



WEST RIDGE TRAILSIDE NEIGHBOURHOOD PLAN

Commercial Needs Analysis

Orillia, Ontario

Prepared for **Charter Development LP**

February 2, 2021



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February 2, 2021

Mr. Henry Glavic
c/o Charter Development LP
P.O. Box 2088
Orillia, Ontario L3V 6R9

Dear Mr. Glavic:

RE: West Ridge Trailside Neighbourhood Plan – Commercial Needs Analysis (Orillia, Ontario)

urbanMetrics inc. is pleased to submit this *Commercial Needs Analysis* for the West Ridge Trailside Neighbourhood Plan located in West Orillia. The Study evaluates whether there is sufficient community need/market demand to support a local neighbourhood-serving commercial centre within the new Trailside community, and if so, to provide recommendations regarding the type of uses, site size and location for a commercial centre.

There are approximately 105 hectares of land within the Trailside Neighbourhood Plan Area. The Trailside Plan comprises a variety of low, medium and high-density residential uses, two school sites, parkland and environmental protection lands. Given the type and location of these uses, as well as the magnitude of the existing per capita supply of retail and service commercial uses in the Study Area, our analysis determined that approximately 0.42 hectares of land could potentially be developed for local-serving commercial space. Based on an assessment of various criteria, our analysis further recommends that the commercial centre should be located at the intersection of Stone Ridge Boulevard and the 15th Line. It has been a pleasure conducting this assignment on behalf of Charter and we look forward to discussing the results of our analysis with you.

Yours truly,
urbanMetrics inc.

A handwritten signature in black ink, appearing to read "D. R. Annand".

Douglas R. Annand, CMC, PLE
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Contents

1.0	Introduction.....	1
1.1	Background.....	2
1.2	Commercial Needs Analysis	3
1.3	Approach	3
1.4	Assumptions	4
2.0	Study Area	6
	Key Findings	7
3.0	Population	9
	Key Findings	10
4.0	Competitive Environment	12
	Key Findings	13
4.1	Existing Retail and Service Space	14
4.2	Competitive Developments.....	16
5.0	Market Analysis	20
	Key Findings	21
5.1	Existing Space Per Capita.....	22
5.2	Retail/Service Commercial Needs	23
6.0	Commercial Site Context and Location	27
	Key Findings	28
6.1	Commercial Site Location and Surrounding Land Uses	28
6.2	Trailside Neighbourhood Plan Commercial Site	31
7.0	Conclusions.....	33
Appendix A	North American Industry Classification System	36

Figures

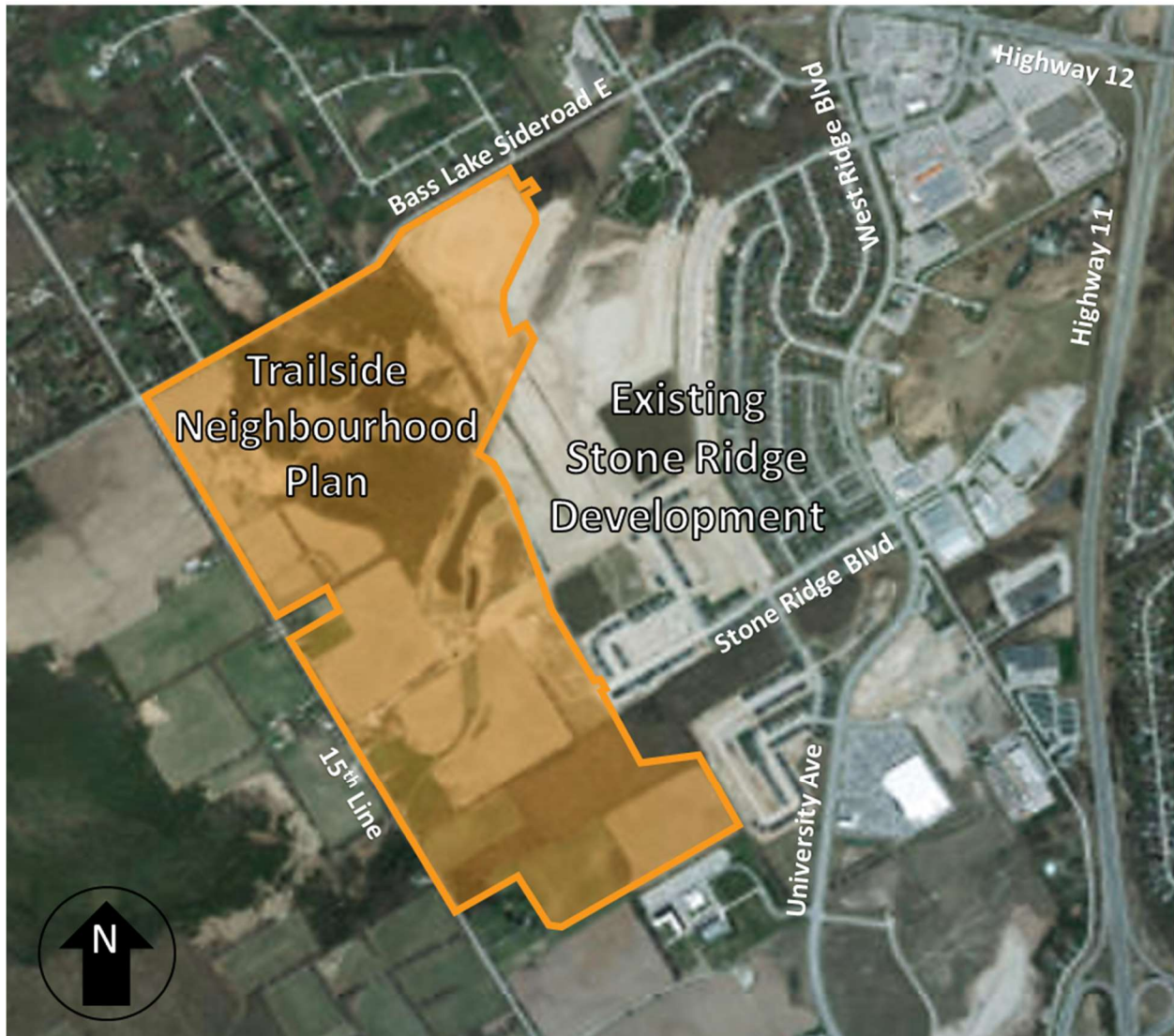
Figure 1-1: West Ridge Trailside Neighbourhood Plan Area	2
Figure 2-1: Study Area.....	8
Figure 3-1: Study Area Population	11
Figure 4-1: Commercial Inventory Nodes	14
Figure 4-2: September 2020 Commercial Inventory	15
Figure 4-3: Planned Development Activity (2020).....	17
Figure 4-4: West Ridge Remaining Vacant Lands	18
Figure 5-1: Existing Study Area Per Capita Space	23
Figure 5-2: Study Area Per Capita Commercial Needs Analysis (2020)	24
Figure 5-3: Study Area Per Capita Space Analysis (Full Build-Out)	25
Figure 6-1: Neighbourhood Commercial Site Location.....	29
Figure 6-2: Commercial Centre Location and Surrounding Land Use.....	30

1.0 Introduction

1.1 Background

urbanMetrics inc. has been retained by Charter Development LP (“Charter”) to evaluate whether there is sufficient community need/market demand for a local neighbourhood-serving commercial centre in the West Ridge Trailside Neighbourhood Plan Area (“Trailside Neighbourhood Plan” or “Trailside”). The Trailside Neighbourhood Plan Area is shown in Figure 1-1.

Figure 1-1: West Ridge Trailside Neighbourhood Plan Area



SOURCE: urbanMetrics inc., based on County of Simcoe Interactive Mapping. For illustration purposes only.

The Trailside Neighbourhood Plan lands owned by Charter are approximately 105 hectares in size. The Charter lands include approximately 1,293 low, medium and high density residential units. If all the Neighbourhood Greenfield lands are included, the size of the area is approximately 109 hectares and could generate approximately 1,443 residential units. Our assessment is based on the larger number of units (1,443), which provides for a more conservative analysis.

1.2 Commercial Needs Analysis

This analysis focuses on the need and suitability for retail and service commercial uses in the Trailside Neighbourhood Plan and addresses the following key considerations:

- What is the current and future supply of retail/service uses to serve local residents of the Trailside community recognizing the location of the Costco Warehouse Membership Club, as well as the broad range of additional retail developments that exist or are permitted in close proximity to the Trailside Neighbourhood Plan?
- Is the current and future local offering of retail and service uses sufficient for the Trailside community based on local residents needs?
- If it is determined there is a need for a local-serving commercial centre and that this centre can be sustained (economically viable), what size should the centre be, what are the appropriate types of uses, and what is the best site location within the Trailside Neighbourhood Plan?

1.3 Approach

The following actions were undertaken to evaluate the market need for local-serving retail and service uses in the Trailside community and to determine the most appropriate location for a neighbourhood commercial centre:

- **Study Area** – A Study Area was delineated to represent the geographic area from which the majority of existing and future customer support for neighbourhood commercial uses would be derived. The Study Area population largely consists of the Trailside Neighbourhood Plan and the adjoining Stone Ridge Subdivision development to the east.
- **Study Area Population** – The current and projected population for the Study Area was then estimated. The year 2020 has been assumed as the base year for the analysis. In determining the projected population, we have relied on information provided by Charter as to the existing and future number and type of residential units existing and planned within the Study Area.

- **Study Area Inventory** – All retail and selected service commercial uses within the Study Area were inventoried. The inventory is considered current as of September 2020 and has been utilized to establish existing service levels in the Study Area.
- **Future Competition** – It was then determined if there are any additional retail and service commercial uses planned for the Study Area that would fulfill a portion of the retail/service commercial needs of local residents.
- **Per Capita Space Analysis** – A per capita space analysis was undertaken for selected retail and service categories that are considered appropriate uses for a neighbourhood commercial centre. From this analysis, the existing per capita service level for each local serving retail and service category within the Study Area was determined to provide an assessment of how well served the area is compared to normal benchmarks. This approach applies typical per capita ratios to the forecasted Study Area population to estimate future market need.
- **Market Assessment** – Based on a review of the existing commercial space in the Study Area, as well as estimates of the existing and forecast market needs of Study Area residents, an assessment was undertaken of how much commercial space should be provided in the Trailside Neighbourhood Plan.
- **Commercial Centre Assessment** – Based on the results of the market needs analysis, an evaluation of typical site and access characteristics for a viable local-serving neighbourhood commercial centre was undertaken to determine the most appropriate size, use mix and location for a commercial centre within the Trailside community.,

1.4 Assumptions

There are a number of underlying and basic assumptions upon which the validity of the findings presented in this report depend. Based on our considerable and longstanding experience in the retail planning process, we recognize and appreciate the problems associated with making broad and generalized assumptions about future conditions. In undertaking a retail market needs analysis, the intent is to make future assumptions that are a consultant's best estimate. Any prediction of the future is inherently imprecise; however, it is important that the assumptions made are realistic.

Undoubtedly, deviations from historic and current trends will take place in the future. However, basic assumptions are required regarding the possible extent of such deviations. These assumptions include the following:

- During the forecast period considered in this report, a reasonable degree of economic stability will prevail in the Province of Ontario and City of Orillia. The recent affects of the Covid-19 pandemic will not prevail over the longer term.

- Estimates of the current and future population growth in the Study Area have been based on Census population and information related to ongoing/planned housing development in the area provided by Charter.
- The official statistical sources utilized in this report (based largely on Statistics Canada publications, which have been footnoted where utilized) are considered sufficiently accurate for the purposes of this analysis (i.e. for historic and current population).

Our research and analysis has been conducted in accordance with the terms of reference for this assignment and our authorized scope of work. The findings and recommendations presented in this report represent our best judgment based upon the information available to us as of the date of our research. Although every effort has been taken to ensure the accuracy, completeness, and reliability of the information provided in this report, urbanMetrics assumes no responsibility for the consequences of anyone's use of the information contained in this report.

If for any reason major changes occur which would influence the basic assumptions stated above, the recommendations or conclusions contained in this report should be reviewed in light of such changed conditions and revised, if necessary.

2.0 Study Area

Key Findings

- Based on our experience, neighbourhood and convenience shopping is typically undertaken within one or two kilometres of a person’s home. Recognizing this, our Study Area has been generally defined to extend north to Bass Lake Side Road East, east to Highway 11, south to Old Barrie Road East, and west to Line 15 (the Oro-Medonte/Orillia municipal boundary).
- This Study Area has been the focus of our inventory and per capita space analysis and is largely comprised of the Trailside Neighbourhood Plan, the developing Stone Ridge subdivision to the east and the commercial developments located east of University Avenue/West Ridge Boulevard and extending northeast to Hwy 12 and Hwy 11.
- The Study Area delineated for this analysis is based on geographical distance and travel times, the location of existing and future commercial competition, community characteristics, and natural and man-made barriers that may inhibit or restrict customer movement.

A Study Area represents the main geographic area from which the majority of customers will regularly support the specific type of stores and services that are likely to locate in a neighbourhood commercial centre accounting for typically 70% to 80% of regular customer support. Remaining customer support includes occasional expenditures of customers living outside the Study Area (i.e. inflow). These customers could include visitors, non-permanent residents, the travelling public and/or individuals who work in, or near the Study Area, but reside elsewhere.

Our Study Area delineation recognizes several factors, including:

- Geographical distance and travel times;
- The location of existing competition in the local area;
- The nature and size of the potential retail/service development;
- Natural and man-made barriers (e.g., Highway 11/12, Line 15 North), which may inhibit or restrict the ease of vehicular and pedestrian traffic movement for customers arriving on foot or by car; and,
- The access characteristics of the site, including the accessibility and visibility of the site provided by the local and regional road network.

Based on our experience, localized neighbourhood and convenience shopping is typically undertaken within one or two kilometres of a person’s home. Recognizing this, and the factors outlined above, we have defined a Study Area for this Commercial Needs Study.

As shown in Figure 2-1, the Study Area has been generally defined to extend north to Bass Lake Sideroad East, east to Highway 11, south to Old Barrie Road East, and west to 15th Line (the Oro-

Medonte/Orillia municipal boundary). This Study Area has been the focus of our inventory and per capita space analysis and is largely comprised of the existing Stone Ridge Community and the proposed Trailside Neighbourhood Plan Area.

Figure 2-1: Study Area



SOURCE: urbanMetrics inc., based on County of Simcoe Interactive Mapping.

3.0 Population

Key Findings

- The residential population of the Study Area increased by approximately 1,100 residents between 2006 and 2016. It is estimated that between 2016 and 2020 the population of the Study Area grew at an average annual rate of 30%, resulting in an estimated 2020 Study Area population of 4,800 residents.
- Heightened population growth in the Study Area in recent years can be attributed to the ongoing development of the Stone Ridge Community, which currently has approximately 1,000 residential units occupied.
- The population of the Study Area is expected to increase to an estimated 10,200 persons at full build-out. This includes the complete build-out of the subject lands, and the Stone Ridge Subdivision to the east.

In order to determine the current and future commercial market need of an area, it is important to have an understanding of the population base that will live in the Study Area now and in the future.

Figure 3-1 summarizes the historical, current and forecast population in the Study Area. As detailed, the residential population in the Study Area between 2006 and 2016, increased by approximately 1,100 persons.

In 2020, we estimate that the population of the Study Area has grown to approximately 4,800 residents, an increase of 2,600 persons since the 2016 Census and representing an average annual growth rate of 30%. Relative to previous years, this heightened average annual growth rate can be attributed to the ongoing development of the Stone Ridge Subdivision, which currently has approximately 1,000 occupied units.

Going forward, the population of the Study Area is expected to increase to an estimated 10,200 persons at full build-out. This includes the complete build-out of the Stone Ridge Subdivision and the Trailside Neighbourhood Plan.

Figure 3-1: Study Area Population

	2006	2011	2016	2020	2031
				Full Build-Out	
Study Area Population ⁽¹⁾	1,100	1,900	2,200	4,800	10,200
Average Annual Growth	160	60	650	491	
Average Annual Growth %	15%	3%	30%	10%	
City of Orillia ⁽²⁾	31,400	31,400	32,100	33,400	40,200

SOURCE: urbanMetrics inc.

1) 2006, 2011 and 2016 population based on Statistics Canada Census data, adjusted for net undercoverage (i.e. Simcoe County 2006 = 3.68%; 2011 = 2.80%; 2016 = 3.01%). Forecast years reflect urbanMetrics estimates, which includes 2,236 units as part of the Stone Ridge Subdivision (of which approximately 1,000 are occupied), and the expected residential development throughout the West Ridge Trailside Neighbourhood Plan Area.

2) 2006, 2011 and 2016 population based on Statistics Canada Census data, adjusted to account for net undercoverage (i.e. Simcoe County 2006 = 3.68%; 2011 = 2.80%; 2016 = 3.01%). 2031 population is based on the 2017 Orillia Development Charges Background Study (Hemson).

4.0 Competitive Environment

Key Findings

- All commercial space in the Study Area has been evaluated, including: Food Store Retail space; Non-Food Store Retail space, Commercial Services; and vacant space.
- The Study Area currently contains a total of 937,600 square feet of retail/service commercial space. This includes 50,900 square feet of FSR space, 685,800 square feet of NFSR space, and 184,800 square feet of commercial service space. There is also 16,100 square feet of vacant space.
- The total amount of retail/commercial service space in the Study Area has increased since urbanMetrics completed a previous commercial analysis in 2017. This increase is largely based on the ongoing development of the X-Change lands at University Avenue and Diana Drive, which as of September 2020, included approximately 40,600 square feet of new retail/service commercial space. These lands are also expected to accommodate an additional 21,125 square feet of retail/service commercial space, but this space is yet to be constructed.
- The RioCan project, east of Monarch Drive, and the Smart Centres site at 95-175 Murphy Road, represent two areas with plans to develop additional retail/commercial service space in the future. The Smart Centres site has up to 68,300 square feet of retail/service space slated for possible future development. The RioCan project has 2,300 square feet of commercial space slated for the development of a new Mr. Lube, automotive service centre. There are also plans to develop two additional free-standing developments of 5,000 and 1,523 square feet respectively. These sites, alongside the developing X-Change lands, represent additional competition for any retail/service commercial space within the Trailside Neighbourhood Plan.

An analysis of competitive retail and service commercial facilities is essential to understand existing service levels in the Study Area, and the function that existing Study Area retail and service facilities fulfill for local residents and visitors.

Based on our field research conducted in September 2020, all commercial space in the Study Area has been inventoried including:

- Food Store Retail (“FSR”)
- Non-Food Store Retail (“NFSR”)
- Services; and,
- Vacant Space.

Appendix A provides a listing of the various store types included in the FSR, NFSR and service categories inventoried.

4.1 Existing Retail and Service Space

Figure 4-1 indicates the location of the retail/service commercial areas inventoried through our field research, and is considered current as of September 2020. Collectively, the retail/service commercial nodes inventoried provide Study Area residents with access to a significant amount of retail/service commercial space within one to two kilometres of their homes. The existing space includes both regional serving establishments (e.g. Costco) and local/convenience serving stores and services.

Figure 4-1: Commercial Inventory Nodes



SOURCE: urbanMetrics inc., based on Google Earth Imagery.

Figure 4-2, summarizes the results of our field research. Based on the inventory completed in September 2020, a total of 937,600 square feet of retail/service commercial space has been identified in the Study Area. The increase in the total amount of retail/commercial space in the Study Area (up from 886,000 square feet in this area in 2017) has largely resulted from the ongoing development of the X-Change lands at University Avenue and Diana Drive, which as of September 2020, included approximately 40,600 square feet of new retail/service commercial space. These lands are also expected to accommodate an additional 21,125 square feet of retail/service commercial space, but this space is yet to be constructed.

The existing inventory includes 50,900 square feet of FSR space, 685,800 square feet of NFSR space, and 184,800 square feet of commercial service space. There is 16,100 square feet of vacant space.

Figure 4-2: September 2020 Commercial Inventory

STORE CATEGORY	West Ridge Area	Murphy Road Area	Costco Area	TOTAL STUDY AREA
Convenience & Specialty Food	7,000	3,500	—	10,500
Supermarkets & Grocery	40,400	—	—	40,400
Total Food Store Retail (FSR) Stores	47,400	3,500	—	50,900
Apparel and Accessories Stores	28,400	20,000	—	48,400
Building and Outdoor Home Supply Stores	130,000	—	—	130,000
General Merchandise Stores	9,200	176,500	155,400	341,100
Home Furnishings Stores	55,000	5,400	—	60,400
Other Miscellaneous Stores	46,900	39,900	—	86,800
Pharmacies & Personal Care Stores	2,800	—	—	2,800
Selected Automotive	16,300	—	—	16,300
Total Non-Food Store Retail (NFSR) Stores	288,600	241,800	155,400	685,800
Liquor, Beer & Wine Stores	—	—	—	—
Liquor, Beer & Wine Stores	—	—	—	—
Banks/Credit Unions	16,200	—	—	16,200
Cultural, Entertainment & Recreation Services	42,300	—	15,000	57,300
Food Services & Drinking Places Services	43,500	6,200	13,100	62,800
Health Care Services	7,000	—	4,500	11,500
Other Services	6,100	—	10,500	16,600
Personal & Household Goods Repair & Maintenance Services	5,700	—	—	5,700
Personal Care Services	4,500	—	2,000	6,500
Social Services	—	—	8,200	8,200
Total Commercial Services	125,300	6,200	53,300	184,800
Vacant	1,700	—	14,400	16,100
Vacant	1,700	—	14,400	16,100
TOTAL	463,000	251,500	223,100	937,600

SOURCE: urbanMetrics inc.

Each of the commercial nodes within the Study Area contains a unique composition and variety of retailers. The following describes the existing commercial space by node:

- 1) **West Ridge Area** – The area bounded by Highway 12/Monarch Drive/West Ridge Boulevard is one of Orillia’s major retail nodes. It includes a wide variety of store types serving both the day-to-day needs of nearby residents and visitors, in addition to a variety of national tenants that serve the shopping needs of Orillia residents and visitors/tourists. A total of 489,100 square feet of retail and service space is located in this area, including 47,400 square feet of FSR space, 288,600 square feet of NFSR space, and 151,400 square feet of services. There is also 1,700 square feet of vacant commercial space in this node. A number of the existing tenants in this node are typically found in neighbourhood/convenience-oriented commercial centres (e.g. personal care services, convenience/specialty food stores, and health care services).
- 2) **Murphy Road Area** – This node includes the McDonalds and Circle K/Gas Station located on the corner of Highway 12 and Murphy Road which together comprise approximately 9,700 square feet. It also includes the SmartCentres development to the east, which includes approximately 241,800 square feet of NFSR space, and is anchored by a Walmart Supercentre. This node also contains a convenience store and a fast-food entity. There has been minimal change to this commercial area since our previous 2017 inventory.
- 3) **Costco Area** – This node is centred around the 155,400 square foot Costco Warehouse. Compared to our previous inventory, this node also includes 40,600 square feet of new retail/service commercial space on the X-Change lands developed at University Avenue and Diana Drive. In future years, this development is expected to develop an additional 21,125 square feet of retail/service commercial space. This additional space is not included in our inventory summarized in Figure 5-2, but is noted in the following section as a future competitive development.

In total, this node contains 223,100 square feet of retail service commercial space, including 155,400 square feet of NFSR space, and 53,300 square feet of services. There is also 14,400 square feet of vacant space, all of which is located on the newly developed X-Change lands. Similar to many of the tenants in the West Ridge Area, a number of the existing tenants in this node are typically found in neighbourhood/convenience-oriented commercial centres (e.g. personal care services, convenience/specialty food stores, and health care services).

4.2 Competitive Developments

As part of our competitive analysis we also identified any proposed commercial developments in the Study Area. These developments have been identified based on the City of Orillia Development Status

Summary (August 2020). The location of these developments is shown in Figure 4-3. The proposed developments are located in and around the existing retail nodes identified in Figure 5-2.

Figure 4-3: Planned Development Activity (2020)



SOURCE: urbanMetrics inc., based on the County of Simcoe Interactive Mapping and the City of Orillia August 2020 Development Status Summary.

A brief description of the planned, designated and proposed developments in each commercial node identified in Figure 4-3, has been provided below:

- 1) **West Ridge Area** – As shown in Figure 4-4, a new stand-alone building is being developed at 3287 *Monarch Drive*. This building is estimated to comprise 2,300 square feet of commercial space and will be the location of a new Mr. Lube, automotive service centre.

Figure 4-4 also shows that there is retail expansion potential available in the remainder of this RioCan project on the east side of *Monarch Drive*. RioCan has plans for two free-standing developments of 5,000 and 1,523 square feet respectively, opposite the Home Sense and Value Village. It is likely that these units would be occupied by service uses; however, the specific uses are not yet determined in Orillia’s 2020 Development Summary.

Figure 4-4: West Ridge Remaining Vacant Lands



SOURCE: urbanMetrics inc., based on Google Earth Imagery and City of Orillia Status Summary.

- 2) **Murphy Road Area** – There are additional lands slated for development at 95-175 Murphy Road, on the Smart Centres site. This Walmart anchored Supercentre site has been planned to include a total of nine buildings, or 310,000 square feet of space. Currently, the site has been developed with 241,800 square feet of space, leaving approximately 68,200 square feet of retail/service commercial space to be developed in the future. This includes a 14,000 square foot Pet Smart currently being constructed across from the Winner's.

- 3) **Costco Area** – As previously mentioned, there is still additional retail/service commercial space to be built on the X-Change lands, just north of the existing Costco location. This includes four additional buildings, and 21,125 square feet of new retail/service commercial space.

5.0 Market Analysis

Key Findings

- Study Area residents currently require an estimated total of 74,400 square feet of local serving retail and commercial service space. In the Study Area there is currently 271,000 square feet of existing retail/service commercial space in these selected categories which is significantly more space than required by Study Area residents in 2020.
- Based on the 4,800 Study Area residents in 2020, there is currently an estimated 195 square feet of retail/service commercial per capita. This service level far exceeds typical requirements. Typical service levels for all retail and service categories range between 40 to 50 square feet per capita.
- Assuming a population of 10,200 persons at full build-out, and the same per capita space ratios, a total of 158,100 square feet of space in the selected retail/service commercial categories would be required by Study Area residents at build-out. Therefore, the 271,000 square feet of existing retail/service commercial space in the Study Area today, far exceeds the long-term retail/commercial service requirements of Study Area residents. However, over the long term, there are expected to be potential deficiencies in pharmacies and personal care stores, and personal care, health care and other services.
- Although our analysis indicates an oversupply of local-serving commercial facilities to serve the developing population in the Study Area, we believe there may still be an opportunity to provide a smaller neighbourhood commercial centre with a total of 3,000 to 5,000 square feet of space that could include personal services (e.g., barber, beauty salon), a small walk-in clinic or equivalent health care service, a small convenience store with an in-store ATM, and a small restaurant/drive thru to also serve potential pass-by traffic. We anticipate that the potential deficiencies in personal care stores, and personal care, health care and other services will be captured throughout other retail/service commercial areas in the Study Area, such as those locating along University Avenue, throughout the West Ridge node, and within the X-Change development.

In order to determine the amount of additional retail/service commercial space that could be supported by Study Area residents and whether there is a need for local serving commercial space within the Trailside Neighbourhood Plan, urbanMetrics has undertaken a per capita space analysis that addresses the market need for a range of convenience serving retail uses (e.g. food stores, pharmacies/personal care stores) and services (e.g. restaurants, financial services, personal services, health care services and selected other services). These are the types of uses typically found in a neighbourhood commercial centre.

We would note that utilizing the space per capita methodology represents a general guide to the need for retail and service space to serve the local population in a given market area. The actual space required locally may vary depending on income levels and the amount of spending inflow and outflow which occurs. However, this analysis provides a strong indication of whether there is a shortage or oversupply of commercial space in the Study Area.

5.1 Existing Space Per Capita

As shown in Figure 5-1, the major commercial nodes in the vicinity of the Trailside Neighbourhood Plan benefit Study Area residents by providing close and convenient access to a wide variety of retail uses and services, many of which are convenience and local-serving in nature.

Although we recognize that the majority of retail and service space in the Study Area also serves the entire City of Orillia (e.g. Costco) as well as adjacent municipalities and tourists/visitors to the area, it is evident that Study Area residents are still extremely well served on a per capita basis by the existing supply of retail and service facilities within a short distance of their homes.

Based on the estimated 4,800 persons living in the Study Area in 2020, there is currently an estimated 195 square feet of retail/service commercial per capita. This existing service level significantly exceeds that required to serve the total retail and service commercial need of people living in the Study Area (i.e., typical service levels for all retail and service categories range between 40 to 50 square feet per capita).

Figure 5-1: Existing Study Area Per Capita Space

STORE CATEGORY	TOTAL INVENTORY		Study Area Existing Per Capita Space
	ft ²	%	
Convenience & Specialty Food	10,500	1.1%	2.2
Supermarkets & Grocery	40,400	4.3%	8.4
Total Food Store Retail (FSR) Stores	50,900	5.4%	10.6
Apparel and Accessories Stores	48,400	5.2%	10.1
Building and Outdoor Home Supply Stores	130,000	13.9%	27.1
General Merchandise Stores	341,100	36.4%	71.1
Home Furnishings Stores	60,400	6.4%	12.6
Other Miscellaneous Stores	86,800	9.3%	18.1
Pharmacies & Personal Care Stores	2,800	0.3%	0.6
Selected Automotive	16,300	1.7%	
Total Non-Food Store Retail (NFSR) Stores	685,800	73.1%	142.9
Liquor, Beer & Wine Stores	-	0.0%	-
Liquor, Beer & Wine Stores	-	0.0%	-
Banks/Credit Unions	16,200	1.7%	3.4
Cultural, Entertainment & Recreation Service	57,300	6.1%	11.9
Food Services & Drinking Places Services	62,800	6.7%	13.1
Health Care Services	11,500	1.2%	2.4
Other Services	16,600	1.8%	3.5
Personal & Household Goods Repair & Maintenance	5,700	0.6%	1.2
Personal Care Services	6,500	0.7%	1.4
Social Services	8,200	0.9%	1.7
Total Commercial Services	184,800	19.7%	38.5
Vacant	19,000	2.0%	4.0
Vacant	16,100	1.7%	3.4
TOTAL	937,600	100.0%	195.3

SOURCE: urbanMetrics inc.

5.2 Retail/Service Commercial Needs

Utilizing an approach commonly used to estimate the future retail/service commercial needs of a smaller study or trade area, we have completed a high-level per capita space analysis to estimate Study Area residents' per capita space requirements for selected retail and service space categories. These categories include the type of uses that typically locate in a neighbourhood commercial centre.

Based on our experience, we have estimated that each Study Area resident would require approximately 15.5 square feet of selected retail and service commercial space.

This per capita space ratio has been applied to the Study Area’s estimated 2020 population, as well as to the anticipated build-out population, to provide an estimate of the total local- serving space required by Study Area residents. The resulting space requirements have been compared to the existing amount of space in the Study Area, which is supported not only by Study Area residents, but by other residents of the City, pass-by traffic, tourists, employees working in the area who live outside the Study Area, plus other visitors to the area.

Figure 5-2 details the per capita space ratios in each of the select retail/service categories that would likely locate within the Trailside Neighbourhood Plan. Based on this analysis, Study Area residents currently require a total of approximately 74,400 square feet of local-serving retail and commercial service space. In the Study Area there is already 271,000 square feet of existing retail/service commercial space in these selected categories, significantly more space than required by Study Area residents today.

Figure 5-2: Study Area Per Capita Commercial Needs Analysis (2020)

Category	Study Area SQFT Per Capita Space Requirements ⁽¹⁾	Total Space Required by Study Area Residents ⁽²⁾	Existing Occupied Space in Study Area/Periphery	Surplus (+) / Deficit (-)
	A	B (A X Pop'n)	C	D (B-C)
Study Area				
2020 Population Estimate	4,800			
SELECTED FOOD STORE RETAIL (FSR)				
FSR: Convenience & Specialty Food Stores	1.0	4,800	10,500	5,700
SUB TOTAL	1.0	4,800	10,500	5,700
SELECTED NON FOOD STORE RETAIL (NFSR)				
NFSR: Pharmacies & Personal Care Stores	1.0	4,800	2,800 -	2,000
NFSR: Other Miscellaneous Stores	2.0	9,600	86,800	77,200
SUB TOTAL	3.0	14,400	89,600	75,200
SERVICES				
Services: Financial Services	1.0	4,800	16,200	11,400
Services: Food Services & Drinking Establishments	3.5	16,800	62,800	46,000
Services: Personal Care Services	1.5	7,200	6,500 -	700
Services: Cultural, Entertainment & Recreation Establishments	1.5	7,200	57,300	50,100
Services: Health Care Services	1.5	7,200	11,500	4,300
Other Services	2.5	12,000	16,600	4,600
SUB TOTAL	11.5	55,200	170,900	115,700
GRAND TOTAL - Convenience Related	15.5	74,400	271,000	196,600

SOURCE: urbanMetrics inc.

¹ urbanMetrics inc., estimates based on our own market experience.

² Total needs which can be met both within the Study Area and elsewhere in the surrounding area.

Assuming a population of 10,200 persons at full build-out, and the same per capita space ratios, a total of 158,100 square feet of space in the selected retail/service commercial categories would be required by Study Area residents at build-out as shown in Figure 5-3. Therefore, the 271,000 square feet of existing space in the Study Area still exceeds these long-term requirements.

Over the long term, there are expected to be potential deficiencies in certain categories such as pharmacies and personal care stores, and personal care, health care and other services (e.g., select office administration, insurance, and real estate); however, given the nature, function and locational requirements of these uses, it would be much more appropriate for these uses to be located in other higher traffic areas of Orillia (i.e., the West Ridge Area, the Westmount Area and downtown Orillia). There is also potential that some of these deficiencies will be addressed by new tenants and the ongoing development of the X-Change lands where many of the existing units are already occupied by service-oriented uses (e.g., Easy Financial, Georgian Dental etc.).

Figure 5-3: Study Area Per Capita Space Analysis (Full Build-Out)

Category	Study Area SQFT Per Capita Space Requirements ⁽¹⁾	Total Space Required by Study Area Residents ⁽²⁾	Existing Occupied Space in Study Area/Periphery	Surplus (+) / Deficit (-)
Study Area				
Population Estimate at Full Build-Out		10,200		
SELECTED FOOD STORE RETAIL (FSR)				
FSR: Convenience & Specialty Food Stores	1.0	10,200	10,500	300
SUB TOTAL	1.0	10,200	10,500	300
SELECTED NON FOOD STORE RETAIL (NFSR)				
NFSR: Pharmacies & Personal Care Stores	1.0	10,200	2,800 -	7,400
NFSR: Other Miscellaneous Stores	2.0	20,400	86,800	66,400
SUB TOTAL	3.0	30,600	89,600	59,000
SERVICES				
Services: Financial Services	1.0	10,200	16,200	6,000
Services: Food Services & Drinking Establishments	3.5	35,700	62,800	27,100
Services: Personal Care Services	1.5	15,300	6,500 -	8,800
Services: Cultural, Entertainment & Recreation Establishments	1.5	15,300	57,300	42,000
Services: Health Care Services	1.5	15,300	11,500 -	3,800
Other Services	2.5	25,500	16,600 -	8,900
SUB TOTAL	11.5	117,300	170,900	53,600
GRAND TOTAL - Convenience Related	15.5	158,100	271,000	112,900

SOURCE: urbanMetrics inc.

¹ urbanMetrics inc., estimates based on our own market experience.

² Total needs which can be met both within the Study Area and elsewhere in the surrounding area.

Even though Study Area residents (which includes residents of the new Trailside community) will be well served with a range of convenience/local-serving retail/service options from a planned function

perspective, it may still be appropriate to provide for a limited amount of local-servicing commercial space in the Trailside Neighbourhood Plan. Recognizing the additional space under development and planned on the X-Change lands and in the West Ridge node, we estimate that the Trailside Plan could support approximately 3,000 to 5,000 square feet of neighbourhood commercial space, including such uses as personal service (e.g., barber, beauty salon), a small walk-in clinic or equivalent health care service, a day care, a small convenience store with an in-store ATM, and a small restaurant/drive-thru. Given the extent of commercial over supply and the dependence of these new commercial uses on maximum population numbers / demand, development of the commercial site should occur at or following build-out of the Trailside Plan to help ensure its viability and success.

6.0 Commercial Site Context and Location

Key Findings

- The Trailside Neighbourhood Plan is located at the western edge of the City of Orillia and abuts Line 15, the western boundary of the City with the Township of Oro-Medonte. Approximately 0.42 hectares of land within this 105-hectare Neighbourhood Plan Area is being considered as the potential site for a local-serving commercial space.
- The subject commercial site is surrounded by low, medium and high-density residential uses, parklands and woodlots. The adjacent area west of Line 15 consists primarily of vacant agricultural/rural lands.
- Convenient access is a key factor in ensuring the success of any commercial centre, including a neighbourhood centre. The proposed location for the neighbourhood centre would benefit from its exposure to pass-by traffic on Stone Ridge Boulevard and 15th Line, while being easily accessible to future residents of the Trailside community.

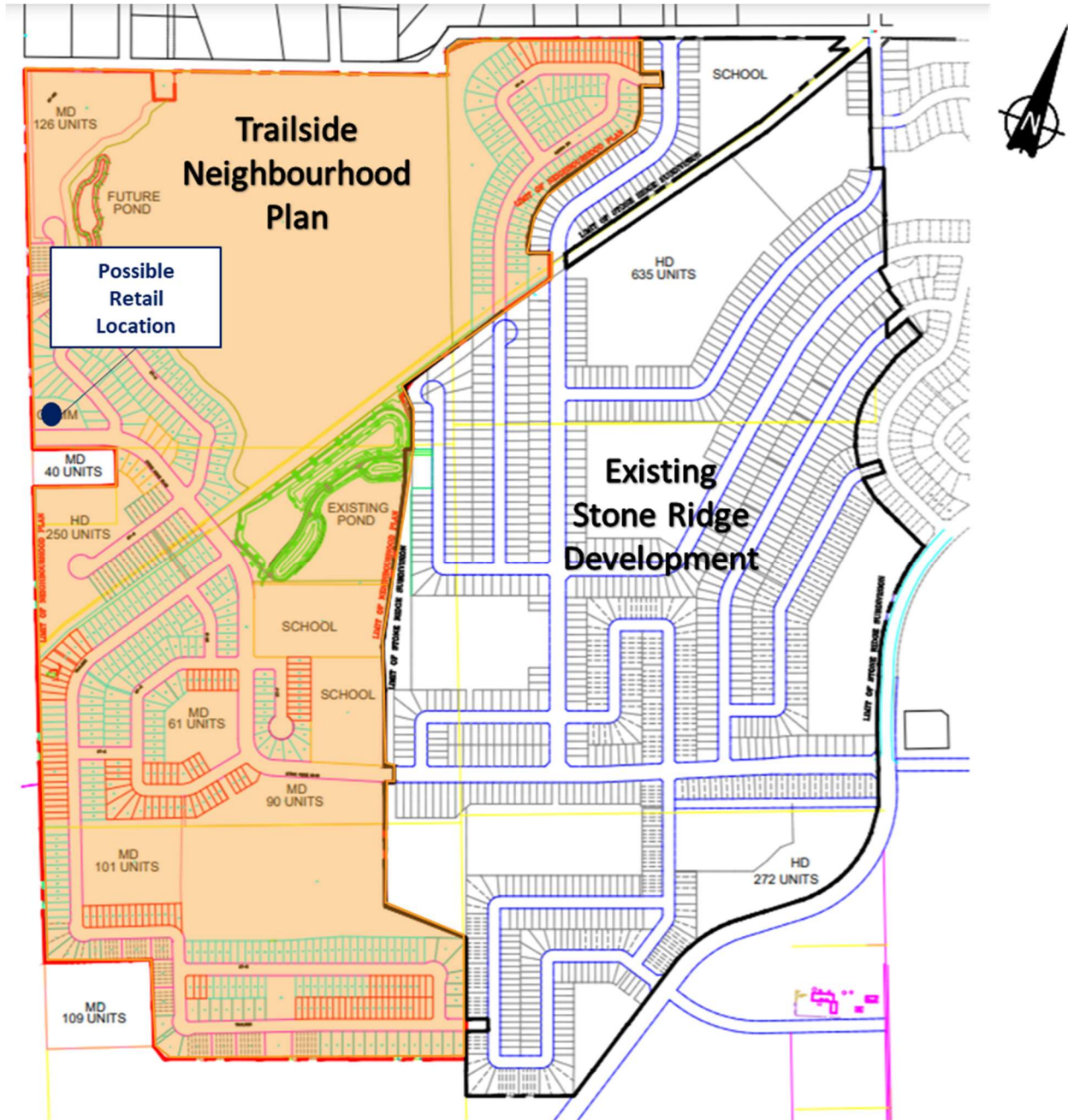
Based on the conclusions in Section 5.0, it is estimated that the Trailside Plan could support approximately 3,000 to 5,000 square feet of neighbourhood commercial space. As such, the following section reviews typical site, access and locational characteristics to determine the most appropriate location for a viable commercial centre within the Trailside community.

6.1 Commercial Site Location and Surrounding Land Uses

Figure 6-1 shows the proposed location of the neighbourhood commercial site. As shown, the proposed commercial block is situated on the northeast corner of the Stone Ridge Boulevard and Line 15 intersection, at the western edge of Trailside Neighbourhood plan.

It is surrounded by a variety of low, medium, and high density residential, parklands and woodlots. The lands surrounding the proposed commercial block to the west – beyond the western boundary of Orillia (i.e., 15th Line) – are agricultural/rural land and currently contain no development to date or proposed in the near term.

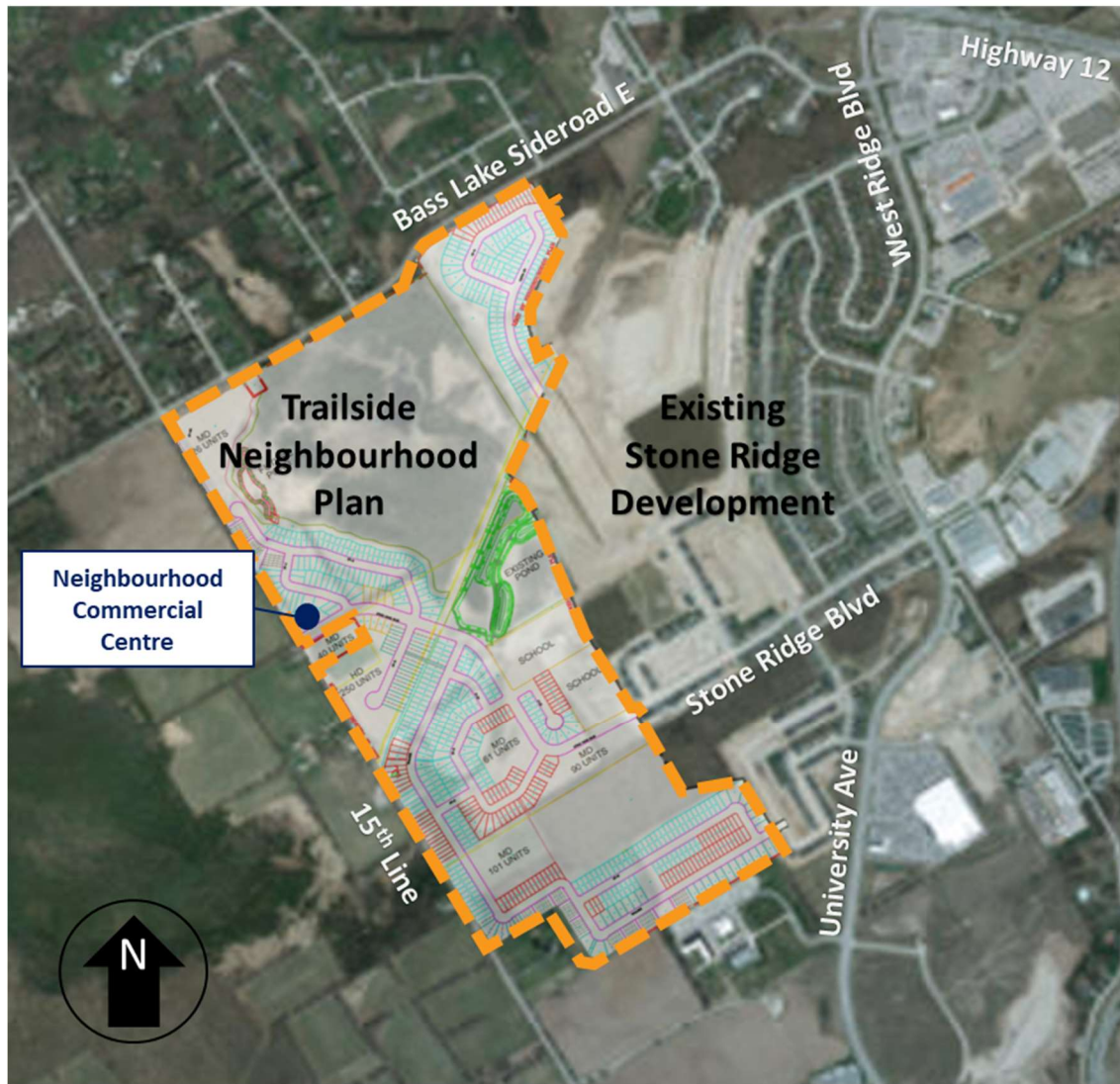
Figure 6-1: Neighbourhood Commercial Site Location



SOURCE: urbanMetrics inc., based on Lotting Plan provided by Charter LP in January 2021.

Being located on the western edge of the Trailside Neighbourhood Plan enhances the overall access and visibility of future commercial uses at this location, to future residents and pass-by traffic. The site is within 400 metres of two schools and within one kilometre of the Lakehead University Orillia Campus.

Figure 6-2: Commercial Centre Location and Surrounding Land Use



Source: urbanMetrics inc., based on County of Simcoe Interactive Mapping and Lotting Plan provided by Charter LP in January 2021. For illustration only.

Currently, Stone Ridge Boulevard serves as an arterial road from Orion Boulevard east to West Ridge Boulevard. Through the development of the Trailside Neighbourhood Plan, Stone Ridge Boulevard will

transition into a collector road between Orion Boulevard westerly to the 15th Line. Line 15 and Bass Lake Road are arterial roadways, providing key through routes for vehicles, pedestrians, and cyclists.

Exposure along the 15th Line and Stone Ridge Boulevard, combined with direct access to the commercial site, makes the proposed commercial site a desirable and feasible location from a market perspective.

6.2 Trailside Neighbourhood Plan Commercial Site

It is recognized that the Study Area provides a very high level of retail/service commercial space per capita now and in the future. However, we are of the opinion that the Trailside Neighbourhood Plan could support approximately 0.4 ha of land with approximately 3,000 to 5,000 square feet of local-serving commercial space.

Further, it is our opinion that a commercial site on the northeast corner of the Stone Ridge Boulevard and 15th Line intersection is the most appropriate location for a local-serving neighbourhood centre for the following reasons:

- The proposed peripheral location of the commercial centre on the 15th Line, has a key role in attracting and supporting potential commercial uses to the Trailside Neighbourhood Plan. Relative to other roadways throughout this area, the 15th Line benefits from increasing traffic volumes and provides enhanced exposure and accessibility for commercial uses to residents, visitors and pass-by traffic.

In fact, it is estimated that development of the Trailside Neighbourhood Plan and Stone Ridge Subdivision – in addition to external background growth in the area – will contribute to increasing traffic volumes along 15th Line from the current 3,000, to 7,000 by build-out. This forecasted daily traffic count for 15th Line significantly exceeds the anticipated daily traffic count for Stone Ridge Boulevard-which is forecast to have a maximum daily traffic count of 2,000 vehicles per day. Recognizing these estimates, the proposed location, along 15th Line, is critical to the overall viability of local serving commercial uses in the West Ridge Area.

- The site has street frontage on two of four sides, minimizing its direct impact on surrounding residential lots. Future commercial space at this location, including the possible impacts of loading areas, parking, snow storage areas and waste management facilities would have less substantial impact on surrounding residential uses in comparison to a more centrally located site.

- The proposed location is within walking distance to low, medium and high-density residential units as well as two school sites. Direct access to this population will help support the neighbourhood commercial development.
- The location of the commercial block in the Trailside Neighbourhood Plan is valuable in distinguishing and separating the local serving retail/service space at this location from extensive retail competition in the area. Physical separation from superior retail areas to the east, combined with exposure to an arterial and collector road, makes the site a suitable and viable location for local serving commercial uses.

7.0 Conclusions

Based on the results of our commercial needs analysis for the Trailside Neighbourhood Plan, we conclude the following:

- The Study Area is currently very well served by commercial facilities in the selected local serving retail/commercial service categories (i.e., convenience related FSR, NFSR and select services). Based on the Study Area’s estimated 2020 population, there is already a surplus of approximately 196,600 square feet of space available to residents in these selected retail/service categories. The majority of these commercial facilities are located within one to two kilometres of the Trailside Neighbourhood Plan, providing ample local access for existing and future residents.

Assuming a population of 10,200 at full build-out, and the same per capita ratios, a total of approximately 158,100 square feet of the selected retail/commercial space would be required by Study Area residents. This long-term requirement is already exceeded by the current supply of 271,000 square feet of existing local serving space in the Study Area. However, by full build-out of the Study Area, we estimate there will be a few retail/service categories, such as such a small convenient store, restaurant/drive-thru, and personal care, health care and other services, which would be appropriate in serving the more local oriented needs of the Study Area population.

Notwithstanding the significant quantity of retail/service commercial space in the Study Area today, combined with the competitive developments and retail space being introduced in the future, it is our opinion that a small commercial centre of 3,000 to 5,000 square feet would be appropriate for the Trailside Neighbourhood Plan. This size is sufficient to provide space for such uses as personal care service space (i.e., beauty salon, barber etc.), day care, health care services (e.g., walk-in clinic), a small convenience store with an in-store ATM and a small restaurant/drive-thru. The commercial site would be constructed at, or following, build-out of the Trailside Plan due to its reliance on maximum population numbers / consumer demand.

- The proposed location for a local-serving commercial centre on the northeast corner of Stone Ridge Boulevard and 15th Line is considered suitable and viable for the following reasons:
 - The location is significantly distanced from the extensive retail areas / commercial competition located to the east.
 - It is located at the intersection of an arterial and future collector road, which enhances traffic volumes as well as exposure and access for future residents, pass-by traffic and visitors to the area.
 - The location is in proximity to where people live and work. It is surrounded by low, medium and high-density residential uses and is within a 400 m walking distance of two school sites.

- The inclusion of a local-serving commercial centre contributes to a complete community within the Trailside Neighbourhood Plan Area.

Given the preceding, we conclude that the proposed location is the best location in the Trailside Neighbourhood Plan for the development of a commercial block that contains somewhere between 3,000 to 5,000 square feet of local-serving retail/service commercial uses.

Appendix A **North American Industry Classification System**

Figure A- 1: North American Industry Classification System (NAICS) Categories

Trade Group	NAICS	Description
FOOD (FSR)		
90	Supermarkets	
	44511	Supermarkets and Other Grocery (except Convenience) Stores
100	Convenience and Specialty Food Stores	
	44512	Convenience Stores
	44521	Meat Markets
	44522	Fish and Seafood Markets
	44523	Fruit and Vegetable Markets
	44529	Other Specialty Food Stores, including Baked Goods Stores, & Confectionary & Nut
BEVERAGE STORES		
110	Beer, Wine and Liquor Stores	
	44531	Beer, Wine and Liquor Stores
NON-FOOD STORE RETAIL (NFSR)		
Automotive		
20	Used and Recreational Motor Vehicle and Parks Dealers (Tires, Batteries, Automotive Accessories component)	
	44131	Automotive Parts and Accessories Stores
	44132	Tire Dealers
Furniture, Home Furnishings and Electronics Stores		
30	Furniture Stores	
	44211	Furniture Stores
40	Home Furnishings Stores	
	44221	Floor Covering Stores
	44229	Other Home Furnishings Stores (e.g. window treatments, kitchen and tableware, bedding and linens, brooms and brushes, lamps and shades, and prints and picture frames).
50	Computer and Software Stores	
	44312	Computer and Software Stores
60	Home Electronics and Appliance Stores	
	44311	Appliance, Television and other Electronics Stores
	44313	Camera and Photographic Supplies Stores
Building and Outdoor Home Supplies Stores		
70	Home Centres and Hardware Stores	
	44411	Home Centres
	44413	Hardware Stores
80	Specialized Building Materials and Garden Stores	
	44412	Paint and Wallpaper Stores
	44419	Other Building Material Dealers <i>Aluminum doors and screens, retail</i> <i>Brick and tile dealers, retail</i> <i>Cabinets, kitchen (to be installed), retail</i> <i>Concrete and cinder block dealers, retail</i> <i>Electrical supplies stores selling primarily to other business but also selling to household consumers</i> <i>Electrical supplies, retail</i> <i>Fencing dealers, retail</i> <i>Garage doors, retail (wood)</i> <i>Glass stores, retail</i> <i>Lumber and planing mill product dealers, retail</i> <i>Plumbing supplies stores selling primarily to other businesses but also selling to household consumers</i> <i>Plumbing supplies, retail</i> <i>Prefabricated house and building dealers, retail</i> <i>Retailers of ceramic floor and wall tiles</i> <i>Roofing material dealers, retail</i> <i>Sales of aluminum doors and installation</i> <i>Tile and brick dealers, retail</i>
	44421	Outdoor Power Equipment Stores
	44422	Nursery Stores and Garden Centres

Trade Group	NAICS	Description
NON-FOOD STORE RETAIL (NFSR)		
Pharmacies and Personal Care Stores		
120	Pharmacies and Personal Care Stores	
	44611	Pharmacies and Drug Stores
	44612	Cosmetics, Beauty Supplies and Perfume Stores
	44613	Optical Goods Stores
	44619	Other Health and Personal Care Stores (includes stores retailing health and personal care items, such as vitamin supplements, hearing aids, and medical equipment and supplies)
Clothing and Accessories Stores		
140	Clothing Stores	
	44811	Men's Clothing Stores
	44812	Women's Clothing Stores
	44813	Children's and Infant's Clothing Stores
	44814	Family Clothing Stores
	44819	Other Clothing Stores
150	Shoe, Clothing Accessories and Jewellery Stores	
	44815	Clothing Accessories Stores
	44821	Shoe Stores
	44831	Jewellery Stores
	44832	Luggage and Leather Goods Stores
General Merchandise Stores		
170	Department Stores	
	45211	Department Stores
180	Other General Merchandise Stores	
	45291	Warehouse Clubs and Superstores
	45299	All Other General Merchandise Stores:
	452991	<i>Home & Auto (i.e. Canadian Tire)</i>
	452999	<i>Other General Merchandise Stores (e.g. general stores, variety stores, "dollar" stores)</i>
Miscellaneous Retailers		
160	Sporting Goods, Hobby, Music and Book Stores	
	45111	Sporting Goods Stores
	45112	Hobby, Toy and Game Stores
	45113	Sewing, Needlework and Piece Goods Stores
	45114	Musical Instrument and Supplies Stores
	45121	Book Stores and News Dealers
	45122	Pre-Recorded Tape, Compact Disc and Record Stores
190	Miscellaneous Store	
	45311	Florists
	45321	Office Supplies and Stationery Stores
	45322	Gift, Novelty and Souvenir Stores
	45331	Used Merchandise Stores
	45391	Pet and Pet Supplies Stores
	45392	Art Dealers
	45399	All Other Miscellaneous Store Retailers:
	453991	<i>Tobacco & Tobacco supplies</i>
	453992	<i>Artist Supplies</i>
	453993	<i>Collectors items (cards, stamps etc.)</i>
	453994	<i>Beer & Wine Making</i>
	453995	<i>Swimming Pool Accessories</i>
	453996	<i>Religious Goods and Accessories</i>

Trade Group	NAICS	Description
SERVICES		
200	Consumer Services Rental	
	5322	Consumer Goods Rental (including formal wear, costume, video, tape & disc rental)
	5323	General Rental Centres (including tools, party rental)
210	Finance and Insurance	
	52211	Banks
	52213	Credit Unions
220	Insurance and Real Estate	
	52421	Insurance Agencies and Brokerages
	53121	Offices of Real Estate Agents and Brokers
230	Professional, Scientific & Technical Services	
	5411	Legal Services
	5412	Accounting, Tax Preparation, Bookkeeping and Payroll Services
	5413	Architectural, Engineering and Related Services
	5414	Specialized Design Services
	5415	Computer Systems Design and Related Services
	5416	Management, Scientific and Technical Consulting Services
	5417	Scientific Research and Development Services
	5418	Advertising and Related Services
	54191	Marketing Research and Public Opinion Polling
	54192	Photographic Services
	54194	Veterinary Services
	54199	All Other Professional, Scientific and Technical Services
240	Selected Office Administrative Services	
	5613	Employment Services
	56143	Business Service Centres (eg. printing, copying, mail centres)
	56144	Collection Agencies
	56145	Credit Bureaus
241	56151	Travel Agencies
250	Health Care Services	
	6211	Offices of Physicians
	6212	Offices of Dentists
	6213	Offices of Other Health Practitioners
	6214	Out-Patient Care Centres (e.g. Family Planning, Community Health)
	6215	Medical and Diagnostic Laboratories
260	Entertainment	
261	71312	Amusement Arcades
262	71394	Fitness & Recreational Sports Centres
263	71399	All other Amusement and Recreation Industries (includes billiards parlours)
264	51213	Motion Picture and Video Exhibition (includes cinemas)
270	Food Services and Drinking Places	
271	7221	Full-Service Restaurants
272	7222	Limited-Service Eating Places
273	7224	Drinking Places (Alcoholic Beverages)
280	Personal and Household Goods Repair and Maintenance	
281	8111	Automotive Repair & Maintenance (includes lubrication, diagnostic centre, tire repair, undercoating, car washes etc.)
282	8114	Personal and Household Goods Repair and Maintenance (including appliance repair, reupholstery & furniture repair, shoe repair, key duplication etc.)
290	Personal Care Services	
	8121	Personal Care Services (including hair, beauty, tanning salon, weight reduction centres, electrolysis, estheticians etc.)
	8123	Dry Cleaning and Laundry Services
	8129	Other Personal Services (e.g. pet care (except Veterinary), Photo Finishing)
300	VACANT	
	9999	VACANT RETAIL/SERVICE SPACE

SOURCE: urbanMetrics inc., based on the North American Industry Classification System ('NAICS').