

Charis Developments Ltd.

July 11, 2025

Suite 204 - 186 Hurontario Street, Collingwood, ON, L9Y 4T4

RE: Commercial Market Impact Study - Update Memorandum

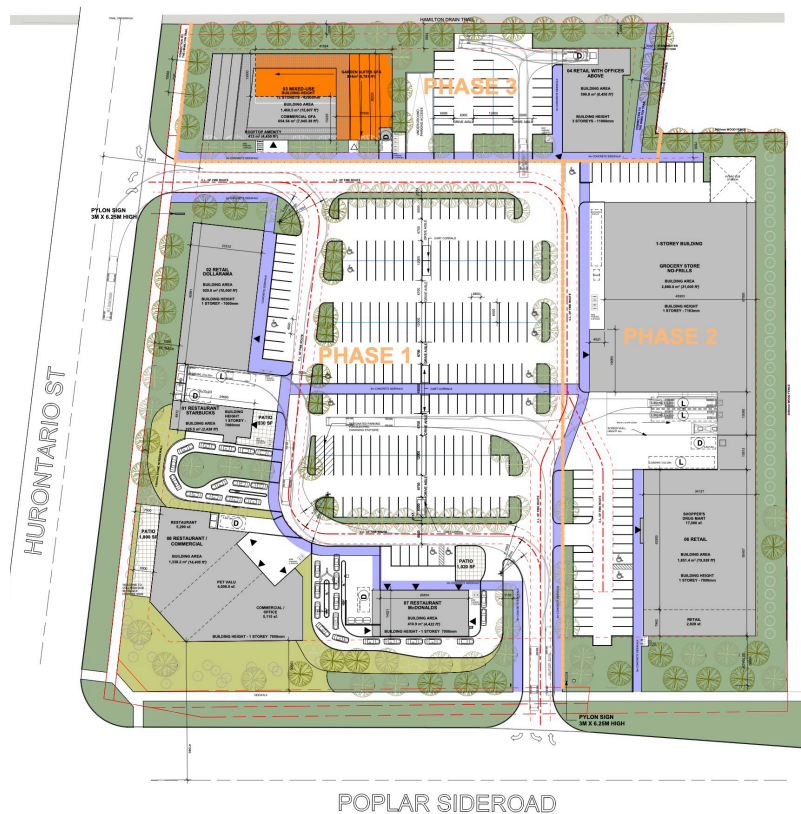
Parcel Economics Inc. ("Parcel") has been retained by Charis Development Ltd. ("Charis") to complete a Commercial Market Impact Study Update Memorandum ("Commercial Update Memorandum") for their proposed Gateway Centre Development, located at 853 & 869 Hurontario Street and 7564 Poplar Sideroad in the Town of Collingwood, hereafter referred to as the subject site.

In September 2024, Parcel Economics Inc. ("Parcel") prepared *The Gateway Centre Commercial Market Impact Study*, which examined the commercial market demand for a mixed-use development that included retail/service commercial space, office space and residential units on the subject site. Charis has recently revised the concept plan for the subject site, which now proposes approximately 108,600 square feet of commercial space inclusive of 89,093 square feet of retail service commercial space. This includes 31,000 square feet of Food Supermarket space and 17,000 square feet of Pharmacy space, as shown in Figure 1.

A Food Supermarket, a Pharmacy and Retail Commercial Establishment are not permitted on the subject site, based on the Town of Collingwood Zoning By-law 2010-040 for lands zoned C5 - Highway Commercial.

The Gateway Centre Commercial Market Impact Study previously completed for the subject site validated the market demand and opportunity for the Retail Commercial Establishment store space being proposed. As the concept plan for the subject site has been revised, this Commercial Update Memorandum is required to identify the market demand and impact of the proposed Food Supermarket and Pharmacy.

Figure 1
Updated Concept Plan for the Gateway Centre



Source: Issued by Charis Developments Ltd., for discussion on May 9th, 2025.

1.0 Introduction

1.1 Context

The proposed development at 853 & 869 Hurontario Street and 7564 Poplar Sideroad includes approximately 3.8 hectares of land. Charis is proposing to develop these lands with approximately 108,600 square feet of commercial space inclusive of 89,093 square feet of retail service commercial space. Included in this space is approximately 31,000 square feet of space for a Food Supermarket and 17,000 square feet for a Pharmacy.

The subject site includes approximately 3.0 hectares of land that are currently designated and zoned Highway Commercial under the Town's in-force Official Plan and Zoning By-law (designated Mixed-Use Corridor I under the

recently adopted Official Plan) and approximately 0.8 hectares of land that have been designated Mixed-Use Corridor II under the Town's recently adopted Official Plan (these lands are currently designated Residential).

Based on the Town of Collingwood Zoning By-law 2010-040, the C5 - Highway Commercial zone for the subject site includes some of the following uses:

- Business office
- Business service establishment
- Commercial school
- Hardware store
- Health club
- Home centre
- Computer and software store
- Convenience store
- Day care centre
- Dry cleaner's establishment
- Electronics & appliance store
- Financial & insurance service office
- Furniture store
- Garden supply outlet
- General merchandise store
- Home improvement store
- Laundromat
- Medical office
- Personal service shop
- Pet store
- Professional service office
- Real estate services office
- Restaurant
- Veterinarian clinic

Note: In the table above, we have focused on retail/service commercial permitted uses identified in By-law 2010-040.

As part of the proposed development and planning application submission, Charis is seeking to expand the list of permitted uses on the subject site to include a Food Supermarket and Pharmacy, as well as Retail Commercial Establishment space. This expansion would be in addition to the retail / service commercial uses that are already permitted on the subject site.

As it relates to proponents seeking to amend the Official Plan or Zoning By-law to permit commercial uses within existing commercial designations, the Town of Collingwood's in-force Official Plan, January 2019 Office Consolidation, addresses the need for Market Impact Studies in Section 4.4.3.7.2, where it states:

2. 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 Core, will not be prejudiced with resulting adverse impacts on levels of retail service and a significant risk of urban blight. The study will provide the following information:

- a) identification of the specific type and size of retail facility to be justified;*
- b) the basis for projecting market demand due to population growth, spending patterns, and other relevant factors;*

- c) *provision of updated information on the performance of Collingwood's retail sector;*
- d) *an impact analysis of the proposed development on the viability and planned function of the Downtown Core and other commercial areas;*
- 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*

As part of the initial concept plan for the subject site, Parcel—in September 2024—prepared *The Gateway Centre Commercial Market Impact Study* that demonstrated the market demand for a range of retail / service commercial uses, including the Retail Commercial Establishment. As a result, this Commercial Update Memorandum is specifically required to determine the market demand and impact of the Supermarket and Pharmacy being proposed on the subject site as part of the updated concept plan.

1.2 Purpose

As an update to the *Gateway Centre Commercial Market Impact Study* prepared by Parcel in 2024, this Commercial Update Memorandum centers on determining the market demand and impact for a 31,000 square foot Supermarket and a 17,000 square foot Pharmacy, with supportive commentary.

2.0 Site & Policy Context

2.1 Surrounding Land Uses

Figure 2 shows the location of the subject site, at the southern boundary of the Town of Collingwood. The subject site is surrounded by low-density residential neighbourhood, environmental lands, lands intended for future neighbourhood buildings and rural agricultural lands to the south in Clearview Township. **The area immediately surrounding the subject site lacks a local, walkable supply of retail / service commercial uses excepting limited, stand-alone stores and services.**

Figure 2

Location of the Subject Site



Source: Parcel.

North - the lands directly north of the subject site are designated *Highway Commercial* in the in-force Town of Collingwood Official Plan. These lands currently contain a pet care service, a church and a daycare facilities. Further north beyond Tracey Lane Boulevard extends east from Hurontario Road are low-density residential uses that extend east to the Train Trail.

East - the area to east of the of the subject site primarily contains low-density residential development. Further east are lands designated *Future Neighbourhood* that are approved for the development of semi-detached and townhome units. Further east are lands designated *Environmental Protection* that include a dog park and the Pawplar Community Garden. To the east of the subject site, along Poplar Sideroad is the site of a new Collingwood Hospital, which will serve the communities of Wasaga Beach, Collingwood, Clearview and the Blue Mountains, when completed.

South - south of the subject site beyond Poplar Sideroad is the northern edge of the Township of Clearview. These lands are generally vacant and designated *Agricultural* and *Rural* in the Township of Clearview Official Plan.

West – the lands to directly west of the subject site are designated *Highway Commercial* in the in-force Official Plan and contain a gas station and a Tim Hortons. Select stand-alone commercial uses, including a hair salon and dry cleaners are also located just north of the Tim Hortons. Further west are lands designated *Future Neighbourhood*, some of which are being planned or proposed for residential uses. This includes a proposal for 64 single-detached units at 50 Saunders Street and a mix of semi-detached and townhouse units at 7914 Poplar Sideroad.

2.2 Accessibility

Vehicular

Vehicular access is provided to the subject site along Poplar Sideroad, a *County Jurisdiction (Arterial Road)*, and Hurontario Street, an *Arterial Road* that runs north south along the western edge of the subject site. As roadways that funnel significant traffic volumes, the subject site and future retail / service commercial uses will benefit from heightened exposure and access. As acknowledged in the *Gateway Centre Commercial Market Impact Study*, the subject site will also benefit from enhanced visitation affiliated with people who frequent summer and winter properties in Collingwood and the surrounding area and are looking for somewhere to stop prior to their drive.

The north end of the subject site abuts the Hamilton Drain Trail, a trail that accommodates cyclists, walkers, hikers and a range of other winter-oriented activities. Exposure to this trail could increase the likelihood for people, including those residing within neighbouring residential developments to the east and west, to pass or access commercial uses on the subject site.

Transit

The subject site is not currently directly served by public transit. The nearest bus stop can be accessed one kilometre north of the subject site, at the north east corner of Hurontario Street and Lockhart Road (Collingwood East Route).

The Collingwood East Route connects across Eastern Collingwood, travelling to the Collingwood Hospital, Jean Vanier, Bay Haven, the YMCA and the Collingwood Collegiate.

The Town of Collingwood has indicated a desire for the proposed development to serve as a transit hub/stop in the future as part of Collingwood Public Transit (Colltrans). A space for a transit shelter is provided in front of the proposed Food Supermarket. Transit access and connectivity will further enhance the amount of traffic using and accessing future retail / service commercial uses on the subject site going forward.

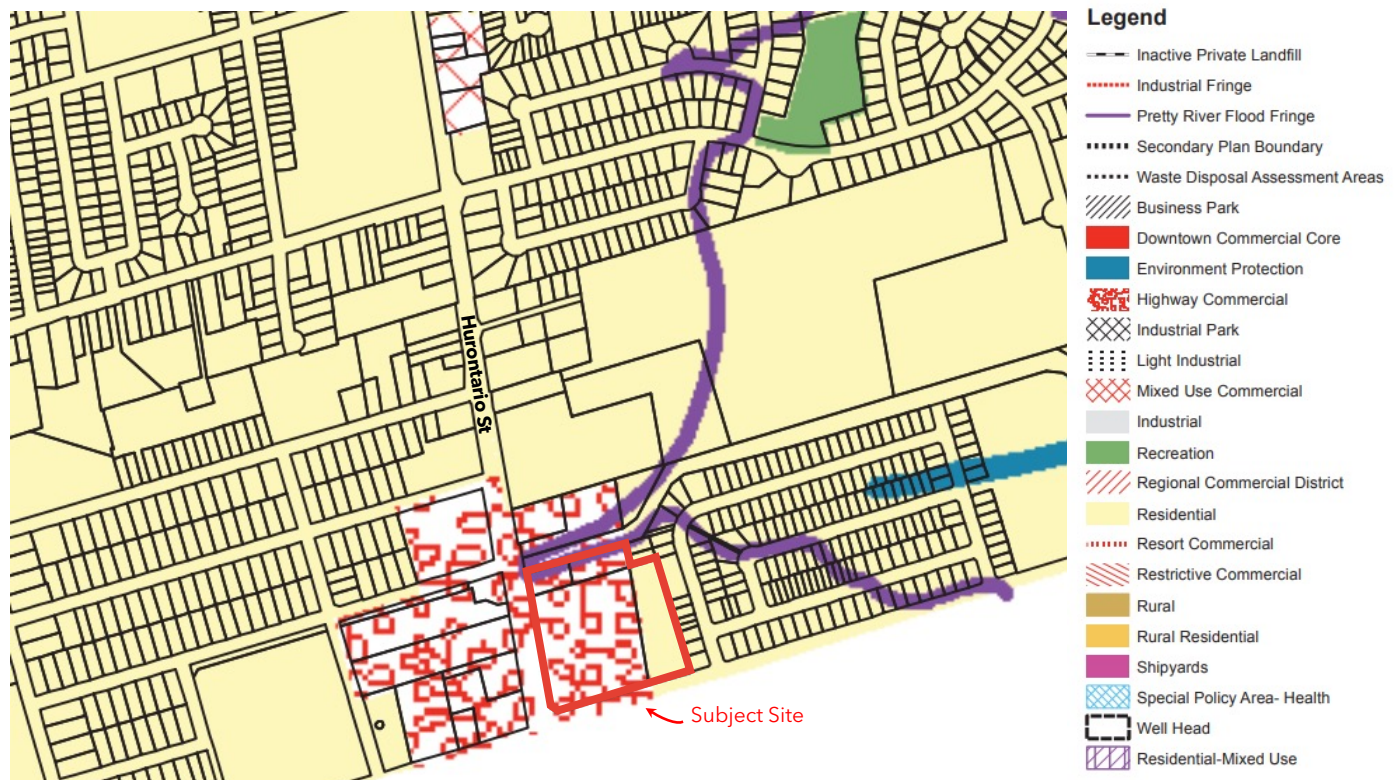
2.3 Planning Context

Consistent with the *Gateway Centre Commercial Market Impact Study*, Parcel has summarized various applicable policies in the in-force Town of Collingwood Official Plan, as well as the New Collingwood Official Plan, that are relevant to accommodating retail / service commercial uses on the subject site.

In-Force Town of Collingwood Official Plan

The majority of the subject site, or approximately 3.0 hectares, is designated *Highway Commercial* in Schedule A of the Town of Collingwood in-force Official Plan, with the remaining 0.8 hectares designated *Residential* as shown in Figure 3.

Figure 3
Collingwood In-Force Official Plan (2019) - Schedule A



Section 4.4 of the *Town of Collingwood Official Plan*, which relates to the *Commercial* land use designation, states that:

Within a Commercial designation shown on the Land Use Schedule, the predominant use of land shall be for commercial activities such as personal service, accommodation, retail shopping and office facilities in accordance with the provisions in this section of the Plan. Other activities may include institutional, residential and public uses.

Section 4.4.8, which addresses Highway Commercial uses of the *Town of Collingwood Official Plan* goes on to state:

The Highway Commercial designation recognizes the need to provide a wider scope for the development of designated commercial areas for highway commercial uses, which generally require large floor areas, large land areas, or orientation to vehicular traffic and which are not likely to be provided in traditional retail areas including the Downtown Core.

Section 4.4.8.1 also states:

Permitted uses include motor vehicle dealerships, motor vehicle gas stations and/or washes, recreation vehicle sales and services, home centres, light equipment sales and rentals, veterinarian clinics, hotels, motels, personal services, restaurants, business offices, places of entertainment and the following retail commercial establishments:

furniture stores, home improvement stores, garden supply outlets and convenience stores.

Prohibited uses include department stores, food supermarkets, home and auto supply stores, warehouse membership clubs and financial institutions. Accessory outside runs associated with veterinarian clinics shall be prohibited.

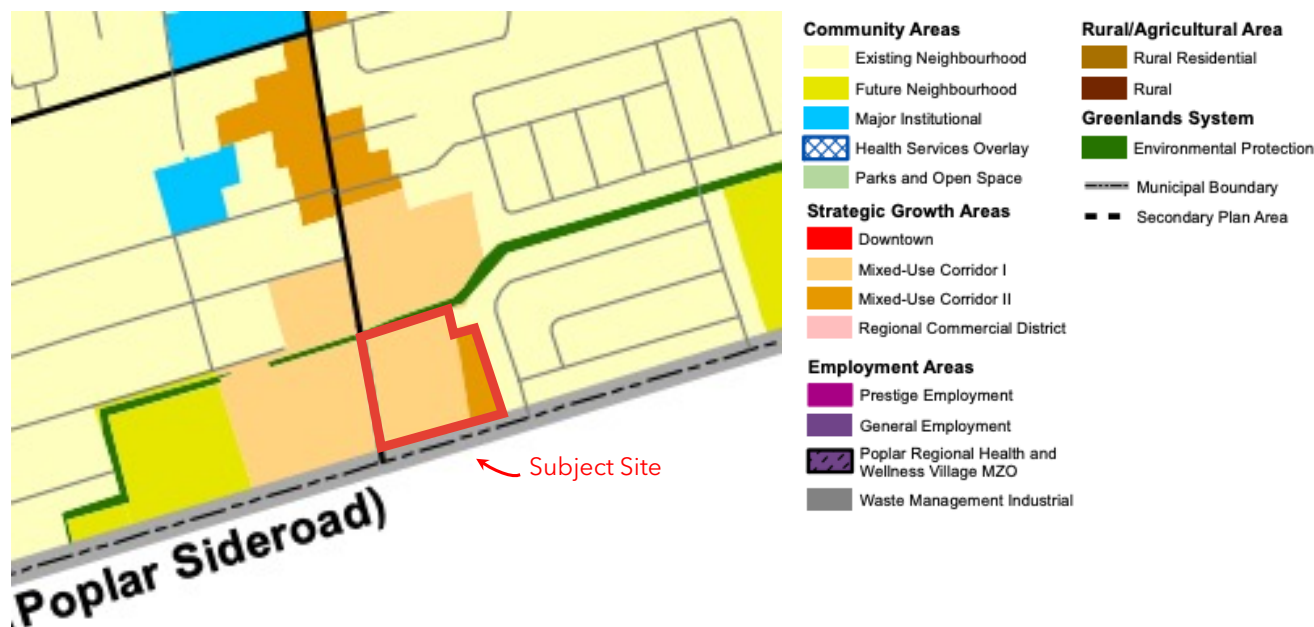
New Collingwood Official Plan

The Town of Collingwood is in the process of updating its Official Plan. The *New Collingwood Official Plan* was adopted by Council in December 2023 and was approved by the County of Simcoe but was subsequently appealed to the Ontario Land Tribunal. Until then, the in-force Official Plan referenced above will remain in effect.

Schedule 2 – Land Use Plan is shown in Figure 4 below. As shown, as part of this *New Collingwood Official Plan*, the subject site is largely designated *Mixed Use Corridor I*, with approximately 0.8 hectares of land designated *Mixed-Use Corridor II*.

Figure 4

New Collingwood Official Plan Schedule 2 – Land Use Plan



Source: Parcel based on the New Town of Collingwood Official Plan, Schedule 2 – Land Use Plan.

Section 5.3.2 of the *New Collingwood Official Plan* addresses policies related to this land use designation. Specifically, Section 5.3.2.2 b) identifies a list of permitted uses within the *Mixed Use Corridor I* designation, including:

- i. Retail and service commercial uses;
- ii. Restaurants;
- iii. Artisan studios and maker spaces;
- iv. Auto-focused uses such as automotive service centres and repair shops, and automobile
- v. Hotels and Resorts, including ancillary uses;
- vi. Convention/Conference facilities;
- vii. Private clubs;
- viii. Office Uses
- ix. Cultural, entertainment and recreational uses
- Public service facilities;
- x. Major Institutional uses;
- xi. Day care facilities
- xii. Residential Apartments, including Additional Needs Housing; and
- xiii. Commercial and/or accessory parking facilities at-grade and/or in structures.

Collingwood Zoning By-law

The Town of Collingwood Zoning By-law 2010-040 zones the subject site *C5 – Commercial*. This zone permits a range of retail / service commercial businesses, excluding a Food Supermarket, a Pharmacy and a Retail Commercial Establishment. The uses permitted in the C5 zone include:

- Business office
- Business service establishment
- Commercial school
- Computer and software store
- Convenience store
- Day care centre
- Dry cleaner's establishment
- Electronics & appliance store
- Financial & insurance service office
- Furniture store
- Garden supply outlet
- Hardware store
- Health club
- Home centre
- Home improvement store
- Laundromat
- Medical office
- Personal service shop
- Pet store
- Professional service office
- Real estate services office
- Restaurant
- Veterinarian clinic
- General merchandise store

Note: In the table above, we have focused on retail/service commercial permitted uses identified in By-law 2010-040.

The Gateway Centre Commercial Market Impact Study prepared for the subject site in September 2024, justified the expansion of the list of permitted uses to include Retail Commercial Establishment space.

Recognizing that the updated concept plan includes a Food Supermarket and a Pharmacy, this Commercial Update Memorandum is sought to identify the market demand and impact of these uses in order to support the desired expansion of permitted uses on-site to include a Food Supermarket and Pharmacy.

3.0 Market Dimensions

3.1 Study Area Boundaries

The total market influence of any retail / service commercial development extends across a wide geographic area that is difficult to capture within any particular boundary. However, in order to determine if there is demand for any retail use, including the Supermarket and Pharmacy store space proposed on the subject site, it is key to establish a Study Area. This Study Area is necessary as a means to estimate the associated market, competitive inventory and market conditions affiliated with the future operations of these stores.

Recognizing the location of the subject site in the Town of Collingwood and the primary role of this assessment to determine 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 Core**, Parcel has delineated Collingwood as the Primary Study Area ("PSA") as shown in Figure 5. Collingwood represents the primary area from which new retail / service commercial uses on the subject site, in this case the Supermarket and Pharmacy stores, are expected to derive most of their customer support (i.e., the largest share of market activity).

Recognizing additional consumer support will be generated from individuals residing outside of Collingwood, Parcel has delineated three Secondary Study Areas ("SSA"), including the municipalities of Wasaga Beach, Clearview and the Blue Mountains. Given their proximity and the accessibility of the subject site by vehicle to each SSA zone, it is reasonable to expect that future commercial uses on the subject site will attain some level of consumer support from each of these areas. These SSA zones have also been considered on the basis of mobile analytics data utilized as part of the *The Gateway Centre Commercial Market Impact Study*, summarized herein.

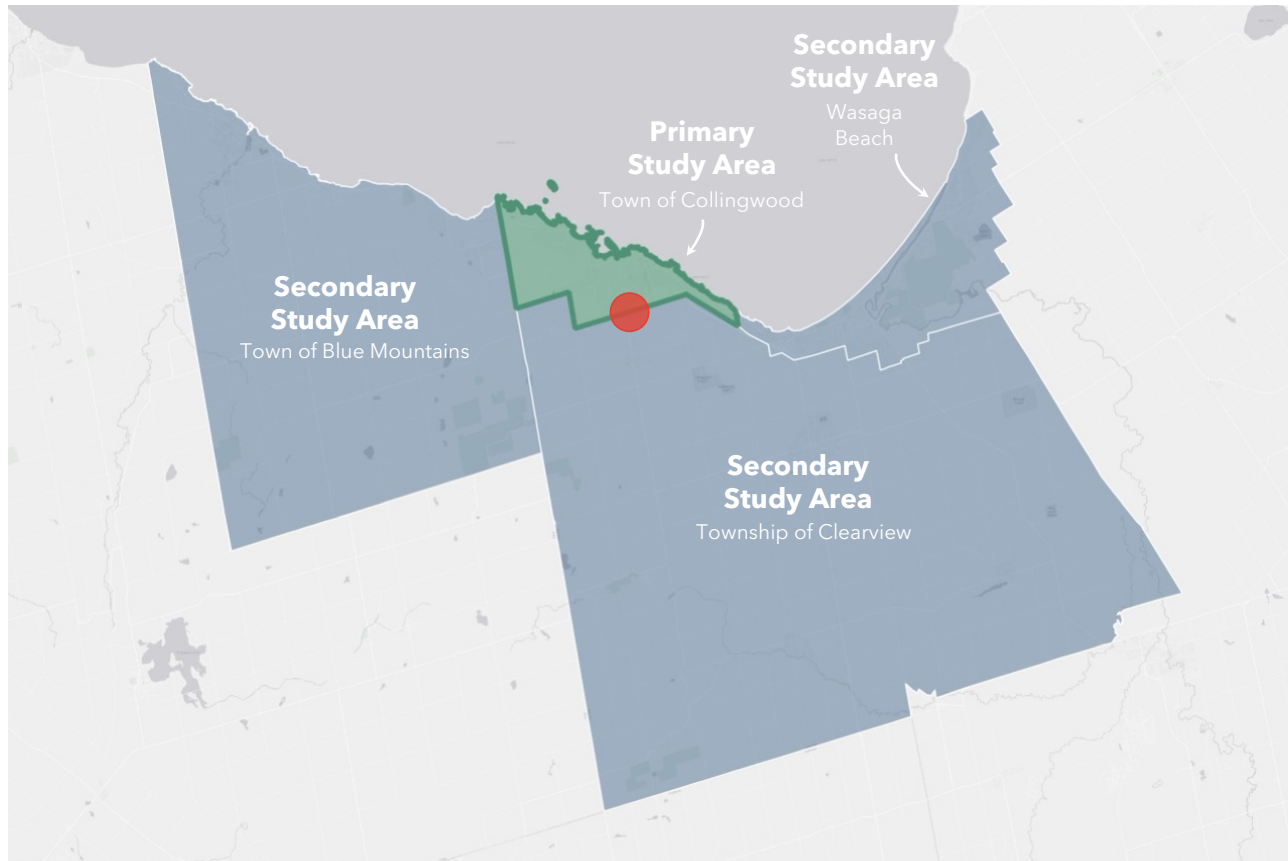
The Study Area delineated above is more generally based on a range of market factors, including:

- Geographic distances and travel times;
- The location of existing competition in the area, including for purposes of this analysis the location of existing Pharmacy and Supermarket space;
- The nature and size of development being contemplated on the subject site, particularly in the context of surrounding land uses;
- The access characteristics of the subject site, including exposure, connectivity and visibility to the surrounding local and regional road network; and
- Natural and man-made barriers to movement that could restrict or influence the movement of customers to and from the site.

Furthermore, the Study Area has been delineated in the context of previous work completed for the Town of Collingwood, including (i) the Retail Market Opportunity and Impact Analysis Study undertaken in 2006 by Clayton Research Associates Ltd., and the Study Area delineated by urbanMetrics inc., as part of the Town's Growth Management work in 2022.

Figure 5

Primary & Secondary Study Areas



Source: Parcel.

In addition to residents of each Study Area zone, additional sales potential and market support is anticipated to be available from inflow traffic, including seasonal residents, employees who work in the area but live elsewhere, the visiting public and other passing traffic. As detailed later in this Commercial Update Memorandum, inflow has been estimated based on mobile analytics, as well as consideration for stores within the PSA and each SSA zone, other outside markets (i.e., those in Simcoe County and beyond). It is intended to capture additional sales affiliated with permanent residents of the surrounding area, in addition to expenditures made by seasonal residents and tourists.

Mobile Analytics (Customer Origins)

As mentioned, one of the factors used to inform this Study Area was the mobile analytics data completed as part of the *Gateway Centre Commercial Market Impact Study* for a number of supermarkets in Collingwood. Parcel surveyed the customer origins to five existing supermarkets in Collingwood, in addition to Walmart, to better

understand how and where customers of these stores are coming from. The results of this analysis are shown below in Figure 6.

As detailed, the largest share of visitors to existing supermarkets in Collingwood are associated with individuals residing in Collingwood, the PSA. Regardless of location, each supermarket in Collingwood attains between 40% and 48% of its visits from individuals residing within the town.

The customer origins detailed below also identify that some level of regular customer support also comes from residents of Clearview, Wasaga Beach and the Blue Mountains, the three SSA zones considered. While representing a smaller share than visits by Collingwood residents, it appears that residents of these areas also comprise more routine visits to supermarkets in Collingwood than would typically be associated with more seasonal resident traffic, tourists or other visitors (i.e., inflow).

Figure 6

Summary of Visitation (Customer Origins) to Supermarkets in Collingwood

	FreshCo	Loblaws	Metro	Sobeys	Walmart
<i>Address:</i>	<i>55 Mountain Road</i>	<i>12 Hurontario Street</i>	<i>640 First Street</i>	<i>39 Huron Street</i>	<i>10 Cambridge Street</i>
Collingwood	40%	42%	48%	45%	47%
Blue Mountains	7%	7%	8%	6%	8%
Wasaga Beach	13%	9%	8%	8%	10%
Clearview	12%	13%	11%	15%	13%
Other Simcoe	2%	1%	2%	6%	2%
Other Grey County	8%	4%	4%	3%	7%
All Other	18%	24%	19%	17%	14%
Total	100%	100%	100%	100%	100%

"Inflow"

Source: Parcel based on mobile analytics data.

Based on our review, and in support of the Study Area relied upon for the analysis herein, it is reasonable to assume the Supermarket and Pharmacy store space proposed on the subject site will accrue most of its customer support from residents in Collingwood, in addition to the Blue Mountains, Wasaga Beach and Clearview. In fact, the mobile analytics data above suggests that between 70% and 77% of visits to existing supermarkets in Collingwood are affiliated with permanent residents of these areas.

Reliance on support from residents of each SSA zone is furthered by the location of the subject site at the south end of Collingwood and the northern boundary of Clearview. That said, it is also reasonable to assume that the level of capture—or customer support—from each SSA zone will vary. As described in further detail herein, this variation is

tied to the location of the subject site, the existing supply and type of stores in each SSA, in addition to competition and trends affiliated with other markets (including those in Simcoe County and beyond).

3.2 Population

To determine the potential impact, if any, of the proposed Supermarket and Pharmacy, we have updated the current and forecast population of the defined Study Area. The base year, based on more recent available data, has been updated from 2023 in the previous study, to 2024. Current and future population, in addition to income, are driving factors in determining future retail sales and the potential need for new retail / service commercial space in an area.

Population forecasts for the Study Area are based on forecasts contained in the Simcoe County Official Plan Amendment No. 7 and the Grey County Official Plan. This includes estimates of the 2028 population of the Study Area, the planned first full-year of operation for retail uses on the subject site, in addition to longer-term forecasts for the Study Area to 2032 and 2041.

As of 2024, approximately 83,300 persons lived in the Study Area as detailed in Figure 7. Nearly 34% of Study Area residents are affiliated with the PSA zone. By 2028, the estimated first full year of operation for the proposed Supermarket and Pharmacy store, the Study Area is estimated to have grown to 86,800 persons, growth of approximately 4% from the current 2024 population. Population growth across the PSA over this period is anticipated to be slightly faster than the Study Area as a whole, with the 2028 population of the PSA forecast to be 5% above its current 2024 population.

Over the forecast period to 2041, the Study Area is expected to grow by 23,700 persons, growth of over 28% from the current 2024 population. Consistent with forecast growth over the shorter-term, this is largely due to significant population growth anticipated in the PSA, which is expected to grow around 34% over this period.

Figure 7

Study Area Population (Primary & Secondary Zones)

	Historical ¹		Current ²		Forecast ²	
	2016	2021	2024	2028	2032	2041
Primary Study Area (Collingwood)	22,400	25,700	28,000	29,400	32,100	37,600
Average Annual Growth	660	767	350	675	611	
Average Annual Growth Rate	2.9%	3.0%	1.3%	2.3%	1.9%	
Secondary Study Area (Blue Mountains)	7,200	9,800	11,200	11,500	12,600	14,900
Average Annual Growth	520	467	75	275	256	
Average Annual Growth Rate	7.2%	4.8%	0.7%	2.4%	2.0%	
Secondary Study Area (Clearview)	14,600	15,400	16,000	16,400	17,700	20,300
Average Annual Growth	160	200	100	325	289	
Average Annual Growth Rate	1.1%	1.3%	0.6%	2.0%	1.6%	
Secondary Study Area (Wasaga Beach)	21,200	25,800	28,100	29,500	31,200	34,200
Average Annual Growth	920	767	350	425	333	
Average Annual Growth Rate	4.3%	3.0%	1.2%	1.4%	1.1%	
Total Study Area	65,400	76,700	83,300	86,800	93,600	107,000
Average Annual Growth	2,260	2,200	875	1,700	1,489	
Average Annual Growth Rate	3.5%	2.9%	1.1%	2.0%	1.6%	

Source: Parcel.

¹ Statistics Canada Census data, adjusted for under coverage.² Statistics Canada Census data, adjusted for under coverage.³ Forecasts included in the Simcoe County Official Plan Amendment No.7 and the Grey County Official Plan.

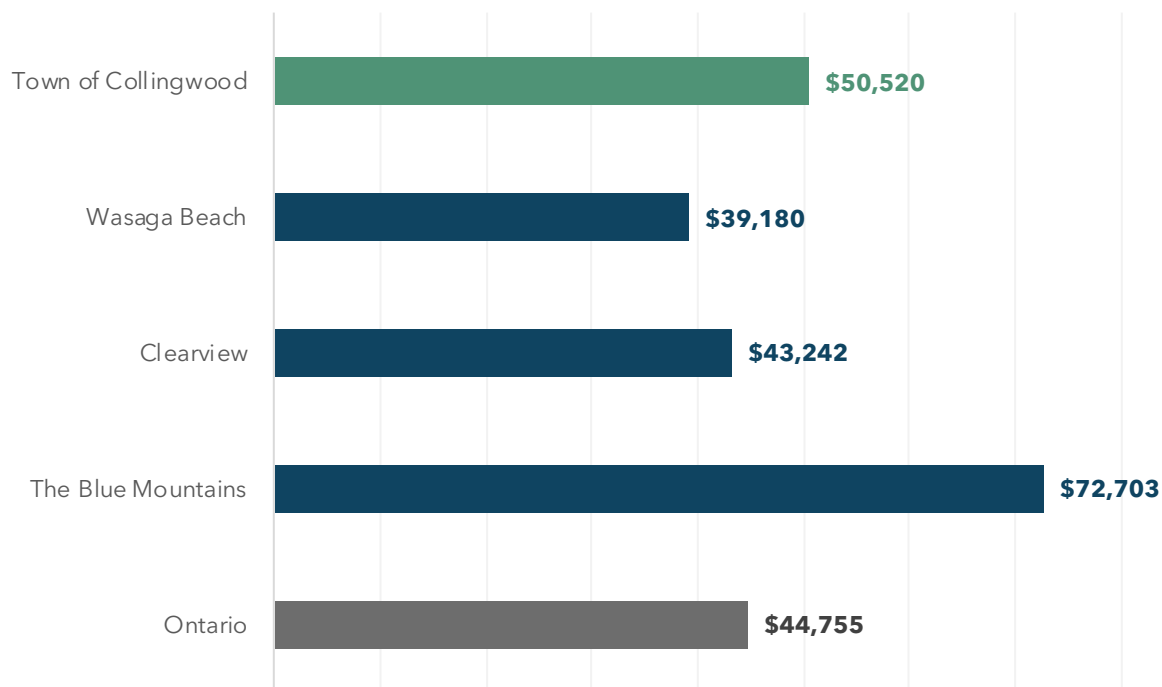
3.3 Income

Consistent with the *Gateway Centre Commercial Market Impact Study*, per capita income data from the 2021 Census has been used to estimate the potential spending power of residents across the Study Area. Average per capita income is an important input when considering current and future demand for retail / service commercial space in an area.

As of the 2021 Census, the average per capita income in Collingwood—an important input in our retail/service commercial demand assessment to follow—was **above the Province** at \$50,520 per capita. Across each SSA zone, the average per capita income in Wasaga Beach and Clearview were found to be below the province at \$39,180 and \$43,242 respectively. By contrast, the average per capita income of the Town of Blue Mountains is 62% above the province at \$72,703.

Figure 8

2020 Average Per Capita Income



Source: Parcel based on 2021 Statistics Canada Census data.

3.4 Existing Inventory

As previously mentioned, this Commercial Update Memorandum is explicitly related to the 31,000 square foot Supermarket and 17,000 square foot Pharmacy being proposed on the subject site, as these uses are not currently permitted on lands in the C5 zone.

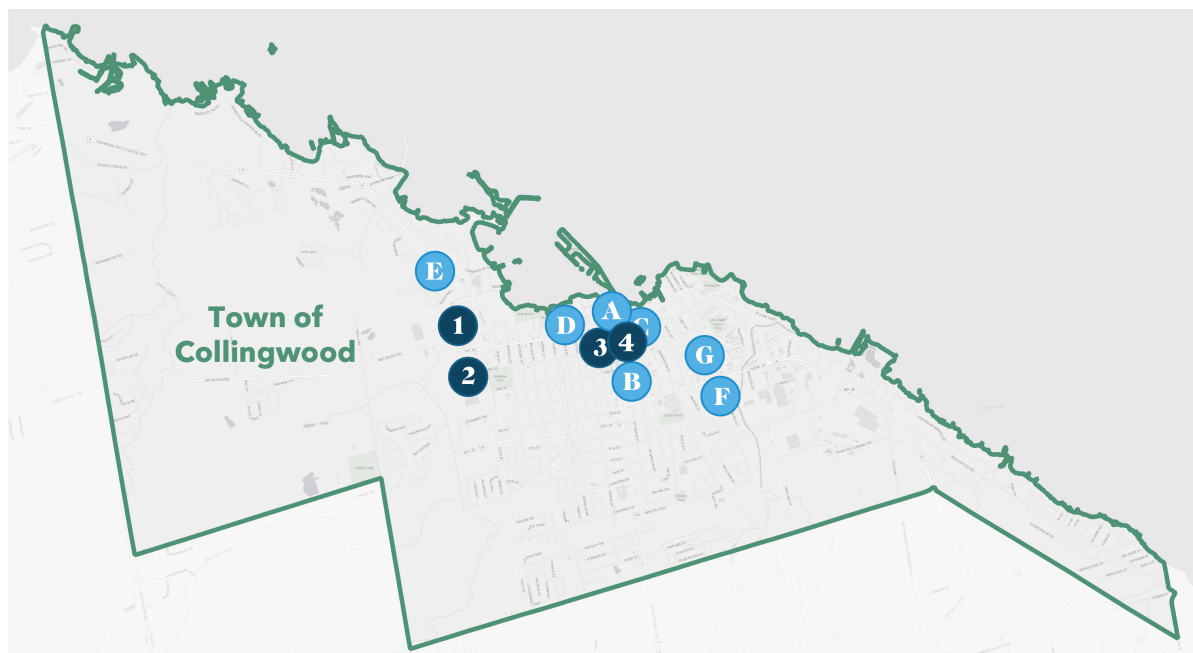
Existing Supermarkets & Pharmacies

Consistent with the inventory completed by Parcel as part of the *Gateway Centre Commercial Market Impact Study*, there are currently four supermarkets in Collingwood, totalling 158,300 square feet as shown in Figure 9. Existing stores are generally located within or near the Downtown with an evident “gap” in the supply of supermarket space at the south end of the town. The Supermarkets identified in Figure 9 are consistent with the Supermarkets identified by urbanMetrics in the Town’s Growth Management Study.

There are also seven pharmacies located in Collingwood, including approximately 50,600 square feet of space. Similar to the distribution of Supermarket space in Collingwood, these stores are concentrated towards the north end of the town, north of Sixth Street.

Figure 9

Supermarkets & Pharmacies in Collingwood



ID	Store Name	Address	Square Footage	Land Use Designation
Supermarkets				
1	Freshco	55 Mountain Rd	31,100 SF	Regional Commercial District
2	Metro	640 First St	39,600 SF	Regional Commercial District
3	Loblaws	12 Hurontario St	57,800 SF	Downtown Commercial Core
4	Sobeys	39 Huron St	29,800 SF	Downtown Commercial Core
Total			158,300 SF	
Pharmacies				
A	Rexall	1 Huron St	10,700	Downtown Commercial Core
B	Stuart Ellis IDA Pharmacy	169 Hurontario St	8,300	Downtown Commercial Core
C	The Drug Boutique	28 Huron Street	2,700	Downtown Commercial Core
D	Shoppers	175 First St	20,100	Mixed Use Commercial
E	Cranberry Compounding Pharmacy	10 Keith Ave	3,500	Highway Commercial
F	Pharmasave - Mary's	460 Hume St	3,300	Highway Commercial
G	Erie Street Medical Pharmacy	186 Erie St	2,000	Special Policy Area - Health
Total			50,600 SF	

Source: Parcel.

Surrounding Supermarkets & Pharmacies

Parcel has also examined the location and size of Supermarkets and Pharmacies across each SSA zone.

Understanding the competitive landscape in each SSA zone is important in understanding how existing stores and services in Collingwood compare to offerings across the broader commercial landscape. Differences in the amount, type and locations of stores in each SSA, in addition to the proximity of each to offerings throughout Collingwood, is also important in substantiating the Study Area delineated for the analysis herein and the potential consumer support that stores in Collingwood may accrue from residents of each area now and in the future.

Supermarket and Pharmacy store space across each SSA are shown and detailed in Figure 10. As detailed, there is a varying amount and distribution of these stores across each SSA, leading to a few observations:

- Next to Collingwood, Wasaga Beach currently contains the largest supply of Supermarket and Pharmacy store space. This likely minimizes the share of consumer support that the PSA can expect to accrue from residents in this area, as a larger share of residents can be expected to fulfill their shopping needs locally. Furthermore, distance between Wasaga Beach and the new store space being proposed on the subject site suggests that new space on the subject site is unlikely to increase the amount of market support the PSA can expect to accrue from this area going forward. However, the new hospital proposed east of the subject site, along Poplar Sideroad, could increase PSA expenditures by Wasaga Beach residents when the hospital is completed in 2033.
- Clearview contains a nominal amount of Supermarket store space when compared to store offerings in the PSA. Existing space is also distributed across two stores, in Stayner and Creemore respectively. Owing to the location and size of Supermarkets in Clearview, the PSA is likely to accrue a more notable share of consumer support from residents of this area. The introduction of a new supermarket on the subject site will also likely increase the share of consumer support from this area going forward, particularly given its proximity to the northern boundary of this township. For some Clearview residents (e.g., Nottawa, etc.), a new store on the subject site would be their closest Supermarket.

A similar relationship is true for Pharmacies in Clearview, with only three small Pharmacy stores located in the municipality. Like above, these stores are in Creemore and Stayner suggesting that the PSA will likely accrue a more notable share of consumer support from Clearview residents. The introduction of a new Pharmacy store on the subject site will also likely increase the share of consumer support from this area, albeit at a less significant scale. While the proposed Pharmacy store is located at the northern boundary of Clearview, it is recognized that Clearview residents are also located in proximity to other Pharmacies, including Shoppers in Wasaga Beach.

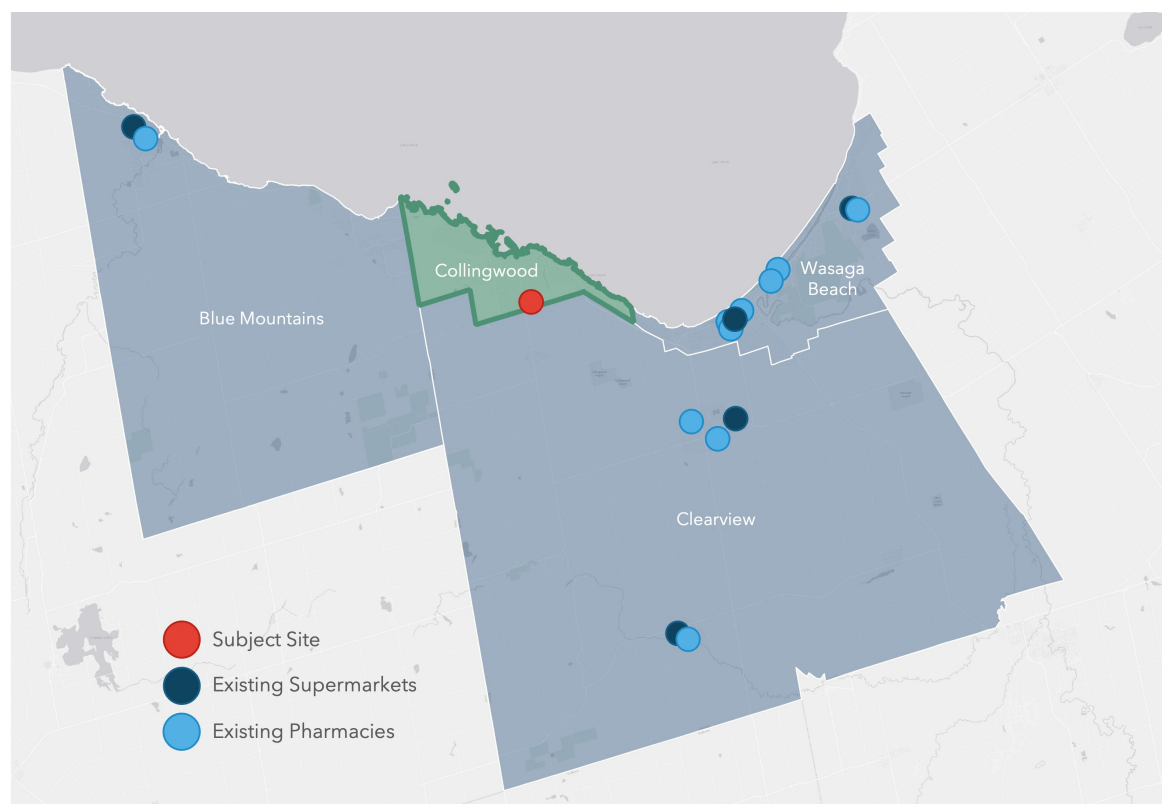
- The Blue Mountains contains a single Supermarket, towards the west end of the town in Thornbury. While some residents likely rely on stores in Meaford and other areas, the absence of significant and diverse Supermarket opportunities in the town suggests that stores in the PSA already accrue more notable

consumer support from Blue Mountain residents. A similar dynamic holds for Pharmacy stores, with only one small Pharmacy in the Blue Mountains today.

While a notable amount of consumer support for stores in the PSA is likely tied to residents of the Blue Mountains, it is unlikely that support accrued from this area will increase in response to a new supermarket and pharmacy on the subject site, particularly given its location at Hurontario Street and Poplar Sideroad. Consumer support from residents of the Blue Mountains is instead more likely to be captured by existing stores in Collingwood, (e.g., FreshCo & Metro at the west end of Collingwood, Shoppers & Rexall in Downtown) which are closer to residents of the Blue Mountain than future space on the subject site would be. However, the new hospital proposed east of the subject site, along Poplar Sideroad, could increase PSA expenditures by Blue Mountain residents when the hospital is completed in 2033.

Figure 10

Location of Supermarkets & Pharmacies Across the Secondary Study Area(s)



	Supermarkets		Pharmacies	
	Store Size	Share	Store Size	Share
Wasaga Beach	98,200 sf	30%	32,300 sf	33%
Clearview	37,600 sf	12%	10,900 sf	11%
Blue Mountains	31,600 sf	10%	4,800 sf	5%
Collingwood	158,300 sf	49%	50,600 sf	51%
Total	325,700 sf	100%	98,600 sf	100%

Source: Parcel.

Proposed Supermarket & Pharmacy Space

To ensure the most recent available information is being relied on, Parcel has reviewed planned commercial developments in Collingwood, to determine if there are any applications that intend, or could, introduce new Supermarket or Pharmacy store space similar to what is being proposed on the subject site.

Based on our review, there are eight applications in Collingwood that include a retail component as part of their application. As detailed in Figure 11, these applications include a combined 68,500 square feet of new retail / service commercial space. Based on our review and available information, there are also **no proposals planning or seeking** to include new Supermarket and/or Pharmacy store space.

Many existing proposals are proposing an expansion to an existing retail store in Collingwood, including the Beer Store, Canadian Tire and an automobile dealership. Others anticipate retail development for specific uses including a car wash. Where the commercial space is not specified, retail units are small in size and therefore unlikely to host a Pharmacy or Supermarket space. Furthermore, more notable retail space included as part of the proposed mixed-use development at 31 Hurontario Street is not permitted to accommodate a large food supermarket and/or other large floor space retail uses.

Figure 11

Existing Commercial Proposals

Address	Type	Commercial		Detail
		Sq. Ft.	Sq. M	
55 Mountain Road	Commercial	30,100	2,800	Expansion of existing Canadian Tire
415 First St	Commercial	6,500	600	Addition to existing Beer Store
629 Hurontario St	Commercial	1,100	100	Conversion of house to medical office
298 Pretty River Parkway	Commercial	4,300	400	One-Storey car wash
307 Pretty River Parkway	Commercial	3,200	300	Expansion to existing Nissan dealership
Shipyards Collingwood Quay	Mixed-Use	3,600	300	Two retail units, likely to include a restaurant
31 Hurontario St	Mixed-Use	16,500	1,500	Divided across multiple units, site does not have permissions for a large food supermarket or other large floor plate retail uses
32 Oak Street	Mixed-Use	3,200	300	Includes two retail units ~ 1,040 square feet
Total		68,500	6,300	

Source: Parcel based on the Town of Collingwood Development Application data, accessed in June 2025.

There is a Ministerial Zoning Order ("MZO") for the Poplar Health & Wellness Village, east of the subject site beyond Raglan Street. This MZO is anticipated to develop as a mixed-use community, comprising a range of mid-to high-rise residential developments, parks and open space, major institutional uses and retail / service commercial facilities. That said, future population affiliated with this development is not included in the population forecasts for Collingwood in Simcoe County Official Plan Amendment No.7. Furthermore, new population is not anticipated to be accrued over the short-term, including the forecast horizon considered for this analysis. Given the current status and long-term nature of the MZO, the residential and commercial composition of these lands have not been finalized. As a result, there are no specifics affiliated with the amount or type of retail / service commercial space that could be located on this site, including the potential integration of new Supermarket or Pharmacy store space.

Consistent with *The Gateway Centre Commercial Market Impact Study*, the only indication of potential development at this location is from an Open House presentation in May 2022, which identified that as much as one million square feet of medical, health and wellness services could be integrated at this site. However, the specific distribution of space and timing of development is unknown.

4.0 Market Analysis

A residual market analysis has been undertaken to estimate the market opportunity for new Supermarket and Pharmacy store space in the PSA.

4.1 Expenditure Potential

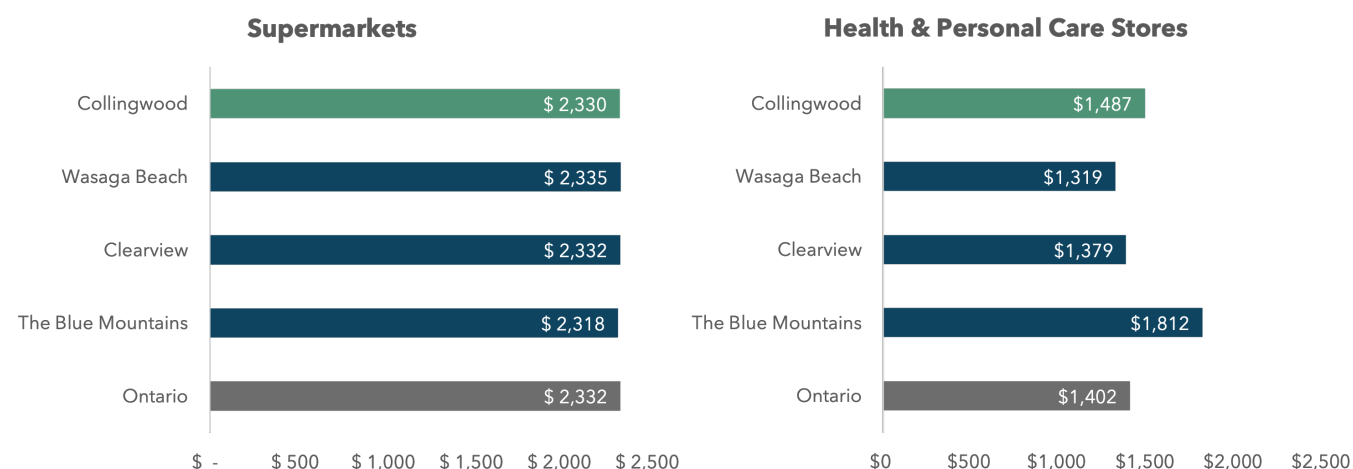
In estimating current and future potential in Collingwood, Parcel has relied on per capita retail expenditures in Ontario for 2024, the last full year period for which Retail Trade data from Statistics Canada is available. To account for how changes in income impact retail expenditures, particularly in the context of the Study Area delineated for this analysis, a regression equation was developed by Parcel based on Statistics Canada Households survey data.

In the case of Supermarket store spending, income elasticity of demand is relatively “low” meaning that household spending varies less significantly with income. In the case of Pharmacy (or Health and Personal Care) store spending, income elasticity is comparable “high”. Like other non-Food stores, household spending at Health and Personal Care stores rises more significantly with higher incomes.

Based on this relationship, minor adjustments associated with different income levels across each municipality included in the Study Area have been made to account for potential variability in spending patterns at the local level (see Figure 12).

Figure 12

Estimated Supermarket & Pharmacy Store Spending Per Capita



Source: Parcel based on population forecasts, Statistics Canada Retail Trade (20-10-0008-01) and Household Spending by Household Income Quintile (11-10-0223-01) data. Includes an adjustment for e-commerce spending.

Space Required

Supermarket Space

Based on food store spending detailed in Figure 12 and the current 2024 population of the Study Area from Figure 7, it is estimated that Study Area residents spent some \$199.0 million at Supermarkets in 2024, with approximately one-third (34%) of these expenditures by PSA residents.

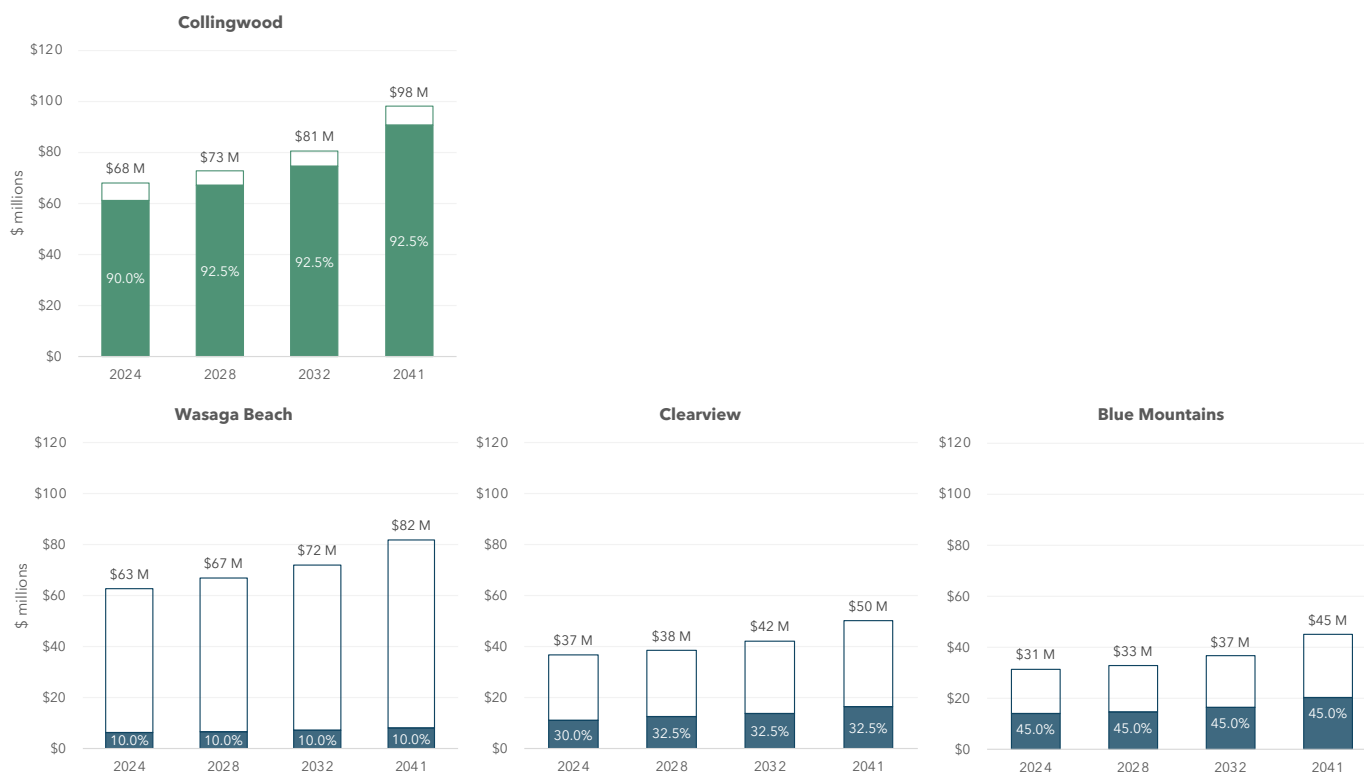
Capture rates are then applied to estimate the share of Study Area resident's Supermarket spending estimated to occur in the PSA. Estimated capture rates are based on a range of factors, including the amount and location of existing stores operating in the PSA, in addition to outside competition. Based on the existing supply and diversity of stores in Collingwood, our analysis assumes that Supermarkets in the town have a relatively high capture rate of local town residents. This is consistent with assumptions in the Town's Growth Management work which states that, *"based on Collingwood's extensive retail offerings, it is assumed that all categories have a significantly high capture rate of local residents"*.

Differentiated capture rates are also applied to each SSA zone to reflect differences in the amount of regular customer support that Supermarkets in Collingwood are estimated to accrue from each municipality. Estimated capture rates are based on the existing supply and composition of supermarkets in each area and how this supply compared to what is available in Collingwood. Other factors including the accessibility of Collingwood stores to each area, the proximity of each SSA zone to opportunities elsewhere in Simcoe County and beyond, in addition to our own professional experience have also been used to inform these capture rates.

Figure 13 details the forecast growth in Supermarket store expenditures by Study Area zone to 2041. To be conservative, our analysis holds capture rates across Wasaga Beach and the Blue Mountains constant over the forecast period. Only a small uptick in capture rates has been applied to Collingwood and Clearview in 2028, in-line with the opening of the new Supermarket and Pharmacy stores proposed on the subject site. Collingwood and Clearview are estimated to more directly benefit from the opening of these stores on the basis of enhanced connectivity, accessibility and proximity to the stores proposed on the subject site.

Figure 13

Forecast Supermarket Expenditures, by Study Area Zone



Source: Parcel.

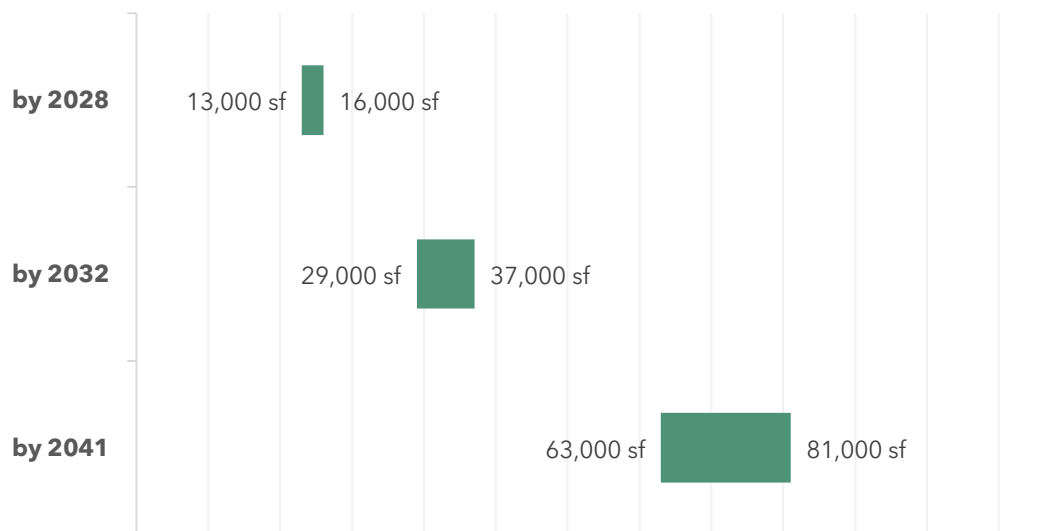
Inflow is another factor that will influence demand for the proposed Supermarket space. This includes demand affiliated with visitors of the PSA, people who work in the area but live elsewhere (i.e., permanent residents of surrounding areas), in addition to demand generated from seasonal residents and tourists. Inflow estimates employed herein are based on our evaluation of Supermarket stores in Collingwood, in addition to those across other outside markets (i.e., those in each SSA zone and beyond). Inflow estimates are also informed by our mobile analytics surveys which identified that between 23% and 30% of visitation to existing Supermarkets in Collingwood is affiliated with people residing outside the Study Area (see Figure 6).

If approximately 25% of Supermarket store sales are from residents outside of the Study Area, it is estimated that existing Supermarket stores currently achieve an average sales performance level of \$780 per square foot. Holding inflow constant over the forecast period, we estimate that between 13,000 and 16,000 square feet of additional Supermarket store space could be supported in the PSA by 2028 (the first full-year the proposed Supermarket is anticipated to be open), increasing to between 29,000 and 37,000 square feet of space by 2032 and upwards of 63,000 square feet by 2041 as detailed in Figure 14. Inflow rates have been held constant in the future, as the Georgian Bay region, including Collingwood, is anticipated to continue to be a tourism destination within Ontario.

This is consistent with the Growth Management Study completed by urbanMetrics on behalf of the Town of Collingwood, where a 30% tourism factor is maintained through the forecast period.

Figure 14

Forecast Demand for Additional Supermarket Store Space



Source: Parcel.

Pharmacy Space

Based on non-food store spending detailed in Figure 12 and the current 2024 population of the Study Area from Figure 7, it is estimated that Study Area residents spent some \$119.9 million at Health and Personal Care stores in 2024, with approximately one-third (34%) of these expenditures by PSA residents.

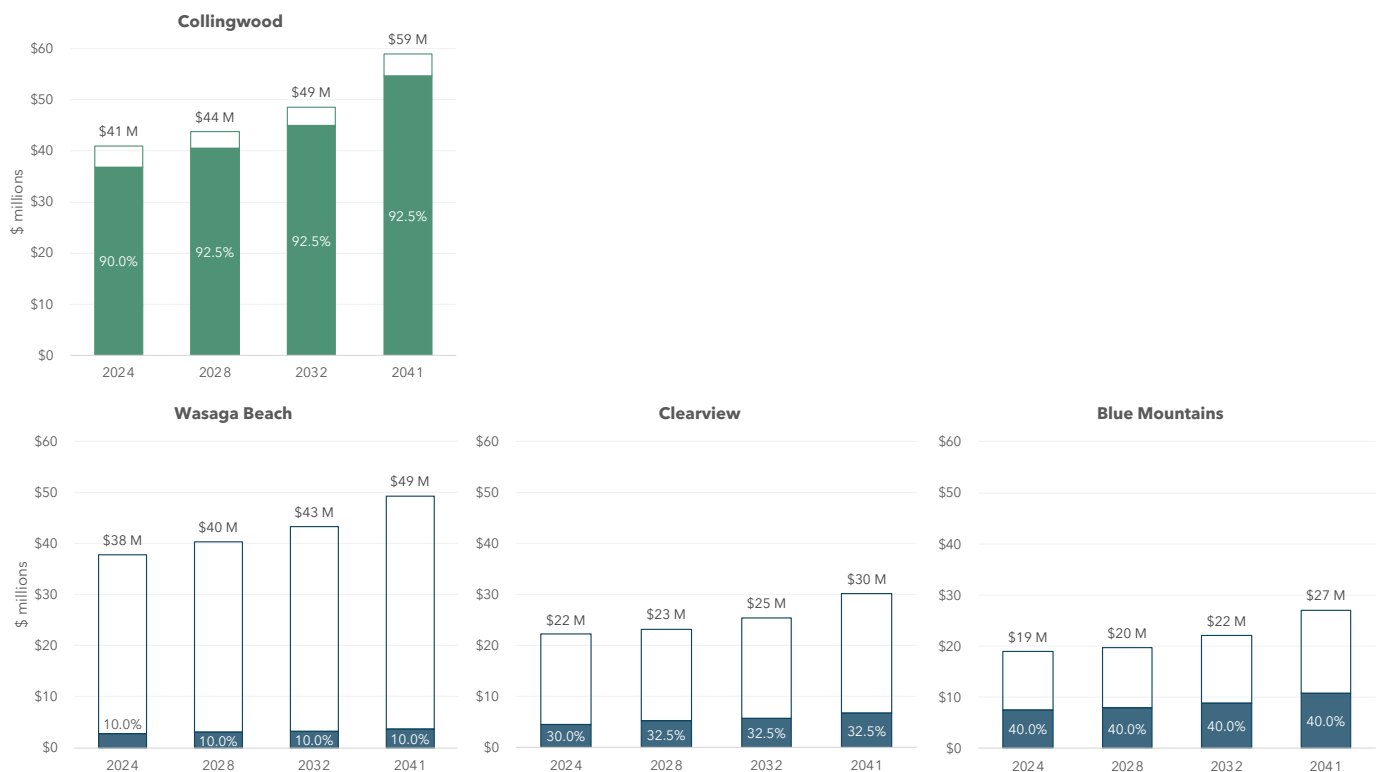
Like above, the capture rates affiliated with each Study Area zone consider a range of factors, including the quantum, location and amount of other Pharmacies located across the PSA and each SSA zone. Based on the existing supply and diversity of stores in Collingwood, our analysis similarly estimates a relatively high capture rate of local town residents. This is consistent with assumptions in the Town's Growth Management work which similarly estimate a high capture share of local Collingwood residents.

Different capture rates are also applied to each SSA zone to capture differentiation in the share of consumer support that existing Health and Personal Care stores are estimated to accrue from each area. As previously mentioned, these capture rates are informed by the broader competitive landscape, proximity and accessibility of PSA stores including potential new space on the subject site, in addition to our own professional experience.

Figure 13 forecasts expected growth in Health and Personal Care store expenditures by Study Area zone to 2041, primarily as a result of population growth. To be conservative, our analysis holds capture rates across Wasaga Beach and the Blue Mountains constant over the forecast period. Only a small uptick in capture rates has been applied to Collingwood and Clearview in 2028, in-line with the opening of a new pharmacy on the subject site. We consider this assumption to be conservative, as the new hospital that will be built on Poplar Sideroad, east of the subject site will increase capture rates from the SSA, as this new hospital will serve residents of the Blue Mountains, Wasaga Beach and Clearview.

Figure 15

Forecast Health & Personal Care Store Expenditures, by Study Area Zone



Source: Parcel.

Inflow affiliated with visitors of the PSA, people who work in the area but live elsewhere (i.e., permanent residents of surrounding areas), in addition to demand generated from seasonal residents and tourists will similarly influence demand for Health and Personal Care store space in the PSA. Inflow estimates included herein are based on our evaluation of existing stores in the PSA, outside markets included in the SSA and other areas more broadly.

If approximately 20% of Health and Personal Care store sales are affiliated with inflow, it is estimated that existing Health and Personal Care stores currently achieve an average sales performance level of nearly \$1,300 per square

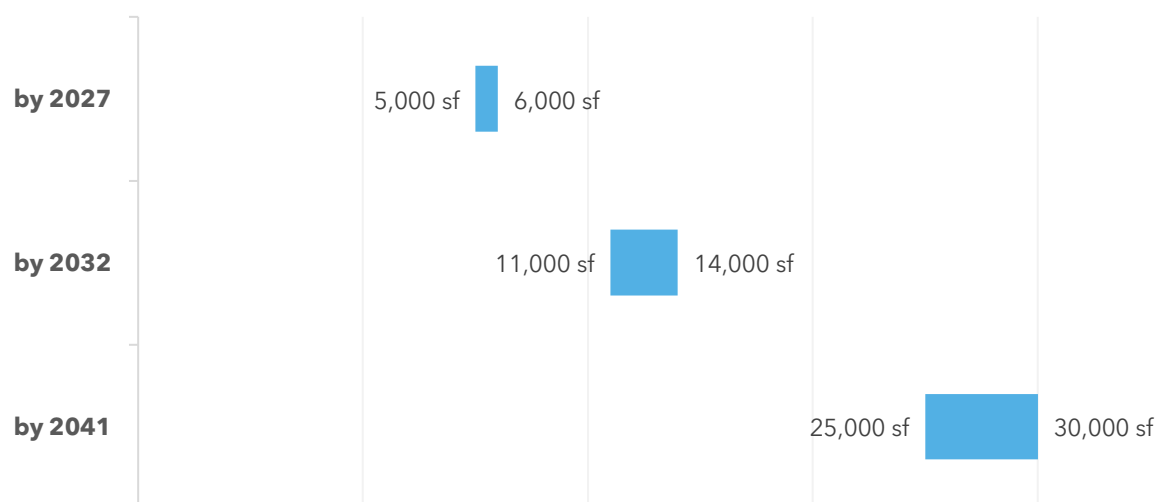
foot. This is significant given typical performance levels for Health and Personal Care stores, which generally range from \$900 to \$1,100 per square foot. At a high-level, it suggests that there could already be demand for additional Health and Personal Care store space in the PSA.

We have held rates of inflow constant in the future as the Georgian Bay region, including Collingwood, is anticipated to continue to be a tourism destination within Ontario. This is consistent with the Growth Management Study completed by urbanMetrics on behalf of the Town of Collingwood, where a 30% tourism factor is maintained through the forecast period.

Maintaining inflow over the forecast period, we estimate that between 5,000 and 6,000 square feet of additional Health and Personal Care store space could be supported in the PSA in 2028 (the first full-year the store is anticipated to be open), increasing to between 11,000 and 14,000 square feet of space by 2032 and between 25,000 and 30,000 square feet of space by 2041 as detailed in Figure 16.

Figure 16

Forecast Demand for Additional Health & Personal Care Store Space



Source: Parcel.

Inflow Estimates

Inflow assumptions related to demand for additional Supermarket store and Health and Personal Care store space have been held constant over the forecast period to 2041. As the population of the Study Area increases, this means that inflow sales levels are expected to increase proportionately. In our opinion, this is a reasonable assumption because:

- The population of the Study Area is anticipated to grow by 1.7% per year between 2024 and 2041. Parcel has examined how this compares to population growth anticipated across nearby areas over this period (i.e., locations which would contribute or be reflected as part of inflow to the Study Area). Specifically, Parcel has assessed population growth anticipated for Simcoe County, Grey County and the Greater Toronto Area ("GTA") through an examination of Ministry of Finance population projections by Census Division released in Fall 2024. As detailed below, population growth across these areas to 2041 is similar to growth rates anticipated across the Study Area over this period. An examination of these trends help substantiate why a proportional increase in inflow over the forecast period is reasonable in light of trends being experienced across the Study Area.

	2024	2041	Average Annual Growth Rate
Study Area	83,300	107,000	1.7%
Grey County	111,745	137,778	1.4%
Simcoe County	598,785	777,682	1.8%
GTA	7,670,678	9,181,965	1.2%
Ontario	16,124,116	19,645,405	1.3%

- Inflow assumptions employed in this analysis include inflow expenditures affiliated with permanent residents of surrounding areas (i.e., outside the Study Area), inclusive of those tied to seasonal residents and tourists. In the Growth Management work completed for the Town of Collingwood, a different approach was taken whereby inflow reflected only market demand affiliated with permanent residents of the surrounding area. Demand affiliated with the four season tourism industry was accounted for separately through a 30% tourism factor adjustment. The 30% tourism factors was based on "*an understanding of the current inventory and the nature of the future retail industry*". Relative to the inflow and tourism factors employed in the Town's Growth Management work, the inflow assumptions employed for this analysis are arguably conservative, providing additional context as to why these assumptions have been held constant over the forecast period.

Potential Sales Impact

Supermarket Space

Parcel has also prepared a sales impact (transfer) analysis to better understand the potential impact that the proposed new Supermarket store space on the subject site could have on Supermarkets operating in the PSA.

- Based on this analysis, it is estimated that the introduction of a new 31,000 square foot store will reduce the store performance of existing stores in Collingwood in 2028. Specifically, this includes a reduction in current sales performance levels by 8.4%. This impact is anticipated to be short-lived, with sales performance levels anticipated to be fully recovered by 2031.
- By 2031, the sales performance levels of existing stores are forecast to have increased 0.7% from their current 2024 levels. By 2041, existing sales performance levels are expected to have increased even further, forecast at approximately \$960 per square foot or approximately 23.5% above existing performance levels.

Health & Personal Care Store Space

Parcel has also prepared a sales impact (transfer) analysis to better understand the potential impact that the 17,000 square foot Pharmacy proposed on the subject site could have on existing Health and Personal Care stores in the PSA.

- Based on this analysis, it is estimated that the introduction of a new 17,000 square foot store will reduce the store performance of existing stores in Collingwood in 2028 by some 14.2%. This impact is anticipated to be short-lived, with sales performance levels anticipated to be fully recovered by 2031. Notwithstanding this reduction, existing Health and Personal Care stores are still anticipated to have sales performance levels at \$1,096, which is still at the high-end of the typical performance levels for these stores (i.e., which range from \$900 to \$1,100 per square foot).
- By 2041, the sales performance levels of existing stores are forecast to have reestablished and exceeded their current 2024 levels, estimated at approximately \$1,506 per square foot or approximately 17.9% above existing performance levels.

Typically, sales declines at or exceeding 15% are interpreted as having an adverse impact on existing stores operating in the area, such that this level of impact can contribute to existing or competing store closures. Recognizing the amounting and forecast impact of both the new supermarket and pharmacy proposed on the subject site, it is therefore reasonable to suggest that these stores can be supported in Collingwood without having an adverse or irreversible impact on existing stores in Collingwood, particularly those in the Downtown. Furthermore, we consider our analysis to be conservative, as the new hospital to be built on Poplar Sideroad, east of the subject site, would likely result in capture rates that are higher than the rates considered in our analysis.

See **Appendix** for Full Details of the Expenditure Analysis

4.2 Summary of Demand

Aggregating the distinct analyses for Supermarket and Health and Personal Care store space above, it is estimated the Collingwood could support between 13,000 and 16,000 square feet of Supermarket store space and between 5,000 and 6,000 square feet of Health and Personal Care store space by 2028. By 2041, Study Area residents are forecast to support between 63,000 and 81,000 square feet of Supermarket store space and between 25,000 and 30,000 square feet of Health and Personal Care store space.

Additional Context

The Growth Management work completed for the Town of Collingwood as part of their Official Plan Review includes warranted space estimates to 2041. Parcel has compared these estimates to those which have resulted from the analysis in this report to further substantiate the validity of the analysis employed.

Work completed for the town identifies that new permanent residents of Collingwood to 2041 could support some 78,200 square feet of additional Supermarket space and some 26,100 square feet of Health and Personal Care store space. An additional 9,500 square feet of Supermarket space and 4,900 square feet of Health and Personal Care store space could be supported by new seasonal residents over this period. In applying the 30% tourism factor employed in the Growth Management work, this increases to total demand for approximately 114,000 square feet of new Supermarket space and some 40,300 square feet of new Health and Personal Care store space by 2041.

These estimates are well above the estimates identified in our analysis detailed above and, if anything, suggest the assumptions and estimates employment in this analysis are reasonable and likely conservative. Forecasts included as part of the Town's Growth Management also provide further justification for the space being proposed on the subject site.

The analysis above validates that the amount of Food Supermarket space and Pharmacy store space being proposed on the subject site will not have any adverse impact on the planned function or existing operation of existing and/or future Supermarket and Pharmacy stores in the PSA. Subsequent to the Retail Commercial Establishment space justified as part of the *Gateway Commercial Market Impact Study* prepared in September 2024, it validates the market demand for these uses.

5.0 Conclusions

Consistent and in addition to the Retail Commercial Establishment space and other uses supported as part of *The Gateway Centre Commercial Market Impact Study* completed by Parcel in September 2024, the proposed 31,000 square foot Supermarket and 17,000 square foot Pharmacy store space proposed on the subject site are not anticipated to have any adverse impact on the planned function of existing stores in Collingwood, especially those in the Downtown.

Furthermore, this Commercial Update Memorandum substantiates why the **OPA and ZBA being sought by Charis Development Ltd. for the subject site are appropriate and reasonable from a market perspective**, particularly as each store is not anticipated to impact the viability and planned function of the Downtown Core and/or other Supermarkets and Pharmacy stores in Collingwood.

More specifically and as it relates to policy tests identified in Section 4.4.3.7.2 of the Town of Collingwood Official Plan, we note:

a) identification of the specific type and size of retail facility to be justified;

The proponent is seeking an Official Plan and Zoning Bylaw Amendment to expand the permitted uses on the subject site to include a Supermarket and Pharmacy store, as well as a Retail Commercial Establishment. In September 2024, Parcel Economics Inc. ("Parcel") prepared *The Gateway Centre Commercial Market Impact Study*, which examined the commercial market demand for a mixed-use development that included retail/service commercial space, office space and residential units on the subject site. This study justified demand for a range of retail / service commercial development, including General Merchandise store space, Retail Commercial Establishment space and a full range of other retail and service commercial establishments.

The proponent has since revised the concept plan for the subject site. The revised concept plan includes approximately 108,600 square feet of space of commercial space. Included in this space is 89,093 square feet of retail / service commercial space, which is permitted and justified through the previously prepared *Gateway Centre Commercial Market Impact Study*. This space also now includes 31,000 square feet of Supermarket space and 17,000 square feet of Pharmacy space, both of which are estimated to enter the market in 2028.

As a result, this Commercial Update Memorandum has been completed to determine and justify the market opportunity for the Supermarket and Pharmacy proposed as part of the updated concept plan for the subject site.

b) the basis for projecting market demand due to population growth, spending patterns, and other relevant factors;

In projecting market demand, we have relied on an expenditure-based market demand analysis for Supermarket and Pharmacy (i.e., Health and Personal Care) store space, as these stores are not currently permitted on lands

zoned *Highway Commercial - C5*. To justify market demand on the subject site, particularly as it relates to the planned function of other retail locations in the town, a Study Area—including Collingwood, in addition to Wasaga Beach, Clearview and the Blue Mountains was delineated. Based on the supply of existing store space, accessibility, other competitive influences, it is reasonable to expect future commercial uses on the subject site will attain some level of consumer support from permanent residents and anticipated growth in these areas.

Analysis and justification therefore considers a range of consumer support from permanent residents and anticipated growth across Collingwood, in addition to Wasaga Beach, Clearview and the Blue Mountains as it is reasonable to expect future commercial uses on the subject site will attain some level of consumer support from these areas. These municipalities, which collectively represent the Study Area for this market study, have also been used as the basis for justifying market demand on the subject site, particularly as it relates to the planned function of other retail locations in the town.

For context, it is also important to note that the Growth Management Discussion Paper identified demand for nearly 1.2 million square feet of additional retail / service commercial space in the Town to support population growth to 2041, this included demand for approximately 114,000 square feet of additional Supermarket store space and some 40,300 square feet of Pharmacy (i.e., Health and Personal Care) store space.

c) provision of updated information on the performance of Collingwood's retail sector;

To substantiate the analysis completed as part of this Commercial Update Memorandum, Parcel updated the inventory of existing Supermarkets and Pharmacy stores in Collingwood. The existing supply of space in these two store categories served as key input into the market analysis employed. Ensuring that the supply and number of stores in each of these categories was up to date and accurate was also key in substantiating the captures rates and inflow assumptions utilized in the analysis. This includes how the existing number of stores, their location and amounting store space, compares to surrounding competition including opportunities across each SSA zone and beyond.

d) an impact analysis of the proposed development on the viability and planned function of the Downtown Core and other commercial areas;

Consistent with the Growth Management Discussion Paper, the analysis included in this Commercial Update Memorandum identified that additional Supermarket and Pharmacy store space is required in Collingwood to accommodate population growth in the Study Area to 2041.

Population growth across the Study Area is anticipated to generate demand for between 13,000 and 16,000 square feet of additional Supermarket store space and between 5,000 and 6,000 square feet of additional Health and Personal Care store space by 2028. By 2041, growth is anticipated to increase demand to between 63,000 and 81,000 square feet of Supermarket store space and between 25,000 and 30,000 square feet of Health and Personal Care store space. This is sufficient to accommodate the new 30,000 square foot Supermarket and 17,000 square foot pharmacy proposed on the subject site.

Furthermore, the space proposed on the subject site is not anticipated to have an adverse impact on existing stores in Collingwood, particularly those in the Downtown, over the longer-term. We do note that the Town's Downtown Commercial Core includes some 87,600 square feet of Supermarket space and some 21,700 square feet of Pharmacy (i.e., Health and Personal Care) store space. The development of the store space proposed on the subject site could impact these stores in the Downtown Commercial Core, in addition to others throughout the town, in the short-term. However, these impacts will not be significant enough to result in an adverse impact and potential store closures (i.e. impacts exceeding 15%).

Specifically, our impact analysis, demonstrates that the new Supermarket on the subject site will have a modest impact on existing stores in Collingwood, including in the Downtown Commercial Core, in 2028. However, a full recovery is anticipated by 2032, with sales performance levels ultimately increasing over 23% between 2024 and 2041. Similarly, our impact analysis suggests that new Pharmacy stores space on the subject site could have a larger impact on existing stores in 2028. While a full recovery is not anticipated until after 2032, we note that existing stores in Collingwood are anticipated to be operating at sales performance levels well above what is typical throughout the entire forecast horizon.

In light of this analysis, it is our opinion that the proposed Supermarket and Pharmacy store space proposed on the subject site will not impact the viability of the planned function of the Downtown Commercial Core or other commercial areas located throughout Collingwood to 2041.

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

As our analysis has demonstrated that a new 31,000 square foot Food Supermarket and 17,000 square foot Pharmacy on the subject site are not anticipated to have an adverse impact significant enough to result in potential store closures (i.e. impacts exceeding 15%) there is not a need for specific requirements, limitations and safeguards to protect the planned function of the Downtown Core or other commercial areas.



Appendix A: **Market Analysis**

Figure A.1

Study Area Expenditure Potential

Province of Ontario	2024		E-commerce	Adjusted	
Food Store Retail	\$3,456	27.8%		\$3,385	29.2%
Supermarket & Grocery	\$ 2,388	19.2%	2.5%	\$ 2,328	20.1%
Convenience & Specialty Food	\$ 444	3.6%	2.5%	\$ 433	3.7%
Beer, Wine & Liquor	\$624	5.0%	-	\$ 624	5.4%
Non-Food Store Retail (NFSR)	\$8,986	72.2%		\$8,223	70.8%
General Merchandise Stores	\$ 2,684	21.6%	4.5%	\$ 2,563	22.1%
Clothing & Accessories	\$ 1,089	8.8%	17.0%	\$ 904	7.8%
Furnishing, Home Furnishing, Electronics	\$ 1,269	10.2%	15.5%	\$ 1,072	9.2%
		-		\$ -	-
Miscellaneous Retailers	\$ 1,165	9.4%	11.0%	\$ 1,037	8.9%
Health & Personal Care	\$ 1,500	12.1%	6.5%	\$ 1,403	12.1%
Tires/Batteries/Automotive Accessories	\$ 292	2.3%	-	\$ 292	2.5%
Building & Outdoor Home Supplies	\$ 987	7.9%	3.5%	\$ 952	8.2%
Total Retail Expenditures	\$12,442	100%	6.7%	\$11,608	100%

Collingwood	2024		2028		2032		2041	
Per Capita Retail Expenditures	\$12,107		\$12,315		\$12,523		\$12,992	
Population	28,000		29,400		32,100		37,600	
Total Retail Expenditure Potential (\$m)	\$339.0		\$362.1		\$402.0		\$488.5	
Food Store Retail (FSR)	\$ 98.9	29.2%	\$ 105.6	29.2%	\$ 117.2	29.2%	\$ 142.5	29.2%
Supermarket & Grocery	\$ 68.0	20.1%	\$ 72.6	20.1%	\$ 80.6	20.1%	\$ 98.0	20.1%
Convenience & Specialty Food	\$ 12.6	3.7%	\$ 13.5	3.7%	\$ 15.0	3.7%	\$ 18.2	3.7%
Beer, Wine & Liquor	\$18.2	5.4%	\$19.5	5.4%	\$21.6	5.4%	\$26.3	5.4%
Non-Food Store Retail (NFSR)	\$240.1	70.8%	\$256.5	70.8%	\$284.8	70.8%	\$346.0	70.8%
General Merchandise Stores	\$ 74.9	22.1%	\$79.9	22.1%	\$88.8	22.1%	\$107.9	22.1%
Clothing & Accessories	\$ 26.4	7.8%	\$28.2	7.8%	\$31.3	7.8%	\$38.0	7.8%
Furnishing, Home Furnishing	\$ 31.3	9.2%	\$33.4	9.2%	\$37.1	9.2%	\$45.1	9.2%
Miscellaneous Retailers	\$ 30.3	8.9%	\$32.3	8.9%	\$35.9	8.9%	\$43.6	8.9%
Health & Personal Care	\$ 41.0	12.1%	\$43.7	12.1%	\$48.6	12.1%	\$59.0	12.1%
Tires/Batteries/Automotive Accessories	\$ 8.5	2.5%	\$9.1	2.5%	\$10.1	2.5%	\$12.3	2.5%
Building & Outdoor Home Supplies	\$ 27.8	8.2%	\$29.7	8.2%	\$33.0	8.2%	\$40.1	8.2%
Total Collingwood Expenditure Potential (\$m)	\$339.0	100%	\$362.1	100%	\$402.0	100%	\$488.5	100%

Wasaga Beach	2024		2028		2032		2041	
Per Capita Retail Expenditures	\$11,127		\$11,315		\$11,504		\$11,929	
Population	28,100		29,500		31,200		34,200	
Total Retail Expenditure Potential (\$m)	\$312.7		\$333.8		\$358.9		\$408.0	
Food Store Retail (FSR)	\$91.2	29.2%	\$97.3	29.2%	\$104.7	29.2%	\$119.0	29.2%
Supermarket & Grocery	\$ 62.7	20.1%	\$ 66.9	20.1%	\$ 72.0	20.1%	\$ 81.8	20.1%
Convenience & Specialty Food	\$ 11.7	3.7%	\$ 12.4	3.7%	\$ 13.4	3.7%	\$ 15.2	3.7%
Beer, Wine & Liquor	\$16.8	5.4%	\$17.9	5.4%	\$19.3	5.4%	\$21.9	5.4%
Non-Food Store Retail (NFSR)	\$221.5	70.8%	\$236.5	70.8%	\$254.3	70.8%	\$289.0	70.8%
General Merchandise Stores	\$ 69.0	22.1%	\$ 73.7	22.1%	\$ 79.3	22.1%	\$ 90.1	22.1%
Clothing & Accessories	\$ 24.3	7.8%	\$ 26.0	7.8%	\$ 27.9	7.8%	\$ 31.8	7.8%
Furnishing, Home Furnishing	\$ 28.9	9.2%	\$ 30.8	9.2%	\$ 33.2	9.2%	\$ 37.7	9.2%
Miscellaneous Retailers	\$ 27.9	8.9%	\$ 29.8	8.9%	\$ 32.1	8.9%	\$ 36.4	8.9%
Health & Personal Care	\$ 37.8	12.1%	\$ 40.3	12.1%	\$ 43.4	12.1%	\$ 49.3	12.1%
Tires/Batteries/Automotive Accessories	\$ 7.9	2.5%	\$ 8.4	2.5%	\$ 9.0	2.5%	\$ 10.3	2.5%
Building & Outdoor Home Supplies	\$ 25.7	8.2%	\$ 27.4	8.2%	\$ 29.4	8.2%	\$ 33.5	8.2%
Total Wasaga Beach Expenditure Potential (\$m)	\$312.7	100%	\$333.8	100%	\$358.9	100%	\$408.0	100%

Clearview	2024		2028		2032		2041	
Per Capita Retail Expenditures	\$11,477		\$11,672		\$11,868		\$12,308	
Population	16,000		16,400		17,700		20,300	
Total Retail Expenditure Potential (\$m)	\$183.6		\$191.4		\$210.1		\$249.9	
Food Store Retail (FSR)	\$53.5	29.2%	\$55.8	29.2%	\$61.3	29.2%	\$72.9	29.2%
Supermarket & Grocery	\$ 36.8	20.1%	\$ 38.4	20.1%	\$ 42.1	20.1%	\$ 50.1	20.1%
Non-Food Store Retail (NFSR)	\$130.1	70.8%	\$135.6	70.8%	\$148.8	70.8%	\$177.0	70.8%
General Merchandise Stores	\$ 40.5	22.1%	\$ 42.3	22.1%	\$ 46.4	22.1%	\$ 55.2	22.1%
Clothing & Accessories	\$ 14.3	7.8%	\$ 14.9	7.8%	\$ 16.4	7.8%	\$ 19.5	7.8%
Furnishing, Home Furnishing	\$ 17.0	9.2%	\$ 17.7	9.2%	\$ 19.4	9.2%	\$ 23.1	9.2%
Miscellaneous Retailers	\$ 16.4	8.9%	\$ 17.1	8.9%	\$ 18.8	8.9%	\$ 22.3	8.9%
Health & Personal Care	\$ 22.2	12.1%	\$ 23.1	12.1%	\$ 25.4	12.1%	\$ 30.2	12.1%
Tires/Batteries/Automotive Accessories	\$ 4.6	2.5%	\$ 4.8	2.5%	\$ 5.3	2.5%	\$ 6.3	2.5%
Building & Outdoor Home Supplies	\$ 15.1	8.2%	\$ 15.7	8.2%	\$ 17.2	8.2%	\$ 20.5	8.2%
Total Clearview Expenditure Potential (\$m)	\$183.6	100%	\$191.4	100%	\$210.1	100%	\$249.9	100%
Blue Mountains	2024		2028		2032		2041	
Per Capita Retail Expenditures	\$13,997		\$14,244		\$14,490		\$15,044	
Population	11,200		11,500		12,600		14,900	
Total Retail Expenditure Potential (\$m)	\$156.8		\$163.8		\$182.6		\$224.2	
Food Store Retail (FSR)	\$45.7	29.2%	\$47.8	29.2%	\$53.2	29.2%	\$65.4	29.2%
Supermarket & Grocery	\$ 31.4	20.1%	\$ 32.9	20.1%	\$ 36.6	20.1%	\$ 45.0	20.1%
Convenience & Specialty Food	\$ 5.8	3.7%	\$ 6.1	3.7%	\$ 6.8	3.7%	\$ 8.4	3.7%
Beer, Wine & Liquor	\$ 8.4	5.4%	\$ 8.8	5.4%	\$ 9.8	5.4%	\$ 12.0	5.4%
Non-Food Store Retail (NFSR)	\$111.1	70.8%	\$116.0	70.8%	\$129.3	70.8%	\$158.8	70.8%
General Merchandise Stores	\$ 34.6	22.1%	\$ 36.2	22.1%	\$ 40.3	22.1%	\$ 49.5	22.1%
Clothing & Accessories	\$ 12.2	7.8%	\$ 12.8	7.8%	\$ 14.2	7.8%	\$ 17.5	7.8%
Furnishing, Home Furnishing	\$ 14.5	9.2%	\$ 15.1	9.2%	\$ 16.9	9.2%	\$ 20.7	9.2%
Miscellaneous Retailers	\$ 14.0	8.9%	\$ 14.6	8.9%	\$ 16.3	8.9%	\$ 20.0	8.9%
Health & Personal Care	\$ 18.9	12.1%	\$ 19.8	12.1%	\$ 22.1	12.1%	\$ 27.1	12.1%
Tires/Batteries/Automotive Accessories	\$ 3.9	2.5%	\$ 4.1	2.5%	\$ 4.6	2.5%	\$ 5.6	2.5%
Building & Outdoor Home Supplies	\$ 12.9	8.2%	\$ 13.4	8.2%	\$ 15.0	8.2%	\$ 18.4	8.2%
Total Blue Mountains Expenditure Potential (\$m)	\$156.8	100%	\$163.8	100%	\$182.6	100%	\$224.2	100%
Study Area	2024		2028		2032		2041	
Food Store Retail (FSR)	\$ 289.3	29.2%	\$ 306.5	29.2%	\$ 336.4	29.2%	\$ 399.7	29.2%
Supermarket & Grocery	\$ 199.0	20.1%	\$ 210.8	20.1%	\$ 231.4	20.1%	\$ 274.9	20.1%
Non-Food Store Retail (NFSR)	\$ 702.7	70.8%	\$ 744.6	70.8%	\$ 817.2	70.8%	\$ 970.8	70.8%
General Merchandise Stores	\$ 219.1	22.1%	\$ 232.1	22.1%	\$ 254.7	22.1%	\$ 302.6	22.1%
Clothing & Accessories	\$ 77.2	7.8%	\$ 81.8	7.8%	\$ 89.8	7.8%	\$ 106.7	7.8%
Furnishing, Home Furnishing	\$ 91.6	9.2%	\$ 97.1	9.2%	\$ 106.6	9.2%	\$ 126.6	9.2%
Miscellaneous Retailers	\$ 88.6	8.9%	\$ 93.9	8.9%	\$ 103.0	8.9%	\$ 122.4	8.9%
Health & Personal Care	\$ 119.9	12.1%	\$ 127.0	12.1%	\$ 139.4	12.1%	\$ 165.6	12.1%
Tires/Batteries/Automotive Accessories	\$ 25.0	2.5%	\$ 26.4	2.5%	\$ 29.0	2.5%	\$ 34.5	2.5%
Building & Outdoor Home Supplies	\$ 81.4	8.2%	\$ 86.2	8.2%	\$ 94.6	8.2%	\$ 112.4	8.2%
Total Study Area Expenditure Potential (\$m)	\$992.0	100%	\$1,051.1	100%	\$1,153.6	100%	\$1,370.5	100%
Cumulative Growth in Expenditure Potential								
Food Store Retail (FSR)			\$17.2		\$47.1		\$110.4	
Supermarket & Grocery			\$ 11.8		\$ 32.4		\$ 75.9	
Non-Food Store Retail (NFSR)			\$41.8		\$114.4		\$268.1	
Health & Personal Care			\$ 7.1		\$ 19.5		\$ 45.7	
Study Area Retail Expenditures (\$m)			\$59.0		\$161.5		\$378.4	

Figure A.2

Food Supermarket Expenditure Analysis

Supermarkets & Grocery Store Analysis				
Supermarket & Grocery	2024	2028	2032	2041
Collingwood				
Supermarket & Grocery Expenditures (\$m)	\$ 68.0	\$ 72.6	\$ 80.6	\$ 98.0
Estimated Primary Study Area Share (%)	90.0%	92.5%	92.5%	92.5%
Estimated Primary Study Area Share (\$m)	\$ 61.2	\$ 67.2	\$ 74.6	\$ 90.6
Residual Potential (\$m)		\$ 6.0	\$ 13.4	\$ 29.4
Wasaga Beach				
Supermarket & Grocery Expenditures (\$m)	\$ 62.7	\$ 66.9	\$ 72.0	\$ 81.8
Estimated Primary Study Area Share (%)	10.0%	10.0%	10.0%	10.0%
Estimated Primary Study Area Share (\$m)	\$ 6.3	\$ 6.7	\$ 7.2	\$ 8.2
Residual Potential (\$m)		\$ 0.4	\$ 0.9	\$ 1.9
Clearview				
Supermarket & Grocery Expenditures (\$m)	\$ 36.8	\$ 38.4	\$ 42.1	\$ 50.1
Estimated Primary Study Area Share (%)	30.0%	32.5%	32.5%	32.5%
Estimated Primary Study Area Share (\$m)	\$ 11.0	\$ 12.5	\$ 13.7	\$ 16.3
Residual Potential (\$m)		\$ 1.4	\$ 2.6	\$ 5.2
Blue Mountains				
Residual Potential (\$m) Expenditures (\$m)	\$ 31.4	\$ 32.9	\$ 36.6	\$ 45.0
Estimated Primary Study Area Share (%)	45.0%	45.0%	45.0%	45.0%
Estimated Primary Study Area Share (\$m)	\$ 14.1	\$ 14.8	\$ 16.5	\$ 20.2
Residual Potential (\$m)		\$ 0.6	\$ 2.3	\$ 6.1
Total Study Area				
Supermarket & Grocery Expenditures (\$m)	\$ 199.0	\$ 210.8	\$ 231.4	\$ 274.9
Estimated Primary Study Area Share (\$m)	\$ 92.7	\$ 101.1	\$ 112.0	\$ 135.3
Estimated Primary Study Area Share (%)	46.6%	48.0%	48.4%	49.2%
Residual Potential (\$m)		\$ 8.5	\$ 19.3	\$ 42.7
Existing Supermarket & Grocery Store Space	158,300			
Existing Inflow	25.0%			
Existing Supermarket & Grocery Sales Performance				
	\$780.5			
Study Area Warranted Additional Supermarket & Grocery Space				
Additional Residual Potential from Total Study Area Residents		\$ 8.5	\$ 19.3	\$ 42.7
Inflow (%)		25%	25%	25%
Inflow (\$m)		\$ 2.8	\$ 6.4	\$ 14.2
		\$ 11.3	\$ 25.7	\$ 56.9
Space Warranted				
@\$700 per square foot		16,000 sf	37,000 sf	81,000 sf
@\$800 per square foot		14,000 sf	32,000 sf	71,000 sf
@\$900 per square foot		13,000 sf	29,000 sf	63,000 sf
Proposals for New Grocery Store Space				
	2024	2028	2032	2041
Subject Site				
Square Feet Proposed		31,000 sf	31,000 sf	31,000 sf
Estimated Sales per Square Foot		\$700	\$800	\$900
Total Estimates Sales (\$Millions)		\$21.7	\$24.8	\$27.9
Less: Inflow		25%	25%	25%
Less: Inflow (\$Millions)		\$5.4	\$6.2	\$7.0
Total Sales Volume from Study Area Residents (\$Millions)		\$16.3	\$18.6	\$20.9

Figure A.3

Food Supermarket Impact Analysis

Impact of New Grocery Store Space to Existing Stores				
Proposed New Space Sales Transfer or Residual Demand				
Total Sales Volume Required from Study Area Residents (excludes inflow)		\$16.3	\$18.6	\$20.9
Total Sales Volume Available from Study Area Residents (excludes inflow)		\$8.5	\$19.3	\$42.7
Sales Transfer Required From Existing Stores / Existing Market Demand		(\$7.8)	\$0.7	\$21.7
Impact Analysis				
Existing Sales from Study Area Residents	\$92.7	\$84.9	\$93.4	\$114.4
Plus Inflow	25%	25%	25%	25%
Inflow	\$30.9	\$28.3	\$31.1	\$38.1
Total Sales (including Inflow)	\$123.5	\$113.1	\$124.5	\$152.5
Existing Square Feet Grocery	158,300 sf	158,300 sf	158,300 sf	158,300 sf
Sales / SF Current	\$780.5	\$714.7	\$786.3	\$963.6
Change in Existing Stores Sales / SF from 2024		-8.4%	0.7%	23.5%

Figure A.4

Pharmacy Expenditure Analysis

Pharmacy & Personal Care Store Analysis				
Health & Personal Care	2024	2028	2032	2041
Collingwood				
Health & Personal Care Expenditures (\$m)	\$ 41.0	\$ 43.7	\$ 48.6	\$ 59.0
Estimated Primary Study Area Share (%)	90.0%	92.5%	92.5%	92.5%
Estimated Primary Study Area Share (\$m)	\$ 36.9	\$ 40.5	\$ 44.9	\$ 54.6
Residual Potential (\$m)		\$ 3.6	\$ 8.1	\$ 17.7
Wasaga Beach				
Health & Personal Care Expenditures (\$m)	\$ 37.8	\$ 40.3	\$ 43.4	\$ 49.3
Estimated Primary Study Area Share (%)	7.5%	7.5%	7.5%	7.5%
Estimated Primary Study Area Share (\$m)	\$ 2.8	\$ 3.0	\$ 3.3	\$ 3.7
Residual Potential (\$m)		\$ 0.2	\$ 0.4	\$ 0.9
Clearview				
Health & Personal Care Expenditures (\$m)	\$ 22.2	\$ 23.1	\$ 25.4	\$ 30.2
Estimated Primary Study Area Share (%)	20.0%	22.5%	22.5%	22.5%
Estimated Primary Study Area Share (\$m)	\$ 4.4	\$ 5.2	\$ 5.7	\$ 6.8
Residual Potential (\$m)		\$ 0.8	\$ 1.3	\$ 2.4
Blue Mountains				
Health & Personal Care Expenditures (\$m)	\$ 18.9	\$ 19.8	\$ 22.1	\$ 27.1
Estimated Primary Study Area Share (%)	40.0%	40.0%	40.0%	40.0%
Estimated Primary Study Area Share (\$m)	\$ 7.6	\$ 7.9	\$ 8.8	\$ 10.8
Residual Potential (\$m)		\$ 0.3	\$ 1.2	\$ 3.3
Study Area				
Health & Personal Care Expenditures (\$m)	\$ 119.9	\$ 127.0	\$ 139.4	\$ 165.6
Estimated Primary Study Area Share (\$m)	\$ 51.7	\$ 56.6	\$ 62.7	\$ 75.9
Estimated Primary Study Area Share (%)	43.1%	44.6%	45.0%	45.8%
Residual Potential (\$m)		\$ 4.9	\$ 11.0	\$ 24.2
Existing Health & Personal Care Store Space	50,600			
Existing Inflow	20%			
Existing Health & Personal Care Sales Performance				
	\$1,277			
Study Area Warranted Additional Health & Personal Care Space				
Additional Residual Potential from Study Area Residents		\$ 4.9	\$ 11.0	\$ 24.2
Inflow (%)		20%	20%	20%
Inflow (\$m)		\$ 1.2	\$ 2.8	\$ 6.1
		\$ 6.1	\$ 13.8	\$ 30.3
Space Warranted				
@\$900 per square foot		7,000 sf	15,000 sf	34,000 sf
@\$1000 per square foot		6,000 sf	14,000 sf	30,000 sf
@\$1100 per square foot		6,000 sf	13,000 sf	28,000 sf
Proposals for New Pharmacy Space				
	2024	2028	2032	2041
Subject Site				
Square Feet Proposed		17,000 sf	17,000 sf	17,000 sf
Estimated Sales per Square Foot		\$900	\$1,000	\$1,100
Total Estimates Sales (\$Millions)		\$15.3	\$17.0	\$18.7
Less: Inflow		20%	20%	20%
Less: Inflow (\$Millions)		\$3.1	\$3.4	\$3.7
Total Sales Volume from Study Area Residents (\$Millions)		\$12.2	\$13.6	\$15.0

Figure A.5

Pharmacy Impact Analysis

Impact of New Pharmacy Space to Existing Stores				
Proposed New Space Sales Transfer or Residual Demand				
Total Sales Volume Required from Study Area Residents (excludes inflow)		\$12.2	\$13.6	\$15.0
Total Sales Volume Available from Study Area Residents (excludes inflow)		\$4.9	\$11.0	\$24.2
Sales Transfer Required From Existing Stores		(\$7.3)	(\$2.6)	\$9.2
Impact Analysis				
Existing Sales from Study Area Residents	\$51.7	\$44.4	\$49.1	\$61.0
Plus Inflow	20%	20%	20%	20%
Inflow	\$12.9	\$11.1	\$12.3	\$15.2
Total Sales (including inflow)	\$64.6	\$55.5	\$61.4	\$76.2
Existing Square Feet Pharmacy	50,600 sf	50,600 sf	50,600 sf	50,600 sf
Sales / SF Current	\$1,277	\$1,096	\$1,213	\$1,506
Change in Existing Stores Sales / SF from 2024		-14.2%	-5.0%	17.9%