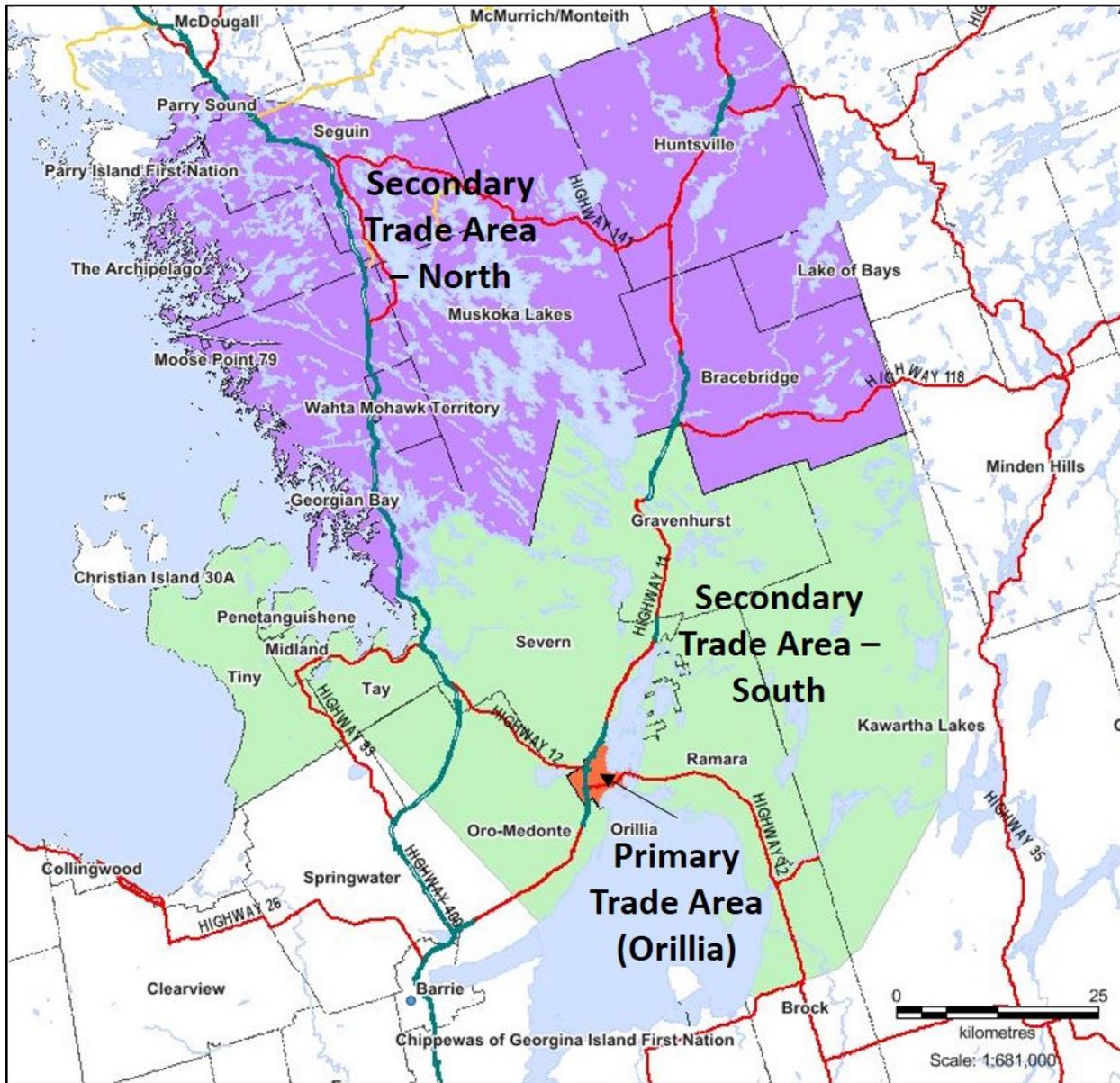


Downtown Orillia Trade Areas

Figure 2.2 – Trade Areas

(Excerpt from Downtown Orillia Retail Mix Study)



Downtown Orillia Retail Mix Study, urbanMetrics inc.
November 25, 2016

To determine downtown customer origins, a licence plate survey was conducted by urbanMetrics in the downtown area in July 2016 and compared with the results of previous customer origin surveys, including:

- 2013 Licence Plate Survey¹;
- 2014 Shop Local Survey;
- 2014 Downtown Visitor Survey;
- 2015 Downtown Visitor Survey; and
- 2014 Farmers' Market Visitor Survey.

Licence plate data was recorded by urbanMetrics at the following locations in Downtown Orillia: within municipal pay parking lots throughout the downtown area; street parking locations; and at major retail locations with surface parking (i.e. Metro; Shoppers Drug Mart; Giant Tiger/Dollar Tree; and Home Hardware). This data was then submitted to the Ontario Ministry of Transportation who returned corresponding dissemination area data for each licence plate recorded.

These surveys have provided valuable input in order to confirm the extent of the Trade Area for Downtown Orillia. This current and past research has been used to indicate the geographic extent and drawing power of the existing commercial facilities that are located in Downtown Orillia.

The total market influence attributable to Downtown Orillia extends over a wide area, beyond which any precise geographic boundary that can be drawn. Licence plate survey research conducted in 2013 and 2016 indicates that the majority of the customers for the downtown area originate from within the City of Orillia (i.e. approximately 60%²). However, a significant portion of downtown customers are drawn from outside the City, including tourists, seasonal residents and permanent residents of the surrounding regional area. For example, Figure 2-1 shows a considerable number of downtown customers who originated from the Greater Toronto Area. These customers would represent seasonal residents who have cottages near Orillia and/or tourists visiting the area.

Although licence plate surveys provide a general indication of customer origins, they have some limitations. For example, they do not capture pedestrians or persons travelling by means such as public transit. In addition, some corporate-leased vehicles or rental cars may be registered to the company and not the person driving the vehicle. Finally, the licence plate data obtained by the Ministry of Transportation for vehicles registered to rural addresses often provides the location of a nearby post office box only and not the dissemination area of the owner's actual location of residence.

Data from the customer origin research conducted in 2014 (e.g. 2014 Shop Local Survey; 2014 Downtown Visitor Survey; 2015 Downtown Visitor Survey; and 2014 Farmers' Market Visitor Survey) indicates that approximately 80% of downtown

¹ Conducted by urbanMetrics inc. in Downtown Orillia in November and December 2013.

² Based on urbanMetrics fieldwork in Downtown Orillia in 2013 and 2016.

customers are derived from the City of Orillia. This historic data has been used to validate the results of urbanMetrics fieldwork in Orillia.

A Trade Area has been defined, which reflects the geographic area from which the majority of regular customer support will be derived. In order to determine the trade area served by Downtown Orillia, a number of factors have been considered:

- The competitive environment and selection retail establishments elsewhere in the City of Orillia and other nearby downtown areas (e.g. Barrie);
- The accessibility and locational characteristics of Downtown Orillia;
- Physical and psychological barriers (e.g. lakes, rivers, highways, municipal boundaries, etc.); and
- A review of previous customer origin research conducted in Downtown Orillia.

For the purposes of our analysis, we have conservatively assumed that approximately 60% of Downtown Orillia customers are derived from the City of Orillia, in addition to another 20% collectively drawn from the Secondary Trade Area – North and the Secondary Trade Area – South. The remaining customer support for retail stores and services in Downtown Orillia is derived from inflow from outside of the defined Trade Area (e.g. Barrie).

As such, the Trade Area for Downtown Orillia has been illustrated in Figure 2-2. The defined Trade Area has been further subdivided into three smaller zones:

- **Primary Trade Area** – is comprised of the entire City of Orillia and represents the area from which retail stores and services in Downtown Orillia derive the majority of their customers.
- **Secondary Trade Area (South)** – is comprised of the following portions of Simcoe County: Severn Township, Ramara Township, Town of Midland, Town of Penetanguishene, Tiny Township, Tay Township, Oro-Medonte (part). It also includes Muskoka District – Town of Gravenhurst, Durham Region – Brock Township (part) and the City of Kawartha Lakes (part)
- **Secondary Trade Area (North)** – is comprised of the following portions of Muskoka District: Georgian Bay Township, Town of Bracebridge, Town of Huntsville, Muskoka Lakes Township and Lake of Bays Township (part). It also includes the following portion of Parry Sound District: Wahta Mohawk Territory (IRI), Parry Island First Nation (part), Town of Parry Sound, Seguin Township (part), McDougall (part) and The Archipelago Township (part).