



The Gateway Centre

Commercial Market Impact Study

September 16, 2024

Parcel



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Executive Summary

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

Charis is seeking to re-designate and re-zone their property to accommodate a mixed-use development on the subject site that includes residential uses, in addition to 10,173 square metres (approximately 109,500 square feet) of retail/service commercial space and 1,080 square metres (11,627 square feet) of office space located above one of the retail/service commercial buildings.

The majority (some 3.0 hectares) of land on the subject site is designated *Highway Commercial* in Schedule A of the *Town of Collingwood Official Plan* and zoned C5 Commercial in the existing Zoning By-law, with the remaining 0.8 hectares of land designated *Residential* and zoned Deferred Residential. Based on the existing permitted uses affiliated with these designations, Charis is seeking to expand the list of permitted uses on the subject site to include a Supermarket and a Pharmacy, as well as Retail Commercial Establishment space.

As part of a complete application for this development, a *Commercial Market Impact Study* is required as part of the Official Plan and Zoning By-Law amendments being sought.

We provide the following conclusions as it relates to the appropriateness of the Official Plan and Zoning By-Law amendments being sought and the impact—or lack thereof—of the proposed development on the viability and planned function of the Downtown Core and other commercial areas of the Town.

- From a surrounding land use and access perspective, the subject site is well located for the proposed development. Located at the southern end of the Town, near to significant residential development and a prominent population base, **the proposed development will introduce new retail / service commercial space in an area that currently lacks commercial space.** This will assist in creating a more complete community in southern Collingwood, with an appropriate range and mix of commercial uses. The subject site also benefits from excellent access and exposure, located along Hurontario Street, a major throughfare to core areas of Collingwood.
- The subject site's current Highway Commercial land use designation and zoning permit the commercial development, except for the Supermarket, Pharmacy and Retail Commercial Establishment(s), while the

Residential land use designation and Deferred Residential Zone do not permit any commercial uses. Based on forecast demand, population growth and the lack of these store-types in this area of Collingwood, the introduction of these uses are not anticipated to have impact on the function of other stores and services in the Town.

- As it relates to the tests in **Section 4.4.3.7.2** of the *Town of Collingwood Official Plan*, it is our opinion that the proposed **site-specific amendments being sought satisfies each of these policy test**. Not only does the subject site have excellent characteristics from a market perspective, but there is also anticipated to be a shortfall of retail/service commercial space in the Town by 2032, including Supermarket space, Pharmacy and Personal Care space and General Merchandise space. Furthermore, while the proposed supermarket on the subject site is anticipated to have a modest impact on existing supermarkets in the Town in 2027, this impact is anticipated to fully dissipate by 2032, with store performance levels returning to existing levels. By 2041, even with the introduction of 49,300 square feet of supermarket space on the subject site, store performance levels are anticipated to be nearly 27% higher than existing levels.
- The proposed 10,173 square metres (109,500 square feet) of retail/service commercial space on the subject site is determined to not have any negative impact on the viability and planned function of the Downtown Core and other commercial areas of the Town.
- As it relates to a site-specific amendment to include permissions for Supermarket and Retail Commercial Establishment Space. In our opinion, there will be market demand to support 4,580 square metres (49,300 square feet) of Supermarket space and 3,130 square metres (33,700 square feet) of Retail Commercial Establishment space on the subject site.

1.0

Introduction

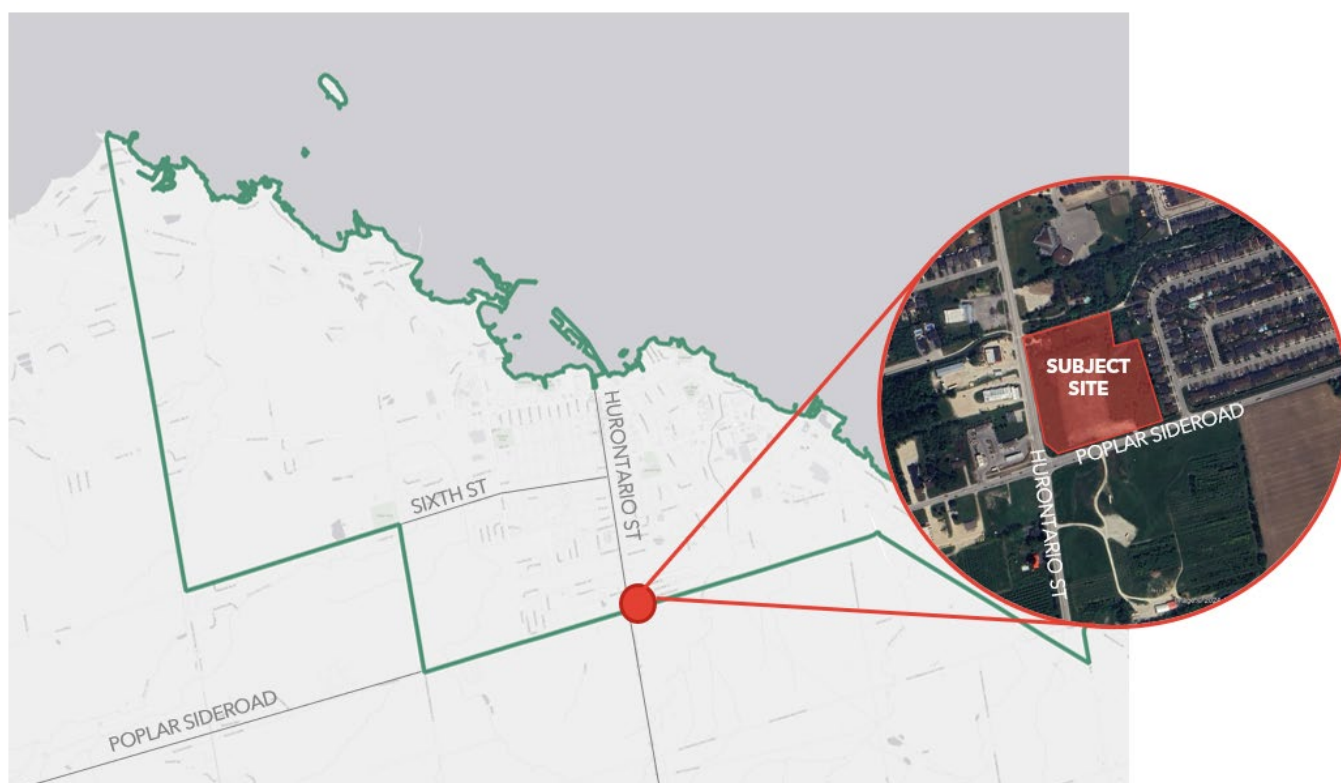
Parcel Economic Inc. ("Parcel") has been retained by Charis Developments Ltd. ("Charis") to prepare a Commercial Market Impact Study for a mixed-use development being proposed at 853 & 869 Hurontario Street and 7564 Poplar Sideroad in the Town of Collingwood, hereafter referred to as the subject site. This Commercial Market Impact Study has been requested by the Town of Collingwood as part of the complete application for the Official Plan Amendment ("OPA") and Zoning By-Law Amendment ("ZBA") for the subject site.

1.1 Site & Context

The subject site is located at the south end of the Town of Collingwood, in Simcoe County and is being proposed for a new mixed-use development including a range of residential, commercial and office uses. The location of the subject site is shown in Figure 1.1.

Figure 1.1

Subject Site Location - Town Wide



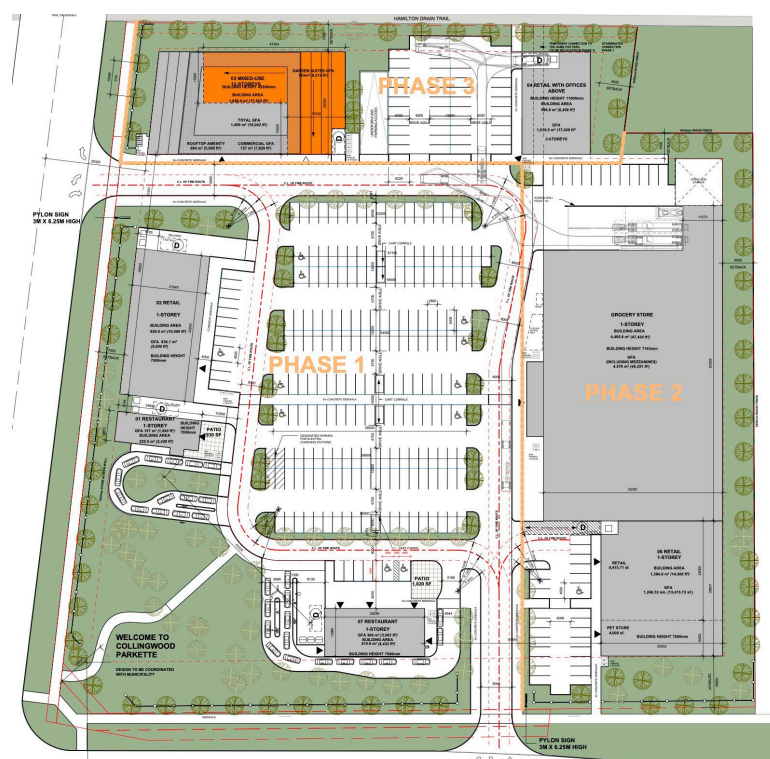
Source: Parcel.

The subject site includes some 3.8 hectares of land at the northeast corner of Hurontario Street and Poplar Sideroad at 853 & 869 Hurontario Street and 7564 Poplar Sideroad. Charis has prepared a concept plan for the subject site. As shown in Figure 1.2, the proposed Gateway Centre Development is planned to include residential space, in addition to 10,173 square metres (approximately 109,500 square feet) of retail/service commercial space and 1,080 square metres (11,627 square feet) of office space above one of the retail/service commercial buildings.

Below is a more specific breakdown of the retail / service commercial space proposed as part of the Gateway Centre.

Figure 1.2

Existing Concept Plan



		Retail GFA
1	Restaurant	226 sm
2	Available Units	929 sm
3	Available Units	848 sm
4	Available Units	1,799 sm
A	Grocery Store	4,576 sm
6	Multi-Unit	1,385 sm
	Pet Valu	372 sm
	Additional Retail Unit	1,013 sm
7	Restaurant	411 sm
Total		10,173 sm

Source: Parcel. Site plan provided by Charis Developments.

As part of the OPA and ZBA for the subject site, Charis is seeking site specific permissions for 49,300 square feet

of Supermarket space (which includes pharmacy space), and 33,700 square feet of Retail Commercial Establishment space, in addition to retail/service commercial uses that are already permitted on the subject site.

1.2 Purpose

This Commercial Market Impact Study has been requested by the Town of Collingwood as part of the OPA and ZBA being sought by Charis for the subject site. The Town of Collingwood in-force Official Plan (January 2019, Office Consolidation), addresses the need for Market Impact Studies in **Section 4.4.3.7.2**, requiring that any proponent seeking to amend the Official Plan or Zoning By-law to permit commercial uses within existing commercial designations should complete a Market Impact Study. Specifically, **Section 4.4.3.7.2**, states:

2. Market Impact Studies demonstrating that the proposed development is justified on the basis 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

Therefore, the primary purpose of this Commercial Market Impact Study is to address the requirements identified in Section 4.4.3.7.2 of the Town's Official Plan and determine if the amount and type of retail/service commercial space being requested is warranted from a market perspective. Further to the requirements in **Section 4.4.3.7.2** of the in-force Official Plan, Parcel circulated a Terms of Reference for a Commercial Market Impact Study to the Town (included in Appendix D). The scope of work in the Terms of Reference was accepted by the Town in an email on May 8, 2024.

1.3 Assumptions

In completing a Commercial Market Impact Study, it is important to identify the key assumptions inherent to the approach undertaken. It is these assumptions that have guided the likely opportunities available within the Town of Collingwood over the short and longer-term planning horizon.

To this end, the following provides a summary of the key assumptions employed as part of this assignment:

Analytical Structure

- As part of the update to the Collingwood Official Plan, a *Growth Management Official Plan Update Discussion Paper* was prepared (July 2020) (the "Discussion Paper"). This Discussion Paper identified the need for nearly 1.2 million square feet of additional retail/service commercial space in the Town to support growth to 2041. To address Policy 4.4.3.7.2 c) of the Town's Official Plan, which relates to the performance of Collingwood's retail sector, Parcel—as confirmed by the Town of Collingwood—has **relied on the retail / service commercial inventory included in the Town's commercial work** completed as part of the Discussion Paper.

However, recognizing the site-specific amendment being requested for the development of the subject site, Parcel has updated the existing inventory of Supermarket & Grocery Store space and Pharmacy & Personal Care Store space in Collingwood. Furthermore, recognizing the importance of the Downtown—both functionally as by way of the Official Plan—Parcel has also updated the inventory of retail / service commercial space on lands designated Downtown Commercial Core. These updates ensure that the

information relied upon is the most current, relevant information and best reflects any changes that have occurred since the height of the COVID-19 Pandemic.

- The year **2023** has been assumed as the **base year** for this analysis, as it represents the most recent full-year period for which updated retail expenditure data is available. The **first full year of operation** (or estimated market entry) for the proposed supermarket and other retail / service commercial uses on the subject site has been assumed to be **2027**.

Other Assumptions

- It is assumed that a reasonable degree of economic stability will prevail in the Province of Ontario, and specifically in the context of the Town of Collingwood, over the course of the development planning horizon identified in this study.
- The statistical inputs relied upon in our analysis are considered sufficiently accurate for the purposes of this analysis. These statistical sources—including available Statistics Canada Census data, municipal information and third-party real estate information—have ultimately informed a number of the key underlying assumptions and inputs utilized in our analysis relating to the performance of commercial real estate in the Town of Collingwood.
- References to the Canadian dollar in this report generally reflect its 2023 value, including the range of supporting statistical inputs and research that have informed our baseline market assumptions. Additional adjustments have also been made to reflect real growth in expenditures for future periods, where applicable.

In the event that material changes occur that could influence the foregoing assumptions, the various analytical assumptions, key research findings and other strategic recommendations contained in this report should be reviewed or updated, accordingly.

1.4 Surrounding Land Uses

The subject site is located at the southern boundary of Collingwood, surrounded by low-density residential neighbourhoods, environmental lands and lands intended for future neighbourhood development and mixed-use buildings. Excepting limited, stand-alone stores and services, there is an absence of retail / service commercial uses in this area of Collingwood.

To the North

Directly north of the subject site are lands 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 facility. Further north at Tracey Lane Boulevard, extending east from Hurontario Road is a new low-density residential subdivision area that extends east to the Train Trail.

To the East

To the east of the subject site is an established residential area comprised of single-detached housing. Further east are vacant lands, designated Future Neighbourhood lands and Environmental Protection Lands that contain a dog park and the Pawplar Community Garden. Land designated Future Neighbourhood are presently proposed to be developed with 64 single-detached housing units.

Further east, beyond Raglan Street is also the western boundary of the Poplar Regional Health and Wellness Village Minister's Zoning Order ("MZO"). The Poplar Regional Health and Wellness Village MZO is anticipated to develop as a mixed-use village that includes a range of uses including mid-to high rise residential dwelling units, parks and open space facilities, retail / service commercial facilities and major institutional uses.

To the South

South of the subject site beyond Poplar Sideroad is the northern edge of the Township of Clearview. Lands to the south are primarily vacant and designated Agricultural and Rural in the Township of Clearview Official Plan.

To the West

Directly west of the subject site are lands currently designated Highway Commercial that presently contain a gas station with a Tim Hortons and stand-alone commercial uses, including a car instruction facility and an auto repair centre. Currently, there no development applications to redevelop existing uses at this location. To the west of the subject site are also a number of new subdivisions, including Mountain Croft and Summit View (Phases 1 & 2) as well as the planned Summit View Phase 3.

Access

Vehicular

Transportation and access are key when evaluating the retail/service commercial potential of a site or area. Vehicular access to the subject site is provided via Poplar Sideroad, which is a County Jurisdiction (Arterial Road), and Hurontario Street, which is an Arterial Road that runs north south along the western edge of the site.

As roadways that facilitate heightened traffic volumes, this will increase exposure and access to future uses on the subject site. Hurontario Street also represents a major throughfare to core areas of Collingwood, including its Downtown. As people—including those who frequent summer and winter properties in Collingwood and beyond—leave the Town, future retail / service commercial uses are also likely to benefit from enhanced visitation by those looking for somewhere to stop prior to their drive.

Along the north end of the subject site is the Hamilton Drain Trail. This trail accommodates cyclists, walkers, hikers and a range of other winter-oriented activities. This trail could increase the likelihood for people to pass or access the commercial uses on the subject site, it also provides for immediate connectivity with neighbouring residential development to the east.

Transit

Currently, the subject lands are not directly served by public transit but can be accessed by existing bus routes that reach Lockhart Road, less than one kilometre north of the subject site. Specifically, the closest bus stop to the subject lands is located at the northeast 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 and the Collingwood Collegiate.

Going forward and as part of the proposed development concept for the subject site, plans and allowances for the looping of Collingwood Public Transit (Colltrans) have also been made to better enable access to residents and visitors. Transit access directly to the subject site will further enhance the amount of traffic using and accessing future retail / service commercial uses on the subject site.

1.5 Planning Context

The following provides a review of the various 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.

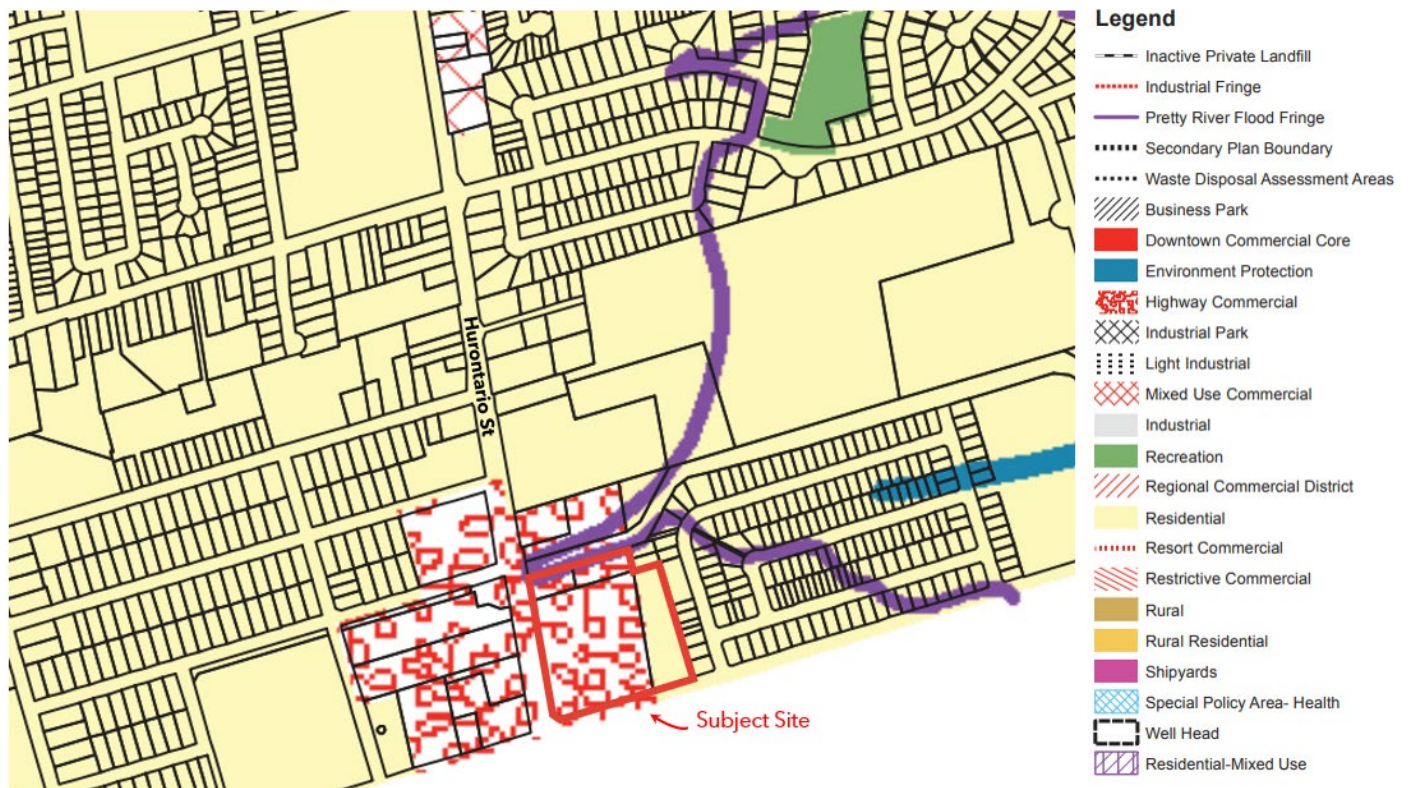
In-Force Town of Collingwood Official Plan

Figure 1.3 shows that the majority (some 3.0 hectares) of land on the subject site is designated *Highway Commercial* in Schedule A of the *Town of Collingwood Official Plan*, with the remaining 0.8 hectares of land designated *Residential*. 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.

Figure 1.3

Collingwood In-Force Official Plan – Schedule A



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

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 but does not come into effect until it is approved by the County of Simcoe. Until then, the in-force Official Plan referenced above will remain in effect.

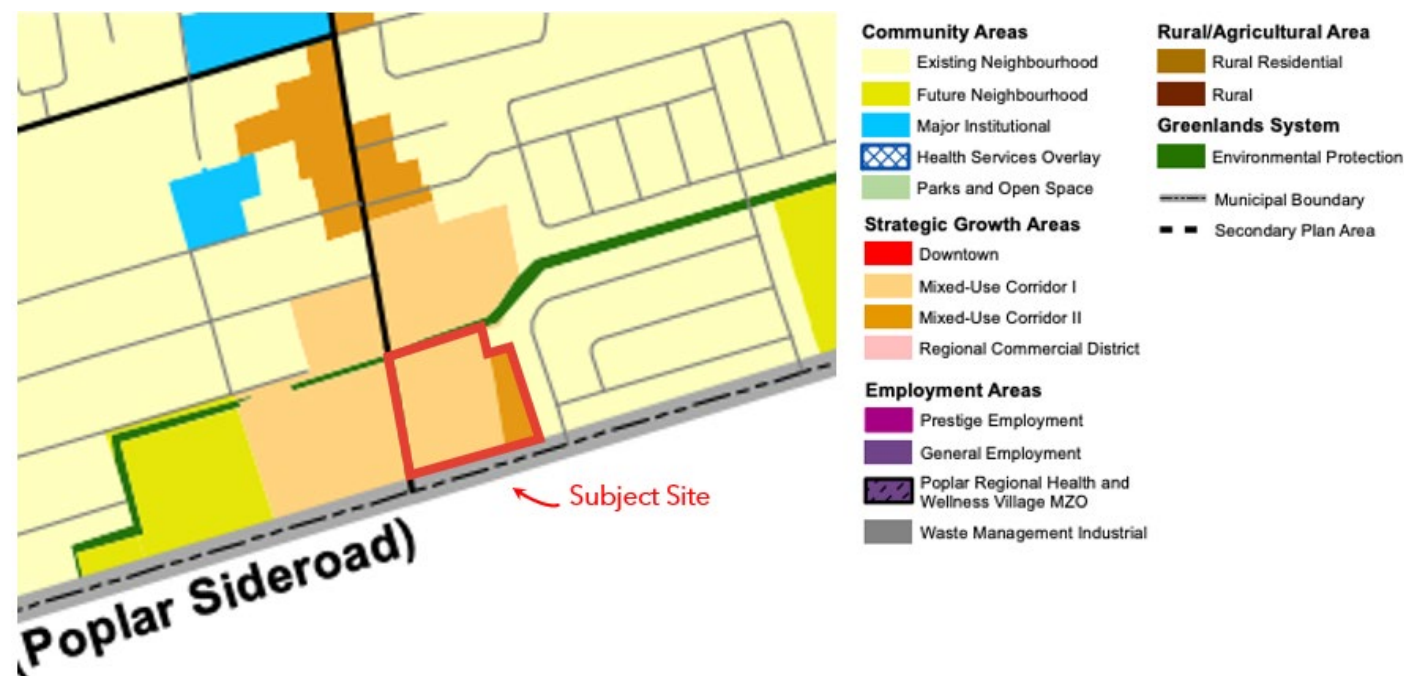
Schedule 2 – Land Use Plan is shown in Figure 1.4 below. As shown, as part of this *New Collingwood Official Plan*, the subject site is largely designated *Mixed Use Corridor I*, with approximately 0.8 hectares of land designated *Mixed-Use Corridor II*.

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

Figure 1.4

New Collingwood Official Plan Schedule 2 – Land Use Plan



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

Collingwood Zoning By-law

Retail/service commercial space anticipated as part of the proposed development is distributed across 3.0 hectares of land currently designated and zoned *Highway Commercial* under the Town's in-force Official Plan and Zoning By-law 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).

The Town of Collingwood Zoning By-law 2010-040 zones the subject site *C5 – Commercial*. This zone includes—among other things—a range of retail / service commercial businesses. However, the existing Zoning By-law does not currently permit a Food Supermarket, a Speciality Food Store and a Pharmacy. 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.

Recognizing some of the uses sought and showing interest in the proposed development, Charis Developments - as part of their Official Plan and Zoning By-law Amendment—is **seeking to expand the list of permitted uses to include a Food Supermarket (including a Pharmacy) and Retail Commercial Establishments.** The remaining uses being contemplated for the subject site are permitted, as of right, within the Highway Commercial land use designation and C5 zone.

Background Context: Collingwood Official Plan Update Discussion Paper (2020)

An update to the Collingwood Official Plan that is currently underway. As part of this update, a *Growth Management Official Plan Update Discussion Paper* was prepared in July 2020 (the “Discussion Paper”). This Discussion Paper identified the need for nearly 1.2 million square feet of additional retail/service commercial space in the Town to support growth to 2041, including the need for approximately 114,000 square feet of supermarket space.

This same study goes on to state that “*the Town of Collingwood will not have a sufficient supply of vacant commercially designated land to meet demand by 2041*”. This statement is based on the supply of vacant commercial land available to accommodate additional retail/service commercial uses in the Town, which includes the subject site. Therefore, the need for additional commercial land is in addition to the potential for retail/service commercial uses on the subject site.

In advance of the work completed as part of the Commercial Market Impact Study for the subject site, it is evident through the Discussion Paper that there is a shortfall of commercial land to support retail / service development in the Town going forward. More specifically, the analysis completed on behalf of the Town indicates that retail/service commercial space **is warranted** on the subject site.

Furthermore, we would note that this paper relies on a 2041 population. Since the completion of this paper, the County of Simcoe has approved Amendment No. 7 to the County of Simcoe Official Plan, which identifies a 2051 population forecast of 42,690 persons in Collingwood, as well as population that could potentially be accommodated within the Poplar Regional Health and Wellness Village MZO. This will create additional demand for retail/service commercial uses in Collingwood.

2.0

Population & Trade Area

Key Findings

- A Trade Area represents the primary geographic area from which retail and service/commercial entities are anticipated to attain most of their customer support.
- Residents in the Town of Collingwood are anticipated to be the primary support of commercial activity. Future need is also based on additional support coming from adjacent municipalities, and from other “inflow” including support from those living in other areas of Simcoe, Ontario and beyond.
- The average per capita income of Trade Area residents is higher than Simcoe County and the Province, at \$50,520 in 2020.
- The Town of Collingwood is forecast to grow to 42,700 persons by 2051. This represents growth of 15,200 persons over the current 2023 population, or growth of 55% over this period.
- Collingwood also has a significant seasonal population, or people who frequent the Town as a year-round destination. Seasonal residents are estimated at approximately 6,130 persons, increasing customer support and demand for a range of retail and services.
- Furthermore, the Discussion Paper estimates that the seasonal population in Collingwood could increase by nearly 5,600 persons by 2041, placing increased pressure on the need for new retail amenities across the Trade Area.

2.1 Trade Area

For the purposes of this assessment, we have delineated a “Trade Area” which represents the primary geographic area from which new retailers and service-provider are expected to generate most of their customer support. The Trade Area is illustrated in Figure 2.1 and includes the entirety of the Town of Collingwood. This Trade Area has served as the focus for the majority of our supporting research program included herein and has represented the primary focus of our analysis with the recognition that it will serve as the core driver, and main supporter, of commercial activity on the subject site and elsewhere in Collingwood.

Figure 2.1

Trade Area



Source: Parcel.

Background Context: Collingwood Official Plan Update Discussion Paper (2020)

We note that the Discussion Paper, the Trade Area included both a Primary Trade Area ("PTA") and a Secondary Trade Area ("STA"). This Trade Area was consistent with the Trade Area utilized in the *Retail Market Opportunity and Impact Analysis Study* undertaken for the Town in 2006.

In the Discussion Paper and the *Retail Market Opportunity and Impact Analysis Study*, the PTA included the Town of Collingwood, while the STA included the Town of Blue Mountains, the Township of Clearview, and Wasaga Beach. This STA was delineated to account for the broader market influence of retail / service commercial facilities near the Town, and the local and regional characteristics of Collingwood relative to other geographies.

This Trade Area was chosen to reflect the likelihood that of at least some expenditure support will be coming from adjacent areas. Furthermore, the previous analysis includes "inflow" visitation from shoppers originating from beyond this immediate area (e.g., Trade Area employees, visitors from other areas of Simcoe County, etc.).

2.2 Population

Permanent Population

The Simcoe County Growth Forecasts and Land Needs Assessment ("Simcoe County LNA") from March 31, 2022 includes population forecasts for the Town of Collingwood. These population forecasts have served as the basis for projecting market demand for retail / service commercial space.

As detailed in Figure 2.2, the Simcoe County LNA forecasts that the Town of Collingwood will grow to some 31,410 persons by 2031, increasing to 37,590 persons by 2041 and 42,690 persons by 2051. Based on a 2023 population of approximately 27,500 persons, this means the Town is anticipated to grow approximately 14% over the next 8-years, to 2031, an average annual growth rate of 1.8% per year.

The Simcoe County LNA forecasts do not include the potential additional population associated with the MZO for the Poplar Regional Health & Wellness Village. Recognizing this proposal to develop a mixed-use community on 130 acres in southeast Collingwood, Parcel has considered anticipated future population and retail / service commercial space as part of our analysis. Currently, the Poplar Regional Health & Wellness Village is in the preliminary stages of its planning applications, meaning the exact nature and form of development is not yet publicly available. However, existing information states that currently the project plans to include some 2,200 purpose-built workforce and supportive residential housing units.

Parcel has relied on this preliminary information to estimate the amount of population that could be accommodated within these housing units. To be conservative, this estimate has assumed that all units will be apartment units. Figure 2.2 details the potential impact of these units, including growth of some 3,300 persons by 2051. Recognizing population growth anticipated across the rest of the Town, this means that the 2051 population could include some 46,000 persons.

Figure 2.2

Trade Area Population, Current & Forecast

	Historical ¹		Current ²		Forecast ²		
	2016	2021	2023	2027	2032	2041	2051
Town of Collingwood	22,400	25,700	27,500	28,700	32,100	37,600	42,700
<i>Average Annual Growth</i>	660	900	300	680	611	510	
<i>Average Annual Growth Rate</i>	2.9%	3.5%	1.1%	2.4%	1.9%	1.4%	
Poplar Regional Health & Wellness Village							3,300

Source: Parcel.

Note: Population in table rounded to nearest 100 persons.

¹ Statistics Canada, adjusted for net under coverage.

² Simcoe County Growth Forecasts and Land Needs Assessment, March 31, 2022, prepared by Hemson Consulting Ltd.

Seasonal Population

The Town of Collingwood is frequented by many people as a seasonal destination. It serves as a gateway to the Town of Blue Mountains, is an attraction for downhill and cross-country skiing and other amenities including mountain biking and proximity to the Niagara Escarpment and Georgian Bay shore.

In turn, it draws tourists to the area year-round, including many who own or frequent a second property in the Town. These people—or seasonal residents—serve a critical function in the local economy. Like year-round residents, they depend on retail / service commercial uses in the Town.

Based on the Town of Collingwood *2024 Development Charges Background Study: Water Treatment Plant*, February 2021, 2024, prepared by Hemson Consulting, the Town was estimated to have a seasonal population of 6,126 persons residing in 2,042 dwelling units in 2023. The *2024 Development Charges Background Study: Water Treatment Plant* does not include forecasts for the seasonal population.

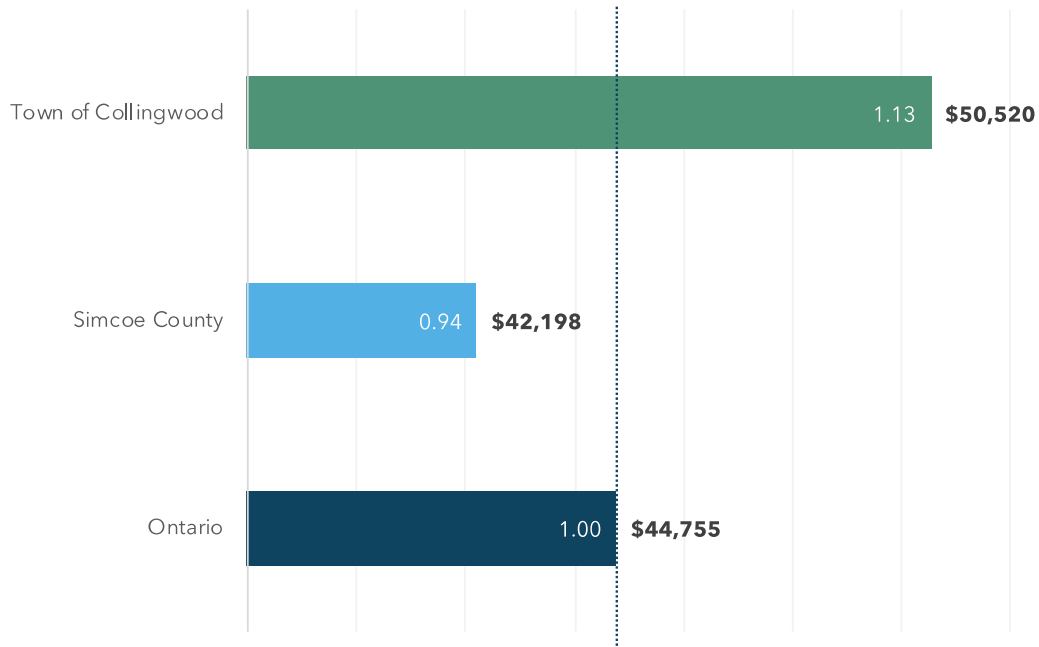
However, in the Discussion Paper, Figure 3-9 estimates that the seasonal population within Collingwood could grow by 5,592 persons between 2016 and 2041, residing in 1,864 dwelling units. For the purpose of our Commercial Market Impact Study for the subject site, when estimating market demand for a Food Supermarket and a Pharmacy, we have treated the seasonal population as “inflow” demand.

2.3 Income

As of the 2021 Census, the average per capita income in the Trade Area—an important input in our retail/service commercial demand assessment to follow—was **above the Region and Province** at \$50,520 per capita.

Existing and future retail/service commercial businesses will rely, at least in part, on capturing spending from Town residents who have a greater ability to spend across all store categories. Furthermore, the Town will continue to benefit from its seasonal population, including individuals who travel to the Town from across Southern Ontario including the Greater Toronto Area.

Figure 2.3
Per Capita Income



Source: Parcel based on the 2021 Census.

3.0

Existing Supply of Retail / Service Commercial Space

Key Findings

- There is approximately **2.39 million** square feet of retail / service commercial space in the Town of Collingwood. This includes some 158,300 square feet of Supermarket space and some 50,600 square feet Pharmacy and Personal Care store space.
- Despite differences in location, each supermarket in Collingwood benefits from a range of customer support, including from Collingwood residents in addition to significant support from those living in other areas of Ontario.
- Despite growth in the local population, there has not been any growth in the supply of supermarket and pharmacy stores.
- In fact, the most recent grocery store development—the Sobeys on Huron Street occurred pre-2005. Similarly, the most recent pharmacy development was in 2016, the Rexall at 25 Huron Street.
- Previous work completed for the Town in 2020, estimated the vacancy rate of the Downtown at 4.2%. Despite an 8% increase in the Downtown's retail / service commercial supply, vacancy has dropped to 2.8%. This highlights the continued strength of the Downtown.
- There are no development applications in Collingwood that anticipate including the same type and scale of retail development being proposed on the subject site.

3.1 Commercial Supply

Recognizing that a supermarket and a pharmacy, are not a permitted use on lands in the C5 Zone—including on the subject site—our analysis herein has centered on market demand for these uses.

As part of this work, Parcel has conducted an inventory of existing Supermarket & Grocery Store space in addition to Pharmacy & Personal Care Store space in Collingwood to determine the extent by which the needs of current and future residents can be met at existing stores in the Trade Area.

As the *C5 - Highway Commercial* zone already permits a range of retail / service commercial uses, as summarized in Section 1.3 of our report, for the retail / service commercial categories that area already permitted on the subject site, we have relied on the inventory included in the Discussion Paper.

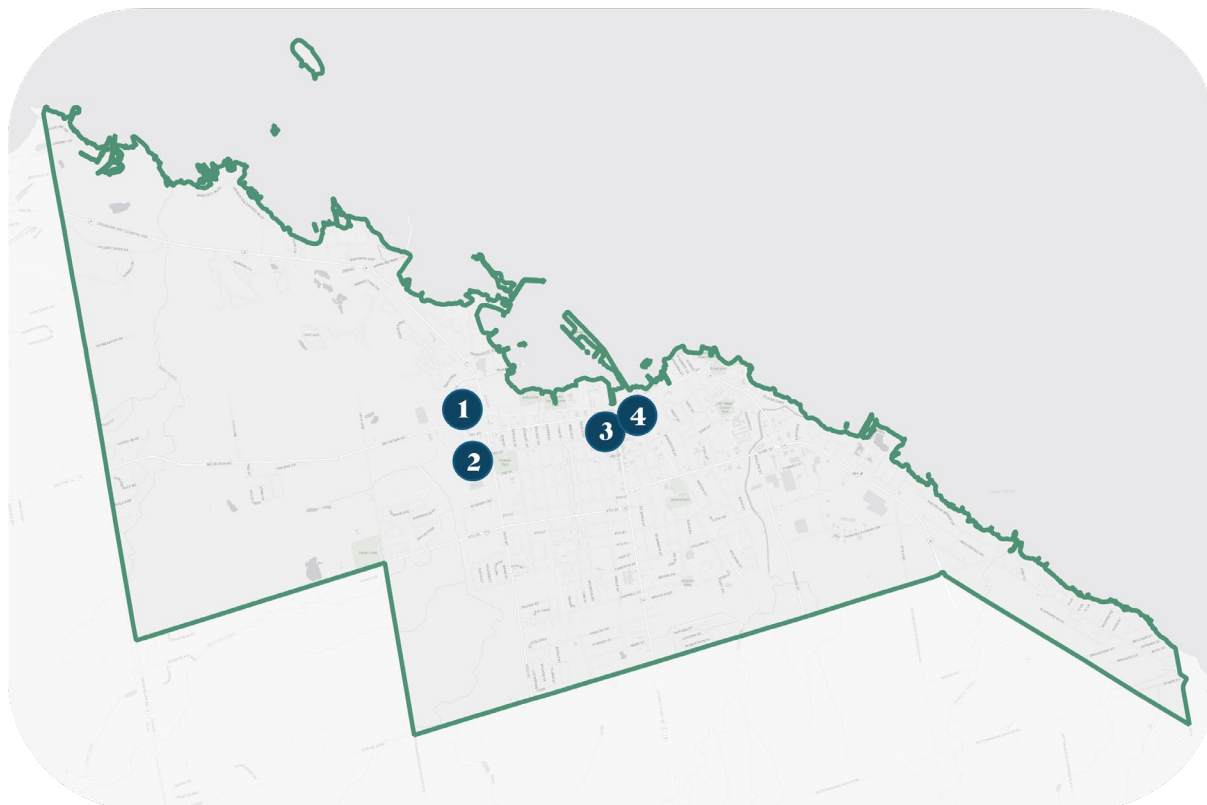
Existing Supermarkets

Currently, the Town of Collingwood includes some **158,300 square feet** of Supermarket & Grocery Store space. Figure 3.1 shows that this space is distributed across four existing supermarkets. Two of these stores—or some 87,600 square feet of space—are in Downtown Collingwood on lands designated Downtown Commercial Core, while the remaining 70,700 square feet of space is located outside the Downtown, on lands designated Regional Commercial District.

As shown in Figure 3.1, there is currently a “gap” in Supermarket & Grocery Store space in the south end of Collingwood to serve these existing and future residents.

Figure 3.1

Existing Supermarket & Grocery Stores in Collingwood



ID	Store Name	Address	Square Footage	Land Use Designation
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	

Source: Parcel based on inventory completed in June 2024. This estimate is slightly different than the total identified in the 2020 Discussion Paper. In reviewing the size of existing stores, Parcel estimated the existing Loblaws at 57,800 square feet. This revision reduces the total supply by 8,200 square feet from that previously identified.

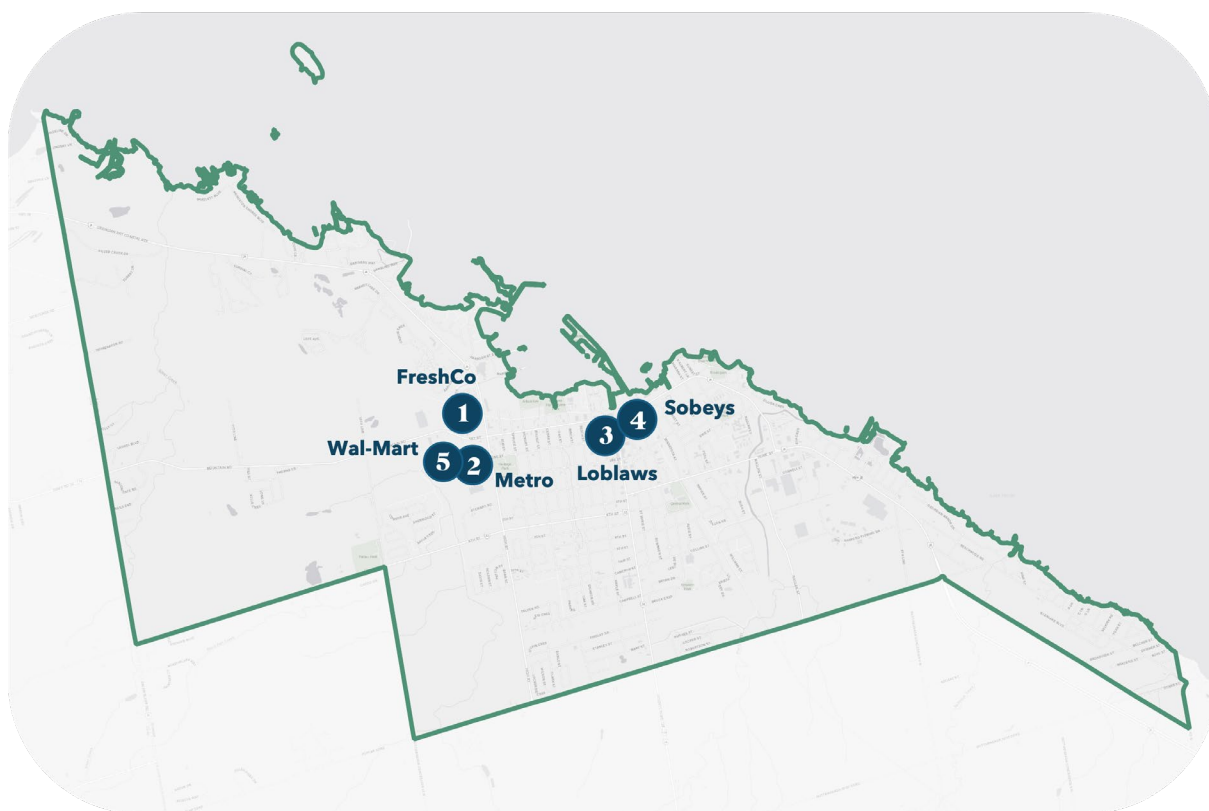
Customer Origins

Customer origins data was used to understand the shopping patterns of Collingwood residents. It has also provided us a more tangible understanding of potential “inflow” to existing supermarkets in the Town, helping inform what type or amount of inflow could be attained at a supermarket or grocery store on the subject site.

For the purposes of this analysis, customer origins data was more specifically used to better understand the current function of existing supermarkets in the Town. Therefore, Parcel completed customer origin for each existing supermarket in Collingwood, as well as Walmart. The location of each is shown in Figure 3.2.

Figure 3.2

Survey Retail Locations



Source: Parcel.

Figure 3.3 details the travel patterns of each supermarket. This includes trips made by Trade Area residents (i.e., those with a common evening location in Collingwood) and trips made by “visitors” (i.e., those with a common evening location outside Collingwood). Figure 3.3 is indicative of total visits to each supermarket, deliberately including repeat visitation to highlight the tendency—or not—of local people to visit one store or another more frequently.

There are several findings that can be gleaned from Figure 3.3:

- Local residents represent a similar share of visitation to each supermarket and grocery store in Collingwood, ranging between 40% and 48% of visitation to each establishment.
- This trend is apparent across all stores, including those located in Downtown Collingwood or at other locations towards the west end of the Town.
- Tied to the common evening location of individuals, inflow from seasonal residents, tourists and other visitors who reside outside the Town of Collingwood comprise a significant share of customer support. Notwithstanding the size, location or type (brand) of store, inflow visitation comprises over 50% of visits at each establishment.

Figure 3.3

Summary of Visitation by Node (Common Evening Location)

	FreshCo	Loblaws	Metro	Sobeys	Walmart	
Collingwood	40%	42%	48%	45%	47%	"Local" Residents
Other Simcoe	27%	23%	21%	29%	24%	
Grey County	15%	11%	12%	9%	15%	Other "Inflow"
All Other	18%	24%	19%	17%	14%	
Total	100%	100%	100%	100%	100%	

Source: Parcel based on mobile analytics data.

To better understand the shopping patterns of Collingwood residents, we have conducted a more granular examination of where Trade Area shoppers are coming from. Shown in Figure 3.4, this includes the share of Trade Area residents (i.e., shoppers) that have a common evening location in east and west Collingwood. For the purpose of this analysis, we have considered Hurontario Street to be the dividing line between east and west Collingwood.

- At a high-level, Figure 3.4 shows that all grocery stores in Collingwood receive a higher share of customer traffic from individuals residing in West Collingwood. While this could be related to larger share of the population in Collingwood West (approximately 61% of the total population), it demonstrates that Collingwood residents have the **propensity to shop at all grocery stores in the Town**, not just the store located nearby to their home. In fact, the Loblaws located in Collingwood West attains more visits from individuals living in Collingwood East, than Sobeys which is actually located in Collingwood East (i.e., closer to these shoppers).

- **Location is evidently not the only factor driving visitation** to grocery supermarkets in Collingwood. Trends identified across existing stores highlight that residents and shoppers can and are willing to travel to various stores, whether this be due to affinity for a specific brand, store type, accessibility or other features.

Figure 3.4

Grocery Store Visitation by Residents of East & West Collingwood



Source: Parcel based on mobile analytics data. Red dot shows the location of the subject site.

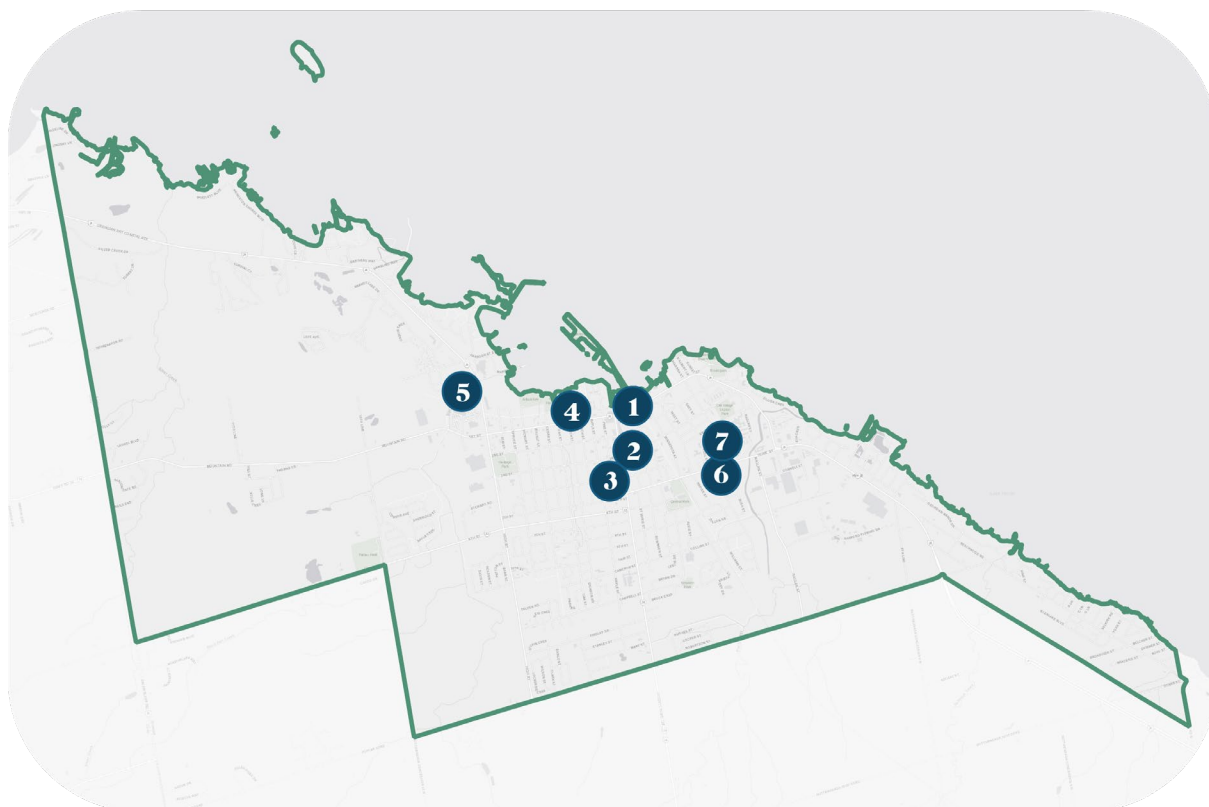
See **Appendix A** for Additional Customer Origins Detail.

Existing Pharmacy & Personal Care Stores

There is some 50,600 square feet of Pharmacy and Personal Care stores in Collingwood presently. This includes some 21,700 square feet of space in Downtown Collingwood on lands designated Downtown Commercial Core, 20,100 square feet of space on lands designated Mixed Use Commercial, 2,000 square feet on lands designated Special Policy Area - Health and some 6,800 square feet on lands designated Highway Commercial. Similar to our observation for supermarkets & grocery stores, there is a notable “gap” in the supply Pharmacy and Personal Care store space in south Collingwood to serve both existing and future residents.

Figure 3.5

Existing Pharmacy & Personal Care Stores in Collingwood



ID	Store Name	Address	Square Footage	Land Use Designation
1	Rexall	1 Huron St	10,700	Downtown Commercial Core
2	Stuart Ellis IDA Pharmacy	169 Hurontario St	8,300	Downtown Commercial Core
3	The Drug Boutique	28 Huron Street	2,700	Downtown Commercial Core
4	Shoppers	175 First St	20,100	Mixed Use Commercial
5	Cranberry Compounding Pharmacy	10 Keith Ave	3,500	Highway Commercial
6	Pharmasave - Mary's	460 Hume St	3,300	Highway Commercial
7	Erie Street Medical Pharmacy	186 Erie St	2,000	Special Policy Area - Health
Total			50,600 SF	

Source: Parcel based on inventory completed in June 2024. Total estimate reflects a 2,000 square foot difference from the 2020 Discussion paper due to the inclusion of an additional pharmacy identified at the Erie Street Medical Building.

It is important to note that the existing supply of Supermarket & Grocery Store space in addition to Pharmacy & Personal Care Store space is consistent with the quantum of space accounted for in these categories under the Discussion Paper prepared on behalf of the Town.

Despite growth in the local population in Collingwood, there has been no growth in the supply of Supermarket space and / or Pharmacy & Personal Care store space since the inventory completed as part of the Town's Official Plan Update Discussion Paper.

Commercial Supply in Downtown Collingwood

To address Policy 4.4.3.7.2 c) of the Town's Official Plan, which relates to the performance of Collingwood's retail sector, Parcel—as confirmed by the Town of Collingwood—has relied on the retail / service commercial inventory included in the Town's commercial work completed as part of the Discussion Paper.

That said, recognizing the importance of the Downtown to the Town's commercial structure and Official Plan more broadly, Parcel has updated the inventory of retail / service commercial space on lands designated Downtown Commercial Core. This update will help ensure that the state and function of the Downtown is most accurately represented, particularly identifying any changes that may have occurred since the height of the COVID-19 Pandemic.

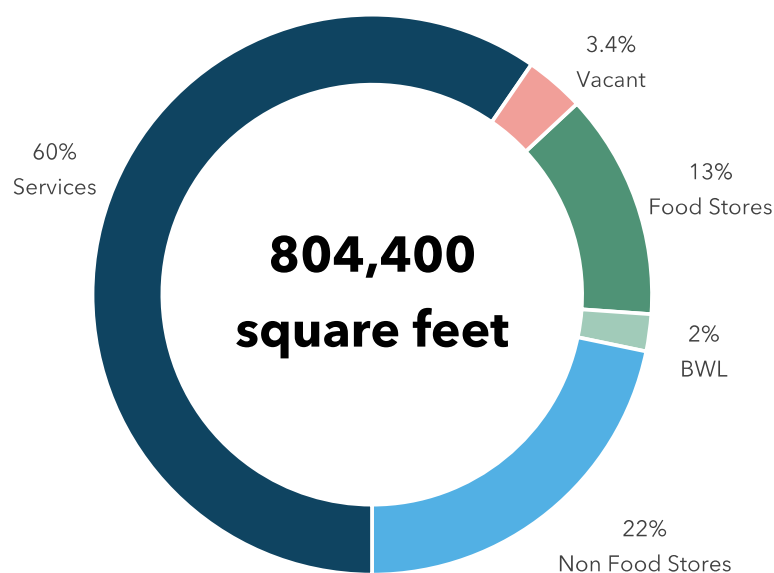
Furthermore, given the importance of the Downtown, this update was completed with the intent of assessing if there have been any changes to market vacancy. At the time the Discussion Paper was prepared, the **vacancy rate of the Downtown Commercial Core area was 4.2%**, slightly above the vacancy rate in the rest of the Town, some 3.6% (excluding vacant space in the Downtown Commercial Core). Updating the inventory of the Downtown is also important to identify if there have been any further changes in the vacancy rate of commercial space in this core area of the Town.

Inventory of Downtown Collingwood

Parcel completed an inventory of existing retail / service commercial space on lands designated Downtown Commercial Core in June 2024. Figure 3.3 shows that there is just over 804,400 square feet of retail / service commercial space in Collingwood currently, the majority (some 60%) of which is comprised of Services. While comprising significantly less space than Services, Non-Food Stores represent the next largest share of space in the Downtown, comprising approximately 22% of all space. Food Stores, including Beer, Wine and Liquor ("BWL"), comprised the smallest share of occupied space in the Downtown Commercial Core.

Figure 3.6

Inventory of Downtown Commercial Core Lands



Source: Parcel.

The inventory completed by Parcel in June 2024, reflects an 6.6% increase in the supply of retail / service commercial space identified across the Downtown Commercial Core lands as part of the Discussion Paper. Growth in the supply of new space is partly associated with newer mixed-use developments, including approximately 27,000 square feet of space included as part of the Monaco Condominiums, located at 1 Hume Street.

Notwithstanding growth in the supply of commercial space located in Downtown Collingwood, the vacancy rate is estimated at just 3.4%. Not only is this vacancy rate below a healthy rate, which typically ranges between 4% and 6%, but it is also below the vacancy reported at the time of the inventory completed for the Discussion Paper (4.2%).

Downtown Collingwood: Retail / Commercial Market Conditions

Downtown Collingwood prevails as the core concentration and centre for retail / service commercial development in the Town. Despite inactivity and pressures tied to the COVID-19 Pandemic since the time of commercial work completed in 2020, Downtown businesses have recovered well.

The Downtown also now boosts a vacancy rate below that reported in 2020, despite growth in the overall supply of space. This suggests that there was capacity for new space to enter the market in recent years and continues to suggest that there may be demand for additional space going forward. It also highlights that the area continues to prevail after the COVID-19 Pandemic. While businesses experienced unprecedented impacts, ongoing closures and new competition through e-commerce, retail/service commercial uses in the Downtown continue to succeed.

Based on this analysis and overview, it is not expected that new retail uses integrated as part of the proposal for the subject lands will have an adverse impact on the Downtown. In fact, it is likely that uses proposed will enhance the supply of retail space per capita while also introducing larger-scale uses that complement rather than compete with diverse service offerings concentrated in the Downtown.

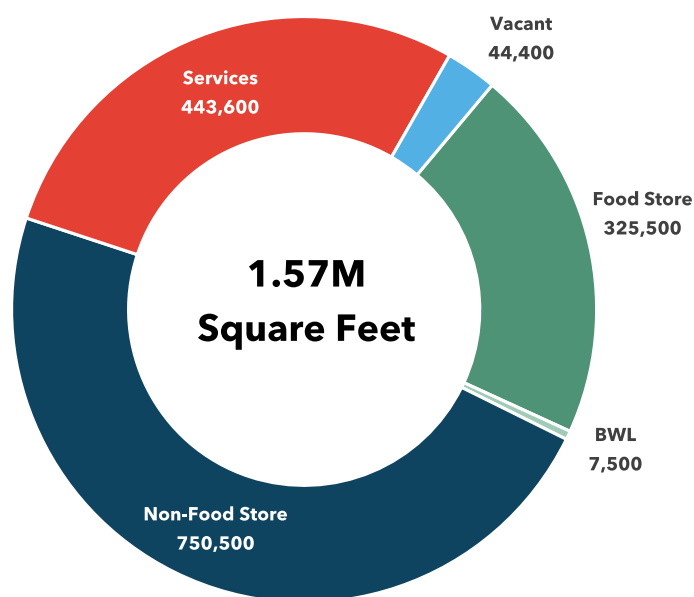
Commercial Supply Elsewhere in Collingwood

The Trade Area—excluding the Downtown—includes approximately **1.57 million square feet of retail / service commercial space** as detailed in Figure 3.7. This includes a significant concentration of Non-Food Store space (48%) due to the prominence of big-box stores located along the First Street Corridor and on lands designated Regional Commercial across western Collingwood.

Relative to the heightened share of Services concentrated in Downtown Collingwood, these larger Food and Non-Food stores provide a key regional-serving function, to seasonal residents, visitors and those residing in other nearby municipalities. Like uses being sought on the subject lands, these store types are important in sustaining and supporting population and employment growth across the Town.

Figure 3.7

Collingwood Retail / Service Commercial Space, Outside the Downtown



Source: Parcel based on commercial inventory detailed in the Town's 2020 Official Plan Update Discussion Paper, inventory based on work completed in January 2022.

Commercial space concentrated outside the Downtown contains a limited supply of vacant space, estimated at **2.8% or some 44,400 square feet** per the Town's Discussion Paper. This vacancy rate is relatively low recognizing that a healthy vacancy typically ranges from 4% to 6% depending on the context and location.

Furthermore, based on a high-level review, it is possible that the vacancy rate reported in January 2020 has since lowered, as many previously identified vacant units are now occupied. For example, at the time of the previous inventory, there was some 27,500 square feet of space identified at 100 Pretty River Parkway South, most of which was vacant due to the recency of building development. Currently, the space at this location is fully leased, hosting a range of tenants including The Golf Club, Anytime Fitness, Sherwood Homes and Collingwood Kitchen and Bath Design Centre.

Low vacancy rates indicates that current and future residents may be underserved by the current supply of retail / service commercial space. This also creates an economic development challenge, as existing businesses in Collingwood could experience difficulty relocating within the Town.

Collingwood has also increased the supply of retail/service commercial space since the time of the 2020 inventory. This space is performing well, validating the continued demand and need for retail space across Collingwood more generally. A newer retail plaza located at 151 & 175 First Street for example, is fully occupied, including a range of tenants such as a Shoppers Drug Mart, Cobs Bread, Popeye's and other limited food service restaurants.

3.2 Potential New Commercial Development

Proposed Commercial Development

Parcel has reviewed planned commercial developments in the Town of Collingwood, with particular attention to any proposals that intend—or could—introduce a new Supermarket & Grocery Store space or Pharmacy & Personal Care Store space. Based on data accessed through the Town of Collingwood in June 2024, there are eight proposals that plan to include some retail / service commercial space as part of their application.

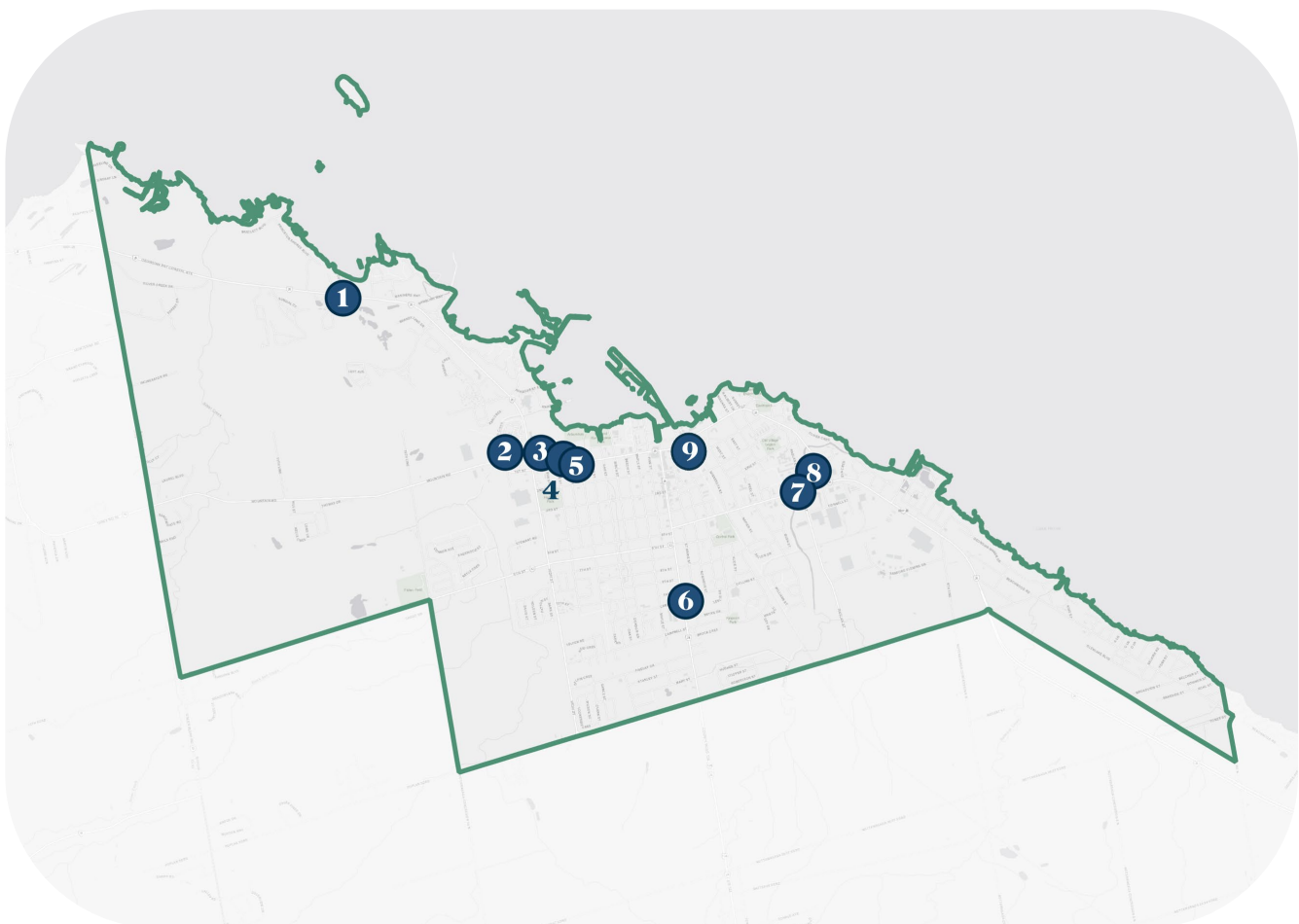
Figure 3.5 shows the location and space included as part of each proposal. As detailed, there are no plans for major commercial developments in Collingwood currently. There are also no proposals seeking to integrate a new Supermarket, Pharmacy or Personal Care stores as part of their application. In fact, it is unlikely that the space anticipated as part of any of the applications would be large enough to host these uses.

There are no applications that contemplate including retail / service commercial space like the scale and type of uses being sought on the subject site.

These nine applications include a total of some 84,690 square feet of new gross floor area (GFA). A number of existing applications propose an increase to an existing store in the Town, while many are smaller in scale and are positioned to host an office or limited-service use.

Figure 3.8

Commercial Proposals in the Town of Collingwood



	Address	SF	Details of Proposal
1	11555 Highway 26 West	5,520	Multi-unit commercial building
2	55 Mountain	29,600	Expansion to existing Canadian Tire
3	26 Elm	2,380	Conversion of existing building to a restaurant and accessory brewery
4	415 First	6,510	Addition to Beer store
5	380 First	8,610	Office building for local firm
6	629 Hurontario	11,310	Dental office
7	498 Hume	5,110	Restaurant Addition
8	298 Pretty River	4,280	New car wash
9	31 Huron St	11,370	Multi-unit at grade of mixed-use development

Source: Parcel based on the Town of Collingwood Development Application data, accessed June 2024.

Poplar Health & Wellness Village

As previously mentioned, there is an MZO for the Poplar Health & Wellness Village, east of the subject site. This project is still in the preliminary stages of its planning applications, meaning the residential population and commercial component has not yet been finalized. Further, as noted in Section 2.2, the population accommodated in the Poplar Health & Wellness Village would be in addition to the 2051 forecasts allocated to Collingwood in the Simcoe County Official Plan. There are no specifics on the amount of retail/service commercial space that is anticipated within the Poplar Health & Wellness Village. The only indication is May 31, 2022, presentation at an Open House that identifies as much as 1 million square feet of medical, health and wellness services. However, the specific distribution space and timing of development is not known at this time.

3.3 Summary of Existing Supply

Recognizing the proposed development of the subject site, there are a number of findings that can be gleaned from the existing commercial supply in Collingwood:

- The supply of commercial space in Downtown Collingwood has increased since the inventory completed as part of the Town's Discussion Paper. Notwithstanding growth in space, the vacancy rate has declined to approximately 3.4%, which is below a healthy vacancy rate that typically ranges between 4% and 6%. This suggests that Downtown Collingwood continues to perform well, and that there may be **demand for additional space** going forward.

- The Town of Collingwood includes some **158,300 square feet** of Supermarket & Grocery Store space. This estimate is slightly different than the total Supermarket estimate included in the Discussion Paper. Parcel—in reference to information from Choice REIT—has estimated the size of the existing Loblaws to be 57,800 square feet. This revision reduces the total supply by 8,200 square feet from the 2020 Discussion Paper.
- Based on our review of customer origins to existing supermarkets in the Town, it appears location is not the only factor driving visitation. Rather, Collingwood residents have the propensity to shop at all grocery stores within the Town, not just the store located nearest to their home. This means that if the supply or accessibility of a store were to change, it is unlikely to impact the level of service provided to surrounding residents.
- There is also some **50,600 square feet** of Pharmacy and Personal Care stores within the Town. Despite growth in population, there has been no increase in the supply of supermarket or pharmacy and personal care store space since the last inventory was compared as part of the Discussion Paper in 2020. The 2,000 square foot difference is due to the inclusion of an additional pharmacy in our analysis, located in the Erie Street Medical Building.
- There are no applications that contemplate including retail / service commercial space like the scale and **type** of uses being sought on the subject site.
- Existing development applications involving retail/service commercial space combine to include nearly 84,700 square feet of new retail/service commercial GFA. Unlike the proposed development of the subject site, the majority of space proposed as part of other existing applications is divided into smaller-scale commercial retail units, positioned to host office or other limited service uses.
- The proposed Poplar Health & Wellness Village anticipates the development of retail / service commercial space. At the present time, it is not clear if this space will serve the local population and employees accommodated in this village or if it will be more regional serving. That being said, the retail / service commercial space proposed on the subject site has the potential to co-exist with space ultimately accommodated in the Poplar Health & Wellness Village.

4.0

Market Context

Key Findings

- Forecast demand could support between 35,000 to 45,000 square feet of new Supermarket space in Collingwood by 2032, increasing to between 74,000 to 95,000 square feet by 2041.
- Forecast demand could support approximately 13,000 to 15,000 square feet of Pharmacy and Personal Care store space by 2032, increasing to between 26,000 and 32,000 square feet by 2041.
- Based on the methodology utilized in the Discussion Paper, permanent and seasonal residents, in addition to tourism, is anticipated to generate support for up to 352,800 square feet of other general retail uses (i.e., Other Food and Non-Food Store space) and some 282,100 square feet of additional Services space by 2041.
- In total, there is demand for between 734,900 and 761,900 square feet of additional retail/service commercial space in Collingwood by 2041.
- Approximately 84,700 square feet of this space could be accommodated within existing applications in the development pipeline. The proposed development of the subject lands would account for an additional 11% of this demand.
- Based on existing applications in the pipeline and the subject site, there would still be demand for upwards of **540,700 square feet** of new space by 2041. This will support development on other vacant and underutilized commercial sites located throughout the Town, as well as within the Poplar Heath & Wellness Village.

4.1 Market Demand for Supermarkets & Pharmacy & Personal Care Store Space

Relying on research and other statistical inputs gathered, we have undertaken a detailed expenditure-based market demand analysis for Supermarket and Pharmacy & Personal Care space, specific to the Town of Collingwood. This detailed analysis has been conducted for these categories, as a Supermarket and Pharmacy are not currently permitted in the C5 Zone.

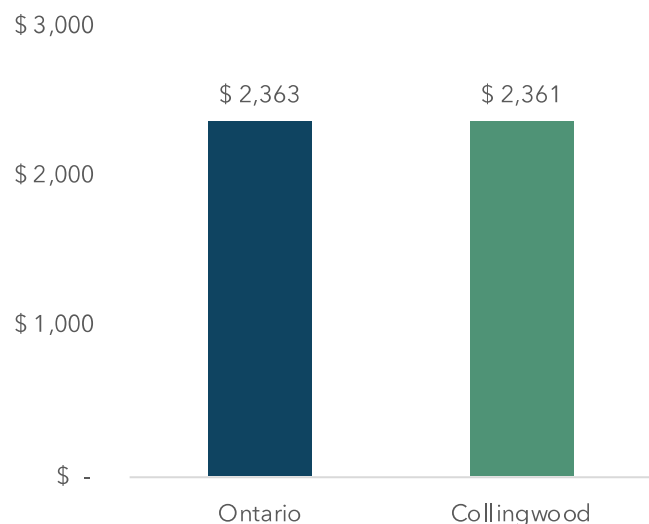
Supermarkets & Grocery Stores

The average Ontarian spent nearly \$2,400 annually at Supermarkets and Grocery stores in 2023. Food spending at Supermarkets and Grocery stores is relatively inelastic, meaning that spending does not necessarily rise significantly with income. This is likely due, in part, because at a certain point higher income individuals spend more money on food services (e.g., restaurants) as opposed to spending more at the grocery store.

Recognizing Trade Area residents' per capita income relationship to the provincial average (as illustrated previously in Figure 2.4) and based on a regression analysis of Ontario household spending by income quintile, we have adjusted Trade Area residents' Supermarkets and Grocery store spending per person as shown in Figure 6.1.

Figure 4.1

Supermarket & Grocery Store Spending per Capita



Source: Parcel, based on the population of Collingwood, 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 at 3.0%.**

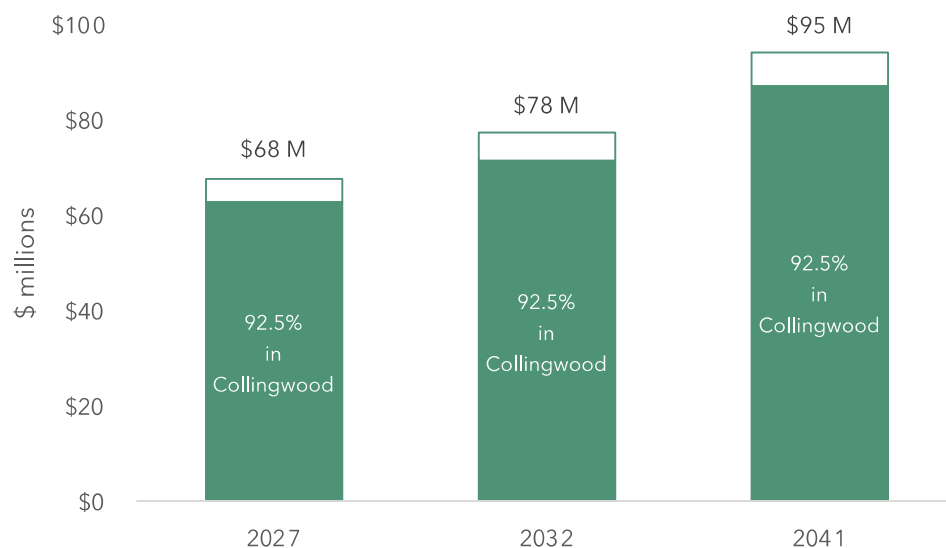
Based on the food retail spending in Figure 4.1 and the 2023 population in Figure 2.2, we estimate that current permanent residents in Collingwood spent approximately **\$64.2 million** dollars at supermarket and grocery stores in 2023 (excluding restaurants and takeout), approximately \$57.7 million (90%) of which was spent at Supermarket and Grocery stores in Collingwood.

The portion of supermarket and grocery store expenditures anticipated to occur in the Town of Collingwood—some 90%—is based on the work completed as part of the Town's Discussion Paper. This work estimated that only 10% of permanent resident' supermarket and grocery store spending was made at locations outside of the Town.

Figure 4.2 forecasts the expected growth in retail expenditures across Collingwood to 2041. This forecast is based on growth in the permanent population only and does not account for additional demand generated from the Town's seasonal population or other tourism. As shown in Figure 4.2, we have assumed that going forward, the Town will capture 92.5% of residents Supermarket and Grocery store spending, an increase from the 90% utilized in the Town's Discussion Paper. The slightly higher capture rate is due to the introduction of a new supermarket on the subject site in 2027.

Figure 4.2

Forecast Supermarket & Grocery Store Spending



Source: Parcel, based on population forecasts in Figure 2.2, food retail spending per capita in Figure 4.1, and estimations of Trade Area capture patterns and inflow rates as found in the 2020 Official Plan Update Discussion Paper completed for the Town.

As mentioned previously, Parcel analyzed customer origins to existing grocery stores in Collingwood to better understand residents shopping patterns. This assessment was also undertaken to understand the impact of inflow (i.e., customers who live outside the Town of Collingwood) on existing supermarkets and grocery stores in the area. As noted earlier in Figure 3.3, approximately 55% of visits to the four supermarket locations in Collingwood were from people residing outside of the Trade Area. We note that in the analysis in the Town's Discussion Paper utilized a 30% inflow for the permanent population in the Town, plus added a factor to account for additional demand from the seasonal population and a tourism factor. When you factor in demand from seasonal residents and tourists, the inflow factor utilized in the Town's Discussion Paper is approximately 52% and consistent with the inflow factor used in our analysis. Therefore, we consider the inflow factor used in our analysis to be reasonable.

Based on this analysis, we estimate that existing supermarkets in Collingwood are currently achieving an average sales performance of approximately \$810 per square foot. To determine space requirements based on retail expenditures, Parcel has relied on expected store performance levels, which range from \$700 per square foot to \$900 per square foot. These performance levels reflect industry averages, the type and quantity of existing stores, and are also adjusted to reflect Collingwood's role in the broader context of Ontario.

Based on these sales performance levels, Parcel has then made minor changes to captures rates and inflow to estimate the total amount of additional supermarket and grocery store space that could be supported in Collingwood over the next decade. As detailed above, a new store is estimated to increase the capture rate to 92.5% in 2027 and beyond, as it will provide additional shopping options to Collingwood residents.

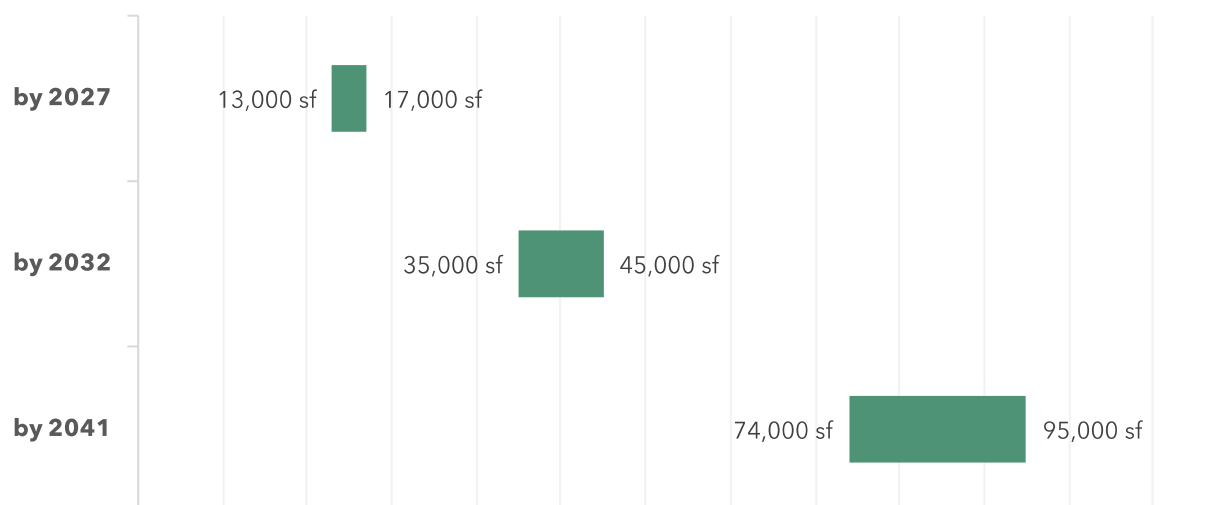
Parcel has then considered the impact of a new grocery store on potential inflow sales accrued across Trade Area grocery stores. To this end, it has been estimated that inflow will remain constant at 55% for existing stores in the Trade Area.

For the new supermarket proposed on the subject site, we have utilized a slightly higher 60% inflow. This slightly higher inflow recognizes the location of the new store at the south end of the Trade Area, in proximity to neighbouring municipalities such as Clearview. The 60% inflow assumed for the supermarket at the subject site is consistent with inflow at the existing FreshCo (60% inflow) and Loblaws (58% inflow).

Based on this analysis, we estimate that between **35,000 and 45,000 square feet** of additional supermarket and grocery store space could be supported in Collingwood by 2032, increasing to between **74,000 and 95,000 square feet** by 2041 as detailed in Figure 4.3.¹

Figure 4.3

Additional Supermarket & Grocery Store Space



Source: Parcel, based on Figure 4.2 and average food store sales of between \$700 and \$900 per square foot.

¹ Warranted Supermarket GFA excludes space associated with loading areas (either open or enclosed).

Impact Assessment

Based on the analysis detailed above, the amount of supermarket space warranted in 2027 is less than the amount of supermarket space proposed on the subject site. Therefore, Parcel has also prepared a sales impact (transfer) analysis. This analysis has been prepared to better understand the potential impact that a new supermarket on the subject site—some 49,300 square feet (4,576 square metres)— may have on existing supermarkets operating in the Trade Area.

- Based on this analysis, it has been estimated that the introduction of a new 49,300 square foot supermarket in 2027 will reduce the store performance of existing stores in 2027. Specifically, it is estimated that the new store will reduce existing performance levels by 10.3% in 2027. This impact is expected to be short-lived. By 2032, sales performance levels are forecast to have fully recovered.
- Specifically, by 2032, our analysis indicates that the introduction and short-term impact of the new 49,300 square foot store on the subject site in 2027 will be reconciled. The sales performance levels of existing stores are forecast to have increased some 2.5% from their current 2023 levels. By 2041, existing sales performance levels are expected to have increased even further, forecast at \$980 per square foot or over 27% above existing performance levels.

Furthermore, it is our opinion that this outcome represents a reasonable scenario or impact assessment. That said, we have also examined the potential impact of the new grocery store on the subject site to existing stores should a different capture rate be attained over the forecast period.

Figure 4.4 details the estimated impact based on alternative capture rates. As detailed, in the worst-case scenario—where the new store has no impact to the Trade Area’s existing capture rate—existing sales performance levels are forecast to decline by 13.4%, with full recovery not anticipated until after 2032. In our opinion, this scenario is not reasonable, as a new 49,300 square foot supermarket, in addition to existing supermarket space in the Trade Area, is anticipated to provide Trade Area residents with additional shopping opportunities and increase expenditures within the Town.

Figure 4.4

Potential Impact of a New Grocery Store on the Subject Site

	Impact of New Store on Sales Capture			
	No Change	Amounting Increase		
Capture Rate	90%	92.5%	95.0%	97.5%
Amounting Impact on Existing Sales				
...in 2028	-13.4%	-10.3%	-7.2%	-4.1%
...in 2033	-1.1%	2.5%	6.0%	9.5%

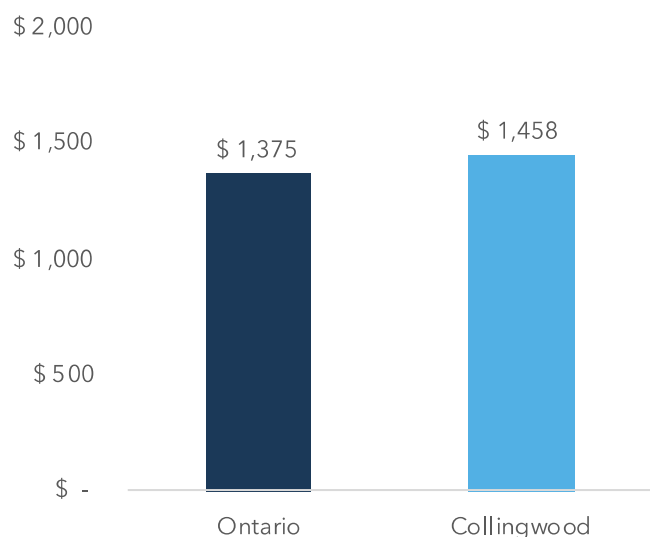
Pharmacy & Personal Care Store Space

The average Ontarian spends nearly \$1,400 annually at Pharmacy and Personal Care stores. Pharmacy and personal care store spending—like most Non-Food store spending is relatively elastic, meaning that spending often rises with income. Current and future health and personal care stores in Collingwood will benefit from the higher spending capacities of people living in the Trade Area.

Recognizing Trade Area residents' per capita income relationship to the provincial average (as illustrated previously in Figure 2.4) and based on a regression analysis of Ontario household spending by income quintile, we have adjusted Trade Area residents' pharmacy and personal care store spending per person as shown in Figure 4.4.

Figure 4.5

Pharmacy & Personal Care Store Spending per Capita



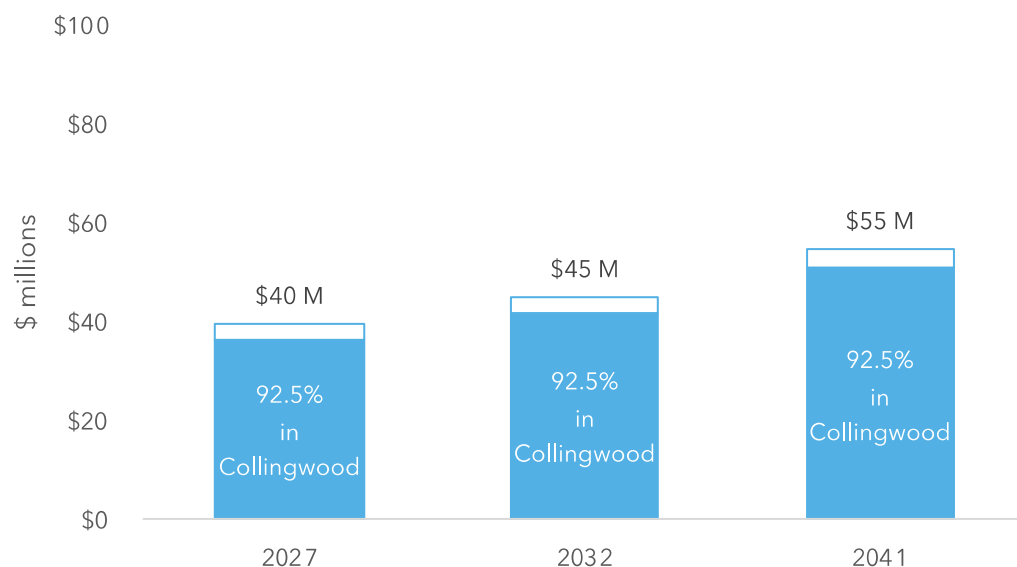
Source: Parcel, based on the population of Collingwood, Statistics Canada Retail Trade (20-10-0008-01) and Household Spending by Household Income Quintile (11-10-0223-01) data. **Includes an adjustment for e-commerce spending at 7.0%.**

Based on the food retail spending in Figure 4.4 and the 2023 population in Figure 2.2, we estimate that current permanent residents in Collingwood spent approximately **\$37.3 million** dollars at pharmacy and personal care stores in 2023, approximately \$33.6 million (90%) of which was spent at pharmacy and personal care stores in Collingwood. Consistent with our supermarket analysis, we have assumed that a new pharmacy and personal care store on the subject site will increase expenditures made by Collingwood residents within the Trade Area. For the

purposes of this analysis, we have assumed that pharmacy and personal care stores in the Trade Area will capture 92.5% of Trade Area resident expenditures in this store category in 2027.

Figure 4.6

Forecast Pharmacy & Personal Care Store Spending



Source: Parcel, based on population forecasts in Figure 2.2, food retail spending per capita in Figure 4.1, and estimations of Trade Area capture patterns and inflow rates as found in the 2020 Official Plan Update Discussion Paper completed for the Town.

We have estimated inflow of 40% for both existing and new pharmacy and personal care stores in Collingwood. This assumed inflow is lower than the 55% inflow identified in the mobile analytics data for supermarkets. It is also generally consistent with the work completed as part of the Town's Discussion Paper, which assumes that 42% of new pharmacy and personal care store space in the Town will be supported by inflow, seasonal residents and tourists.²

Based on this analysis, we estimate that existing pharmacy and personal care stores in Collingwood are currently achieving an average sales performance of approximately \$1,150 per square foot. To determine space requirements based on retail expenditures, Parcel has relied on expected store performance levels, which range

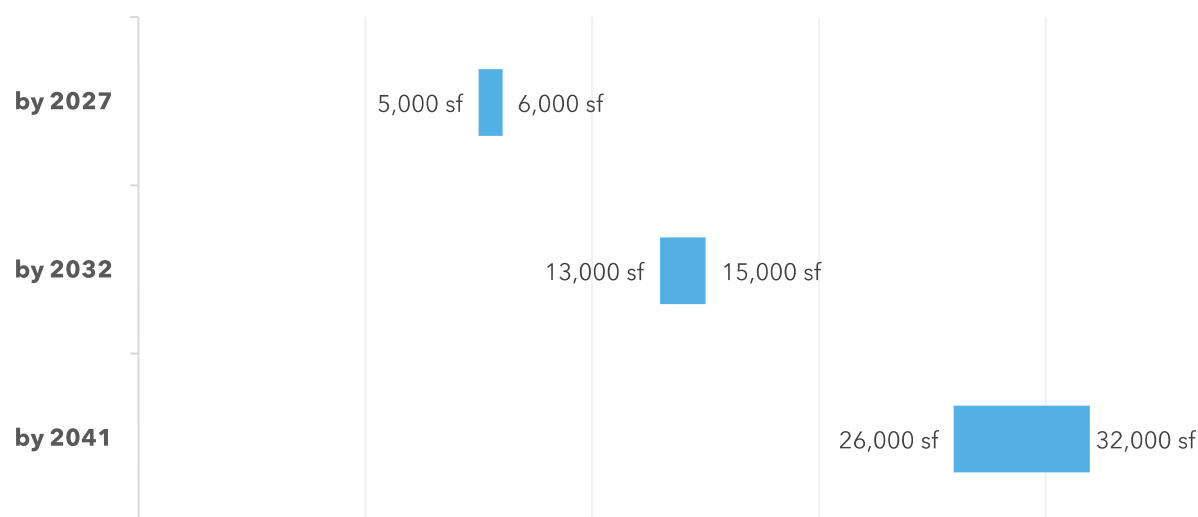
² Figure 6-9 in the urbanMetrics analysis assumes 10% inflow for space supported by permanent residents. The urbanMetrics analysis then assumes seasonal residents will support 2,600 square feet of space by 2031 and incorporates a tourism factor of 30%. In total this results in the warranted need for 21,482 square feet by 2031, with inflow, seasonal population and tourists warranting 8,950 square feet, or 42% of space.

from \$900 per square foot to \$1,100 per square foot. These performance levels reflect industry averages, the type and quantity of existing stores, and are also adjusted to reflect Collingwood's role in the broader context of Ontario.

If and capture rates increase to 92.5% and inflow rates remain constant over the forecast period, we estimate that between **13,000 and 15,000 square feet** of additional pharmacy and personal care store space could be supported in Collingwood over the next decade, increasing to between **26,000 and 32,000 square feet** by 2041 as detailed in Figure 4.6.

Figure 4.7

Additional Pharmacy & Personal Care Store Space



Source: Parcel, based on Figure 4.2 and average food store sales of between \$900 and \$1,100 per square foot.

Impact Assessment

It is our understanding that a pharmacy and personal care store is currently not a tenant that has expressed interest in commercial space on the subject site. However, our analysis demonstrates that as much as 6,000 square feet of space could be accommodated on the subject site in 2027 with no impact on existing stores in the Trade Area. This increases to as much as 15,000 square feet by 2032 with no sales transfers from existing stores in the Trade Area.

Summary of Demand for Supermarket & Pharmacies

Figure 4.7 summarizes the results of our warranted space calculations above. This includes anticipated demand for additional supermarket and pharmacy & personal care store space in Collingwood over the forecast period to 2041. As identified, there will be demand for as much as 45,000 square feet of supermarket space by 2032, increasing to as much as 95,000 square feet by 2041. There is also identified to be demand for as much as 15,000 square feet of pharmacy and personal care store space over the next decade, increasing to as much as 32,000 square feet by 2041. This amount of space is sufficient to justify the amount of space proposed on the subject site, with residual space to be accommodated at other locations throughout the Town, including in the Poplar Health and Wellness Village.

Figure 4.8
Supermarket & Pharmacy Warranted Space Estimates

	2027		2032		2041	
	Low	High	Low	High	Low	High
Supermarket & Grocery Stores	13,000 sf	17,000 sf	35,000 sf	45,000 sf	74,000 sf	95,000 sf
Pharmacy & Personal Care Stores	5,000 sf	6,000 sf	13,000 sf	15,000 sf	26,000 sf	32,000 sf

Source: Parcel based on detailed market demand analysis tables above and detailed in the Appendix.

See **Appendix B** for Detailed Expenditure Analysis

4.2 Market Demand for Other Food & Non-Food Retail & Services

Parcel has completed a per capita analysis to determine the market demand and need for select Food, Non-Food Retail and Services space in Collingwood going forward. It is important to note that the majority of the subject site is designated and zoned *Highway Commercial*, and already permits various retail / service commercial uses. Therefore, many of the uses being considered for the subject site, including general merchandise stores, miscellaneous retailers and food services and drinking places are already permitted on the subject site as of right.

Furthermore, the Town's Discussion Paper demonstrated the need for nearly 1.2 million square feet of additional retail/service commercial space in the Town to support growth to 2041 and a shortfall of vacant commercial lands to accommodate this forecast growth.

As such, it has been determined based on conversations and confirmation with the Town, that replicating the analysis contained in the Discussion Paper, based on the updated population growth estimates (Figure 2.2 & Figure 2.3), is sufficient for forecasting demand for other Food Stores, Non Food Stores and Services over the forecast period.

Per Capita Methodology: Official Plan Update

The per capita methodology included herein is based on the *Official Plan Update Discussion Paper*. This includes the retail inventory by store type completed in January 2020, the typical space per capita ratios, and the study area capture rates and inflow rates contained in Figure 6-9 and 6-10 of the Discussion Paper. Similar to this analysis, demand has been forecast based on anticipated growth in population and the number of seasonal residents in Collingwood over 5-year increments, beginning in 2027 the first full year of operation at the subject site.

Other Food & Non-Food Retail

Recognizing the inventory summarized in Section 3.0—inclusive of the work completed as part of Discussion Paper and our updates to the Downtown inventory, we have forecast demand for Other Food and Other Non-Food Retail space in Collingwood going forward. This includes Speciality Food, Beer, Wine & Liquor Stores and all Non-Food stores, excepting Health and Personal Care stores which was calculated separately, above.

Forecasted demand has been based on population growth only. This means that future space estimates reflect net new space required in Collingwood, notwithstanding existing space in the Town.

Significant population growth anticipated in the Trade Area over the short and longer-term is anticipated to generate demand for a range of other Food and Non-Food Stores, consistent with work completed as part of the Discussion Paper.

Over the next decade, it is estimated that growth in the Town's permanent population will warrant demand for nearly 96,400 square feet of Other Food and Non-Food Store space. This could increase to as much as 211,800 square feet by 2041.

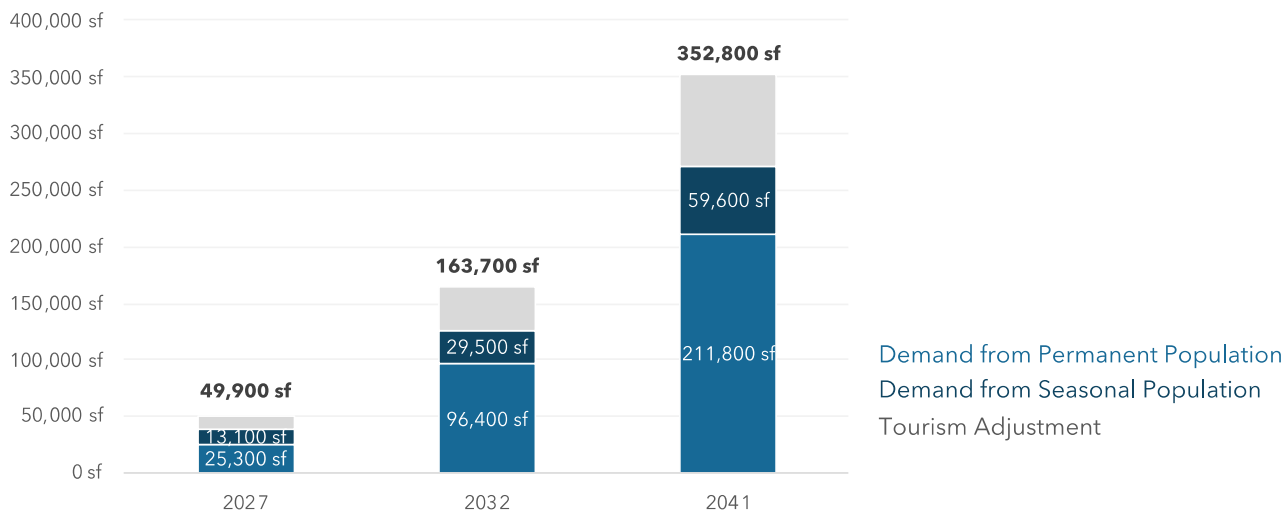
In addition to demand from permanent residents, additional space will be needed in response to demand from the Town's growing seasonal population. In estimating demand from seasonal residents, we have utilized seasonal demand forecasts contained in the Discussion Paper. Based on these forecasts, seasonal residents will warrant an additional 29,500 square feet of Other Food and Non-Food Store space in by 2032, and some 59,600 square feet by 2041.

The analysis completed as part of the Discussion Paper applies a tourism factor of 30% to account for the impact of the Town's four-season industry, the nature of the current inventory and potential forthcoming changes to the retail industry over the longer-term. For consistency, the same assumption has been applied in this analysis.

Figure 4.9 shows the increased amount of space warranted as a result of this adjustment. Specifically, by 2032, it is estimated that there could be demand for as much as **163,700 square feet** of Other Food and Non-Food Store Space, increasing to **352,800 square feet** in 2041.

Figure 4.9

Total Demand for Other Food and Non-Food Stores



Source: Parcel based on the analysis included in the *Official Plan Update Discussion Paper*.

Services

Parcel has also forecast demand for Services space using a per capita approach. This is similarly based on the inventory summarized in Section 3.0. Like above, forecasted demand for Service space has been based on additional population growth only.

In applying the same approach as utilized for the per capita analysis above, it is estimated that over the next decade, by 2032, permanent population growth will generate demand for some 70,700 square feet of new Service space. This could increase to over 155,000 square feet by 2041.

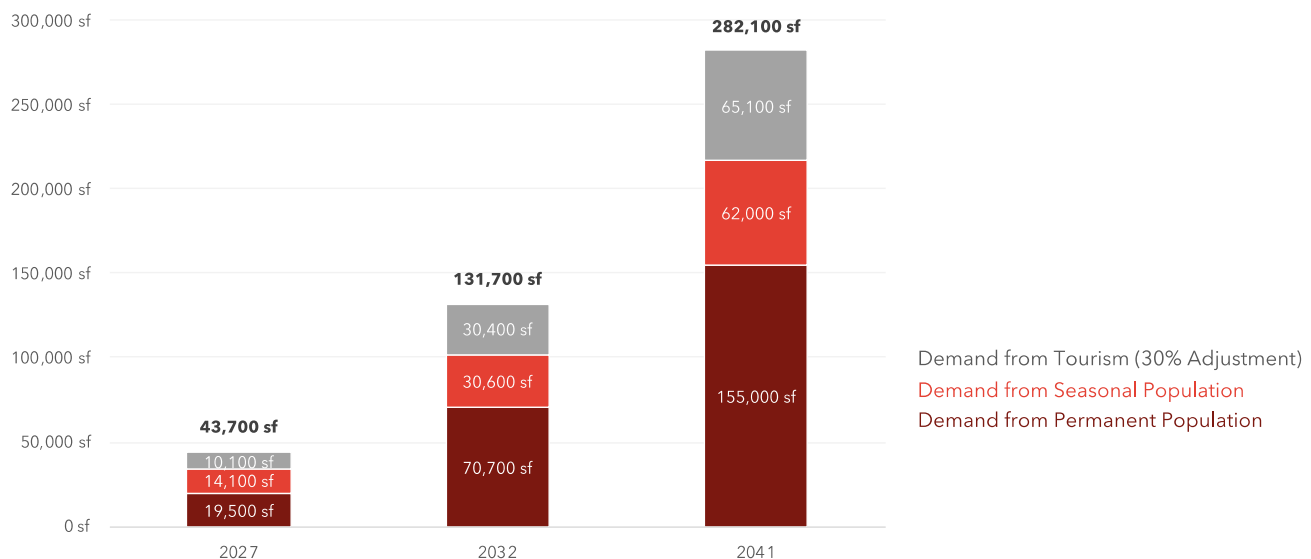
In addition to demand from permanent residents, additional space will be needed in response to demand from the Town's growing seasonal population. This includes demand for an additional 30,600 square feet by 2032 and some 62,000 square feet by 2041.

Parcel has then applied the same tourism factor—some 30%--to estimate potential additional space required in the Town in response to the Town's four-season industry and other factors.

Figure 4.2 shows the increased amount of space warranted, including total demand for **some 131,700 square feet** of new Services space by 2032, increasing to as much as 282,100 square feet by 2041.

Figure 4.10

Total Demand for Services



Source: Parcel based on the analysis included in the *Official Plan Update Discussion Paper*.

See **Appendix C** for Detailed Per Capita Analysis

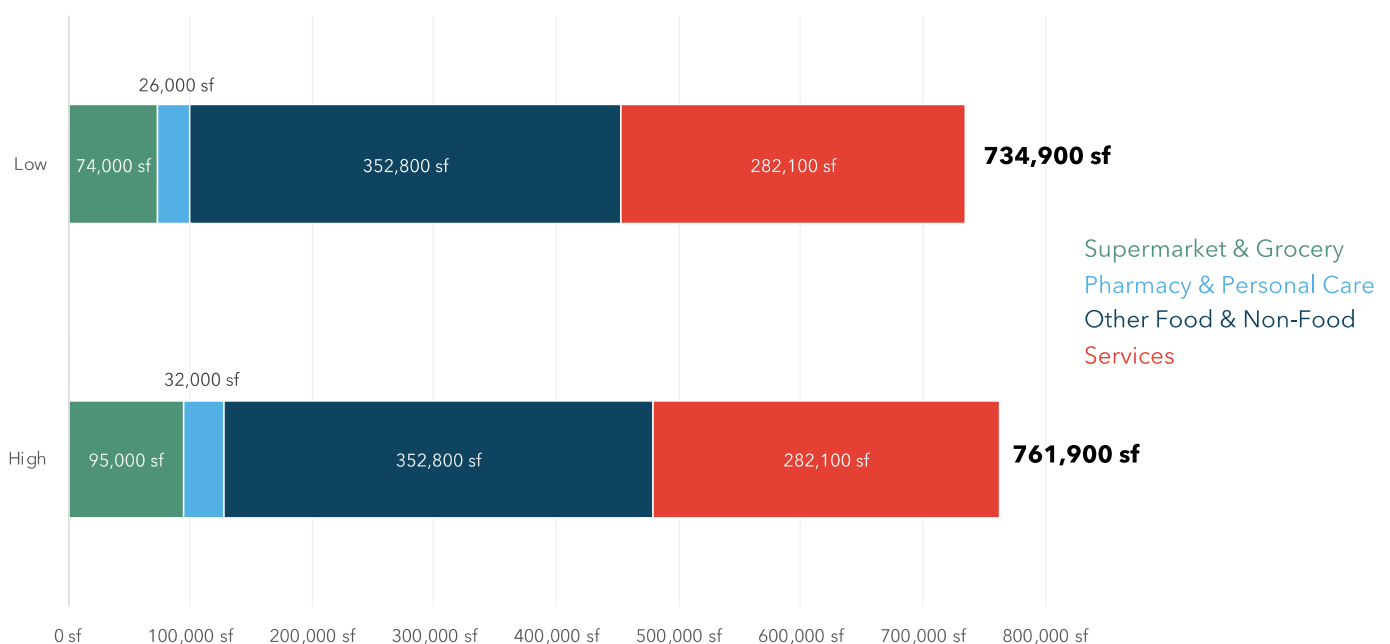
4.3 Summary of Demand

Aggregating the distinct analyses by store category above, we estimate that Collingwood could support between **141,600 and 146,600 square feet of additional retail/service commercial space in the Trade Area by 2027**, with as much as 84,700 square feet of this space being accommodated in existing applications in the development pipeline.

By 2041, Trade Area residents could support between **734,900 and 761,900 square feet of additional retail/service commercial space in the Trade Area, more than enough to support existing applications in addition to the space proposed on the subject site.**

Figure 4.11

Total Demand Warranted in Collingwood in 2041



5.0

Conclusions

Conclusion

Recognizing existing retail trends, population growth and the health of retail/service commercial space in Collingwood—specifically the Downtown—new retail/service commercial uses integrated as part of the proposal for the subject site are **not anticipated to have any adverse impact** on the planned function of Collingwood’s retail locations, especially the Downtown Core.

In fact, it is likely that the proposed development will provide a valuable increase to the supply of commercial uses in Collingwood, positioning the Town to better support forthcoming population growth and other seasonal residents or tourists while also introducing larger-scale retail uses that complement rather than compete existing service offerings concentrated in the Downtown.

Policy Tests

More specifically, based on our review of the characteristics of the subject site and the future demand for retail/service commercial space in Collingwood, below we have provided the following conclusions as it relates to the appropriateness of the OPA and ZBA being sought by Charis Developments Ltd. for the subject site. We have also detailed the anticipated impact of the proposed development on the viability and planned function of the Downtown Core and other commercial areas of the Town. Finally, we have also addressed the policy tests identified in Section 4.4.3.7.2 of the Town of Collingwood Official Plan.

As it relates to the policy in **Section 4.4.3.7.2** of the Town of Collingwood Official Plan, we provide the following:

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

The proponent is seeking an Official Plan Amendment and Zoning By-Law Amendment to expand the list of permitted uses on the subject site. Specifically, they are seeking to develop lands at 853 & 869 Hurontario Street and 7564 Poplar Sideroad with a mixed -use development that includes residential space, in addition to 10,173 square metres (approximately 109,500 square feet) of retail / service commercial space and 1,080 square metres (11,627 square feet) of office space above one of the retail/service commercial buildings. Included in the retail space on-site is opportunity for a Supermarket, and a Retail Commercial Establishment, which are not currently permitted on-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 Supermarkets space and the per capital methodology for Retail Commercial Establishments, as these store categories but not

currently permitted in the C5 Zone. For all other retail / service commercial categories, we have relied on a per capita analysis, as an appropriate methodology to forecast future warranted space for uses already permitted on the subject site. This per capita analysis relies on and is consistent with the core assumptions used in the Town's *Growth Management Discussion Paper* prepared in July 2020 and completed for the 2031 and 2041 horizon.

It is important to note that the *Growth Management Discussion Paper* identified demand for some 1.2 million square feet of additional retail/service commercial space in the Town to support population growth to 2041.

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

An inventory of retail/service commercial space in Collingwood was conducted in January 2020 as part of the *Growth Management Discussion Paper*. As part of this analysis a vacancy rate of 3.6% was identified in Collingwood, which—as noted by the *Growth Management Discussion Paper*—is below what is considered healthy for commercial market (between 4% and 8%) and is indicative of a need for additional commercial space.

Furthermore, to address Policy 4.4.3.7.2 c) above and in recognition of the importance of the Downtown to the Town's commercial structure and Official Plan more broadly, the inventory of retail/service commercial space on lands designated Downtown Commercial Core was updated by Parcel in June 2024. This helps improve the accuracy and recency of retail / service commercial uses in this core area of the Town and helps identify or examine if any significant changes occurred in the Town since the height of the COVID-19 Pandemic. Based on this update it was identified that the supply of retail/service commercial space in the Downtown was nearly 7% higher than the supply identified as part of the *Growth Management Discussion Paper*.

Furthermore, at the time the *Growth Management Discussion Paper* was prepared, the vacancy rate of the Downtown Commercial Core area was 4.2%. In updating the inventory of the Downtown, it was identified that vacancy has declined to 3.4%, despite an increase in supply. This highlights the strength of the Downtown Commercial Core in Collingwood.

The *Growth Management Discussion Paper* identified the need for additional retail / service commercial space in Collingwood to support growth to 2041, suggesting residents may be under-served in terms of access to commercial uses. Furthermore, an update by Parcel specific to the Downtown validates that the COVID-19 Pandemic did not have any adverse impact on the retail performance of the Downtown. Therefore, based on this review and update it is evident that the commercial market in Collingwood continues to perform well.

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 study identifies that there is not a sufficient supply of future commercial space in the Town to accommodate forecast demand. Rather, population growth across the Town is anticipated to generate demand for an additional 141,600 to 146,600 square

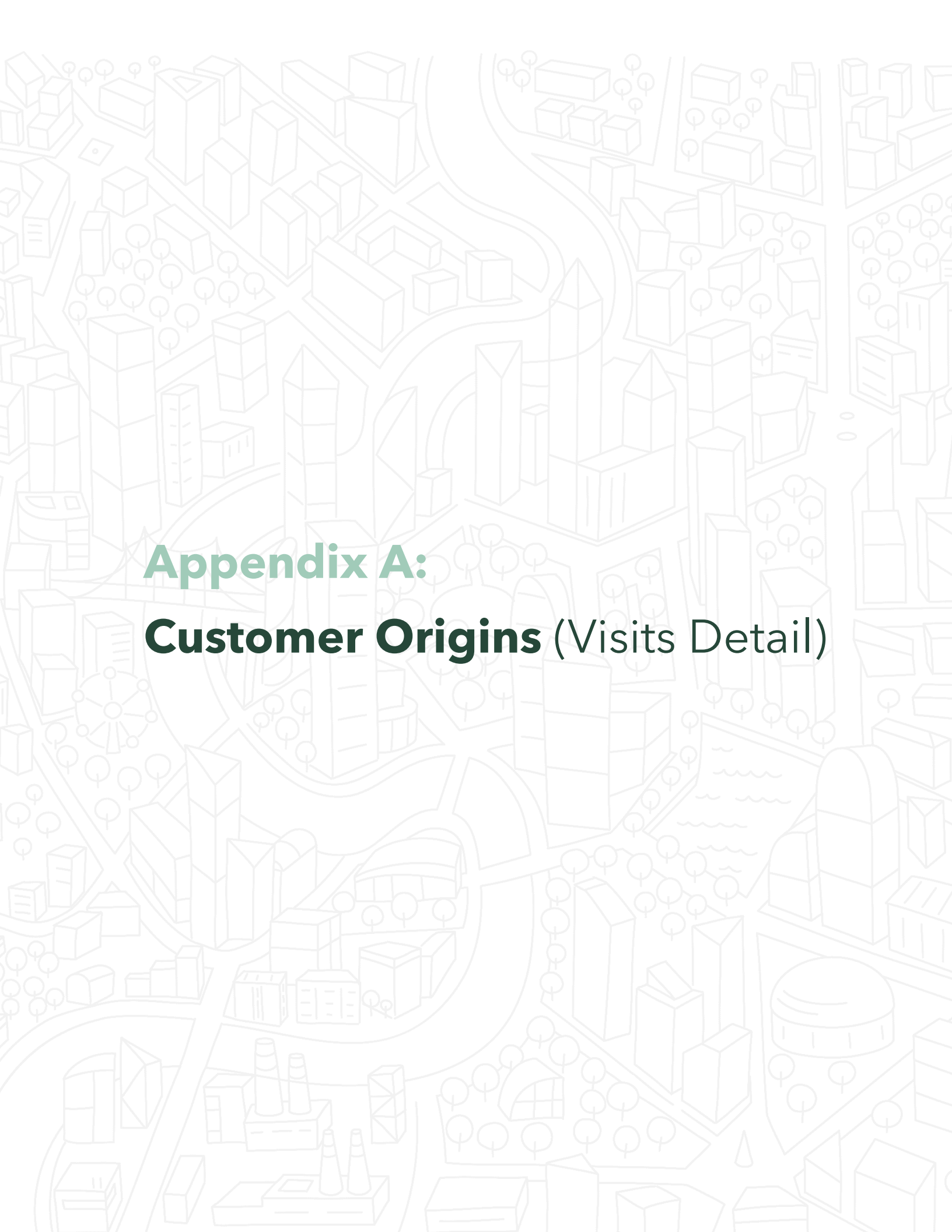
feet of additional retail/service commercial space by 2027. By 2032, demand is anticipated to increase to between 343,400 and 355,400 square feet across all retail / service commercial categories. This warranted space is more than sufficient to accommodate demand within existing applications, as well as proposed space on the subject site, without having an adverse impact on existing commercial facilities within the Town. **This includes demand and justification for a range of retail / service commercial, such as general merchandise stores (e.g., dollar store), Retail Commercial Establishments, convenience and speciality food stores, general retail uses and a full range of service commercial uses.** Warranted space is anticipated to increase to 734,900 to 761,900 square feet of additional retail/service commercial space in the Trade Area by 2041.

We note that the Downtown Commercial Core includes approximately 87,600 square feet of supermarket space and 21,700 square feet of pharmacy and personal care store space. As such, the development of these uses on the subject site has the potential to impact existing businesses in the Downtown Commercial Core. Based on our impact analysis, we have demonstrated that a supermarket of 49,300 square feet on the subject site will have a modest impact on supermarkets Town-wide, including in the Downtown Commercial Core in 2027. However, a full recovery is anticipated by 2032, with sales performance levels ultimately increasing by over 28% by 2041, relative to their current 2023 levels.

Similarly, for pharmacy and personal care store space, as much as 6,000 square feet of space could be accommodated on the subject site in 2027, increasing to over 13,000 square feet by 2032, with little or no impact on existing stores located in the Town of Collingwood, including in the Downtown Commercial Core. Therefore, **it is our opinion that the proposed development will not impact the viability of the planned function of the Downtown Commercial Core or other commercial areas located throughout the Town.**

- 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 there is not forecast to be an impact on the commercial areas by 2032, there is not a need for specific requirements, limitations and safeguards to protect the planned function of the Downtown Core or other commercial areas.

The background of the page is a detailed, light gray isometric line drawing of a city. It features a variety of building shapes, including skyscrapers, houses, and industrial structures with smokestacks. There are also winding roads, clusters of trees, and a body of water with a bridge in the lower right. The overall style is clean and modern, with a focus on geometric forms.

Appendix A: **Customer Origins** (Visits Detail)

Figure A.1

Customer Origins Detail (Total Visits)

	East	West	Total
Metro	361	1,230	1,591
Sobeys	199	276	475
Loblaws	349	367	716
FreshCo	378	592	970
Walmart	442	815	1,257

	East	West	Total
Metro	23%	77%	100%
Sobeys	42%	58%	100%
Loblaws	49%	51%	100%
FreshCo	39%	61%	100%
Walmart	35%	65%	100%

Source:



Appendix B: **Market Analysis Background** (Expenditure-Based)

Figure B.1

Supermarket & Grocery Store Retail Expenditure Background

Province of Ontario	2023		E-commerce	Adjusted	
Food Store Retail (FSR)	\$2,884	22.5%		\$2,797	23.6%
Supermarket & Grocery	\$ 2,436	19.0%	3.0%	\$ 2,363	19.9%
Non-Food Store Retail (NFSR)	\$9,250	72.3%		\$8,407	70.9%
Health & Personal Care	\$ 1,478	11.6%	7.0%	\$ 1,375	11.6%
Total Retail Expenditures	\$12,793	100%	7.3%	\$11,863	100%

Collingwood	2023		2027	2032		2041		
Per Capita Retail Expenditures	\$11,715		\$11,921	\$12,179		\$12,643		
Population	27,500		28,700	32,100		37,600		
Total Retail Expenditure Potential (\$m)	\$322.1		\$342.1	\$390.9		\$475.4		
Food Store Retail (FSR)	\$ 76.0	23.6%	\$ 80.7	23.6%	\$ 92.2	23.6%	\$ 112.1	23.6%
Supermarket & Grocery	\$ 64.2	19.9%	\$ 68.1	19.9%	\$ 77.9	19.9%	\$ 94.7	19.9%
Non-Food Store Retail (NFSR)	\$228.3	70.9%	\$242.5	70.9%	\$277.1	70.9%	\$336.9	70.9%
Health & Personal Care	\$ 37.3	11.6%	\$ 39.6	11.6%	\$ 45.3	11.6%	\$ 55.1	11.6%
Total Collingwood Expenditure Potential (\$m)	\$322.1	100%	\$342.1	100%	\$390.9	100%	\$475.4	100%

Source: Parcel based on data from Statistics Canada.

Figure B.2

Supermarket & Grocery Store Retail Expenditure Analysis

Collingwood	2023		2027		2032		2041	
Food Store Retail (FSR)	\$ 76.0	23.6%	\$ 80.7	23.6%	\$ 92.2	23.6%	\$ 112.1	23.6%
Supermarket & Grocery	\$ 64.2	19.9%	\$ 68.1	19.9%	\$ 77.9	19.9%	\$ 94.7	19.9%
Non-Food Store Retail (NFSR)	\$ 228.3	70.9%	\$ 242.5	70.9%	\$ 277.1	70.9%	\$ 336.9	70.9%
Pharmacy & Personal Care	\$ 37.3	11.6%	\$ 39.6	11.6%	\$ 45.3	11.6%	\$ 55.1	11.6%
Cumulative Growth in Expenditure Potential								
Food Store Retail (FSR)			\$4.7		\$16.2		\$36.1	
Supermarket & Grocery			\$ 4.0		\$ 13.7		\$ 30.5	
Non-Food Store Retail (NFSR)			\$14.2		\$48.8		\$108.6	
Pharmacy & Personal Care			\$ 2.3		\$ 8.0		\$ 17.8	
Supermarkets & Grocery Store Analysis								
Supermarket & Grocery	2023		2027		2032		2041	
Collingwood								
Supermarket & Grocery Expenditures (\$m)	\$ 64.2		\$ 68.1		\$ 77.9		\$ 94.7	
Estimated Trade Area Share (%)	90.0%		92.5%		92.5%		92.5%	
Estimated Trade Area Share (\$m)	\$ 57.7		\$ 63.0		\$ 72.0		\$ 87.6	
Residual Potential (\$m)			\$ 5.3		\$ 14.3		\$ 29.8	
Existing Supermarket & Grocery Store Space	158,300							
Existing Inflow	55.0%							
Existing Supermarket & Grocery Sales Performance								
\$811								
Collingwood Warranted Additional Supermarket & Grocery Space								
Additional Residual Potential from Residents			\$ 5.3		\$ 14.3		\$ 29.8	
Inflow (%)			55%		55%		55%	
Inflow (\$m)			\$ 6.5		\$ 17.5		\$ 36.5	
			\$ 11.7		\$ 31.7		\$ 66.3	
Space Warranted								
@ \$700 per square foot			17,000 sf		45,000 sf		95,000 sf	
@ \$800 per square foot			15,000 sf		40,000 sf		83,000 sf	
@ \$900 per square foot			13,000 sf		35,000 sf		74,000 sf	

Source: Parcel.

Figure B.3

Supermarket & Grocery Store Impact Analysis

Proposals for New Grocery Store Space				
	2023	2027	2032	2041
Subject Site				
Square Feet Proposed		49,300 sf	49,300 sf	49,300 sf
Estimated Sales per Square Foot		\$700	\$800	\$900
Total Estimates Sales (\$Millions)		\$34.5	\$39.4	\$44.4
Less: Inflow		60%	60%	60%
Less: Inflow (\$Millions)		\$20.7	\$23.7	\$26.6
Total Sales Volume from Trade Area Residents (\$Millions)		\$13.8	\$15.8	\$17.7
Impact of New Grocery Store Space to Existing Stores				
Proposed New Space Sales Transfer or Residual Demand				
Total Sales Volume Required from Trade Area Residents (excludes inflow)		\$13.8	\$15.8	\$17.7
Total Sales Volume Available from Trade Area Residents (excludes inflow)		\$5.3	\$14.3	\$29.8
Sales Transfer Required From Existing Stores		(\$8.5)	(\$1.5)	\$12.1
Impact Analysis				
Existing Sales from Trade Area Residents	\$57.7	\$49.2	\$56.2	\$69.8
Plus Inflow	55%	55%	55%	55%
Inflow	\$70.6	\$60.2	\$68.7	\$85.4
Total Sales (Including Inflow)	\$128.3	\$109.4	\$125.0	\$155.2
Existing Square Feet Grocery	166,500 sf	158,300 sf	158,300 sf	158,300 sf
Sales / SF Current	\$770.7	\$691.1	\$789.6	\$980.3
Change in Existing Stores Sales / SF from 2023		-10.3%	2.5%	27.2%

Source: Parcel.

Figure B.4

Health & Personal Care Store Retail Expenditure Analysis

Pharmacy & Personal Care Store Analysis				
Health & Personal Care	2023	2027	2032	2041
Collingwood				
Health & Personal Care Expenditures (\$m)	\$ 37.3	\$ 39.6	\$ 45.3	\$ 55.1
Estimated Trade Area Share (%)	90.0%	92.5%	92.5%	92.5%
Estimated Trade Area Share (\$m)	\$ 33.6	\$ 36.7	\$ 41.9	\$ 50.9
Residual Potential (\$m)		\$ 3.1	\$ 8.3	\$ 17.4
Existing Health & Personal Care Store Space	48,600			
Existing Inflow	40%			
Existing Health & Personal Care Sales Performance				
	\$1,152			
Collingwood Warranted Additional Health & Personal Care Space				
Additional Residual Potential from Collingwood Residents		\$ 3.1	\$ 8.3	\$ 17.4
Inflow (%)		40%	40%	40%
Inflow (\$m)		\$ 2.0	\$ 5.5	\$ 11.6
		\$ 5.1	\$ 13.8	\$ 28.9
Space Warranted				
@ \$900 per square foot		6,000 sf	15,000 sf	32,000 sf
@ \$1000 per square foot		5,000 sf	14,000 sf	29,000 sf
@ \$1100 per square foot		5,000 sf	13,000 sf	26,000 sf



Appendix C: **Market Analysis Background** (Per Capita-Based)

Figure C.1

Per Capita Services Analysis (Permanent Population)

		Typical Space per Capita		Space Req'd by Residents		Target Capture		Adjusted Space		Inflow		Warranted Space
2023 Trade Area Population	27,500											
Growth	1,200	x	A	=	B	x	C	=	D	x	E	= F
2027 Trade Area Population	28,700											
Services												
Finance, Insurance + Real Estate		2.0 sf		2,400 sf		65%		1,560 sf		25%		2,100 sf
Business Services ¹		1.5 sf		1,800 sf		65%		1,170 sf		20%		1,500 sf
Health Care		1.5 sf		1,800 sf		80%		1,440 sf		30%		2,100 sf
Cultural, Entertainment + Recreation		2.0 sf		2,400 sf		60%		1,440 sf		30%		2,100 sf
Food + Drinking Places		3.5 sf		4,200 sf		80%		3,360 sf		40%		5,600 sf
Personal Care		2.0 sf		2,400 sf		90%		2,160 sf		25%		2,900 sf
Other ²		3.0 sf		3,600 sf		70%		2,520 sf		20%		3,200 sf
TOTAL		15.5 sf		18,600 sf				13,650 sf				19,500 sf
		Typical Space per Capita		Space Req'd by Residents		Target Capture		Adjusted Space		Inflow		Warranted Space
2023 Trade Area Population	27,500											
Growth	4,600	x	A	=	B	x	C	=	D	x	E	= F
2032 Trade Area Population	32,100											
Services												
Finance, Insurance + Real Estate		2.0 sf		9,200 sf		65%		5,980 sf		25%		8,000 sf
Business Services ¹		1.5 sf		6,900 sf		65%		4,485 sf		20%		5,600 sf
Health Care		1.5 sf		6,900 sf		80%		5,520 sf		30%		7,900 sf
Food + Drinking Places		3.5 sf		16,100 sf		60%		9,660 sf		30%		13,800 sf
Personal Care		2.0 sf		9,200 sf		80%		7,360 sf		40%		12,300 sf
Cultural, Entertainment + Recreation		2.0 sf		9,200 sf		90%		8,280 sf		25%		11,000 sf
Other ²		3.0 sf		13,800 sf		70%		9,660 sf		20%		12,100 sf
TOTAL		15.5 sf		71,300 sf				50,945 sf				70,700 sf

		Typical Space per Capita		Space Req'd by Residents		Target Capture		Adjusted Space		Inflow		Warranted Space	
2023 Trade Area Population	27,500												
Growth	10,100	x	A	=	B	x	C	=	D	x	E	=	F
2041 Trade Area Population	37,600												
Services													
Finance, Insurance + Real Estate		2.0 sf		20,200 sf		65%		13,130 sf		25%		17,500 sf	
Business Services ¹		1.5 sf		15,150 sf		65%		9,848 sf		20%		12,300 sf	
Health Care		1.5 sf		15,150 sf		80%		12,120 sf		30%		17,300 sf	
Food + Drinking Places		3.5 sf		35,350 sf		60%		21,210 sf		30%		30,300 sf	
Personal Care		2.0 sf		20,200 sf		80%		16,160 sf		40%		26,900 sf	
Cultural, Entertainment + Recreation		2.0 sf		20,200 sf		90%		18,180 sf		25%		24,200 sf	
Other ²		3.0 sf		30,300 sf		70%		21,210 sf		20%		26,500 sf	
TOTAL		15.5 sf		156,550 sf				111,858 sf				155,000 sf	

¹ Professional + Scientific Services; Selected Office Administrative Services; Selected Educational Services.

² Selected Civic + Social Organizations

Figure C.2

Per Capita Services Analysis (Seasonal Population)

		Typical Space per Capita		Space Req'd by Residents		Target Capture		Adjusted Space		Inflow		Warranted Space	
2023 Seasonal Population	7,727												
Growth	882	x	A	=	B	x	C	=	D	x	E	=	F
2028 Seasonal Population	8,610												
Services													
Finance, Insurance + Real Estate		2.0 sf		1,765 sf		65%		1,147 sf		25%		1,500 sf	
Business Services ¹		1.5 sf		1,324 sf		65%		860 sf		20%		1,100 sf	
Health Care		1.5 sf		1,324 sf		80%		1,059 sf		30%		1,500 sf	
Cultural, Entertainment + Recreation		2.0 sf		1,765 sf		60%		1,059 sf		30%		1,500 sf	
Food + Drinking Places		3.5 sf		3,088 sf		80%		2,471 sf		40%		4,100 sf	
Personal Care		2.0 sf		1,765 sf		90%		1,588 sf		25%		2,100 sf	
Other ²		3.0 sf		2,647 sf		70%		1,853 sf		20%		2,300 sf	
TOTAL		15.5 sf		13,676 sf				10,037 sf				14,100 sf	

		Typical Space per Capita		Space Req'd by Residents		Target Capture		Adjusted Space		Inflow		Warranted Space	
2023 Seasonal Population	7,727												
Growth	1,993	x	A	=	B	x	C	=	D	x	E	=	F
2033 Seasonal Population	9,720												
Services													
Finance, Insurance + Real Estate		2.0 sf		3,986 sf		65%		2,591 sf		25%		3,500 sf	
Business Services ¹		1.5 sf		2,989 sf		65%		1,943 sf		20%		2,400 sf	
Health Care		1.5 sf		2,989 sf		80%		2,392 sf		30%		3,400 sf	
Food + Drinking Places		3.5 sf		6,975 sf		60%		4,185 sf		30%		6,000 sf	
Personal Care		2.0 sf		3,986 sf		80%		3,189 sf		40%		5,300 sf	
Cultural, Entertainment + Recreation		2.0 sf		3,986 sf		90%		3,587 sf		25%		4,800 sf	
Other ²		3.0 sf		5,979 sf		70%		4,185 sf		20%		5,200 sf	
TOTAL		15.5 sf		30,891 sf				22,072 sf				30,600 sf	

		Typical Space per Capita		Space Req'd by Residents		Target Capture		Adjusted Space		Inflow		Warranted Space	
2023 Seasonal Population	7,727												
Growth to 2041	4,048	x	A	=	B	x	C	=	D	x	E	=	F
2041 Seasonal Population	11,775												
Services													
Finance, Insurance + Real Estate		2.0 sf		8,095 sf		65%		5,262 sf		25%		7,000 sf	
Business Services ¹		1.5 sf		6,072 sf		65%		3,946 sf		20%		4,900 sf	
Health Care		1.5 sf		6,072 sf		80%		4,857 sf		30%		6,900 sf	
Food + Drinking Places		3.5 sf		14,167 sf		60%		8,500 sf		30%		12,100 sf	
Personal Care		2.0 sf		8,095 sf		80%		6,476 sf		40%		10,800 sf	
Cultural, Entertainment + Recreation		2.0 sf		8,095 sf		90%		7,286 sf		25%		9,700 sf	
Other ²		3.0 sf		12,143 sf		70%		8,500 sf		20%		10,600 sf	
TOTAL		15.5 sf		62,739 sf				44,828 sf				62,000 sf	

Figure C.3

Per Capita Other Food & Non-Food Analysis (Permanent Population)

		Typical Space per Capita		Space Req'd by Residents		Target Capture		Adjusted Space		Inflow		Warranted Space
2023 Trade Area Population	27,500											
Growth	1,200	x	A	=	B	x	C	=	D	x	E	= F
2027 Trade Area Population	28,700											
Food												
Convenience & Specialty Food		1.5 sf		1,800 sf		90%		1,620 sf		25%		2,200 sf
BWL		0.4 sf		480 sf		75%		360 sf		20%		500 sf
Non-Food												
Selected Automotive		2.5 sf		3,000 sf		80%		2,400 sf		20%		3,000 sf
Furniture, Home Furnishings & Electronics		3.0 sf		3,600 sf		65%		2,340 sf		20%		2,900 sf
Building & Outdoor Home Supplies		3.0 sf		3,600 sf		90%		3,240 sf		35%		5,000 sf
Clothing & Accessories		2.0 sf		2,400 sf		65%		1,560 sf		20%		2,000 sf
General Merchandise		6.5 sf		7,800 sf		70%		5,460 sf		25%		7,300 sf
Miscellaneous Retail		2.0 sf		2,400 sf		75%		1,800 sf		25%		2,400 sf
TOTAL		20.9 sf		25,080 sf				18,780 sf				25,300 sf
		Typical Space per Capita		Space Req'd by Residents		Target Capture		Adjusted Space		Inflow		Warranted Space
2023 Trade Area Population	27,500											
Growth	4,600	x	A	=	B	x	C	=	D	x	E	= F
2032 Trade Area Population	32,100											
Food												
Convenience & Specialty Food		1.5 sf		6,900 sf		90%		6,210 sf		25%		8,300 sf
BWL		0.4 sf		1,840 sf		75%		1,380 sf		20%		1,700 sf
Non-Food												
Selected Automotive		2.5 sf		11,500 sf		80%		9,200 sf		20%		11,500 sf
Furniture, Home Furnishings & Electronics		3.0 sf		13,800 sf		65%		8,970 sf		20%		11,200 sf
Building & Outdoor Home Supplies		3.0 sf		13,800 sf		90%		12,420 sf		35%		19,100 sf
Clothing & Accessories		2.0 sf		9,200 sf		65%		5,980 sf		20%		7,500 sf
General Merchandise		6.5 sf		29,900 sf		70%		20,930 sf		25%		27,900 sf
Miscellaneous Retail		2.0 sf		9,200 sf		75%		6,900 sf		25%		9,200 sf
TOTAL		20.9 sf		96,140 sf		75%		71,990 sf		25%		96,400 sf

		Typical Space per Capita		Space Req'd by Residents		Target Capture		Adjusted Space		Inflow		Warranted Space
2023 Trade Area Population	27,500											
Growth	10,100	x	A	=	B	x	C	=	D	x	E	= F
2041 Trade Area Population	37,600											
Food												
Convenience & Specialty Food		1.5 sf		15,150 sf		90%		13,635 sf		25%		18,200 sf
BWL		0.4 sf		4,040 sf		75%		3,030 sf		20%		3,800 sf
Non-Food												
Selected Automotive		2.5 sf		25,250 sf		80%		20,200 sf		20%		25,300 sf
Furniture, Home Furnishings & Electronics		3.0 sf		30,300 sf		65%		19,695 sf		20%		24,600 sf
Building & Outdoor Home Supplies		3.0 sf		30,300 sf		90%		27,270 sf		35%		42,000 sf
Clothing & Accessories		2.0 sf		20,200 sf		65%		13,130 sf		20%		16,400 sf
General Merchandise		6.5 sf		65,650 sf		70%		45,955 sf		25%		61,300 sf
Miscellaneous Retail		2.0 sf		20,200 sf		75%		15,150 sf		25%		20,200 sf
TOTAL		20.9 sf		211,090 sf		75%		158,065 sf		25%		211,800 sf

Source: Parcel.

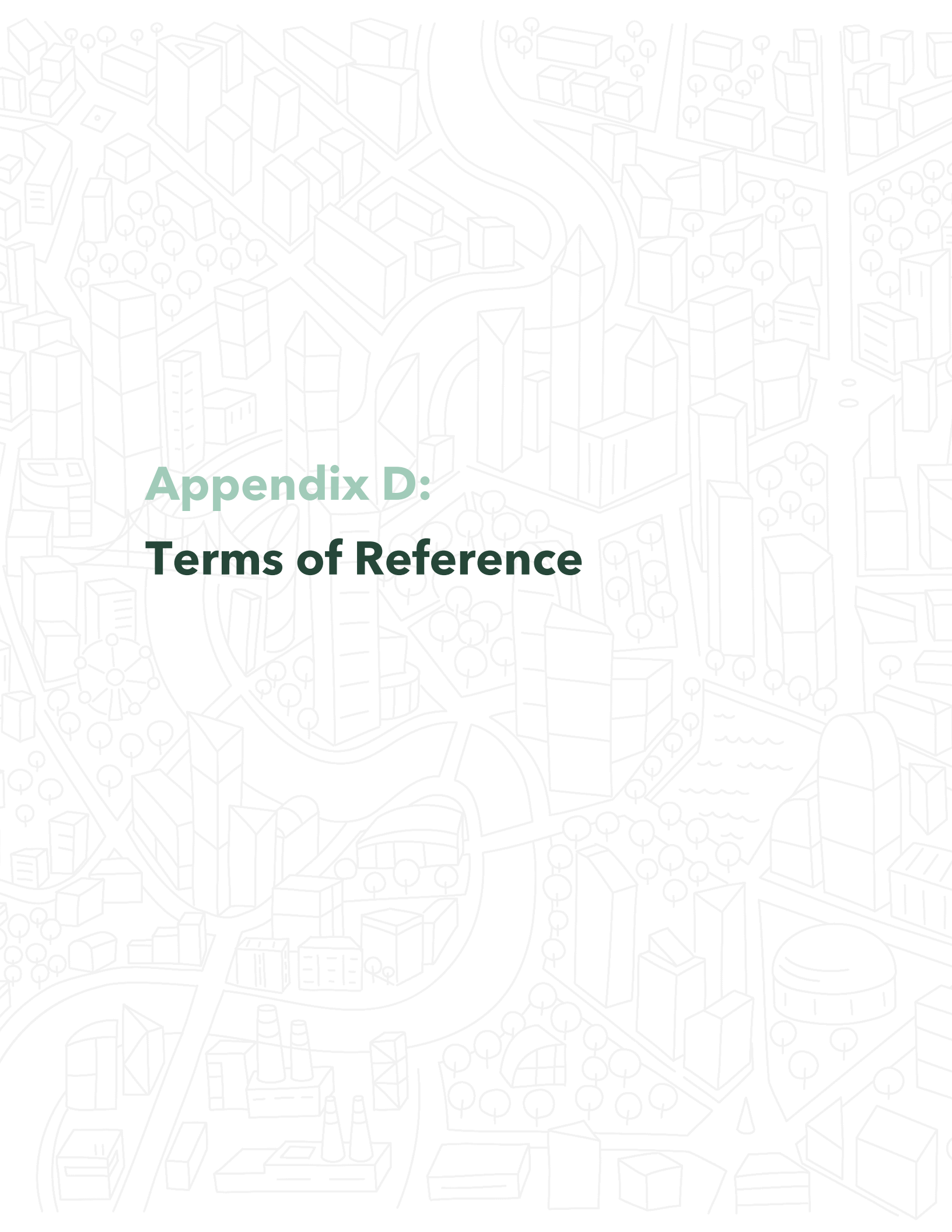
Figure C.4

Per Capita Other Food & Non-Food Analysis (Seasonal Population)

		Typical Space per Capita		Space Req'd by Residents		Target Capture		Adjusted Space		Inflow		Warranted Space
2023 Seasonal Population	7,727											
Growth	882	x	A	=	B	x	C	=	D	x	E	= F
2028 Seasonal Population	8,610											
Food												
Convenience & Specialty Food		1.0 sf		882 sf		90%		794 sf		25%		1,100 sf
BWL		0.3 sf		265 sf		75%		199 sf		20%		200 sf
Non-Food												
Selected Automotive		0.8 sf		706 sf		80%		565 sf		20%		700 sf
Furniture, Home Furnishings & Electronics		2.5 sf		2,206 sf		65%		1,434 sf		20%		1,800 sf
Building & Outdoor Home Supplies		3.0 sf		2,647 sf		90%		2,382 sf		35%		3,700 sf
Clothing & Accessories		1.8 sf		1,588 sf		65%		1,032 sf		20%		1,300 sf
General Merchandise		2.5 sf		2,206 sf		70%		1,544 sf		25%		2,100 sf
Miscellaneous Retail		2.5 sf		2,206 sf		75%		1,654 sf		25%		2,200 sf
TOTAL		14.4 sf		12,706 sf				9,604 sf				13,100 sf

		Typical Space per Capita		Space Req'd by Residents		Target Capture		Adjusted Space		Inflow		Warranted Space
2023 Seasonal Population	7,727											
10-Year Growth	1,993 x	A	=	B	x	C	=	D	x	E	=	F
2033 Seasonal Population	9,720											
Food												
Convenience & Specialty Food		1.0 sf		1,993 sf		90%		1,794 sf		25%		2,400 sf
BWL		0.3 sf		598 sf		75%		448 sf		20%		600 sf
Non-Food												
Selected Automotive		0.8 sf		1,594 sf		80%		1,275 sf		20%		1,600 sf
Furniture, Home Furnishings & Electronics		2.5 sf		4,982 sf		65%		3,239 sf		20%		4,000 sf
Building & Outdoor Home Supplies		3.0 sf		5,979 sf		90%		5,381 sf		35%		8,300 sf
Clothing & Accessories		1.8 sf		3,587 sf		65%		2,332 sf		20%		2,900 sf
General Merchandise		2.5 sf		4,982 sf		70%		3,488 sf		25%		4,700 sf
Miscellaneous Retail		2.5 sf		4,982 sf		75%		3,737 sf		25%		5,000 sf
TOTAL		14.4 sf		28,699 sf		76%		21,693 sf		26%		29,500 sf
		Typical Space per Capita		Space Req'd by Residents		Target Capture		Adjusted Space		Inflow		Warranted Space
2023 Seasonal Population	7,727											
10-Year Growth	4,048 x	A	=	B	x	C	=	D	x	E	=	F
2041 Seasonal Population	11,775											
Food												
Convenience & Specialty Food		1.0 sf		4,048 sf		90%		3,643 sf		25%		4,900 sf
BWL		0.3 sf		1,214 sf		75%		911 sf		20%		1,100 sf
Non-Food												
Selected Automotive		0.8 sf		3,238 sf		80%		2,591 sf		20%		3,200 sf
Furniture, Home Furnishings & Electronics		2.5 sf		10,119 sf		65%		6,577 sf		20%		8,200 sf
Building & Outdoor Home Supplies		3.0 sf		12,143 sf		90%		10,929 sf		35%		16,800 sf
Clothing & Accessories		1.8 sf		7,286 sf		65%		4,736 sf		20%		5,900 sf
General Merchandise		2.5 sf		10,119 sf		70%		7,083 sf		25%		9,400 sf
Miscellaneous Retail		2.5 sf		10,119 sf		75%		7,589 sf		25%		10,100 sf
TOTAL		14.4 sf		58,286 sf		76%		44,059 sf		26%		59,600 sf

Source: Parcel.



Appendix D: **Terms of Reference**



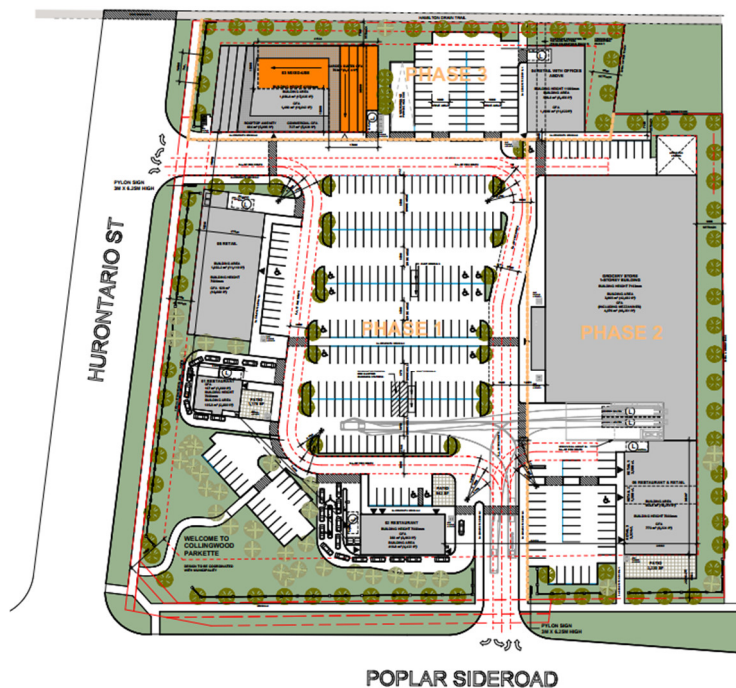
April 4, 2024

RE: Terms of Reference - Commercial Market Impact Study

The following Terms of Reference outlines the tasks that we propose to complete in preparing a Commercial Market Impact Study on behalf of Charis Developments Ltd, 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. The proposed concept plan for the subject site, which includes residential space, in addition to 81,336 square feet of retail/service commercial space across six buildings and 11,621 square feet of office space above one of the retail/service commercial buildings, is shown in Figure 1.

Figure 1

Proposed Concept Plan for the Gateway Centre



The proposed development includes approximately 7.3 acres of land that are currently designated and zoned Highway Commercial under the Town's in-force Official Plan and Zoning By-law and approximately 2 acres 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 permitted uses:

- | | |
|--|-------------------------------|
| • Business office | • Hardware store |
| • Business service establishment | • Health club |
| • Commercial school | • Home centre |
| • Computer and software store | • Home improvement store |
| • Convenience store | • Laundromat |
| • Day care centre | • Medical office |
| • Dry cleaner's establishment | • Personal service shop |
| • Electronics & appliance store | • Pet store |
| • Financial & insurance service office | • Professional service office |
| • Furniture store | • Real estate services office |
| • Garden supply outlet | • Restaurant |
| • General merchandise store | • 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 Official Plan Amendment and Zoning By-law Amendment applications, Charis Developments Ltd. is seeking to expand the list of permitted uses on the subject site to include a Food Supermarket and Pharmacy.

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 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*

The following Scope of Work outlines the tasks that Parcel Economics Inc. will complete in preparing a Commercial Market Impact Study for the Gateway Centre that addresses the requirements identified in Section 4.4.3.7.2 of the Town's Official Plan.

Scope of Work – Commercial Impact Study

The following outlines the tasks that we will undertake in addressing the policies in Section 4.4.3.7.2 of the Town's Official Plan.

Site & Policy Context

To address policy 4.4.3.7.2 a), we will review the current conditions of the site and the amount of commercial space being proposed, as well as any proposed or confirmed tenants. This will include a review of the immediate surrounding area from a market perspective (e.g., physical and access characteristics, relationship with surrounding land uses, etc.). Our analysis will also take into consideration the Official Plan designation and zoning of the subject site, as well as the proposed designation in the Draft Official Plan for the Town of Collingwood.

The Basis for Projecting Market Demand

To address policy 4.4.3.7.2 b), we will **delineate a reasonable catchment or "Trade Area"** that represents the main geographic area from which future commercial facilities in the Town are likely to derive the majority of their customer support. This Trade Area will focus on the population and employment forecasts for the Town in County Official Plan Amendment No. 7. Using a 2023 base year, we will also consider the 5-year (2028) and 10-year (2033) population forecasts for the Town, as well as 2041, which are included in Appendix D of the *Simcoe County Growth Forecasts and Land Needs Assessment*, March 31, 2022, prepared by Hemson Consulting Ltd.

In projecting market demand for retail/service commercial space, our analysis will also have regard for neighbouring areas that reflect the full potential for "inflow" sales from a broader market area. This will be of particular importance for the subject site, as it is at the southern boundary of the Town of Collingwood.

Market Demand for Supermarket and Health & Personal Care Space

Recognizing that a Food Supermarket and Pharmacy are not a permitted use in the C5 zone, we will forecast market demand for these uses based on the following methodology:

- To gain a more nuanced understanding of the current function of Supermarket and Health & Personal Care space in Collingwood and how these existing facilities could be impacted by the commercial development proposed on the subject site, we will prepare **customer origins surveys**, based on available cell phone location data (anonymized via our data provider). We propose to complete 5 customer origin surveys at each of the four supermarkets in Collingwood (Sobeys, Loblaws, FreshCo and Metro) as well as the Walmart

Supercentre. These customer origins surveys will provide us with a better understanding of potential “inflow” to existing Food stores and Health & Personal Care stores in the Town.

- We will compile an **inventory of existing Supermarket and Health & Personal Care store space in the Town**, which could impact future demand for commercial space on the subject site. This inventory would include street address, business name, store category, store size and land use designation within the commercial hierarchy (i.e. Downtown Commercial Core, Highway Commercial, Regional Commercial District, etc.).
- We will identify any **potential locations for planned major commercial development** within Collingwood, with a focus on these store types. This will include the Ministerial Zoning Order (“MZO”) for the Poplar Regional Health & Wellness Village, that could impact demand for commercial space on the subject site. The locations will be evaluated in terms of potential timing to market and competitive influence with future commercial space in the community.
- Relying on research and other statistical inputs gathered as part of the previous work steps, we will undertake a **detailed expenditure-based market demand analysis for Supermarket and Health & Personal Care space** specific to the Town of Collingwood. The expenditure-based market analysis will rely on provincial averages/benchmarks (e.g., Statistics Canada Retail Trade data), as well as our own professional experience to develop expenditure potentials, market shares and inflow ratios for a **residual-based expenditure analysis**, as follows:
 - Local market shares (i.e., expenditures of Trade Area residents at local supermarkets in the Town of Collingwood) will be estimated based on our extensive experience as retail market consultants and the expenditure potential in the Trade Area. These estimates will recognize existing/future competition and how they could impact local market shares.
 - Inflow sales volume from persons residing outside the Trade Area will be estimated based on the results of the customer origins survey data and other supporting research.
 - Total future sales opportunities for supermarkets will be calculated for the Trade Area for the years 2028, 2033, and 2041.
 - We will subsequently translate these expenditures (sales opportunities) into warranted Supermarket and Health & Personal Care space estimates, utilizing per square foot performance level benchmarks. Using this analysis, we will determine if there is residual demand for these uses within the Town to support the space proposed on the subject site.

Market Demand for Other NFSR and Service Space

- It is important to note that the majority of the subject site is designated and zoned Highway Commercial and therefore already permit various retail/service commercial uses as of right. Further, the *Official Plan Update Discussion Paper* demonstrated the need for nearly 1.2 million square feet of additional retail/service commercial space in the Town to support growth to 2041 and a shortfall of vacant commercial lands to accommodate this forecast growth.
- For the balance of retail/service commercial space proposed on the subject site, we will rely on the per capita methodology utilized in the *Official Plan Update Discussion Paper*. Specifically, we will rely in the retail inventory by store type completed in January 2020, the typical space per capita ratios, study area capture rates and inflow rates contained in Figure 6-9 and 6-10 of the *Official Plan Update Discussion Paper*.
- We will update the analysis contained in the Other NFSR and Services analysis contained in *Official Plan Update Discussion Paper* for the years 2028, 2033 and 2041 to determine total warranted space by NFSR and Services store categories. This warranted space will then be compared to the space proposed on the subject site.

Performance of Collingwood's Retail Sector

To address policy 4.4.3.7.2 c), regarding the performance of Collingwood's retail sector, we will rely on the retail/service commercial inventory contained in the *Official Plan Update Discussion Paper*, as well as our own inventory of vacant retail / service commercial space in the Downtown Commercial Core. The *Official Plan Update Discussion Paper* identified a Town-wide commercial vacancy rate of 3.6% and a vacancy rate of 4.2% in the Downtown Commercial Core. Based on our updated inventory of vacant space in the Downtown Commercial Core, we will compare the updated vacancy rate to the rate that existed at the time urbanMetrics completed their inventory in January 2020.

In addition to the updated inventory of the Downtown Commercial Core, we will also identify if there have been any significant store closures in Collingwood since urbanMetrics completed their inventory in January 2020 and what potential impact this could have on Collingwood's retail / service commercial sector.

Impact Analysis

To address policy 4.4.3.7.2 d), we will rely on our residual market demand analysis for Supermarket and Health & Personal Care space to determine if there will be residual market demand for these uses in 2028, 2033 and 2041. If there is sufficient residual demand to support the Supermarket and Health & Personal Care space being proposed

on the subject site, it will demonstrate that these uses could be supported without impacting existing facilities in the Town.

Need for Specific Requirements, Limitations and Safeguards

To address policy 4.4.3.7.2 d), we will consider the existing inventory of space in Collingwood, forecast market demand and the configuration of space proposed on the subject site to determine if there is a need for specific requirements, limitations and safeguards as part of the Official Plan Amendment and Zoning By-law Amendment applications.

Reporting

Our findings will be summarized in a Commercial Market Impact Study. This study will address the policies in Section 4.4.3.7.2 of the Town's Official Plan, including:

- Justification for the type and amount of retail/service commercial space proposed on the subject site;
- A detailed description of the methodology and assumptions used in projecting market demand;
- An update on the performance of Downtown Collingwood's retail sector;
- An impact analysis of the proposed development on the subject site on the viability of the planned function of the Downtown Core and other commercial areas in the Town; and,
- We will comment on the need for specific requirements, limitations and safeguards, if warranted.

We trust that you will find all in order. However, if you have any questions or require additional information, please contact me at your earliest convenience.

Sincerely,

Parcel

Parcel Economics Inc.



Craig Ferguson
Principal



Parcel

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