	Vacant	700
275	Always Flowers	45311	Florists	1,600
275	The Hock King	45331	Used Merchandise Stores	2,500
275	Paul Mac's Pet Food	45391	Pet and Pet Supplies Stores	2,400
275	Herbal Magic	446191	Food (Health) Supplement Stores	1,200
277	Mr. Convenience	44512	Convenience Stores (excl. convenience stores)	2,500
329	Wallys Woodworking	44211	Furniture Stores	2,300
	Peaks & Rafters/North Country Interiors			
391	Lighting & Rugs	44211	Furniture Stores	2,000
391	Georgian Bay Teak	44211	Furniture Stores	2,000
445	Skis & Bikes	45111	Sporting Goods Stores (excl. athletic shoe retailing)	11,500
499	Seasons Retreat	44211	Furniture Stores	5,400
499	Rogers Wireless	44311	Cellular Phone Stores	3,100
	Vacant	n/a	Vacant	300
	Vacant	n/a	Vacant	4,900
	Vacant	n/a	Vacant	1,800
Node 3 - Collingwood Centre (Formerly Blue Mountain Mall) and Vicinity				
Balsam Street				
20	To Good To Be Through	44211	Furniture Stores	2,800
20	Georgian Flooring Center	44221	Floor Coverings Stores (except ceramic)	5,100
20	Salnek Window Fashions	442291	Window Treatment Stores (incl. Curtains, Draperies and Blinds)	2,600
20	Van Dolders Custom Exteriors	442291	Window Treatment Stores (incl. Curtains, Draperies and Blinds)	3,000
20	Northern Home Comfort	442298	Fireplace Stores	3,000
20	Fairways Golf	45111	Sporting Goods Stores (excl. athletic shoe retailing)	2,800
20	Global Pet Foods	45391	Pet and Pet Supplies Stores	2,600
20	Clark Pool & Spa	453999	Hot-tubs and whirlpools	2,800
20	Premier Kitchens	44419	Kitchen Cabinets	2,800
20	City Stone	44419	Ceramic Floor and Wall Tiles	2,800
20	SGO Glass	44419	Glass Stores	1,500
	St Lawrence Enterprises Glass & Mirror	44419	Glass Stores	3,400

Appendix B-1 – Inventory by Street Addresses and Node (cont'd)

Mountain Road

2	Foot Foundation	44821	Shoe Stores	3,800
2	Sears Appliance	44311	Appliance, Television and Other Electronics	9,800
2	Darsco Lighting	442298	Lamps and Lighting Fixtures	15,300
2	Vacant	n/a	Vacant	4,900
2	Vacant	n/a	Vacant	3,000
2	Vacant	n/a	Vacant	13,900
55	Price Chopper	44511	Supermarket & Other Grocery	24,300
55	Zellers	45211	Department Stores	90,300
55	Canadian Tire	452991	Home and Auto Supplies Stores	57,700
55	Decadent Dollar	452999	All Other General Merchandise Stores	6,700
55	Stitches	44812	Women's Clothing Stores	2,500
55	Marks Work Wear House	44814	Family Clothing Stores	8,100
55	Ardene	44815	Other Clothing Accessories Stores	1,900
55	Bell World	44311	Cellular Phone Stores	600
55	The Source By Circuit City	44311	Appliance, Television and Other Electronics	2,800
55	EB Games	45112	Hobby, Toy and Game Stores	1,800
55	The Grapevine Cottage	45322	Gift, Novelty and Souvenir Stores	700
55	Pet Value	45391	Pet and Pet Supplies Stores	2,000
55	Beauty Supply Outlet	44612	Cosmetics, Beauty Supplies	1,900
55	Collingwood Optical	44613	Optical Goods Stores	800
55	Your Family Vitamin Store	446191	Food (Health) Supplement Stores	500
55	Vacant	n/a	Vacant	600
55	Vacant	n/a	Vacant	500
55	Vacant (Ex Casey's)	n/a	Vacant	4,600
	A&P	44511	Supermarket & Other Grocery	37,700
	Wal-Mart	45211	Department Stores	115,000

Node 4 - Huron Street

39	Vacant (Ex Canadian Tire)	n/a	Vacant	32,100
	Competition Sound	44311	Appliance, Television and Other Electronics	1,100
	Rick's Happy Hooka	45111	Sporting Goods Stores (excl. athletic shoe retailing)	1,700

Node 5 - Hume Street

143	Vacant	n/a	Vacant	2,400
316	Vacant	n/a	Vacant	700
328	Vacant	n/a	Vacant	1,300
395	Georgian Bay Home Mobility Products	446199	Other Health and Personal Care Stores	2,400
453	Georgian Audio Video	44311	Appliance, Television and Other Electronics	3,700
460	Beach Comber Hot Tubs	453999	Hot-tubs and whirlpools	2,600
466	Rona Building Supply	44411	Home Centers	13,200
	Mountain Convenience	44512	Convenience Stores (excl. convenience stores)	1,400
	Home Building Center	44411	Home Centers	18,900

Node 6 - Ronnell Crescent and Vicinity

11	Soul Sports	45111	Sporting Goods Stores (excl. athletic shoe retailing)	1,000
	Northern Windows	442291	Window Treatment Stores (incl. Curtains, Draperies and Blinds)	2,500
	Bucher Glass & Mirror	44419	Glass Stores	2,000
	Vacant (Ex Collingwood Toyota)	n/a	Vacant	7,500

Node 7 - Highway 26

Hume Street

501	Jay's Mart	44512	Convenience Stores (excl. convenience stores)	2,300
501	Vacant	n/a	Vacant	4,000
511	Foleys	44211	Furniture Stores	28,400

Highway 26

9849	Joes Store	45114	Musical Instrument and Supplies Stores	3,500
	Home Furniture	44211	Furniture Stores	34,000
	Great Lakes Outfitters	45111	Sporting Goods Stores (excl. athletic shoe retailing)	1,300
	Georgian Surf & garden Center	44422	Nursery and Garden Centers	0
	Vacant	n/a	Vacant	1,500

Appendix B-1 – Inventory by Street Addresses and Node (cont'd)

Node 8 - Other Collingwood
Country Road 21

	Skis Please	45111	Sporting Goods Stores (excl. athletic shoe retailing)	3,000
	Bill Brown Wood Working & Building Supply	44411	Home Centers	4,200
833	Diane's Garden Center	44422	Nursery and Garden Centers	1,000

Hurontario Street

	Cross Roads Convenience	44512	Convenience Stores (excl. convenience stores)	1,500
	The Candy Factory	445292	Confectionery and Nut Stores	1,000
	Walkers Lawn Boy	44421	Outdoor Power Equipment Stores	3,600

Highway 26

	Green Tree Gardens	44422	Nursery and Garden Centers	1,000
--	--------------------	-------	----------------------------	-------

Mountain Road

140	Saunders Office Supply	45321	Office Supplies and Stationery Stores	3,000
140	Georgian Hose	44413	Hardware Stores	1,500
140	Tor Bram Electric	44413	Hardware Stores	2,500
140	Just Counter Tops	44419	Kitchen Cabinets	3,000
140	Vacant	n/a	Vacant	1,200

Stewart Road

25	Mitchell's Top Soil	44422	Nursery and Garden Centers	2,000
90	The Re-Use Center	45331	Used Merchandise Stores	3,500
	Clear Choice Pool & Spa	453999	Hot-tubs and whirlpools	3,000

Source: Clayton Research based information from The Dalvay Group Inc.

Appendix B-2 – Retail and Services Floor Space Inventory of Retail Commercial by NAICS Code and Node

	NAICS Code	Store Type	Rounded Area Sq.ft.
Node 1 - Downtown			
Food and Convenience Type Merchandise (FCTM)			
Supermarkets			
Loblaws	44511	Supermarket & Other Grocery	66,481
Price Chopper	44511	Supermarket & Other Grocery	15,300
Other Food Stores			
Blue Ridge Meats	44521	Meat Markets	2,100
Crave Chocolate	445292	Confectionery and Nut Stores	700
Crave Candy	445292	Confectionery and Nut Stores	700
Wheat & Honey Natural Foods	445299	Other Specialty Food Stores	1,700
Bulk Barn	445299	Other Specialty Food Stores	3,900
Dags & Willow Fine Cheese Gourmet Shop	445299	Cheese stores	2,600
			93,481
Non-Food Type Merchandise (NFTM)			
General Merchandise			
Dollarvilla	452999	All Other General Merchandise Stores	3,000
Apparel & Accessories			
Cora Couture	44812	Women's Clothing Stores	1,700
Tweed & Hickory	44812	Women's Clothing Stores	1,700
Country Landing	44812	Women's Clothing Stores	5,100
Magic Mountain	44812	Women's Clothing Stores	2,600
Sandy White	44812	Women's Clothing Stores	1,900
La Boutique	44812	Women's Clothing Stores	1,600
Luna Sea	44812	Women's Clothing Stores	1,500
Elaine Dickieson Fashion	44812	Women's Clothing Stores	1,600
The Walk-In Closet	44812	Women's Clothing Stores	1,000
Cotton Ginny	44812	Women's Clothing Stores	2,700
Tabi	44812	Women's Clothing Stores	3,300
The Four Seasons	44812	Women's Clothing Stores	1,800
Three Peas In A Pod	44813	Children's and Infants' Clothing Stores	1,700
360 Clothing	44814	Family Clothing Stores	3,300
BK Squared	44814	Family Clothing Stores	2,700
Christies	44814	Family Clothing Stores	6,200
ASA Apparel	44814	Family Clothing Stores	1,400
Shoe Heaven	44821	Shoe Stores	2,200
Becker Shoes	44821	Shoe Stores	3,400
Ms. Tique Jewelers	44831	Jewellery Stores	2,200
Gold Star Jewellery	44831	Jewellery Stores	1,300
T&Y Jewellery	44831	Jewellery Stores	1,400
D.C. Taylor Jewelers	44831	Jewellery Stores	2,300
Tunnel Clothing	448199	All Other Clothing Stores	900
A Supply - The Uniform Shop	448199	All Other Clothing Stores	2,200
Exchange Vows Bridal Clinic	448199	Bridal Stores	1,100
The Graphic Warehouse	448199	All Other Clothing Stores	1,900
Collingwood Running Co.	448199	Athletic Clothing	700
			61,400
Furniture, Home Furnishings & Electronics			
Clarkson's	44211	Furniture Stores	3,000
Blue Mountain Vacuum Center	44311	Cellular Phone Stores	700
Gabrielle Photography	44313	Camera and Photographic Supplies Stores	2,600
Carmen's Foto Source	44313	Camera and Photographic Supplies Stores	3,100
Judy's Drapery & Clothing	442291	Window Treatment Stores (incl. Curtains, Draperies and Blinds)	1,300
Georgian Frame Gallery	442292	Print and Picture Frame Stores	1,000
Tweed & Hickory	442298	Housewares stores	1,300

Appendix B-2 - Retail and Services Floor Space Inventory of Retail Commercial by NAICS Code and Node (cont'd)

Crabtree & Evelyn	442298	Housewares stores	1,000
Rafters Home Store	442298	Housewares stores	2,000
Metro Mode	442298	Housewares stores	2,100
124 Hurontario	442298	Housewares stores	4,100
			<u>22,200</u>
Pharmacies and Personal Care			
Shoppers Drugmart	44611	Pharmacies and Drug Stores	5,600
Stuart Ellis IDA Pharmasave	44611	Pharmacies and Drug Stores	7,800
The Feminine Touch	44612	Cosmetics, Beauty Supplies	1,600
Elemental Bath Body and Home Spa	44612	Cosmetics, Beauty Supplies	1,800
Collingwood Mobility Center	446199	Other Health and Personal Care Stores	1,100
			<u>17,900</u>
Miscellaneous Retailers			
Sports Unlimited	45111	Sporting Goods Stores (excl. athletic shoe retailing)	1,800
Sporting Life	45111	Sporting Goods Stores (excl. athletic shoe retailing)	9,000
Cottage Country Gifts	45112	Hobby, Toy and Game Stores	2,900
Blue Mountain Music	45114	Musical Instrument and Supplies Stores	2,100
Page & Turners Book Store	45121	Book Stores and News Dealers	1,200
Music Room	45122	Pre-Recorded Tape, CD and Record Stores	2,500
Blue Mountain Flowers	45311	Florists	1,100
Floral Renaissance	45311	Florists	1,700
Smart Flowers	45311	Florists	1,600
Saunders Office Supplies	45321	Office Supplies and Stationery Stores	3,200
CN III	45322	Gift, Novelty and Souvenir Stores	2,000
The Altered Native	45322	Gift, Novelty and Souvenir Stores	1,100
Out On A Whim	45322	Gift, Novelty and Souvenir Stores	1,900
South West Imports	45322	Gift, Novelty and Souvenir Stores	1,800
Passionate Kisses Too	45322	Gift, Novelty and Souvenir Stores	2,100
Paula's Pantry&Gift	45322	Gift, Novelty and Souvenir Stores	1,300
Three Huron Antiques	45331	Antiques	2,000
Play-It Again Sports	45331	Used Merchandise Stores	2,100
Uncle Buck's Buy Sell Trade	45331	Used Merchandise Stores	1,000
Here I Come Again	45331	Used Merchandise Stores	1,700
Cover To Cover Used Books	45331	Used Merchandise Stores	900
Salvation Army Thrift Store	45331	Used Merchandise Stores	9,700
Read It Again Books/Greyhound/Taxi	45331	Used Merchandise Stores	1,200
Art Moderne	45331	Antiques	1,700
Willow Wood Gallery	45392	Art Dealers	1,500
Blue Mountain Foundation For The Arts	45392	Art Dealers	2,000
Skelton Galleria	45392	Art Dealers	1,800
A Splash of Color	45392	Art Dealers	600
Balloon Expressions Party Store	453999	Party Supply Store	2,900
			<u>66,400</u>
Home Improvement (HI)			
Building and Outdoor Home Supply			
Robinson's Paint & Wallpaper	44412	Paint and Wallpaper Stores	4,700
Color Your World	44412	Paint and Wallpaper Stores	2,000
Blue Mountain Lock & Key	44413	Hardware Stores	400
Huronvia Alarm	44413	Hardware Stores	1,000
McMaster Crossing Bird Outfitters	44422	Nursery and Garden Centers	1,500
Gardens Nest	44422	Nursery and Garden Centers	1,300
			<u>10,900</u>
Vacant			
Vacant	n/a	Vacant	1,800
Vacant	n/a	Vacant	1,100
Vacant (Ex Duncan Express)	n/a	Vacant	1,900
Vacant	n/a	Vacant	6,900
Vacant	n/a	Vacant	1,300

Appendix B-2 - Retail and Services Floor Space Inventory of Retail Commercial by NAICS Code and Node (cont'd)

Vacant	n/a	Vacant	7,100
Vacant	n/a	Vacant	2,100
Vacant	n/a	Vacant	700
Vacant	n/a	Vacant	3,000
Vacant	n/a	Vacant	1,300
Vacant	n/a	Vacant	1,100
Vacant	n/a	Vacant	400
Vacant	n/a	Vacant	1,500
Vacant	n/a	Vacant	500
			<u>30,700</u>
Node 2 - First Street			
Food and Convenience Type Merchandise (FCTM)			
Other Food Stores			
Mac's	44512	Convenience Stores (excl. convenience stores)	2,200
Mr. Convenience	44512	Convenience Stores (excl. convenience stores)	2,500
M&M Meats	44521	Meat Markets	1,200
Swiss Canadian Bakery	445291	Baked Goods Stores	2,200
			<u>8,100</u>
Apparel & Accessories Stores			
Thurs T's Ltd	448199	Leather (Including Suede) Clothing Stores	1,000
Furniture, Home Furnishings & Electronics			
Seasons Retreat	44211	Furniture Stores	5,400
Peaks & Rafters/North Country Interiors Lighting & Rugs	44211	Furniture Stores	2,000
Georgian Bay Teak	44211	Furniture Stores	2,000
Wallys Woodworking	44211	Furniture Stores	2,300
Telus	44311	Cellular Phone Stores	1,600
Rogers Wireless	44311	Cellular Phone Stores	3,100
Blue Mountain Shades & Shutters	442291	Window Treatment Stores (incl. Curtains, Draperies and Blinds)	1,200
			<u>17,600</u>
Pharmacies and Personal Care Stores			
Herbal Magic	446191	Food (Health) Supplement Stores	1,200
Miscellaneous Retailers			
Great Lakes Trophies	45111	Sporting Goods Stores (excl. athletic shoe retailing)	1,000
Fathom/Kamikaze	45111	Sporting Goods Stores (excl. athletic shoe retailing)	11,000
The Golf Shop/Ski Shop	45111	Sporting Goods Stores (excl. athletic shoe retailing)	2,600
Skis & Bikes	45111	Sporting Goods Stores (excl. athletic shoe retailing)	11,500
Little Ed Ski & Bike Shop	45111	Sporting Goods Stores (excl. athletic shoe retailing)	2,400
Always Flowers	45311	Florists	1,600
Finds of All Kinds	45331	Antiques	2,000
The Hock King	45331	Used Merchandise Stores	2,500
Paul Mac's Pet Food	45391	Pet and Pet Supplies Stores	2,400
International Pool & Spa	453999	Hot-tubs and whirlpools	3,200
			<u>40,200</u>
Home Improvement (HI)			
Building and Outdoor Home Supply			
Rundel Electronic Motors & Pumps	44413	Hardware Stores	400
Vacant			
Vacant	n/a	Vacant	1,700
Vacant (Ex Collingwood Home Comfort)	n/a	Vacant	1,700
Vacant (Ex Don Cherry's)	n/a	Vacant	5,000
Vacant	n/a	Vacant	700
Vacant	n/a	Vacant	300
Vacant	n/a	Vacant	1,700
Vacant	n/a	Vacant	4,900
Vacant	n/a	Vacant	1,800
			<u>18,000</u>

Appendix B-2 - Retail and Services Floor Space Inventory of Retail Commercial by NAICS Code and Node (cont'd)

Node 3 - Blue Mountain Mall and Vicinity			
Food and Convenience Type Merchandise (FCTM)			
Supermarkets			
Price Chopper	44511	Supermarket & Other Grocery	24,300
A&P	44511	Supermarket & Other Grocery	<u>37,700</u>
			62,000
Non-Food Type Merchandise (NFTM)			
General Merchandise			
Zellers	45211	Department Stores	90,300
Wal-Mart	45211	Department Stores	115,000
Canadian Tire	452991	Home and Auto Supplies Stores	57,700
Decadent Dollar	452999	All Other General Merchandise Stores	<u>6,700</u>
			269,700
Apparel & Accessories Stores			
Stitches	44812	Women's Clothing Stores	2,500
Marks Work Wear House	44814	Family Clothing Stores	8,100
Ardene	44815	Other Clothing Accessories Stores	1,900
Foot Foundation	44821	Shoe Stores	<u>3,800</u>
			16,300
Furniture, Home Furnishings & Electronics			
To Good To Be Through	44211	Furniture Stores	2,800
Georgian Flooring Center	44221	Floor Coverings Stores (except ceramic)	5,100
Bell World	44311	Cellular Phone Stores	600
The Source By Circuit City	44311	Appliance, Television and Other Electronics	2,800
Sears Appliance	44311	Appliance, Television and Other Electronics	9,800
Salnek Window Fashions	442291	Window Treatment Stores (incl. Curtains, Draperies and Blinds)	2,600
Van Dolders Custom Exteriors	442291	Window Treatment Stores (incl. Curtains, Draperies and Blinds)	3,000
Northern Home Comfort	442298	Fireplace Stores	3,000
Darsco Lighting	442298	Lamps and Lighting Fixtures	<u>15,300</u>
Pharmacies and Personal Care Stores			
Beauty Supply Outlet	44612	Cosmetics, Beauty Supplies	1,900
Collingwood Optical	44613	Optical Goods Stores	800
Your Family Vitamin Store	446191	Food (Health) Supplement Stores	<u>500</u>
			3,200
Miscellaneous Retailers			
Fairways Golf	45111	Sporting Goods Stores (excl. athletic shoe retailing)	2,800
EB Games	45112	Hobby, Toy and Game Stores	1,800
The Grapevine Cottage	45322	Gift, Novelty and Souvenir Stores	700
Global Pet Foods	45391	Pet and Pet Supplies Stores	2,600
Pet Value	45391	Pet and Pet Supplies Stores	2,000
Clark Pool & Spa	453999	Hot-tubs and whirlpools	<u>2,800</u>
			12,700
Home Improvement (HI)			
Building and Outdoor Home Supply			
St Lawrence Enterprises Glass & Mirror	44419	Glass Stores	3,400
Premier Kitchens	44419	Kitchen Cabinets	2,800
City Stone	44419	Ceramic Floor and Wall Tiles	2,800
SGO Glass	44419	Glass Stores	<u>1,500</u>
			10,500
Vacant			
Vacant	n/a	Vacant	600
Vacant	n/a	Vacant	500
Vacant (Ex Casey's)	n/a	Vacant	4,600
Vacant	n/a	Vacant	4,900
Vacant	n/a	Vacant	3,000
Vacant	n/a	Vacant	<u>13,900</u>
			27,500

Appendix B-2 - Retail and Services Floor Space Inventory of Retail Commercial by NAICS Code and Node (cont'd)

Node 4 - Huron Street			
Non-Food Type Merchandise (NFTM)			
Furniture, Home Furnishings & Electronics			
Competition Sound	44311	Appliance, Television and Other Electronics	1,100
Miscellaneous Retailers			
Rick's Happy Hooka	45111	Sporting Goods Stores (excl. athletic shoe retailing)	1,700
Vacant			
Vacant (Ex Canadian Tire)	n/a	Vacant	32,100
Node 5 - Hume Street			
Food and Convenience Type Merchandise (FCTM)			
Other Food Stores			
Mountain Convenience	44512	Convenience Stores (excl. convenience stores)	1,400
Non-Food Type Merchandise (NFTM)			
Furniture, Home Furnishings & Electronics			
Georgian Audio Video	44311	Appliance, Television and Other Electronics	3,700
Pharmacies and Personal Care Stores			
Georgian Bay Home Mobility Products	446199	Other Health and Personal Care Stores	2,400
Miscellaneous Retailers			
Beach Comber Hot Tubs	453999	Hot-tubs and whirlpools	2,600
Home Improvement (HI)			
Building and Outdoor Home Supply			
Home Building Center	44411	Home Centers	18,900
Rona Building Supply	44411	Home Centers	13,200
			<u>32,100</u>
Vacant			
Vacant	n/a	Vacant	2,400
Vacant	n/a	Vacant	700
Vacant	n/a	Vacant	<u>1,300</u>
			4,400
Node 6 - Ronnell Crescent and Vicinity			
Non-Food Type Merchandise (NFTM)			
Furniture, Home Furnishings & Electronics			
Northern Windows	442291	Window Treatment Stores (incl. Curtains, Draperies and Blinds)	2,500
Miscellaneous Retailers			
Soul Sports	45111	Sporting Goods Stores (excl. athletic shoe retailing)	1,000
Home Improvement (HI)			
Building and Outdoor Home Supply			
Bucher Glass & Mirror	44419	Glass Stores	2,000
Vacant			
Vacant (Ex Collingwood Toyota)	n/a	Vacant	7,500
Node 7 - Highway 26			
Food and Convenience Type Merchandise (FCTM)			
Other Food Stores			
Jay's Mart	44512	Convenience Stores (excl. convenience stores)	2,300
Non-Food Type Merchandise (NFTM)			
Furniture, Home Furnishings & Electronics			
Home Furniture	44211	Furniture Stores	34,000
Foleys	44211	Furniture Stores	<u>28,400</u>
			62,400

Appendix B-2 - Inventory of Retail Commercial by NAICS Code and Node (cont'd)

Miscellaneous Retailers			
Great Lakes Outfitters	45111	Sporting Goods Stores (excl. athletic shoe retailing)	1,300
Joes Store	45114	Musical Instrument and Supplies Stores	<u>3,500</u>
			4,800
Vacant			
Vacant	n/a	Vacant	4,000
Vacant	n/a	Vacant	<u>1,500</u>
			5,500
Node 8 - Other Collingwood			
Food and Convenience Type Merchandise (FCTM)			
Other Food Stores			
Cross Roads Convenience	44512	Convenience Stores (excl. convenience stores)	1,500
The Candy Factory	445292	Confectionery and Nut Stores	<u>1,000</u>
			2,500
Non-Food Type Merchandise (NFTM)			
Miscellaneous Retailers			
Skis Please	45111	Sporting Goods Stores (excl. athletic shoe retailing)	3,000
Saunders Office Supply	45321	Office Supplies and Stationery Stores	3,000
The Re-Use Center	45331	Used Merchandise Stores	3,500
Clear Choice Pool & Spa	453999	Hot-tubs and whirlpools	<u>3,000</u>
			12,500
Home Improvement (HI)			
Building and Outdoor Home Supply			
Bill Brown Wood Working & Building Supply	44411	Home Centers	4,200
Georgian Hose	44413	Hardware Stores	1,500
Tor Bram Electric	44413	Hardware Stores	2,500
Just Counter Tops	44419	Kitchen Cabinets	3,000
Walkers Lawn Boy	44421	Outdoor Power Equipment Stores	3,600
Green Tree Gardens	44422	Nursery and Garden Centers	1,000
Mitchell's Top Soil	44422	Nursery and Garden Centers	2,000
Diane's Garden Center	44422	Nursery and Garden Centers	<u>1,000</u>
			18,800
Vacant			
Vacant	n/a	Vacant	1,200

Source: Clayton Research based information from GEOMarketing Solutions Group Inc.

Appendix B-3

**Inventory of Occupied Retail Commercial Floor Space in
Downtown Core, by Size of Establishment, Town of
Collingwood, May 2006**

Size of Store (Sq. Ft.)	Number of Establishments		Total Floor Area	
		<i>Percent</i>	<i>Sq. Ft</i>	<i>Percent</i>
< 1,000	8	9.1	5,600	2.0
1,000-1,400	18	20.5	21,100	7.7
1,500-1,900	22	25.0	37,500	13.6
2,000-2,400	14	15.9	29,400	10.7
2,500-2,900	8	9.1	21,500	7.8
3,000-3,400	7	8.0	22,300	8.1
3,500-3,900	1	1.1	3,900	1.4
4,000-4,900	2	2.3	8,800	3.2
5,000-5,900	2	2.3	10,700	3.9
6,000-6,900	1	1.1	6,200	2.3
7,000-7,900	1	1.1	7,800	2.8
8,000-8,900	0	0.0	0	0.0
9,000-9,900	2	2.3	18,700	6.8
10,000 <	<u>2</u>	<u>2.3</u>	<u>81,781</u>	<u>29.7</u>
Total	88	100.0	275,281	100.0

Note: Includes all Occupied Food & Convenience Type Merchandise, Non Food Type Merchandise and Home Improvement stores.

Source: Clayton Research based information from GEOMarketing Solutions Group Inc.

Appendix C
Licence Plate Surveys of
Collingwood Shoppers

PURPOSE OF SURVEYS

Two licence plate surveys were conducted of shoppers in Collingwood to ascertain the place of residence of shoppers – whether in the Primary Trade Area, the Secondary Trade Area or outside the Trade Area. Spending by shoppers coming from outside the Trade Area is referred to as “inflow” spending.

The most comprehensive survey, which encompasses shoppers in both the Downtown and the Western Commercial Node, was conducted at a time (near the end of April) when the number of visitors and second home owners would be expected to be relatively low. The more limited survey, which covered only shoppers in the Downtown, was conducted during the final week of skiing so more visitors and second home owners would be expected than in the more comprehensive survey (near the end of March).

The reason for the two surveys was to ascertain whether visitors and second home owners might account for a greater share of shoppers in the Downtown during a time a recreation activity was a draw than when there was no recreational activity.

TECHNICAL DESCRIPTION OF SURVEYS

The licence plate surveys were conducted by The Dalvay Group, a firm specializing in these types of surveys. The licence plate numbers were submitted to the Ontario Ministry of Transportation which in turn plotted the locations by dissemination areas (small areas defined by Statistics Canada for the Census of Canada) in which the ownership of the vehicles surveyed are registered.

The first survey was conducted during the final week of ski season during last week of March (Thursday, March 23 to Saturday, March 25) between 9 a.m. and 8 p.m. of each day. It was restricted to vehicles parked in the Loblaws parking lot and vehicles parked on both sides of Hurontario Street in the Downtown.

The second survey was conducted in late April (Thursday, April 27 to Saturday April 29) between 9 a.m. and 8 p.m. It surveyed vehicles parking at locations in the Western Commercial Node in addition to the two Downtown locations covered by the first survey including the Wal-Mart store, the A&P store, Zellers, Canadian Tire, and the main entrance of the Collingwood Centre (formerly known as the Blue Mountain Mall).

In the first survey, a total of 989 licence plate numbers were secured. For the second survey, the number of licence plates numbers collected was 2,658.

SURVEY HIGHLIGHTS

Appendix C-1 presents the results of the April 2006 survey that encompassed shoppers in both the Downtown and the Western Commercial Node.

Highlights of the survey include the following:

- Collingwood stores draw the majority of their customers from the Trade Area – 71.8 percent of all the licence plates surveyed;
- They also draw a significant proportion of their customers from outside the defined Trade Area (28.2 percent), with the largest contingent from the Greater Toronto Area (GTA) (11.5 percent) or other locations outside of Simcoe or Grey Counties such as Waterloo Region (7.8 percent); and
- The relative distribution of shoppers from within the Primary Trade Area, the secondary trade, or from outside the Trade Area is about the same for the Downtown (slightly higher in fact for outside the Trade Area) as for the Western Commercial Core indicating that both these retailing areas are more or less equally successful in attracting customers from outside the Primary Trade Area. Unfortunately, the licence plate results cannot be used to quantify the extent of cross-shopping between these two areas – i.e., the extent to which shoppers in a single trip shop in both the Downtown and the Western Commercial Node.

Appendix C-1

Summary of Collingwood Origin Licence Plate Survey Results by Location (April, 2006)

	Huronario Street		Loblaws		Sub-total - Downtown Core		Canadian Tire		Zellers		Collingwood Centre		Wai-Mart		A&P		Sub-total - Western Commercial Node		Total	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
<i>Primary Trade Area</i> Town of Collingwood	150	38.9	227	44.8	377	42.2	170	44.4	138	45.1	83	42.6	212	45.8	203	48.6	806	45.7	1,183	44.5
<i>Secondary Trade Area</i> Township of Cleanview	58	15.0	73	14.4	131	14.7	54	14.1	63	20.6	33	16.9	74	16.0	39	9.3	263	14.9	394	14.8
Town of Wasaga Beach	3	0.8	5	1.0	8	0.9	14	3.7	1	0.3	4	2.1	5	1.1	5	1.2	29	1.6	37	1.4
The Blue Mountains	34	8.8	61	12.0	95	10.6	44	11.5	25	8.2	26	13.3	43	9.3	41	9.8	179	10.1	274	10.3
Former Township of Osprey	4	1.0	7	1.4	11	1.2	1	0.3	2	0.7	1	0.5	0	0	6	1.4	10	0.6	21	0.8
<i>Sub-Total, Secondary Trade Area</i>	99	25.6	146	28.8	245	27.4	113	29.5	91	29.7	64	32.8	122	26.3	91	21.8	481	27.3	726	27.3
<i>Total Trade Area</i>	249	64.5	373	73.6	622	69.7	283	73.9	229	74.8	147	75.4	334	72.1	294	70.3	1,287	72.9	1,909	71.8
<i>Outside Trade Area</i> Other Simcoe County	25	6.5	17	3.4	42	4.7	16	4.2	6	2.0	7	3.6	16	3.5	18	4.3	63	3.6	105	4.0
Other Grey County	14	3.6	17	3.4	31	3.5	19	5.0	13	4.2	17	8.7	34	7.3	18	4.3	101	5.7	132	5.0
GTA	58	15.0	68	13.4	126	14.1	43	11.2	25	8.2	14	7.2	42	9.1	56	13.4	180	10.2	306	11.5
All Other	40	10.4	32	6.3	72	8.1	22	5.7	33	10.8	10	5.1	37	8.0	32	7.7	134	7.6	206	7.8
<i>Sub-Total, Outside Trade Area</i>	137	35.5	134	26.4	271	30.3	100	26.1	77	25.2	48	24.6	129	27.9	124	29.7	478	27.1	749	28.2
TOTAL	386	100.0	507	100.0	893	100.0	383	100.0	306	100.0	195	100.0	463	100.0	418	100.0	1,765	100.0	2,658	100.0

Source: Clayton Research based on licence plate survey conducted by The Dalvay Group

Highlights from the March tabulation of licence plates for the Downtown locations surveyed are contained in Appendix C-2.

Appendix C-2

Summary of Collingwood Origin Licence Plate Survey Results by Location (March, 2006)

	Huronario Street		Loblaws		Total - Downtown Core	
	Freq.	%	Freq.	%	Freq.	%
<i>Primary Trade Area</i>						
Town of Collingwood	162	36.9	243	44.2	405	41.0
<i>Secondary Trade Area</i>						
Township of Clearview	66	15.0	68	12.4	134	13.5
Town of Wasaga Beach	3	0.7	5	0.9	8	0.8
The Blue Mountains	34	7.7	49	8.9	83	8.4
Former Township of Osprey	0	0	4	0.7	4	0.4
<i>Sub-Total, Secondary Trade Area</i>	<i>103</i>	<i>23.5</i>	<i>126</i>	<i>22.9</i>	<i>229</i>	<i>23.2</i>
<i>Total Trade Area</i>	<i>265</i>	<i>60.4</i>	<i>369</i>	<i>67.1</i>	<i>634</i>	<i>64.1</i>
<i>Outside Trade Area</i>						
Other Simcoe County	28	6.4	12	2.2	40	4.0
Other Grey County	23	5.2	20	3.6	43	4.3
GTA	77	17.5	97	17.6	174	17.6
All Other	46	10.5	52	9.5	98	9.9
<i>Sub-Total, Outside Trade Area</i>	<i>174</i>	<i>39.6</i>	<i>181</i>	<i>32.9</i>	<i>355</i>	<i>35.9</i>
TOTAL	439	100.0	550	100.0	989	100.0

Source: Clayton Research based on licence plate survey conducted by The Dalvay Group

A comparison of the Appendix C-1 and Appendix C-2 results indicate the Downtown benefits from visitors and second home owners coming to Collingwood to participate in recreational activities such as skiing. According to the March survey taken during the last week of the ski season 35.9 percent of the shoppers in the Downtown resided outside the Trade Area. This is 18.5 percent higher than the 30.3 percent share of outside shoppers in the April survey, which was conducted after ski season had ended.

Appendix D
Telephone Survey of Primary and
Secondary Trade Area Residents

PURPOSE OF SURVEY

An in-home consumer telephone survey of a sample of residents in the Collingwood Trade Area was conducted. The survey provides information on the shopping patterns of Trade Area residents, both in the Primary and Secondary Trade Areas, by type of store. It provides an indication of the extent to which Trade Area residents are shopping in various types of stores within both Collingwood and other parts of the Trade Area as well as outside the Trade Area. The spending done by Trade Area residents outside the Trade Area is often referred to as "spending leakage" from the Trade Area. The recapture of a portion of this "leakage" can occur with new retail facilities providing a broader range of goods for sale or more competition are introduced to the market place.

A survey of 850 households living in the Primary and Secondary Trade Areas was conducted in May 2006 by Foundation Research Group Inc., a consumer research survey firm.

Details of the respondents and survey highlights are included in this appendix. A copy of the survey is included at the end of this Appendix D.

Appendix D-1

Demographic Characteristics of Survey Respondents

TOTAL RESPONDENTS 850

Sex *Percent*

Male	30.9
Female	69.1
Total	100.0

Age

Under 20	0.6
20-34	15.9
35-44	19.1
45-54	22.1
55-64	18.2
65 and over	22.7
Refused	1.4
Total	100.0

Income

Under \$20,000	8.4
\$20,000-29,999	10.8
\$30,000-39,999	10.7
\$40,000-49,999	9.2
\$50,000-59,999	8.7
\$60,000-69,999	6.8
\$70,000-79,999	6.4
\$80,000-89,999	4.2
\$90,000 and over	12.7
Refused	22.1
Total	100.0

Household Size

1 person	20.0
2 persons	38.8
3 persons	14.4
4 persons	16.1
5 or more persons	9.2
Refused	1.5
Total	100.0

Place of Residence

Town of Collingwood	34.2
Town of Blue Mountains	12.4
Ospry Township	5.6
Clearview Township	23.8
Wasaga Beach	24.0
Total	100.0

Source: Clayton Research based on information from Foundation Research Group Inc.

Appendix D-2

Retail Spending Patterns of Trade Area Residents by Type of Store

Store Type and Location	Place of Residence					Total Trade Area
	Primary Trade Area	Town Of The Blue Mountains	Osprey Township	Township Of Clearview	Town Of Wasaga Beach	
FOOD AND CONVENIENCE TYPE MERCHANDISE (FCTM)						
Food Stores						
Supermarket						
Primary Trade Area	91.0	55.9	57.1	27.7	19.5	53.3
Secondary Trade Area	4.6	28.5	11.3	49.5	73.1	34.7
Outside Trade Area	4.4	15.6	31.6	22.8	7.5	12.1
Total	100.0	100.0	100.0	100.0	100.0	100.0
Other Food Stores						
Primary Trade Area	73.8	29.9	38.2	30.8	18.5	42.4
Secondary Trade Area	7.6	17.9	4.4	49.1	67.8	32.4
Outside Trade Area	18.6	52.2	57.4	20.1	13.7	25.1
Total	100.0	100.0	100.0	100.0	100.0	100.0
TOTAL FCTM						
Primary Trade Area	88.8	49.8	54.9	28.1	19.3	51.8
Secondary Trade Area	5.0	26.1	10.5	49.4	72.4	34.3
Outside Trade Area	6.2	24.1	34.6	22.5	8.3	13.9
Total	100.0	100.0	100.0	100.0	100.0	100.0
NON-FOOD TYPE MERCHANDISE (NFTM)						
General Merchandise Stores						
Department Stores						
Primary Trade Area	77.5	66.4	81.7	45.1	48.7	59.9
Secondary Trade Area	0.1	0.2	0.0	0.0	0.1	0.1
Outside Trade Area	22.4	33.4	18.3	54.9	51.2	40.0
Total	100.0	100.0	100.0	100.0	100.0	100.0
Home and Auto Supplies Stores						
Primary Trade Area	95.4	85.7	78.3	63.7	80.0	81.3
Secondary Trade Area	0.0	6.7	3.6	1.9	1.6	1.9
Outside Trade Area	4.6	7.6	18.1	34.4	18.4	16.8
Total	100.0	100.0	100.0	100.0	100.0	100.0
Other General Merchandise Stores						
Primary Trade Area	61.8	43.2	8.4	4.4	6.2	23.3
Secondary Trade Area	17.8	4.1	7.9	22.6	67.3	33.5
Outside Trade Area	20.4	52.6	83.7	73.0	26.5	43.1
Total	100.0	100.0	100.0	100.0	100.0	100.0

Appendix D-2 (cont'd)

Retail Spending Patterns of Trade Area Residents by Type of Store (Cont'd)

Store Type and Location	Place of Residence					Total Trade Area
	Primary Trade Area (Collingwood)	Town Of The Blue Mountains	Osprey Township	Township Of Clearview	Town Of Wasaga Beach	
Clothing and Accessories Stores						
Primary Trade Area	53.0	31.0	60.0	27.9	21.0	38.0
Secondary Trade Area	0.3	19.7	0.0	2.2	3.7	3.5
Outside Trade Area	46.7	49.3	40.0	70.0	75.3	58.5
Total	100.0	100.0	100.0	100.0	100.0	100.0
Furniture, Home Furnishings and Electronics Stores						
Primary Trade Area	43.1	11.6	7.9	10.2	13.9	21.1
Secondary Trade Area	3.2	14.8	12.9	1.5	15.9	7.6
Outside Trade Area	53.7	73.5	79.2	88.3	70.3	71.3
Total	100.0	100.0	100.0	100.0	100.0	100.0
Pharmacies and Personal Care Stores						
Primary Trade Area	94.0	52.7	52.9	21.2	20.9	47.8
Secondary Trade Area	0.7	41.5	19.8	50.9	65.0	37.2
Outside Trade Area	5.3	5.8	27.3	27.9	14.1	15.0
Total	100.0	100.0	100.0	100.0	100.0	100.0
All Other Retailers						
Primary Trade Area	69.4	49.0	41.9	20.9	24.5	39.6
Secondary Trade Area	2.4	4.3	0.3	9.0	12.2	6.9
Outside Trade Area	28.2	46.7	57.7	70.2	63.2	53.4
Total	100.0	100.0	100.0	100.0	100.0	100.0
TOTAL NFTM (not including HI, Other Services or Dept stores)						
Primary Trade Area	62.9	37.8	42.8	24.2	29.9	40.1
Secondary Trade Area	2.5	13.1	6.9	7.0	17.3	8.8
Outside Trade Area	34.6	49.1	50.3	68.8	52.8	51.0
Total	100.0	100.0	100.0	100.0	100.0	100.0
HOME IMPROVEMENT (HI) Building and Outdoor Home Supply						
Primary Trade Area	59.7	33.3	5.8	7.0	13.2	23.6
Secondary Trade Area	5.1	14.2	26.1	28.2	31.2	22.4
Outside Trade Area	35.2	52.4	68.1	64.8	55.6	54.1
Total	100.0	100.0	100.0	100.0	100.0	100.0
GRAND TOTAL						
Primary Trade Area	69.1	41.5	44.1	23.3	25.7	40.7
Secondary Trade Area	3.0	13.9	9.7	16.7	26.0	14.3
Outside Trade Area	27.9	44.6	46.3	60.0	48.3	45.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Clayton Research based on information from Foundation Research Group Inc.

Collingwood Study – April 2006

Interviewer: _____

Verified by: _____

Date of Interview: _____

Good afternoon/evening! My name is _____ of Foundation Research Group, a market research company. We are conducting a survey of shopping habits of residents in your market area and I would like to ask you a few questions. I assure you we are not selling anything.

A. May I speak with the main shopper of the household?

Yes SKIP TO QD

No GO TO QB

B. Is there a better time when I could interview him or her?

Yes GO TO QC

No *Thank and Terminate*

C. When can I call back? RECORD TIME: _____

D. Do you live in...? (read)

Code	Area	Quota
1	Town of Collingwood	300
2	Town of the Blue Mountains	100
3	Former Osprey Township (part of the Grey Highlands)	50
4	Clearview Township	200
5	Town of Wasaga Beach	200

E. Phone Number: (____) ____ - ____

Closest Intersection: _____ and _____

Postal Code (6 digit): _____

Time Started: _____ am/pm

Time Finished: _____ am/pm

In the following questions, I will ask you about your shopping in various types of stores.

GOOD HEALTH MARKET	COLLINGWOOD	RIOCAN CENTRE COLLINGWOOD	15	NODE 3	\$.00

Other (Specify)	Shopping Centre/Street Location/Community				
			99		\$.00
			99		\$.00
			99		\$.00
			99		\$.00
			99		\$.00
			99		\$.00
			99		\$.00

J2d) Have you shopped at any other SPECIALTY FOOD STORES during the past MONTH?

If yes, repeat question J2b) to J2c) above as often as necessary, repeat this sequence for all J2a) questions i) to v)

1a). In the PAST THREE (3) MONTHS, have you shopped at a HOME IMPROVEMENT CENTRE, such as a Home Depot, Rona Cashway, or Home Building Centre?

Yes GO TO QUESTION 1b

No GO TO QUESTION 2a

1b). IF THERE IS A "YES" RESPONSE, ASK THE FOLLOWING QUESTIONS TOGETHER:

i. What is the name of this store and where is it located?

ii. Approximately how much did you spend during the PAST THREE MONTHS at this store?

Store Name	i.		Store Code	Circle Location Code	ii.	
	Community	Shopping Centre Name/ or Closest Intersection			Dollar Amount Spent	
HOME BUILDING CENTRE	COLLINGWOOD	479 HUME ST. (Hume St. & Pretty River Pkwy.)	35	NODE 5	\$	
RONA	COLLINGWOOD	466 HUME ST. (Hume St. & Raglan St.)	35	NODE 5	\$	
HOME DEPOT	BARRIE	BARRIE	35	NODE 11	\$	
					\$	
					\$	
					\$	
					\$	
					\$	

Yes GO TO QUESTION 5b

No GO TO QUESTION 6a

5b). IF THERE IS A "YES" RESPONSE, ASK THE FOLLOWING QUESTIONS TOGETHER:

- i. What is the name of the store and where is it located?
- ii. Approximately how much did you spend during the PAST THREE MONTHS at this store?

	i.	i.		Circle	ii.
Store Name	Community	Shopping Centre Name/ or Closest Intersection	Store Code	Location Code	Dollar Amount Spent
PENNZOIL	COLLINGWOOD	260 FIRST ST. (FIRST ST. & CEDAR ST.)	87	NODE 2	\$
VAN AND TRUCK WORLD	COLLINGWOOD	21 BALSAM ST. (BALSAM ST. & HWY. 26)	87	NODE 3	\$
					\$
					\$
					\$
					\$
					\$
					\$
					\$

5c) Have you shopped at any other TIRE, BATTERY OR AUTOMOTIVE SPECIALTY SHOP in the past THREE MONTHS?

IF YES, REPEAT QUESTION 5b). REPEAT QUESTION 5c) AS OFTEN AS IS NECESSARY.

6a). In the PAST THREE MONTHS, have you shopped at a GENERAL MERCHANDISE STORE, such as Giant Tiger, Sears Catalogue store, a general store or a dollar store?

Yes GO TO QUESTION 6b

No GO TO QUESTION 7a

6b). IF THERE IS A "YES" RESPONSE, ASK THE FOLLOWING QUESTIONS TOGETHER:

- i. What is the name of the store and where is it located?
- ii. Approximately how much did you spend during the PAST THREE MONTHS at this store?

	i.	i.		Circle	ii.
Store Name	Community	Shopping Centre Name/ or Closest Intersection	Store Code	Location Code	Dollar Amount Spent
DOLLAR VILLA	COLLINGWOOD	35 HURONTARIO ST. (HURONTARIO ST. & FIRST St.)	85	NODE 1	\$

MIGHTY DOLLAR	COLLINGWOOD	300 HURONTARIO ST. (HURONTARIO ST. & HAMILTON ST.)	85	NODE 1	\$
THE BARGAIN SHOP	COLLINGWOOD	RIOCAN CENTRE COLLINGWOOD	85	NODE 3	\$
					\$
					\$
					\$
					\$
					\$
					\$

6c) Have you shopped at any other GENERAL MERCHANDISE STORE in the PAST THREE MONTHS? IF YES, REPEAT QUESTION 6b). REPEAT QUESTION 6c) AS OFTEN AS IS NECESSARY.

7a). In the PAST THREE MONTHS, have you shopped at a CLOTHING or CLOTHING ACCESSORIES stores, such as a MEN’S, WOMEN’S or CHILDREN’S CLOTHING STORE, a SHOE STORE, or a JEWELLERY STORE?

Yes GO TO QUESTION 7b
 No GO TO QUESTION 8a

7b). IF THERE IS A “YES” RESPONSE, ASK THE FOLLOWING QUESTIONS TOGETHER:

- i. What is the name of the store and where is it located?
- ii. Approximately how much did you spend during the PAST THREE MONTHS at this store?

Store Name	Community	Shopping Centre Name/ or Closest Intersection	Store Code	Location Code	Dollar Amount Spent
CASA BLANCA	COLLINGWOOD	69 HURONTARIO ST. (HURONTARIO ST. & SECOND ST.)	54	NODE 1	\$
TABI INTERNATIONAL	COLLINGWOOD	126 HURONTARIO ST. (HURONTARIO ST. & THIRD ST.)	54	NODE 1	\$
COTTON GINNY	COLLINGWOOD	128 HURONTARIO ST. (HURONTARIO ST. & THIRD ST.)	54	NODE 1	\$
EXTREME JEANS	COLLINGWOOD	168 B HURONTARIO ST. (HURONTARIO ST. & ONTARIO ST.)	54	NODE 1	\$
ED CHRISTIES	COLLINGWOOD	93 HURONTARIO ST. (HURONTARIO ST. & SECOND ST.)	57	NODE 1	\$
MARK’S WORK WEARHOUSE	COLLINGWOOD	191 HURONTARIO ST. (HURONTARIO ST. & FOURTH ST.)	63	NODE 1	\$

MARK'S WORK WEARHOUSE	COLLINGWOOD	RIOCAN CENTRE COLLINGWOOD	63	NODE 3	\$
JOGGER'S	COLLINGWOOD	RIOCAN CENTRE COLLINGWOOD	68	NODE 3	\$
DESIGNER'S DEALS	COLLINGWOOD	RIOCAN CENTRE COLLINGWOOD	57	NODE 3	\$
BECKER'S SHOES	COLLINGWOOD	73 HURONTARIO ST. (HURONTARIO ST. & SECOND ST.)	64	NODE 1	\$
SHOE HEAVEN	COLLINGWOOD	51 HURONTARIO ST. (HURONTARIO ST. & SECOND ST.)	64	NODE 1	\$
D.C. Taylor Jewellers	COLLINGWOOD	120 HURONTARIO ST. (HURONTARIO ST. & THIRD ST.)	65	NODE 1	\$
Gold Star Jewellers	COLLINGWOOD	53 HURONTARIO ST. (HURONTARIO ST. & SECOND ST.)	65	NODE 1	\$
					\$
					\$

7c) Have you shopped at any other CLOTHING & CLOTHING ACCESSORIES STORE in the PAST THREE MONTHS?

IF YES, REPEAT QUESTION 7b). REPEAT QUESTION 7c) AS OFTEN AS IS NECESSARY.

8a). In the **PAST THREE MONTHS**, have you shopped at any of the following **SPECIALTY stores?**

- i. **A sporting goods store (excl. athletic clothing)**

Yes	1
No	2

→ *GO TO QUESTION 8b*
→ *GO TO ii.*

- ii. **A hobby or toy shop or game store**

Yes	1
No	2

→ *GO TO QUESTION 8b*
→ *GO TO iii.*

- iii. **A florist**

Yes	1
No	2

→ *GO TO QUESTION 8b*
→ *GO TO iv.*

- iv. **A pre-recorded tape, CD and record shop, or a musical instrument and supplies store**

Yes	1
No	2

→ *GO TO QUESTION 8b*
→ *GO TO v.*

- v. **A book and news dealer**

Yes	1
No	2

→ *GO TO QUESTION 8b*
→ *GO TO vii.*

- vi. **An office supply or stationery store**

Yes	1
No	2

→ *GO TO QUESTION 8b*
→ *GO TO viii.*

- vii. **A gift, novelty, souvenir, party supplies or greeting cards store**

Yes	1
No	2

→ *GO TO QUESTION 8b*
→ *GO TO ix.*

- viii. **A pet or pet supplies store**

Yes	1
-----	---

→ *GO TO QUESTION 8b*

8b). FOR EACH "YES" RESPONSE, ASK THE FOLLOWING QUESTIONS TOGETHER:

- i. What is the name of the store and where is it located?
- ii. Approximately how much did you spend during the PAST THREE MONTHS at this store?

Store Name	Community	Shopping Centre Name/ or Closest Intersection	Store Code	Location Code	Dollar Amount Spent
SPORTING LIFE	COLLINGWOOD	222 HURONTARIO ST (HURONTARIO ST & HUME ST.)	75	NODE 1	\$
KETTLE REEK	COLLINGWOOD	65 HURONTARIO ST. (HURONTARIO ST & SECOND ST.)	75	NODE 1	\$
KAMIKAZE THE OUTDOOR STORE	COLLINGWOOD	470 FIRST ST. (FIRST ST. & ELM ST.)	75	NODE 2	\$
FATHOM	COLLINGWOOD	70 FIRST ST. (FIRST ST. & PINE ST.)	75	NODE 2	\$
SKIS & BIKES	COLLINGWOOD	445 FIRST ST (FIRST. ST. & SPRUCE ST.)	75	NODE 2	\$
EB Games	COLLINGWOOD	RIOCAN CENTRE COLLINGWOOD	76	NODE 3	\$
SMART'S FLOWERS	COLLINGWOOD	56 HURONTARIO ST. (HURONTARIO ST. & SECOND ST.)	89	NODE 1	\$
FLORAL RENAISSANCE	COLLINGWOOD	68 HURONTARIO ST. (HURONTARIO ST. & SECOND ST.)	89	NODE 1	\$
ALWAYS FLOWERS AND GIFTS	COLLINGWOOD	272 FIRST ST (FIRST ST. & CEDAR ST.)	89	NODE 2	\$
91 Discs	COLLINGWOOD	13 HURONTARIO ST. (HURONTARIO ST. & FIRST ST.)	82	NODE 1	\$
SAUNDERS' S OFFICE SUPPLIES	COLLINGWOOD	57 HURONTARIO ST. (HURONTARIO ST. & SECOND ST.)	90	NODE 1	\$
BALLOON EXPRESSIONS	COLLINGWOOD	210 HURONTARIO (HURONTARIO ST. & FOURTH ST.)	91	NODE 1	\$
COTTAGE COUNTRY CRAFTS	COLLINGWOOD	17-19 HURONTARIO (HURONTARIO ST. & FIRST ST.)	91	NODE 1	\$

- ii. **A TV or stereo store**

Yes	1	→	GO TO QUESTION 9b
No	2	→	GO TO iii.

- iii. **A china, kitchenware, or bath and linen store**

Yes	1	→	GO TO QUESTION 9b
No	2	→	GO TO iv.

- iv. **A lamp, carpet or other store selling home decor**

Yes	1	→	GO TO QUESTION 9b
No	2	→	GO TO v.

- v. **A computer store**

Yes	1	→	GO TO QUESTION 9b
No	2	→	GO TO QUESTION 10a

- vi. **A camera and photographic supplies store**
CAMERA STORES ARE NOW PART OF HOME ELECTRONICS AND APPLIANCE STORES

Yes	1	→	GO TO QUESTION 8b
No	2	→	GO TO vi.

9b). FOR EACH "YES" RESPONSE, ASK THE FOLLOWING QUESTIONS TOGETHER:

- i. What is the name of the store and where is it located?
- ii. Approximately how much did you spend during the PAST SIX MONTHS at this store?

	i.	i.	Circle	ii.	
Store Name	Community	Shopping Centre Name/ or Closest Intersection	Store Code	Location Code	Dollar Amount Spent
SLEEP ON AIR	COLLINGWOOD	246 HURONTARIO (HURONTARIO ST. & FIFTH ST.)	16	NODE 1	\$
CLERKSON'S	COLLINGWOOD	94 PINE ST. (PINE ST. & SECOND ST.)	16	NODE 1	\$
CLOSETS & THINGS	COLLINGWOOD	124 HURONTARIO (HURONTARIO ST. & THIRD ST.)	16	NODE 1	\$
COUNTRY LANDING	COLLINGWOOD	25 HURONTARIO (HURONTARIO ST. & FIRST ST.)	16	NODE 1	\$
WALLY'S WOODWORK	COLLINGWOOD	329 FIRST ST. (FIRST ST. & WALNUT ST.)	16	NODE 2	\$
GEORGIAN TEAK	COLLINGWOOD	391 FIRST ST. (FIRST ST. & SPRUCE ST.)	16	NODE 2	\$
PEAKS & RAFTERS	COLLINGWOOD	391 FIRST ST. (FIRST ST. & SPRUCE ST.)	16	NODE 2	\$
SEAR'S APPLIANCES	COLLINGWOOD	3 MOUNTAIN RD. (MOUNTAIN RD. & BALSAM RD.)	29	NODE 3	\$
GEORGIAN FLOORING	COLLINGWOOD	21 BALSAM ST. (MOUNTAIN RD. & BALSAM RD.)	17	NODE 3	\$
DARSCO LIGHTING	COLLINGWOOD	2 MOUNTAIN RD. (MOUNTAIN RD. & BALSAM RD.)	25	NODE 3	\$
FOLEY'S	COLLINGWOOD	511 HUME ST. (HUME ST. & PRETTY RIVER PKWY.)	16	NODE 5	\$

HOME FURNITURE	COLLINGWOOD	101 PRETTY RIVER PKWY (PRETTY RIVER PKWY. & ALBERT ST.)	16	NODE 6	\$
GABRIELLE'S PHOTOGRAPHY	COLLINGWOOD	133 HURONTARIO ST (HURONTARIO ST & THIRD ST.)	34	NODE 1	\$
CARMAN'S PHOTO SOURCE	COLLINGWOOD	116 HURONTARIO ST (HURONTARIO ST & THIRD ST.)	34	NODE 1	\$
					\$
					\$
					\$
					\$
					\$
					\$
					\$
					\$
					\$
					\$
Other (Specify)					
					\$
					\$

9c) Have you shopped at any other HOME FURNITURE or FURNISHINGS STORE in the PAST SIX MONTHS?
 IF YES, REPEAT QUESTION 9b). REPEAT QUESTION 9c) AS OFTEN AS IS NECESSARY.

Interviewer Please Note: Repeat this sequence for all 9a) questions, including i. through v.

Interviewer Please Note: The following questions are for shopping habits in the past (1) MONTH.

10a). In the PAST (1) MONTH, have you shopped at a DRUG, HEALTH SUPPLEMENT or COSMETICS store?

Yes GO TO QUESTION 10b
 No GO TO QUESTION 11a

10b). IF THERE IS A "YES" RESPONSE, ASK THE FOLLOWING QUESTIONS TOGETHER:

- i. What is the name of the store and where is it located?
- ii. Approximately how much did you spend during the PAST MONTH at this store?

i.	i.	Circle	ii.		
Store Name	Community	Shopping Centre Name/ or Closest Intersection	Store Code	Location Code	Dollar Amount Spent
IDA	COLLINGWOOD	169 HURONTARIO ST (HURONTARIO ST. & THIRD ST.)	47	NODE 1	\$

SHOPPERS DRUG MART	COLLINGWOOD	119 HURONTARIO ST (BTW. THIRD ST. & SECOND ST.)	47	NODE 1	\$
PHARMA PLUS	COLLINGWOOD	RIOCAN CENTRE COLLINGWOOD	47	NODE 3	\$
COLLINGWOOD HEALTH CENTRE PHARMACY	COLLINGWOOD	186 ERIE ST. (ERIE ST. & NIAGARA ST.)	47	NODE 6	\$
REXALL DRUG STORE	COLLINGWOOD	27 THIRD ST. (THIRD ST. & PINE ST.)	47	NODE 1	\$
WASAGA BEACH IDA	WASAGA BEACH	1900 MOSLEY	47	NODE 7	\$
MAJOR'S GUARDIAN PHARMACY	WASAGA BEACH	587 RIVER ROAD WEST	47	NODE 7	\$
THORNBURY PHARMACY	THORNBURY	45 ARTHUR ST. W	47	NODE 8	\$
STAYNER MEDICAL CENTRE	STAYNER	230 KING ST. N	47	NODE 9	\$
WATSON MEDICAL	STAYNER	230 MAIN ST. E	47	NODE 9	\$
MUXLOW PHARMACY	MEAFORD	54 SYKES ST. N	47	NODE 10	\$
					\$

10c) Have you shopped at any other DRUG, HEALTH SUPPLEMENT OR COSMETICS STORE in the PAST MONTH?
IF YES, REPEAT QUESTION 10b). REPEAT QUESTION 10c) AS OFTEN AS IS NECESSARY.

11a). In the PAST MONTH, have you shopped at a WAREHOUSE MEMBERSHIP CLUB, such as Costco or Sam's Club?

Yes GO TO QUESTION 11b
 No GO TO QUESTION 12

11b). IF THERE IS A "YES" RESPONSE, ASK THE FOLLOWING QUESTIONS TOGETHER:

- i. What is the name of the store and where is it located?
- ii. Approximately how much did you spend on GROCERY items in the PAST MONTH at this store?
- iii. Approximately how much did you spend on NON-GROCERY items in the PAST MONTH at this store?

i.	i.	Circle	Circle	ii.	iii.	
Store Name	Community	Shopping Centre Name/ or Closest Intersection	Store Code	Location Code	Grocery Spending	Non-Grocery Spending

COSTCO	BARRIE	41 MAPLEVIEW DR. E (MAPLEVIEW DR. & HWY. 400)	84	NODE 11	\$	\$
					\$	\$
					\$	\$
					\$	\$
					\$	\$
					\$	\$

11c) Have you shopped at any other WAREHOUSE MEMBERSHIP CLUB in the PAST MONTH?
IF YES, REPEAT QUESTION 11b). REPEAT QUESTION 11c) AS OFTEN AS IS NECESSARY.

Finally, these last few questions will help us classify your answers among different groups of consumers. This information is used only for making statistical tables.

12a) Is your household a permanent or seasonal residence?

- a. Permanent
- b. Seasonal

12. Can you tell me how many people live in your household? [] RECORD NUMBER

13. Which of the following represents your age? READ LIST.

- Less than 20 years [] [1]
- 20 to 34 years [] [2]
- 35 to 44 years [] [3]
- 45 to 54 years [] [4]
- 55 to 64 years [] [5]
- 65 years or older [] [6]
- (DO NOT READ) Refused [] [7]

14. Can you tell me in which of the following income ranges would your total household income belong? READ LIST.

- Less than \$20,000 [] [1]
- \$20,000 to \$29,999 [] [2]
- \$30,000 to \$39,999 [] [3]
- \$40,000 to \$49,999 [] [4]
- \$50,000 to \$59,999 [] [5]
- \$60,000 to \$69,999 [] [6]
- \$70,000 to \$79,999 [] [7]
- \$80,000 to \$89,999 [] [8]
- Over \$90,000 [] [9]
- (DO NOT READ) Refused [] [10]

15. Thank you for your time and have a good day.

RECORD SEX OF RESPONDENT

- Male [] [1]
- Female [] [2]

Interviewer Signature