

Town of Midland, Employment and Commercial Lands Strategy Update



Prepared for:

The Town of Midland

October 12, 2012



October 12, 2012

Wesley R. Crown, MCIP, RPP
Director of Planning and Development
Town of Midland
575 Dominion Avenue,
Midland, Ontario.
L4R 1R2

Dear Mr. Crown:

Re: TOWN OF MIDLAND EMPLOYMENT AND COMMERCIAL LANDS STRATEGY UPDATE

urbanMetrics inc. is pleased to submit our update to the Commercial and Employment Lands components of the 2009 Growth Management Strategy.

The analyses and appendices in the attached report provide our detailed study findings and conclusions.

It has been a pleasure conducting this study on behalf of The Town of Midland and we look forward to discussing our results.

Yours truly,
urbanMetrics inc.

A handwritten signature in blue ink that reads "Rowan Faludi". The signature is written in a cursive, flowing style.

Rowan Faludi
Partner

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1 EXECUTIVE SUMMARY

The goal of the 2009 Growth Management Strategy was to provide guidance to the Town of Midland with respect to the amendments required to update the Official Plan. The study provided an employment lands strategy, a commercial lands strategy, and an intensification strategy, with the aim of bringing the Midland Official Plan into conformity with the Provincial Policy Statement (PPS), Places to Grow (Growth Plan), and the recently adopted County of Simcoe Official Plan.

In this updated study, we have examined the demand for and supply of employment and commercial lands, and have provided updated commentary as to how recent economic events and policy modifications have impacted the findings and recommendations of the 2009 Growth Management Strategy.

In January 2012, the Growth Plan for the Greater Golden Horseshoe was amended to include specific policies related to the Simcoe County Sub-Area. It introduced employment and population targets for 2031, which superseded those contained in the County Official Plan, which were also those relied on in the 2009 Growth Management Strategy.

The amended Growth Plan allocations resulted in increased population growth but reduced employment growth for Midland. As per the amended targets, the Town of Midland is planned to increase its population from 16,900 to 22,500 and to increase its employment base from 12,000 to 13,800 between 2006 and 2031.

In the Town of Midland, there are five areas that are designated as “Employment Area” in the Official Plan and zoned as Industrial and/or Institutional in the Town of Midland’s Zoning By-law 2004-90. These include:

- Highway 12 West Employment Area
- Highway 12 East Employment Area
- Mid-Town Employment Area
- Olive Street Employment Area
- Waterfront Employment Area

Although the largest in size, the Highway 12 West Area is the least intensively developed of the Town’s employment areas. It is still largely rural in character and dominated by a large gravel pit operation.

The Highway 12 East Area is the most active and capable of accommodating small to mid sized businesses. It still contains some 40 hectares of vacant land.

The remaining three Employment Areas are more specialized and constrained by surrounding residential and other land uses. There is virtually no vacant land available in these areas.

In total, there are approximately 400 hectares of lands designated as Employment Area, of which approximately 30% or just over 121.7 hectares are still vacant.

Over the forecast period, the Town of Midland will need to accommodate some 1,800 new jobs (per the County of Simcoe Official Plan and the Provincial Growth Plan). After accounting for the work-at-home population, the employment with no-fixed-place-of-work, and growth in population related employment, this results in a net growth of 100 employees requiring employment land locations by 2031.

Thirty employees per hectare and excess land for expansion results in a demand for some 3.7 additional hectares of employment land by 2031. With 121.7 hectares of vacant employment lands in Midland, this supply is far more than adequate to accommodate need to 2031.

It is important to recognize that this analysis is extremely conservative owing largely to the very low employment allocation provided by the Growth Plan. While population can, to a large extent, be governed by land use planning through sub-division and related approvals, employment, is much more difficult to regulate as it will fluctuate based on the expansion and contraction plans and locational needs of individual companies.

Provincial, County and local policies set the framework for any potential modifications to the Town's land supply. The Places to Grow Plan sets the overall agenda for growth in terms of the necessary considerations that both upper and lower tier planning authorities must consider. Of particular importance is the need to contain growth, where possible, and to ensure that an appropriate land supply is available to accommodate various types of growth over the next 20 years.

The future of Midland's employment areas is influenced by two potentially opposing pressures. On the one hand, there are currently some 122 hectares of vacant employment lands, which is well in excess of what will be required over the next 20 years.

However, at the same time, the employment allocated to the Town by the Provincial Growth Plan and the Draft County Official Plan is extremely limited, and to strictly adhere to the policies of the Growth Plan, the municipality should be planning to achieve this restricted level of future employment growth.

Regardless of the availability of vacant employment lands, however, the Town should still be cautious in terms of managing its supply of employment lands and buildings to ensure that proposals for new development, land conversions and re-use maximize the opportunities to maintain a diverse and strong economic base.

Tourism and recreation are important to the local economy and activities related to these sectors should be considered for excess vacant employment lands.

In total, based on this analysis, the 2031 population growth of 5,400 persons would require the addition of some 438,500 square feet of retail and service space. This equates to a level of 82.7

square feet per capita including both inflow and outflow, which is slightly lower than the 93.2 square feet per capita currently supported in Midland. The lower level, in part, reflects the Growth Plan population and employment allocation which would provide for a shift in employment growth to new growth centres and increased competition from other parts of Simcoe County.

At typical retail densities, 438,500 square feet would require approximately 40 acres (16 hectares)¹. There are approximately 158 (64 hectares) of zoned vacant commercial land existing in Midland, which is significantly more than will be required to accommodate the future space.

A potential distribution of this space could include the addition of a new regional serving node of between 150,000 and 300,000 square feet (15-30 acres) together with neighbourhood and convenience retail sites oriented to existing and new residential communities. A portion of this new space should also be directed to the downtown to bolster the economy of the central area and to support future intensification.

We would note that the actual land requirements may be lower depending on whether part of the warranted space is provided through intensification at higher than typical densities.

If the Growth Plan Employment target of 1,800 new employees is adhered to, only 240,000 square feet would be developed, which would require only 22 acres or 9 hectares. This lower level of space would be primarily oriented to the needs of local residents and should be focused largely in the vicinity of residential areas and the downtown core.

In summary, the general conclusions of the 2009 Growth Management Strategy are still valid, although the amount of warranted retail and employment lands have changed considerably owing to the revised population and employment targets in the Provincial Growth Plan.

¹ Assuming 25% lot coverage.

2 INTRODUCTION

This report is dated October 12, 2012 and has been prepared for the Town of Midland. It contains an update to the Economic and Commercial sections of the May 19, 2009 Midland Growth Management Strategy, prepared jointly by urbanMetrics, Planning Alliance, and Meridian Planning Consultants.

The goal of the 2009 Growth Management Strategy was to provide guidance to the Town of Midland with respect to the amendments required to update the Official Plan. The study provided an employment lands strategy, a commercial lands strategy, and an intensification strategy, with the aim of bringing the Midland Official Plan into conformity with the Provincial Policy Statement (PPS), Places to Grow (Growth Plan), and the recently adopted County of Simcoe Official Plan. The objectives for the study were to:

- Provide for a ‘made in Midland’ response to the Growth Plan, in keeping with the nature and character of the community;
- Provide clear recommendations in terms of the changes required to the Town’s Official Plan with respect to protecting and promoting the Town’s employment lands and economic base;
- Provide clear direction regarding the commercial land use structure in the Town and the policy steps the Town should take to protect the current functioning of commercial areas, and in particular the downtown core.

In this updated study, we have examined the demand for and supply of employment and commercial lands, and have provided commentary as to how the findings and recommendations provided by the 2009 Growth Management Strategy should be modified.

This update is required to address a number of significant events and policy changes which have occurred since the original Growth Management Study was prepared:

- In January, 2012, the Province released Amendment 1 to the Growth Plan for the Greater Golden Horseshoe, which altered the population and employment targets for the Town.
- In 2012, Statistics Canada released the Census of Canada population figures, which provided updated data for the Town of Midland for 2011. In the 2009 report, only the 2006 population data was available.
- In June, 2012, the County of Simcoe released its new draft Official Plan for public review.

- Between 2009 and 2010, communities across Ontario suffered a significant economic downturn, from which many are still recovering. Between 2006 and 2011, the Town of Midland population grew only 1.5% - well below the level required to meet the Provincial Growth Plan target by 2031.

The sections which follow provide an update to Section 3- Employment Areas Strategy and Section 4 Commercial Lands Strategy of the Midland Growth Management Strategy, recognizing the above events, together with current information on the industrial and commercial land supply.

3 EMPLOYMENT AREAS STRATEGY

3.1 POPULATION AND EMPLOYMENT

Figure 1-1 summarizes the historic population and employment and the targets for the Town of Midland. The historic population is based on the 2011 Census of Canada adjusted for undercoverage. The 2006 employment figure was derived from the 2008 Official Plan, as was the 2008 Simcoe County Official Plan targets for 2031. In January 2012, the Growth Plan for the Greater Golden Horseshoe was amended to include specific policies related to the Simcoe County Sub-Area. It introduced employment and population targets for 2031, which superseded those contained in the County Official Plan, which were also those relied on in the 2009 Growth Management Strategy.

As noted in Figure 2-1, the between 2006 and 2011, the Midland population grew by only 300 persons. This rate of growth is well below that needed to achieve the amended 2031 Target contained in the Growth Plan of 5,600 persons.

As the 2011 Census employment figures have not yet been released, only the 2006 figure is available. Between 2006 and 2031, the Town's employment is targeted to grow by some 1,800. This is a significant reduction from the previous Simcoe County target for Midland of 4,000 employees.

In our opinion, the previous population and employment targets would have been difficult to achieve in tandem, as they would have required the Town to attract 1.4 new employees for every new resident. It would also seem to contravene the principles of the Provincial Growth Plan by implying that many new employees in Midland would have to live outside of the community where they work. In contrast, the more recent Growth Plan target ratio of new jobs to new residents of .3 is very low, recognizing that Midland has traditionally been an employment centre for the surrounding communities. In our opinion, it is more achievable than the previously targeted ratio and would be more in line with the anticipated aging population in slow growth communities (i.e. reducing the working age population) and with the principle of creating a more balanced live/work relationship within the County.

FIGURE 2-1: TOWN OF MIDLAND HISTORIC AND PROJECTED POPULATION AND EMPLOYMENT

	2006	2011	2031 Target 2008 Simcoe OP	2031 Target Jan 2012 Growth Plan
Population	16,900	17,200	19,700	22,500
Growth from 2006		300	2,800	5,600
Growth from 2011			2,500	5,300
Employment	12,000	n/a	16,000	13,800
Growth from 2006		n/a	4,000	1,800
Activity Rate (Employment/Residents)	0.7	n/a	0.8	0.6
New Employees/New Residents (2006-31)			1.4	0.3

Source: urbanMetrics

Notes:

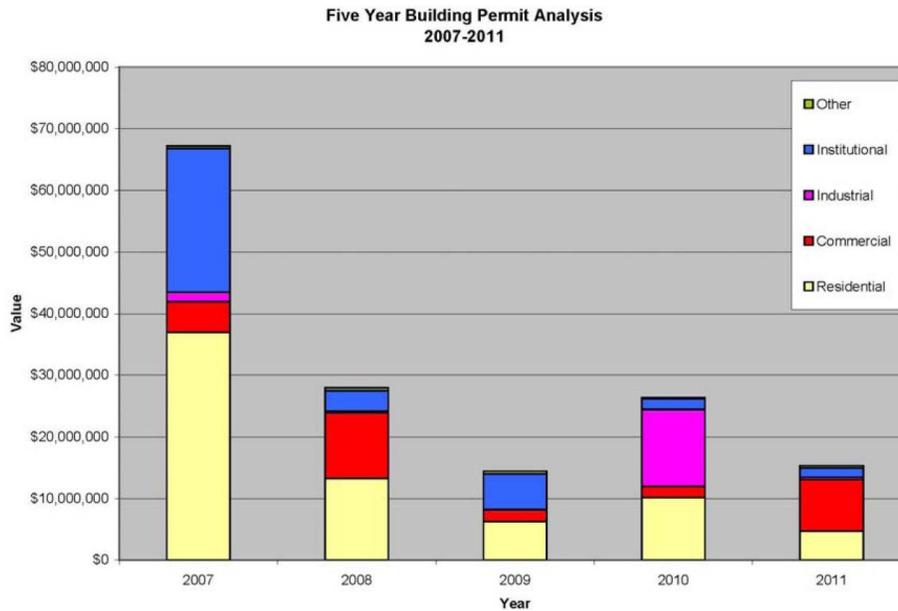
2006 and 2011 populations from Census of Canada Includes 4.0% adjustment for undercoverage.

2006 Employment from 2008 Simcoe County Official Plan

3.2 GROWTH TRENDS IN NON-RESIDENTIAL DEVELOPMENT ACTIVITY

Non-residential development benefits communities through employment and assessment growth. Figure 2-2 illustrates the value of non-residential building permits issued between 2007 and 2011. The total value of all permits has declined significantly since 2007. Although it must be recognized that in that year permit activity was dominated by residential and institutional construction. Commercial building permits have fluctuated since 2007, with the value of permits highest in 2008. The value of industrial building permits has been minimal since 2007, with the exception of a spike in 2010.

FIGURE 2-2: TOWN OF MIDLAND VALUE OF BUILDING PERMITS 2007-2011



Source: Town of Midland Economic Development Information Package 2011

3.3 EMPLOYMENT LANDS SUPPLY

The Employment designation is intended to provide for business and commerce, industry and compatible community and institutional uses. The potential for a range of uses within the designation requires recognition of competing and complementary circumstances of the various uses. Within industrial park areas the predominant use is intended be for large scale industrial, manufacturing and related service uses. Commercial and institutional uses on the periphery of these areas may be considered subject to the policies of Section 3.1.4.

Employment land is important primarily because of the role it plays in accommodating employment growth. In this context, the provision of transportation and servicing infrastructure on these lands is undoubtedly one of the most significant levers available to shape future urban form, and maintain local quality of life. The provision of employment land also contributes to a better live-work relationship with fewer residents needing to commute to job opportunities outside the community. In addition, it provides a greater diversity in the land base, allowing flexibility in responding to economic change. Because it plays such a large role in any economic development strategy, employment land is important to the Town’s future economic prosperity and competitiveness.

The majority of industrial lands are located in the southern portion of the Town along Highway 12. For a variety of reasons, access and exposure are key locational requirements of many businesses seeking industrial sites. For this reason, industrial lands and business parks tend to be located along major transportation corridors. In the case of Midland, Highway 12 is the major route connecting northern Simcoe County with an interchange at Highway 400 to the east and Highway 93 to the west. As a result, the industrial lands along Highway 12 are considered the most important in terms of attracting industrial growth to the Town. While the industrial lands along the waterfront and the downtown may have the potential to attract specialized business development opportunities, the Highway 12 industrial lands have the best transportation characteristics and offer the greatest overall potential to attract new industries to the community.

In the Town of Midland, there are five areas that are designated as “Employment Area” in the Official Plan and zoned as Industrial and/or Institutional in the Town of Midland’s Zoning By-law 2004-90. These include:

- Highway 12 West Employment Area
- Highway 12 East Employment Area
- Mid-Town Employment Area
- Olive Street Employment Area
- Waterfront Employment Area

The location of these areas is provided on Figure 2-3.

FIGURE 2-3: EMPLOYMENT AREAS IN THE TOWN OF MIDLAND

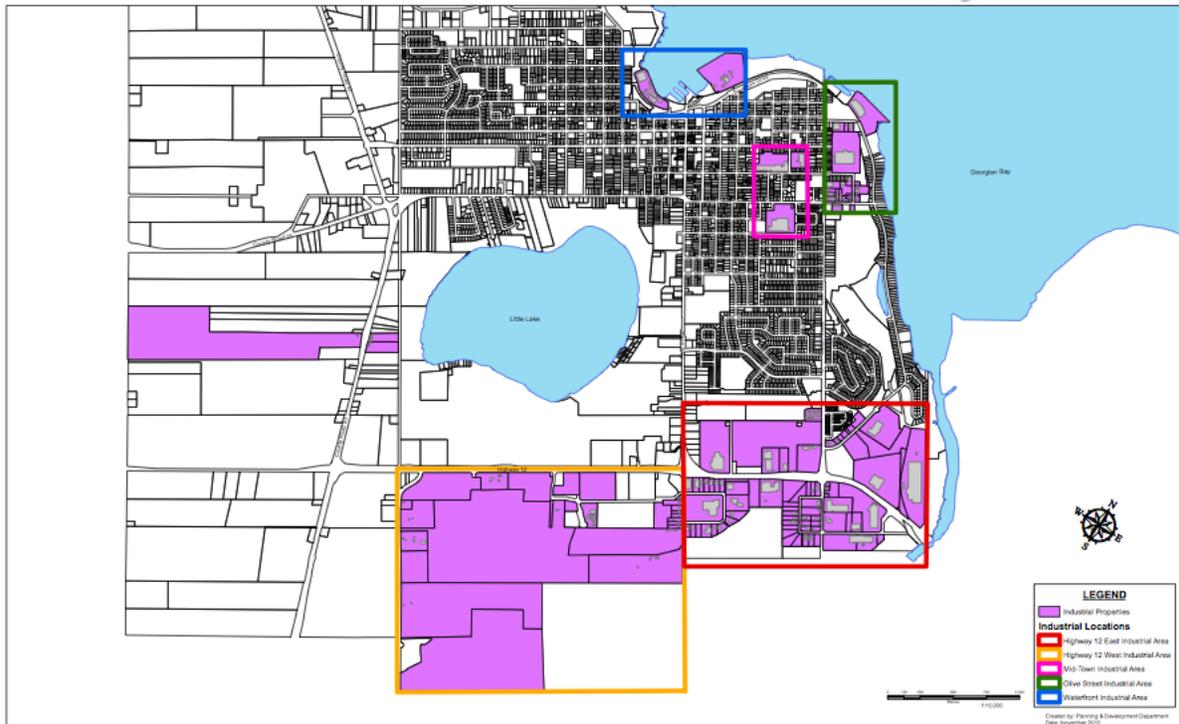


Figure 2-4 summarizes the land inventory information for each of the Town’s Employment Areas. In total, there are approximately 986.8 acres of lands designated as Employment Area, of which approximately 30% remain vacant.

There are just under 2.5 million square feet of gross floor area within the Town’s employment areas, of which some 18% is vacant. It is important to recognize that the vacant space is concentrated in just five buildings in the Highway 12 East area, of which only three are industrial. As a result, this relatively high vacancy rate is not necessarily indicative of a soft market.

FIGURE 2-4: MIDLAND EMPLOYMENT AREA INVENTORY

	Hwy 12 East	Hwy 12 West	Mid-Town	Olive Street	Waterfront	Total Midland
Land Area						
Land Area (HA)	126.5	236.3	9.1	17.3	10.3	399.5
Vacant Land (HA)	39.4	82.2	0.0	0.2	0.0	121.7
Land Area (Acres)	312.4	583.7	22.5	42.7	25.5	986.8
Vacant Land (Acres)	97.2	203.0	0.0	0.5	0.0	300.7
% Vacant	31%	35%	0%	1%	0%	30%
Gross Floor Area (Sq. Ft. Thousands)						
Industrial	1,149	53	288	324	133	1,946
Commercial	13	-	-	3	-	16
Residential	5	49	1	9	-	64
Vacant Buildings	450	-	-	-	-	450
Total	1,617	102	289	336	133	2,477
% Vacant Buildings	28%	0%	0%	0%	0%	18%

Source: urbanMetrics based on Town of Midland Planning Department June 2011 Inventory

3.3.1 HIGHWAY 12 EAST EMPLOYMENT AREA

The Highway 12 East Employment Area is located on the lands to the North and South of Highway 12, and East of King Street to Wye Valley Road. Although not the largest in terms of land area, it is by far the most intensively developed and active of the Town’s five Employment Areas. It is the location of many of Midland’s most prominent industries, including Weber Manufacturing, NEBS, Baytech Plastics – Highway 12 Plant, General Mills-Pillsbury, and TRW Vehicle Safety – Highway 12 Plant, as well as, several smaller businesses.

It contains some 1,149,000 square feet of industrial space within 54 buildings, which represents approximately 60% of the occupied industrial building space in the Town.

3.3.2 HIGHWAY 12 WEST EMPLOYMENT AREA

The Highway 12 West Employment Area is generally located on the south side of Highway 12, east of Brebeuf Road and west of King Street. This Employment Area is still largely rural in character, with just under half of the occupied building space comprising rural residential homes. The majority of the land in this employment area is occupied by a single quarry operation operated by K.J. Beamish. Other industrial users in this area include: the Midland PUC maintenance and storage depot, Rastin and Associates (Lawyers), and AAA Professional Self Storage.

While this area contains approximately two-thirds of the vacant employment land in the Town, it has historically attracted primarily low intensity dry industrial users and those not requiring a prestige setting.

3.3.3 MID-TOWN EMPLOYMENT AREA

The Mid-town Employment Area consists of four properties, which are located between Russell and Lindsay Streets, just east of the downtown commercial core. The area not a consolidated employment district, but comprises two major industrial businesses separated by established residential blocks.

Although comprising just two percent of the Town's industrial lands, it is home to Midland's largest employer – Raytheon-Elcan Optical Technologies. The other prominent industry is Baytech Plastics. There is also one residential dwelling within this defined area. Despite being the smallest of the Town's Employment Areas, it comprises 15% of the industrial space.

Currently, there are no vacant lands located in this Industrial Area.

3.3.4 OLIVE STREET EMPLOYMENT AREA

The Olive Street Employment Area is generally located on the East side of William Street between Yonge Street and Bay Street. There are 25 industrial parcels located in the Olive Street Employment Area, accounting for 18% of all the Industrial properties in the Town of Midland.

Situated on the southern waterfront, this area contains a number of large industrial users interspersed with residential dwellings. There are 9 dwelling units in this area, generally located near the corner of Olive Street and Yonge Street. There is one commercial use – a fitness centre – situated within an industrial unit.

Businesses that are located within the Olive Street Industrial Area include, TRW – Bay Street Plant, Saint- Gobain Technical Fabrics, Steel-Tek, Midland Tool and Machine, and Old Timer Wood Stoves. The Olive Street Employment Area accounts for 4% of all of the Town's Industrial lands, or 17.3 hectares. It is also the second largest Employment Area in terms of industrial gross floor area next to only Highway 12 East.

3.3.5 WATERFRONT EMPLOYMENT AREA

The Waterfront Employment Area is located on the north side of Bayshore Drive, between Fourth Street and Manly Street. The Waterfront Employment Area comprises two industrial operations - UNIMIN Canada Ltd and ADM Agri-Industries Limited. The area has effectively been delineated to accommodate these two waterfront related uses. The Waterfront Employment Area contains 7% of the Employment Area Industrial building floor area in the Town. There are no vacant industrial lands within this area.

3.4 INDUSTRIAL ZONING CATEGORIES

The Town of Midland has two industrial zones M1 and M2.

The M1 Zone is a general industrial zone permitting a wide range of industrial and office uses, together with a limited number of commercial and institutional uses, that are either complementary to an employment area, are space or land extensive, or are not appropriate in other parts of the Town. Commercial uses permitted in this zone include: adult entertainment parlors; animal hospitals; automotive sales and service operations; auction centres; banquet, conference and catering facilities; commercial schools; eating establishments; factory outlets; self storage facilities; “rent-all” shops and fitness clubs. Permitted institutional uses include: ambulance depots; day care centres; training and rehab centres; and places of assembly (e.g. service clubs).

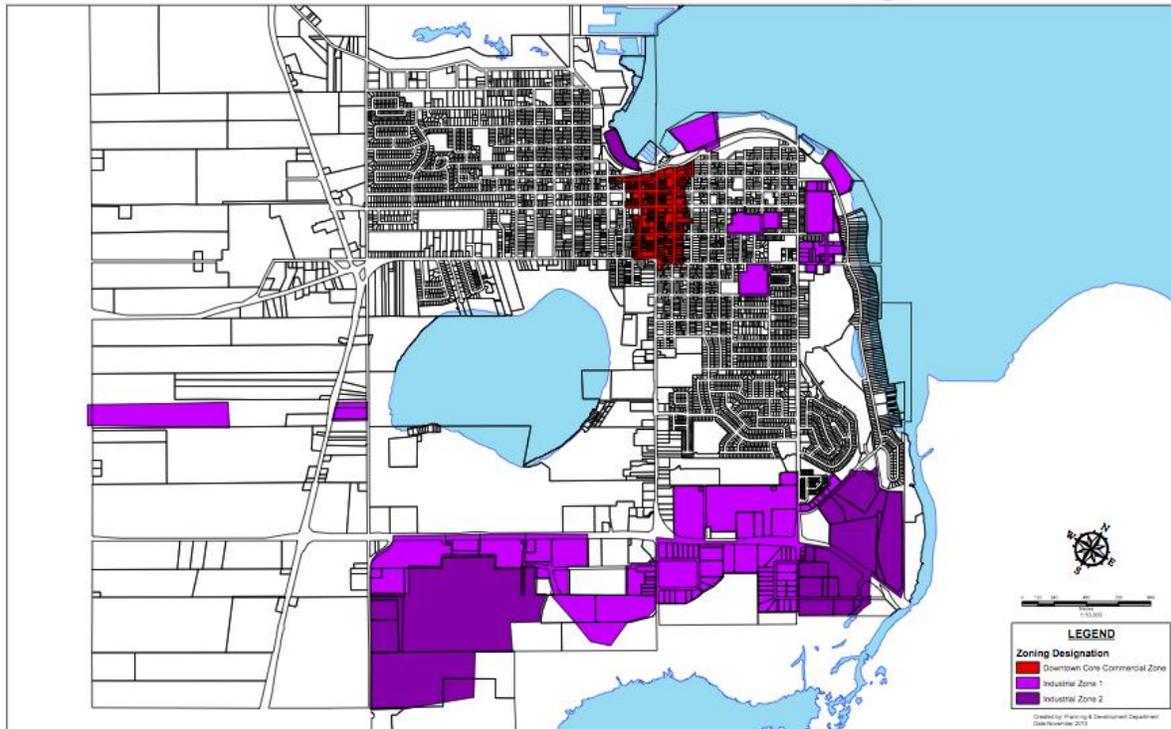
The non-industrial uses permitted in this zone are not dissimilar to the type of uses permitted in general industrial zones in many municipalities. In our experience, 10% to 15% of commercial space tends to locate in industrial areas, primarily because it not appropriately located in commercial and related land use zones. For example, automotive uses, self-storage facilities, service clubs and auction centres typically cannot afford commercial land prices/rents. Adult entertainment parlors are often located in industrial areas to isolate them from residential and commercial areas.

The M2 zone is best described as a heavy manufacturing zone, permitting among other industrial uses, those with a high potential for noise, odour and similar impacts. The only commercial uses permitted include automotive body shops and service stations; and eating establishments.

The only Employment Areas zoned M2 are the southern portion of the Highway 12 West Area, including the gravel pit operation and adjoining lands; the eastern portion of the Highway 12 East Area, east of William Street; and the lands occupied by ADM Agri-Industries in the Waterfront Employment Area.

Figure 2-5 illustrates the location of the lands within each of the Industrial zones.

FIGURE 2-5: INDUSTRIAL LANDS IN THE TOWN OF MIDLAND



3.5 EMPLOYMENT TARGETS

3.5.1 EMPLOYMENT GROWTH FORECASTS TO 2031

As noted previously, the January Amendment to the Provincial Growth Strategy provided revised employment and population projections for Simcoe County. These have been illustrated in Figure 2-6.

As indicated by this figure, Midland is targeted to increase its overall employment base from 12,000 to 13,800 between 2006 and 2031. This represents an increase of some 1,800 employees, which is a significant reduction from the County’s Official Plan growth allocation of 4,000 additional employees.

In total, the County has been targeted to grow by some 70,500 employees between 2006 and 2031, of which almost half have been allocated to Barrie and Orillia. Other major employment growth centres in Simcoe County include: Bradford-West Gwillimbury (10,000); Innisfil (7,400); and, New Tecumseth (6,800). By comparison, the employment allocated to Midland represents just 2.55% of the County total. This is significantly lower than Midland’s present share of the County’s employment base of 6.54%.

In contrast, new employment growth centres are being established in Bradford-West Gwillimbury and Innisfil, where the proportion of future employment added to these areas significantly exceeds their share of the County's current employment base.

These employment targets represent Provincial policy directions and not necessarily market realities, which can be much more volatile than residential targets. The amended Growth Plan targets suggest that Midland has been relegated to a fringe destination for future employment growth in the County. The reality is that new employment growth in the southern portion of the County will mean that the Town is expected to be facing significant competition to attract businesses in the future, including from communities which had much smaller employment bases than Midland in 2006.

FIGURE 2-6: SIMCOE COUNTY EMPLOYMENT PROJECTIONS

Municipality	2006	% of 2006 Employment	2031	Growth 2006 - 2031	% of Growth 2006-2031
Adjala-Tosorontio	1,600	0.87%	1,800	200	0.28%
Bradford West Gwillimbury	8,000	4.36%	18,000	10,000	14.18%
Clearview	4,400	2.40%	5,100	700	0.99%
Collingwood	10,800	5.89%	13,500	2,700	3.83%
Essa	7,700	4.20%	9,000	1,300	1.84%
Innisfil	5,700	3.11%	13,100	7,400	10.50%
Midland	12,000	6.54%	13,800	1,800	2.55%
New Tecumseth	19,700	10.74%	26,500	6,800	9.65%
Oro-Medonte	4,700	2.56%	6,000	1,300	1.84%
Penetanguishene	5,300	2.89%	6,000	700	0.99%
Ramara	1,900	1.04%	2,200	300	0.43%
Severn	3,900	2.13%	4,400	500	0.71%
Springwater	5,000	2.72%	5,600	600	0.85%
Tay	1,500	0.82%	1,800	300	0.43%
Tiny	1,400	0.76%	1,700	300	0.43%
Wasaga Beach	3,100	1.69%	3,500	400	0.57%
COUNTY TOTAL	96,400	52.53%	132,000	35,600	50.50%
Barrie and Orillia	87,100	47.47%	122,000	34,900	49.50%
SIMCOE AREA TOTAL	183,500	100.00%	254,000	70,500	100.00%

Source: Based on June 2012 Simcoe County Official Plan and Schedule 7 of the Growth Plan for the Greater Golden Horseshoe as amended, January 2012.

3.6 PROJECTED DEMAND FOR EMPLOYMENT LAND

The general decline of the North American manufacturing sector combined with the relatively low Growth Plan employment allocations, suggests that Midland will need to critically assess

what industries should realistically be targeted for business attraction over the next 20 year planning horizon.

With respect to planning for employment and economic growth, the traditional approach has been to protect – and in some cases maximize – the amount of vacant developable land with the hope that large inventories of raw land would help capture the attention of investors seeking large, space extensive industrial facilities. Conventional employment land practices have also maintained that large land supplies help to keep industrial land prices in check, which in turn, helps foster municipal cost competitiveness, and protects future growth potential of the areas industrial tax assessment.

Our analysis of employment land need in the Town of Midland has been undertaken within the context of the Provincial policy direction found in the Places to Grow Plan and the Provincial Policy Statement. The new Provincial policy context places an emphasis on providing an adequate supply of employment land and the importance of a diversified economic base.

The following section provides our assessment of long-term employment land need in the Town of Midland. Our purpose is to identify the amount of employment land that the Town should expect to see developed to 2031. The analysis builds upon the Province’s employment and population growth allocation. In determining the long-term employment land requirements for the Town, our analysis includes forecasts for jobs in Midland with an emphasis on those that specifically require vacant “industrial” employment land. Our analysis recognizes the unique economic circumstances of Midland, and the role that tourism, hospitality and service-sector type jobs play in the Midland economy.

3.6.1 1.7.1 EMPLOYMENT BASED METHOD

This section discusses the total employment growth forecast for the Town of Midland and the number of jobs that will need to be accommodated on employment land. The total employment forecast is prepared using an activity-rate based approach which involves applying an activity rate to a future population forecast. The activity rate refers to the ratio of population to employment, which in the case of Midland is exceptionally high at 71%, reflecting its role as an employment centre for the surrounding communities. The 2006 population and employment figures were derived from the Draft June 2012 County of Simcoe Official Plan. The 2006 and 2011 populations are Census based and have been adjusted upwards by a factor of 4% to account for Census undercount. The 2031 employment and population figures are from Schedule 7 of the January 2012 Amendment to the Provincial Growth Plan for the Greater Golden Horseshoe.

The population in the intervening years between 2006 and 2031 has been projected by urbanMetrics. The activity rate for Midland, which is used to derive employment, has been reduced following 2011 to reflect the lower activity rate inferred by the Growth Plan. In total, Midland’s employment base is projected to increase from 12,000 in 2006 to 13,800 in 2031.

The next step is to determine how many of these jobs will need to be accommodated on employment land. Typically, for land use planning purposes, employment is divided into three main types: large office related employment, population-related employment, and employment land employment. Currently there are few office developments within the Town of Midland. Development of office space can occur in virtually any location, whether in downtowns or business parks. It is anticipated that as more serviced employment land is brought to the market some office development will benefit from these new opportunities.

Population/Tourism-Related Employment: A significant amount of employment in any given community is directly tied to servicing the needs of its local population base. Examples of these types of jobs include those aligned with government, healthcare and education. Population based employment also includes a significant share of jobs within the personal and business services, tourism, and retail categories. As a general rule, these population-based jobs are not located in industrial areas. Instead they tend to be heavily concentrated in downtowns, commercial corridors, planned retail centres, institutional areas, and, in the case of schools, directly in residential neighbourhoods.

In developing forecasts for population based employment, we have assumed that these types of jobs will grow commensurately with the Town's population base. Recognizing that as Simcoe County's population will become more "serviced-based"; and that an aging population will place greater importance on sectors such as healthcare, we have increased the share of jobs in this segment of the workforce from 55% in 2006 and 2011 to 59% by 2031. Under this scenario the forecast of population-related employment is based on an expectation of improved performance in attracting retail commercial-type activities, including tourism and recreation-related uses.

Industrial-Based Employment: Industrial jobs are the likely uses of employment land. For organizational purposes we have assumed that 100% of all Manufacturing, Construction, and Transportation and Warehousing jobs – both now and in the future - are to be located on industrial-type employment lands (See Appendix A for the employment on employment lands ratio by industry). To be clear, we recognize that many of these jobs such as sales related jobs associated with these businesses are not necessarily located exclusively on employment ("industrial") lands. For example, management, customer service need stand-alone office facilities, can be located well away from the actual manufacturing plant. Nonetheless, to be conservative, we have developed our employment land forecast based on a 100% allocation of all jobs in this sector as industrial based employment. In addition, although recent trends have shown increasing service sector employment on industrial lands, we have assumed that no retail jobs will be located on these lands in the future -- in other words no conversion of employment lands to commercial uses will be permitted.

In 2011, a total of 4,480 "employment land based jobs" were identified in the Town. Over the forecast period, under this scenario, employment on employment land in Midland is anticipated to represent a declining share of total employment growth to recognize the diminished importance of the manufacturing sector in Midland's economy. We have conservatively

forecasted that employment on employment land will see a steady and gradual decrease in its overall share of employment growth, dropping from 45% in 2006 and 2011 to 41% by 2031.

Employment Land Job Density

The current employment density in Midland is 16.1 jobs per hectare. This is a very low figure, but is influenced by the large quarry operation in the Highway 12 West Employment Area. For industrial land forecasting purposes we have used an industrial employment density of 30 jobs per net hectare. Based on our experience in other communities across southern Ontario, this level of employment density is generally consistent with the standards used for long-range planning purposes.

Expansion Land Potential

For future planning purposes, we have assumed that some excess land for future expansion will be acquired by new businesses purchasing employment lands. A 10% adjustment has been made in this regard.

It is also important to note that a similar adjustment may also be applied to the existing lands to provide for the ability of existing industrial operations to accommodate employment growth through intensification. However, given that the future employment target is very low and that there is a relatively large land surplus, this adjustment was not made as it would negate the need for any new industrial land absorption in Midland over the study period. In our opinion, given the available supply of vacant lands, it is likely that at least some future development will occur on industrial lands that are currently vacant.

Employment Land Demand

Over the forecast period, the Town of Midland will need to accommodate some 1,800 new jobs (per the County of Simcoe Official Plan and the Provincial Growth Plan). After accounting for the work-at-home population, the employment with no-fixed-place-of-work, and growth in population related employment, this results in a net growth of 100 employees requiring employment land locations by 2031.

Thirty employees per hectare and excess land for expansion results in a demand for some 3.7 additional hectares of employment land. There are presently 121.7 hectares of vacant employment lands in Midland, indicating that this land is more than adequate to accommodate need to 2031.

It is important to recognize that this analysis is extremely conservative owing largely to the very low employment allocation provided by the Growth Plan. While population can, to a large extent, be governed by land use planning through sub-division and related approvals. Employment, on the other hand, is much more difficult to regulate as it will fluctuate based on the expansion and contraction plans and locational needs of individual companies. There are

two factors that will likely influence employment growth in Midland beyond which can be captured in the Growth Plan allocation.

First, there is a significant supply of vacant employment land in the community. Regardless of the Provincial Growth Plan employment allocation, those lands are generally approved for development. It would, therefore, not be logical to assume that the municipality would be constrained by the employment cap, when administering development applications.

Secondly, Midland has always been an employment centre for the surrounding area with very high activity rates. In fact, based on the 2006 Census, the number of people working in Midland is approximately the same as the number that live in Tiny, Tay and Penetanguishene, and only less than half of the Midland employment base lives in the Town. The employment targets in the Amended Growth Plan assume that this role will diminish. We would note that under the previous County allocation based on the Growth Plan, Midland was anticipated to experience a significant increase in its activity rate to 2031. In our opinion, insufficient research has been undertaken at the local level to conclude that Midland will become less capable of serving as a regional employment centre in the future.

This being said, it is clear that the employment land supply will be sufficient to accommodate employment growth in Midland well into the future.

FIGURE 2-7: TOWN OF MIDLAND FUTURE EMPLOYMENT LAND REQUIREMENTS

	Forecast						Notes
	2006	2011	2016	2021	2026	2031	
Population (live in Midland)	16,900	17,200	18,300	19,400	20,500	22,500	(1)
Incremental Growth		300	1,100	1,100	1,100	2,000	
Activity Rate	71%	71%	69%	67%	65%	61%	(2)
Employment (work in Midland)	12,000	12,210	12,630	13,000	13,330	13,800	
Minus: Work at Home	430	430	460	490	510	560	(3)
Minus: No Fixed Place of Work	1,755	1,830	1,890	1,950	2,000	2,070	(4)
Sub-Total (Usual Place of Work)	9,815	9,950	10,280	10,560	10,820	11,170	
Employment Share Analysis							
Population/Tourism-Based Employment	5,400	5,470	5,760	6,020	6,280	6,590	(5)
Share	55%	55%	56%	57%	58%	59%	
Employment on Employment Lands	4,415	4,480	4,520	4,540	4,540	4,580	(6)
Share	45%	45%	44%	43%	42%	41%	
Employment on Employment Lands	4,415	4,480	4,520	4,540	4,540	4,580	
Occupied Employment Land (Hectares)		277.8					(7)
Existing Employment Land Job Density (Jobs per net hectare)		16.1					
Cumulative Growth in Employment Land Employment			40	60	60	100	
Planned Employment Density (Jobs Per Hectare)			30	30	30	30	(8)
Employment Land Demand							
Additional Employment Land Required (net hectares)			1.3	2.0	2.0	3.3	
Plus: Expansion Land Potential (10%) (net hectares)			0.1	0.2	0.2	0.3	(9)
Total of Additional Employment Land Required (net hectares)			1.5	2.2	2.2	3.7	
Employment Land Supply							
Vacant Employment Lands (net hectares)		121.7					(10)
LAND SURPLUS			120.2	119.5	119.5	118.0	

Source: urbanMetrics inc.

Notes:

- 1) Population for 2011 based on Statistics Canada. Forecast for 2031 based on January 2012 Amendment to the Growth Plan. Includes census undercoverage (4%).
- 2) Activity Rate for 2011 derived from employment identified in June 2012 Draft County of Simcoe Official Plan. 2031 Activity Rate = Growth Plan Employment/ Growth Plan Population. Activity Rate for Intervening years based on urbanMetrics interpolation.
- 3) Work at Home employment for 2006 is based on 2006 Census. Projected to remain constant as a percent of population.
- 4) 'No Fixed Place of Work' employment for 2006 is based on the 2006 Census. Projected to remain constant as a percent of total employment.
- 5) Population-based employment is employment that exists in response to a resident population. It includes jobs in the retail, tourism and institutional uses. See Appendix for further details. The share of population based employment is anticipated to increase by 0.2% annually after 2011.
- 6) Employment land employment includes jobs in the following sectors: Primary, manufacturing, wholesale trade, construction, transportation and storage and other utility. See Appendix A and B for further details. The share of employment land based employment is anticipated to decrease by 0.2% annually.
- 7) See Figure 2-4. Total Employment Lands (399.5 HA) - Vacant Employment Lands (121.7 HA) = 277.8 HA
- 8) The density assumption of 30 jobs/net hectare reflects typical employment densities for general employment lands of the nature found in Midland.
- 9) Expansion Land Potential recognizes the tendency of some industrial firms to acquire additional land for expansion potential. A conservative adjustment of 10% has been used as an estimate.
- 10) See Figure 2-4.

Legend:

Derived from Provincial Growth Plan

4 POLICY CONTEXT FOR EMPLOYMENT AREAS

4.1 PLACES TO GROW PLAN (2006) AND AMENDED JANUARY, 2012

In June 2006 the Province of Ontario approved the Places to Grow Plan (PTGP) for the Greater Golden Horseshoe (“GGH”). The new Plan requires all upper, single and lower-tier municipalities within the Greater Golden Horseshoe to modify and update their Official Plan documents and bring them into full conformity with the policies and targets of the new Provincial Plan.

One major policy foundation of the PTGP is the strong emphasis given to matters related to the protection and preservation of employment (or “industrial”) areas within the GGH. In recent years many jurisdictions in southern Ontario have voiced their concerns related to the challenges of protecting their long-term industrial land base from conversions to other uses. Market forces in many areas of the GGH have dictated higher-demand, and therefore greater returns, for residential and large-scale retail development. The loss of employment lands, it is argued, could potentially undermine the competitiveness and economic stability of municipalities, and thus weaken their long-term capacity to develop as “complete” and “balanced” communities.

Section 2.2.6.1 of the PTGP establishes the new policy context for providing and maintaining a healthy supply of employment land, stating that –

An adequate supply of lands providing location for a variety of appropriate employment uses will be maintained to accommodate the growth forecasts in Schedule 3.

Under this policy, Midland will need to ensure that “sufficient” employment lands are available over the long term. It is important to recognize of course, that not all jobs are situated in employment areas. Many jobs, especially in more urban areas are geared toward the needs of serving the local and regional population base, such as retail, education, government and healthcare jobs which do not typically require employment lands. Other occupations, including those related to business services, finance, Information Technology (IT), and real estate, typically occur within major office settings. While these may be developed in business parks within selected employment areas, such uses can also be readily integrated into other key areas such as downtowns, commercial arterial corridors, and increasingly, in home-office settings.

In January 2012, the Province Amended the Growth Plan with a specific section addressing the Simcoe Sub-Area, including population and employment targets for the individual area municipalities. The targets for Midland have been discussed in the previous sections.

The Simcoe Sub-Area policies direct a significant portion of growth to communities where “development can be most effectively serviced, and where growth improves the range of

opportunities for people to live, work, and play in their communities”, with a particular emphasis on “Primary Settlement Areas” including: Barrie, Alcona, Bradford, Alliston, Collingwood and Midland/Penetanguishene. Barrie is designated as the “principal Primary Settlement Area”. The Plan, does recognize, however, that “all municipalities will play an important role in ensuring that future growth is planned for and managed in an effective and sustainable manner that conforms with this Plan”. The Plan stipulates that : “The intent of this policy is that by 2031 development for all the municipalities within Simcoe County will not exceed the overall population and employment forecasts contained in Schedule 7”.

The Plan goes on to identify two of specific “Strategic Settlement Employment Areas” - Bradford-West Gwillimbury and Innisfil Heights – to be used for businesses requiring large lots and access to Highway 400. In addition, Rama Road (in the vicinity of Casino Rama) and Lake Simcoe Regional Airport are designated “Economic Employment Districts” to accommodate locally significant employment uses. No special employment designation is provided for the Midland/Penetanguishene area.

4.2 PROVINCIAL POLICY STATEMENT (2005)

The Provincial Policy Statement (‘PPS’) is issued under Section 3 of the Ontario Planning Act. The PPS is intended to provide common direction to all municipalities on key areas of Provincial policy interest. Under the newly revised 2005 PPS, local and regional planning authorities are instructed that their policies “shall be consistent with” the policies of the PPS. This represents a “tightening of the language” compared to the previous PPS which stipulated that municipalities merely have “regard to” the stated Provincial policies.

In general terms, the policies contained in the PPS seek to ensure that all new development in the Province, whether urban or rural, is delivered in a sustainable fashion that helps build stronger communities, ensures wiser use and management of resources, and provides the necessary safeguards to public health and safety.

The PPS provides clear direction related to the promotion of economic development and the preservation of employment lands. Section 1.3.1 states that –

Planning Authorities shall promote economic development and competitiveness by:

- a) *providing for an appropriate mix and range of employment (including industrial, commercial and institutional uses) to meet long-term needs;*
- b) *providing opportunities for a diversified economic base, including maintaining a range and choice of suitable sites for employment uses which support a wide range of economic activities and ancillary uses, and take into account the needs of existing and future businesses;*
- c) *planning for, protecting and preserving employment areas for current and future uses; and*
- d) *ensuring the necessary infrastructure is provided to support current and projected needs.*

Section 1.2.3 of the PPS further states that –

Planning authorities may also permit conversion of lands within employment areas to non-employment uses through a comprehensive review, only where it has been determined that the land is not required for employment purposes over the long term and that there is a need for the conversion.

4.3 COUNTY OF SIMCOE OFFICIAL PLAN (JUNE 2012 DRAFT) (ADOPTED IN 2008 AND AWAITING APPROVAL)

The following policies of the County’s Plan have been identified as “relevant” to our analysis in the context of any modifications made to the Town of Midland’s employment land supply:

Section 3.1.1 of the Official Plan states:

In order to direct growth to the settlements, it is part of the strategy of this Plan to manage the amount of designated land throughout the County to accommodate an appropriate range and mix of employment opportunities, housing and other land uses to meet the projected needs for the next twenty years.

Section 3.1.4 of the Official Plan states:

The Plan recognizes the need to enable and encourage the development of a wide range of business and employment opportunities to meet the needs of a growing population and changing global economics.

In terms of individual communities and settlements, a wider range of employment enables those areas to better withstand the economic changes and cycles regularly encountered. Such employment opportunities arise from the resource base of the County described in Section 3.1.2, from manufacturing to meet the needs of markets both within and outside Simcoe County, and from a service sector which provides a wide range of services to the residents of the County and tourists.

The land use policies of this Plan provide for and encourage multi-use development and expansion of employment opportunities within settlements, the continuation and potential expansion of existing rural employment areas where appropriate, the development of home-based businesses, and the wise management and use of agricultural, aggregate, forestry and other resource lands. Specialized employment opportunities are provided for in the Strategic Settlement Employment Areas and Economic Employment Districts.

Table 1 of Section 3.2 adopts the population and employment projections contained in the January 2012 Amended Provincial Growth Plan and provides a Growth Management Framework to accommodate future development (See Figure 2-6 Above). Section 3.2.10 stipulates that “The County, in collaboration with the local municipalities, will plan to maintain

a balance of employment to residents in accordance with Table 1”. In the case of Midland, this would imply a decrease in the activity rate from 71% to 61%, as described in the previous section.

Section 3.2.8 specifies that: “Each local municipality will identify, plan for, protect and preserve employment areas in their official plans for current and future employment uses”.

Section 3.2.9 provides a framework for the consideration of employment land conversions:

Across the County conversion of employment lands within employment areas to non- employment uses will only be considered through a municipal comprehensive review where it has been demonstrated that:

- a) There is a need for the conversion;*
- b) The local municipality will meet the employment forecasts allocated to the municipality pursuant to this Plan;*
- c) The conversion will not adversely affect the overall viability of the employment area, and achievement of the intensification target, density targets, and other policies of this Plan;*
- d) There is existing or planned infrastructure and public service facilities to accommodate the proposed conversion;*
- e) The lands are not required over the long term for the employment purposes for which they are designated; and*
- f) Cross-jurisdictional issues have been considered*

4.4 TOWN OF MIDLAND OFFICIAL PLAN (2004)

Midland’s Official Plan states the following policies for Employment Areas:

Section 3.1 states:

The Employment Areas designation is intended to provide for business and commerce, industry and compatible community and institutional uses. These lands are intended to provide adequate lands for the future needs of this aspect of the community over the life of the Plan.

The potential for diversity of uses within this designation requires a recognition and understanding of the competing and complementary circumstances that exist so as best to satisfy the needs of the various users and the community at large. As such, within industrial park areas, the predominant use shall be for large scale industrial, manufacturing and related service uses. Commercial and institutional uses, generally on the periphery of such areas, may be considered.

Re-development of outmoded industrial uses to commercial or other compatible uses, particularly in conjunction with the Downtown District, is contemplated. It is also understood that there may be some demand for a conversion of industrial properties to commercial uses, which may be considered where such proposed uses are deemed compatible with surrounding uses. Furthermore, residential uses may be considered, where deemed appropriate, in conjunction with the permitted uses of this section. It is the intent and purpose of this Plan to support and encourage appropriate business growth and to foster market place changes and acceptable land use mixes which will occur over the life of the Plan.

Section 3.1.2 Objectives:

- a) *To provide opportunities for a diversified economic base which supports a healthy, stable economy and enhances employment opportunities.*
- b) *To provide for and maintain an adequate supply of developable land.*
- c) *To reduce and respect the natural conflicts between business uses and residential and public uses.*

Under section 3.14.1 indicates that “current industrial lands should generally be reserved for manufacturing and related uses”. However, applications for re-zonings, which would permit a change of land use to commercial and service related uses, may be considered if:

- they are on the “periphery of industrial areas, or adjacent to major roads”, as long as the proposed uses are viewed as being compatible and would not interfere with adjacent industrial uses;
- The proposed change will promote the use of land or building space otherwise deemed not suitable in terms of the former use; and
- Municipal services and facilities are adequate to support the proposed use.

4.5 POLICY IMPLICATIONS OF EMPLOYMENT LAND SUPPLY

The policies reviewed in this section set the framework for any potential modifications to the Town’s land supply. The Places to Grow Plan sets the overall agenda for growth in terms of the necessary considerations that both upper and lower tier planning authorities must consider. Of particular importance here is the need to contain growth, where possible, and to ensure that an appropriate land supply is available to accommodate various types of growth over the next 20 years.

The future of Midland’s employment areas is influenced by two potentially opposing pressures. On the one hand, there are currently some 122 hectares of vacant employment lands, which is well in excess of what will be required over the next 20 years.

However, at the same time, the employment allocated to the Town by the Provincial Growth Plan and the Draft County Official Plan are extremely limited, and to strictly adhere to the policies of the Growth Plan, the municipality should be planning to achieve this limited level of future employment growth.

In this regard, regardless of the availability of employment land, the Town should still be cautious in terms of managing its supply of employment lands and buildings to ensure that proposals for new development, land conversions and re-use maximize the opportunities to maintain a diverse and strong economic base.

Tourism and recreation are important to the local economy. Midland is a centre for tourists visiting South Georgian Bay. Local and nearby attractions include: boat cruises, the Martyrs Shrine, Sainte Marie Among the Hurons, Discovery Harbour, as well as a host of marinas, eating establishments and accommodations. In addition, Midland also functions as a recreation and service centre for the surrounding seasonal resident population.

The long term surplus of employment lands in the Town may present an opportunity to expand the Town's role as a recreation and tourism centre.

5 COMMERCIAL AREAS STRATEGY

5.1 EXISTING COMMERCIAL LAND USES

Figure 4-1 illustrates the distribution of commercial space in the Town by store type and location based on an inventory conducted by urbanMetrics in September, 2012. There is just under 1.7 million square feet of commercial space in Midland. The detailed inventory has been included in Appendix C, together with a detailed listing of the retail space classification system in Appendix D.

Approximately half of the Town's commercial space is found outside of major shopping centres or the downtown core, although the vast majority of this space is found in three clusters – the vicinity of Highway 12/Yonge Street; the south end of King Street; or in areas flanking the downtown core.

In general, the Town of Midland is able to offer its residents a full range of retail goods and services expected for a community of its size. It presently has two department stores (Wal-mart and Zellers and four supermarkets, including a large Real Canadian Superstore. It has representation by the three major food store chains operating in Ontario. We would note, however, that the future of the Zellers department store operating at Mountainview Mall is uncertain due to the acquisition of most Zellers leases by Target and Walmart. The Mountainview Mall store lease was not transferred and there has been no indication from its parent organization as to how it will operate such stores in the future.

Other major stores operating in Midland include: Giant Tiger (General Merchandise); Galaxy Theatres; Home Depot; Marks Work Warehouse; Rona; TimBr Mart; and, Canadian Tire.

Food Store Retail (FSR) – Included within this category are supermarkets, grocery stores, convenience and specialty food stores. This category accounts for 184,000 square feet of space or 10.1% of total commercial space.

Non-Food Store Retail (NFSR) – This category includes most retail space excluding food stores and services. Comprising approximately 800,000 square feet, it is the largest of the categories inventoried.

Services – Included within this category are all services, such as financial services, entertainment, personal services, medical services and others. Services is the second largest category with just under 400,000 square feet of space or 23% of total commercial space.

Other Retail – This category includes Beer, Wine and Liquor and Automotive which accounted for approximately 14% of Midland's total commercial space.

Vacant – This accounts for 58,000 square feet of retail/service space or 3.5% of Midland’s total commercial space.

FIGURE 4-1: TOWN OF MIDLAND RETAIL AND SERVICE INVENTORY

Store Category	Mountainview				Other	Grand Total
	Downtown BIA	Huronia Mall	Mall	SmartCentres	Midland	
Grocery/Convenience and Specialty Food Stores	9,022	6,188			12,913	28,122
Supermarkets	15,500		38,173		102,146	155,819
Total Food Store Retail (FSR)	24,522	6,188	38,173	-	115,059	183,941
Department Stores			112,046	108,528		220,574
Other General Merchandise Stores	10,601	29,371		7,716	61,934	109,623
Clothing Stores	10,060		12,038	7,716	1,592	31,406
Shoe, Clothing Accessories and Jewellery Stores	1,446	1,543	4,985	1,736		9,710
Computer and Software Stores					1,042	1,042
Furniture Stores			25,103		9,083	34,186
Home Centres and Hardware Stores				85,000	76,000	161,000
Home Furnishings Stores	8,680				2,532	11,212
Specialized Building Materials & Garden Stores	1,100				90,982	92,082
Home Electronics & Appliance Stores	1,200	2,315	3,451		9,614	16,580
Sporting Goods, Hobby, Music and Book Stores	9,066		16,460	955	15,554	42,034
Pharmacies and Personal Care Stores	6,214				20,435	26,649
Miscellaneous Store Retailers	17,650	3,858	1,660		29,282	52,450
Total Non-Food Store Retail (NFSR)	66,017	37,087	175,743	211,652	318,050	808,549
Beer, Wine and Liquor Stores			1,102		10,287	11,389
Automotive					223,506	223,506
Total Other Retail	-	-	1,102	-	233,793	234,895
Food Services and Drinking Places	22,694	15,664	5,528	3,887	46,125	93,898
Finance	26,200	965			18,255	45,420
Health Care Services	6,500		3,036	2,242	40,047	51,825
Personal Care Services	5,364	1,881	1,711	1,562	27,235	37,753
Consumer Services Rental		4,051	3,362		2,365	9,778
Entertainment	15,500		26,153		20,484	62,137
Insurance and Real Estate	2,927	4,823	2,065		19,064	28,879
Personal and Household Goods Repair and Maintenance	2,608		312		6,973	9,893
Professional, Scientific & Technical Services	6,080	723	1,687		38,281	46,771
Schools and Instruction	1,100				1,800	2,900
Selected Office Administrative Services	1,333				1,929	3,262
Social Services					2,000	2,000
Total Services	90,306	28,107	43,854	7,691	224,558	394,516
Vacant	14,728	3,279	32,934	-	7,243	58,184
% Vacant	7.5%	4.4%	11.3%	0.0%	0.8%	3.5%
Grand Total	195,572	74,661	291,806	219,343	898,703	1,680,085

Source: urbanMetrics based on an inventory conducted in September, 2012

5.1.1 VACANT COMMERCIAL SPACE

Figure 4-2 summarizes the commercial vacancy rates. In general, a limited amount of vacant space is desirable to allow for tenant relocations and expansions and to ensure cost competitiveness in the market. The commercial vacancy rate is currently 3.5%, which is indicative of a strong and potentially tight commercial market. The highest vacancy rate is

found at Mountainview Mall at 11.3%, which is largely the result of the relocation of the 10,000 sq. ft. Shoppers Drug Mart to a site previously occupied by Stoneleigh Motors, immediately adjacent to the Mall. Additionally, two spaces sit vacant in Huronia Mall, of which one will soon accommodate the expansion of Pet Valu.

The downtown vacancy rate of 7.5% is reasonable for a downtown core. Typically because of non-uniform space offerings, issues with absentee land lords, and difficulties in accommodating large users and expansions, downtowns have higher than average vacancy rates. The rate in Midland is not at a level suggesting concern, but should be monitored in the future to ensure excess vacancies do not materialize.

In general, vacancy levels throughout the Town are consistent with those of a balanced commercial market. We would note however that the Zellers within Mountainview Mall will be closing in March of 2013, resulting in a significant increase in vacancy levels at the mall. Based on the inventory conducted in September of 2012 and in March of 2009, the size of the Zellers is approximately 100,000 square feet, and when vacant would lead to a vacancy rate of almost 50% at Mountainview Mall in 2013.

FIGURE 4-2: TOWN OF MIDLAND - VACANCY RATES

Location	Total Vacant	Total S.F.	Vacancy Rate
Downtown BIA	14,728	195,572	7.5%
Huronia Mall	3,279	74,661	4.4%
Mountainview Mall	32,934	291,806	11.3%
SmartCentres	0	219,343	0.0%
Other	7,243	898,703	0.8%
Grand Total	58,184	1,680,085	3.5%

Source: urbanMetrics, September 2012

5.1.2 POTENTIAL FUTURE RETAIL SPACE

As indicated in Figures 4-3 and 4-4, there are 9 vacant commercial sites throughout the municipality zoned Highway Commercial, which would permit a wide range of commercial uses including retail stores. In addition, there is an 8.19 hectare waterfront site zoned Marine Commercial and Residential, which would also permit a variety of commercial/entertainment/tourist uses. In total these ten sites total almost 64 hectares (158 acres). These range in size from 2 hectares (5.21 acres), which could support a small commercial plaza of approximately 50,000 square feet to 18.5 hectares (45.7 acres), which could –depending on site/soil characteristics - support a major retail centre of some 500,000 square feet.

While some sites are subject to holding “H” provisions, all of the sites with the exception of the Marine Commercial site have the land use approvals to accommodate a full range of retail activities typically found in shopping centres, commercial plazas and big box developments.

We would note that the owners of sites (24 and 10) with a total of 15 hectares (36 acres) have been soliciting potential tenants with on-site signage.

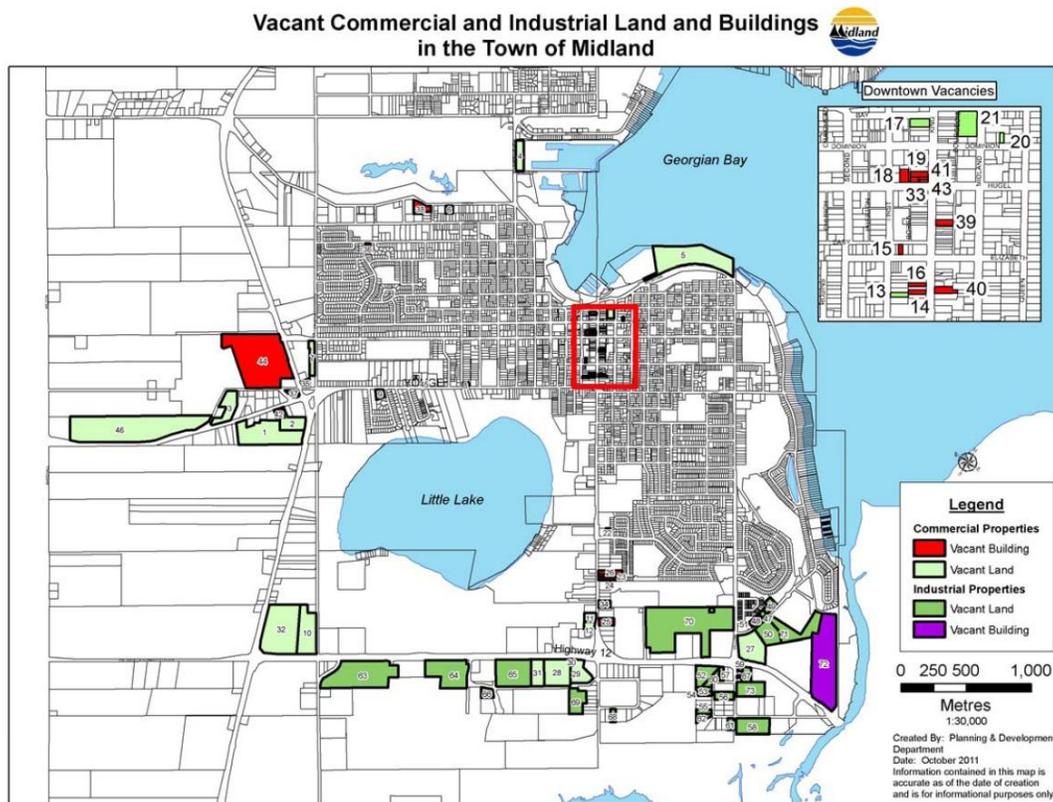
In addition, to these zoned and designated properties, the owners of 281 Cranston Crescent have submitted an application to rezone the property from Industrial Zone M1 to Highway Commercial Zone HC. The proposal involves the partial demolition of an industrial building and redevelopment resulting in a retail space total of 1,366 square metres or just under 15,000 square feet. The application was not approved by the Town and it is currently the subject of an Ontario Municipal Board Hearing.

FIGURE 4-2: TOWN OF MIDLAND – ZONED VACANT COMMERCIAL LANDS

Map Key	Address	Zoning Category	Hectares	Acres
1	739 Balm Beach Rd. East	HC-H	7.59	18.75
2	783 Balm Beach Rd. East	HC-H	2.11	5.21
5	288 Bayshore Drive	R/MC-H	8.19	20.23
10	Highway 12 North	HC4-H	4.79	11.83
27	189 Pilsbury Drive	HC	4.21	10.40
28	630 Prospect Blvd.	HC	4.13	10.20
29	16728 Highway 12	HC	2.31	5.71
30	16736 Highway 12	HC	0.10	0.25
31	16736 Highway 12	HC	2.08	5.14
32	8797 County Road 93	HC4-H	9.93	24.53
46	640 Balm Beach Rd. East	HC2-H	18.50	45.70
Total			63.94	157.93

Source: urbanMetrics based on information compiled by the Town of Midland.

FIGURE 4-3: TOWN OF MIDLAND – VACANT COMMERCIAL AND INDUSTRIAL LANDS AND BUILDINGS



5.2 FORECASTS OF FUTURE DEMAND/SPACE REQUIREMENTS

5.2.1 POLICY BASED APPROACH

In this section we have considered the implications of the Growth Plan employment targets on the potential of the Town to accommodate future commercial space. This is in contrast to a market approach, which would determine need based on future population growth.

As per the Growth Plan and the draft Simcoe County Official Plan, the Town of Midland is targeted to increase its employment base by 1,800 persons. Based on the analysis conducted in Section 2, of this total, it is estimated that some 1,190 would be population/tourist serving jobs. From a review of Statistics Canada employment data and our experience, it is estimated that approximately 50% of the population serving category would comprise retail and related service jobs. The balance would comprise jobs in the education, government, arts, recreation,

accommodations and other non-retail sectors. This would result in a net growth of approximately 600 new retail jobs between 2006 and 2031.

Typically, there is approximately 400 square feet of space per retail employee. At this ratio, the Growth Plan employment targets would require the development of some 240,000 square feet of new retail space between 2006 and 2031.

5.2.2 MARKET BASED APPROACH – PER CAPITA SPACE ANALYSIS

In this section, we have analyzed the additional retail and services space that would be warranted by the additional population targeted for the Town between 2011 and 2031. Based on the amended Growth Plan population allocation, Midland would grow by some 5,400 persons over the next 20 years.

On Figure 4-4, we have estimated the amount of retail and services space which that population growth will require.

The first column in this table indicates the current space (square feet) per resident in each category. In total, the community supports some 93.2 square feet of occupied commercial space per Midland resident. This is an exceptionally high figure. By comparison, the larger self sufficient communities within the GTA typically support between about 35 and 50 square feet per capita. The ratio of 93.2 for Midland, combined with low vacancy rates, points to the very significant role the Town plays in terms of serving the surrounding communities and as a centre for tourists and seasonal residents. As noted previously, Midland is a net importer of employment. For similar reasons, Midland also attracts very high levels of retail inflow.

The second column represents the target total space that is estimated to be supported by each new resident in the 2011 to 2031 period, including spending inside and outside of the Town. The total it is estimated that each new resident would support some 48.5 square feet per capita or 257,050 square feet for all new residents. In the fourth column, we have estimated the percent of space in each category which would be supported inside of the community. For example, it is estimated that some 90% of supermarket spending by Midland residents would be made within the community. Because of the large amount of space within the community, external expenditures - also referred to as “outflow”- are relatively low. The highest outflow is projected within the department store category, owing to the fact that there are no major department stores (e.g. Sears and The Bay) within Midland, and Target has not yet indicated its intention to open a Midland store. In total, it is estimated that new residents to Midland will support some 213,553 square feet within the Town.

In the sixth column, we have estimated the percent of total space in each category that would be supported by non-residents. Termed “Inflow”, this would include regional residents, non-residents working in the community, tourists, seasonal residents and other visitors. The inflow varies by category depending on its attractiveness to non-visitors. For example, localized and more ubiquitous retailing, such as grocery/specialty food and pharmacies is associated with lower levels of inflow. More specialized or larger scale retailers, such as department stores,

supermarkets, home improvement centres, and automotive sales and service, are assumed to have much higher levels of inflow.

In total, based on this analysis, the 2031 population growth of 5,300 persons would require the addition of some 438,500 square feet of retail and service space. This equates to a level of 82.7 square feet per capita including both inflow and outflow, which is slightly lower than the 93.2 square feet per capita currently supported in Midland. The lower level, in part, reflects the Growth Plan population and employment allocation which would provide for a shift in employment growth to new growth centres and increased competition from other parts of Simcoe County.

At typical retail densities, 438,500 square feet would require approximately 40 acres (16 hectares)². As noted in the previous section, there are approximately 158 (64 hectares) of zoned vacant commercial land existing in Midland, which is significantly more than will be required to accommodate the future space.

A potential distribution of this space could include the addition of a new regional serving node of between 150,000 and 300,000 square feet (15-30 acres) together with neighbourhood and convenience retail sites oriented to existing and new residential communities. A portion of this new space should also be directed to the downtown to bolster the economy of the central area and to support future intensification. This would be consistent with Section 3.2 of the Midland Official Plan, which encourages “business retention and growth” within the downtown core.

We would note that the actual land requirements may be lower depending on whether part of the warranted space is provided through intensification at higher than typical densities.

Furthermore, based on the policy approach, only 240,000 square feet would be developed, which would require only 22 acres or 9 hectares. This lower level of space would be primarily oriented to the needs of local residents and should be focused largely in the vicinity of residential areas and the downtown core.

² Assuming 25% lot coverage.

FIGURE 4-3: TOWN OF MIDLAND – PER CAPITA SPACE ANALYSIS

TOWN OF MIDLAND - PER CAPITA SPACE ANALYSIS

Commercial Needs - Retail Category	Midland, Sq. Ft. Per Capita 2012 ²	Midland Target Space Per Capita (sq. ft)	Total Space Required by Midland Residents	Target Midland Local Capture	Space Supported Locally by Midland Residents (sq. ft.)	Inflow	Total Warranted Space in Midland (sq. ft.)	Space Per Capita Service Level - Midland
		A	B (A X Pop'n)	C	D (B X C)	E	F (D/(1-E))	G (F / Pop'n)
Midland Population Growth 2011 - 2031	5,300							
FOOD STORE RETAIL (FSR)								
Grocery/Specialty Food	1.6	1.5	7,950	90%	7,155	25%	9,500	1.8
Supermarket	9.0	4.0	21,200	90%	19,080	60%	47,700	9.0
SUB TOTAL	10.6	5.5	29,150		26,235		57,200	10.8
NON FOOD STORE RETAIL (NFSR)								
Department Stores	12.7	5.0	26,500	75%	19,875	60%	49,700	9.4
Pharmacies and Personal Care Stores	1.5	1.5	7,950	90%	7,155	25%	9,500	1.8
Home Centres and Building Supplies	14.5	4.0	21,200	85%	18,020	75%	72,100	13.6
Other NFSR	17.7	12.0	63,600	85%	54,060	40%	90,100	17.0
SUB TOTAL	46.5	22.5	119,250		99,110		221,400	41.8
OTHER RETAIL								
Automotive	12.8	5.0	26,500	90%	23,850	60%	59,600	11.2
Beer / Liquor / Wine	0.7	0.5	2,650	90%	2,385	40%	4,000	0.8
SUB TOTAL	13.5	5.5	29,150		26,235		63,600	12.0
SERVICES								
Food Services and Drinking Places	5.4	5.0	26,500	85%	22,525	30%	32,200	6.1
Finance	2.6	1.2	6,360	85%	5,406	30%	7,700	1.5
Health Care Services	3.0	1.0	5,300	85%	4,505	30%	6,400	1.2
Personal Care Services	2.2	1.5	7,950	90%	7,155	25%	9,500	1.8
All Other Services ¹	9.5	6.3	33,390	85%	28,382	30%	40,500	7.6
SUB TOTAL	22.7	15.0	79,500		67,973		96,300	18.2
TOTAL	93.2	48.5	257,050		219,553		438,500	82.7

Source: urbanMetrics inc

1) All Other Services includes Insurance and Real Estate, Personal and Household Goods Maintenance and Repair, Professional and Technical Services, Selected Office Administrative Services, Schools and Other Instruction and Social Services

2) Based on Estimated 2012 Population of 17,400.

6 COMMERCIAL POLICY REVIEW

Compared to most municipalities, Midland has a very simplified commercial structure as defined in the Official Plan. Commercial land uses, are permitted either in Employment Areas, within the Downtown District, or within the case of Neighbourhood Commercial, in Residential Areas. Further distinction is provided through the Zoning By-law, which identifies a Highway Commercial zone, a Neighbourhood Commercial zone and a Marine Commercial zone. The vast majority of retail facilities in Midland are designated Employment Area and zoned Highway Commercial.

6.1 DOWNTOWN DISTRICT

The Downtown District is the historic Town Centre, containing the broadest mix of uses, including: retail, commercial, office professional services, hospitality, entertainment, recreation, cultural, institutional, government and residential uses. The Official Plan encourages mixed commercial/residential development to support the community focus of the area.

The Official Plan further goes on to state:

A strong and energetic Town Centre is essential in promoting community growth and prosperity. This occurs in terms of economic well being, community pride and character...

To encourage business retention and growth, the quality and amenities of the Town's urban core should be constantly developed, strengthened and improved. (Sec. 3.2).

In general these policies are appropriate and supportive of a strong mixed use downtown environment. They recognize that downtown retailing relies on a variety of markets, including the regional population base, tourists, downtown residents and downtown employees.

However, as discussed in the market demand analysis section of this report, there is currently more commercial lands designated outside of the core than could reasonably be developed over the next 25 years. Although the downtown is currently functioning well, with minimal vacancies, there is a risk that as-of-right non-core commercial development could curtail its ability to grow and may even result in its deterioration.

We would, therefore, recommend against any further commercial designations that would compete directly with the core, and where feasible to encourage the redesignation of surplus highway commercial sites to other uses, including residential and tourist uses not appropriate for the core.

6.2 COMMERCIAL ZONING CATEGORIES

Commercial uses are generally contained in Highway Commercial Zones, Neighbourhood Commercial Zones and Marine Commercial Zones:

Highway Commercial Zones

Highway Commercial Zones, which are contained within designated Employment Areas, provide for the broadest range of retail, service, institutional and related uses. While Highway commercial zones are scattered throughout the Town, they are primarily concentrated around the malls (Mountainview and Huronia) and big box development (Walmart and Home Depot). This zoning category provides for most of the Town's retailing, including that which serves both local and regional serving functions. Given the blurring of the retail hierarchy which is occurring across North America, the lack of distinction as to function within this zoning category, has proven appropriate.

Neighbourhood Commercial Zones

The Zoning By-law provides for a more limited range of non-retail uses in Neighbourhood Commercial zones than the Highway Commercial category. Presumably the function of these zones is to provide for local serving retail nodes with the primary market being the surrounding neighbourhoods. Neither the Zoning By-law nor the Official Plan addresses this function. Furthermore, no specific size range is identified in the Zoning By-law other than a minimum lot size of 3,000 square metres (0.75 acres). Based on typical retail coverages, this minimum would allow for approximately 8,000 square feet of built commercial space. No maximum size is specified.

At present, five neighbourhood commercial nodes are identified in the Official Plan. The largest is occupied by a 10,000 square foot convenience plaza on William Street. The remaining sites are actually smaller than the 3,000 square metre minimum indicated in the Official Plan. In that neighbourhood serving uses are important to providing day-to-day commercial services to residents and help to reduce the average length and number of automobile trips, their functional difference with Highway Commercial Zones should be clarified, together with a general size range, and locational requirements. We would recommend a size range of between 500 and 1,500 square metres of gross leasable area and locations on arterial or secondary roads at gateways to residential areas.

Where possible, additional neighbourhood commercial designation should be considered, particularly in the north where commercial opportunities are limited.

Marine Commercial Zones

Marine Commercial Zones are intended to provide for commercial uses appropriate for the waterfront, including marinas, docks and boat storage, boat and recreational vehicle sales,

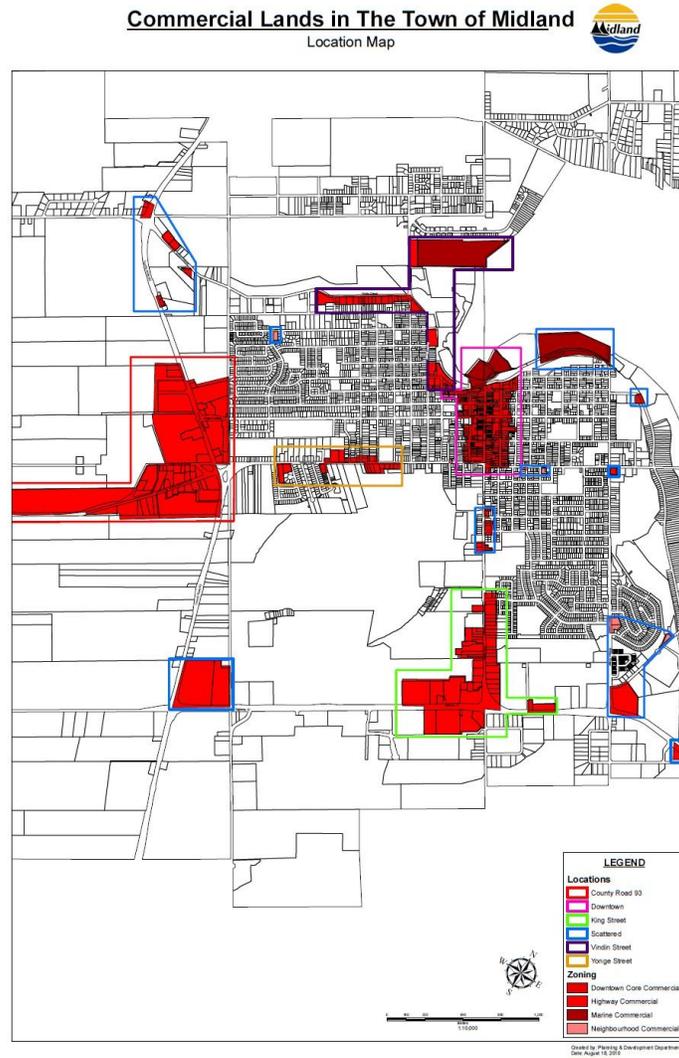
accommodations, fuel retailers, restaurant and fast food facilities, and commercial entertainment establishments. This designation applies to only two sites on Georgian Bay – the Bay Port Yachting Centre and Midland Harbour. The range of uses provided for in these zones is appropriate.

Figure 5-1 illustrates commercial areas under the following zoning categories:

- Downtown Core Commercial Zone
- Highway Commercial
- Marine Commercial
- Neighbourhood Commercial

Commercial areas are concentrated in the Downtown, Highway 12 & King Street (SmartCentres), and along Penetanguishene Road (Mountainview and Huronia Mall).

FIGURE 5-1: TOWN OF MIDLAND - COMMERCIAL ZONING CATEGORIES



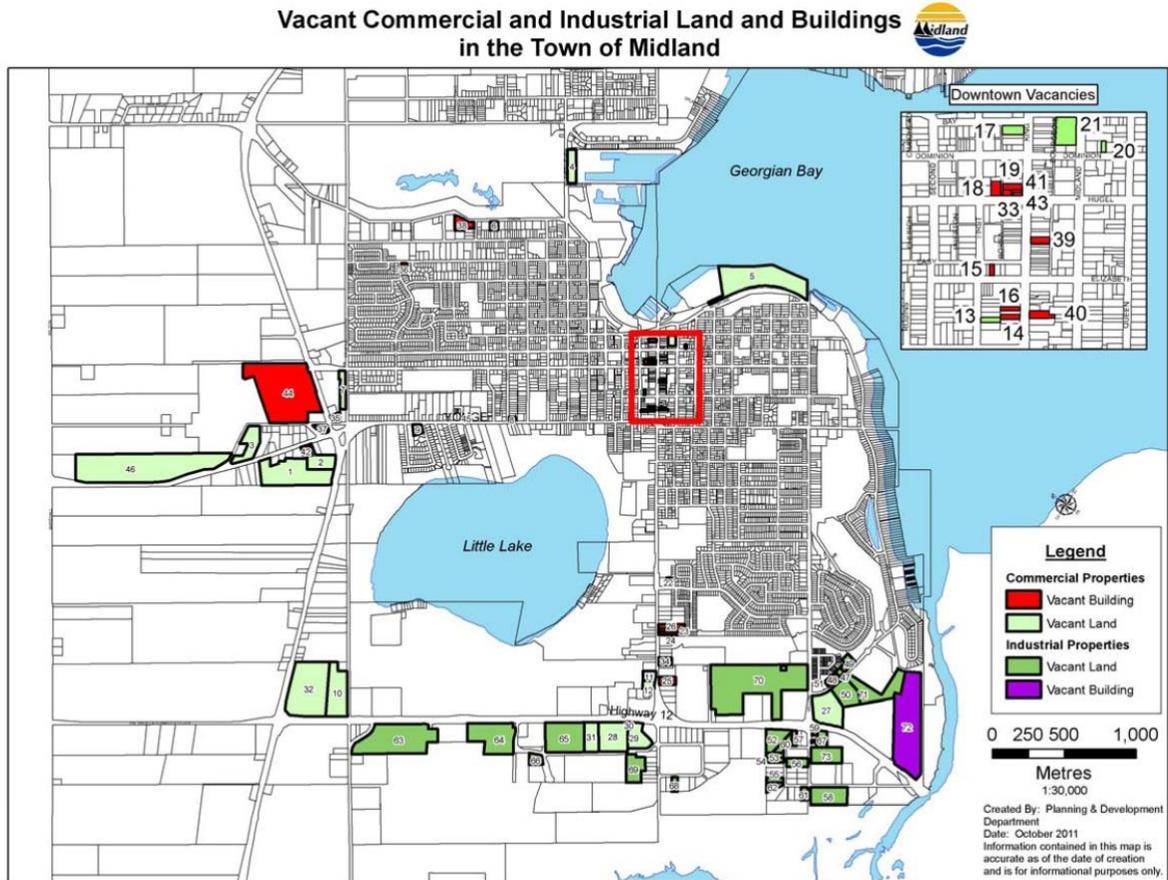
APPENDIX A: MIDLAND PLACE OF WORK BY INDUSTRY

MIDLAND - PLACE OF WORK BY INDUSTRY, 2006

Industries		Usual Place of Work	% on Employment Lands	Employment Lands Employment
11	Agriculture, Forestry, Fishing and Hunting	25	100%	25
21	Mining and Oil and Gas Extraction	80	100%	80
22	Utilities	50	100%	50
23	Construction	210	100%	210
31-33	Manufacturing	2,955	100%	2,955
41	Wholesale Trade	195	95%	185
44-45	Retail Trade	1,995	10%	200
48-49	Transportation and Warehousing	170	100%	170
51	Information and Cultural industries	85	50%	43
52	Finance and Insurance	310	25%	78
53	Real Estate and Rental and Leasing	215	0%	0
54	Professional, Scientific and Technical Services	325	50%	163
55	Management of Companies and Enterprises	0	50%	0
56	Administration & Support, Waste Management & Remediation Services	160	50%	80
61	Educational Services	505	0%	0
62	Healthcare and social assistance	1,320	0%	0
71	Arts, entertainment and recreation	160	50%	80
72	Accommodation and Food Services	810	5%	41
81	Other Services (except Public Administration)	405	50%	203
91	Public Administration	270	25%	68
Total Employment		10,245		4,606
% of Total Employment on Employment Lands				45%

Source: urbanMetrics inc. based on Statistics Canada 2006 Census, 'Place of Work' employment information.

APPENDIX B: MIDLAND VACANT EMPLOYMENT AND COMMERCIAL LAND INVENTORY



Map ID	Property Owner	Street Number	Street Name	Area (hectare)
1	WESTERN ONTARIO DISTRICT OF	739	BALM BEACH ROAD EAST	7.59
2	MIDLAND CONVENTION CENTRE &	783	BALM BEACH ROAD EAST	2.11
3	COLAND DEVELOPMENTS CORPORAT	1277	SUNDOWNER ROAD	2.04
4	BAY PORT VILLAGE INC	1191	HARBOURVIEW DRIVE	1.12
5	909273 ONTARIO INC	288	BAYSHORE DRIVE	8.19
6	DUPUIS MARC STEPHEN	803	VINDIN STREET	0.35
7	MID MALL SHOPPING CENTRE LIM	1099	HUGEL AVENUE	1.08
8	123627 CANADA INC	764	YONGE STREET	0.13
9	DI PAOLA HOLDINGS LTD	935	RUSS HOWARD DRIVE	0.47
10	749730 ONTARIO LIMITED		HIGHWAY 12 N	4.79
11	235450 ONTARIO INC	870	KING STREET	0.60
12	998992 ONTARIO LIMITED	880	KING STREET	0.47
13	HACKER FREDERICK WESLEY	355	FIRST STREET	0.07
14	KINGSIDE LEASING INC	352	KING STREET	0.07
15	175421 CANADA LTD	522	ELIZABETH STREET	0.04
16	KINGSIDE LEASING INC	344	KING STREET	0.05
17	IMPERIAL OIL LIMITED	509	BAY STREET	0.13
18	HUGEL LOFTS LTD	520	HUGEL AVENUE	0.09
19	PACHISI INVESTMENTS LIMITED	266	KING STREET	0.08
20	WILLIS SARAH	448	DOMINION AVENUE	0.04
21	DACS CONSTRUCTION ENTERPRISE	475	BAY STREET	0.39
22	1430956 ONTARIO INC	408	GALLOWAY BOULEVARD	0.19
23	DANIELLS JOHN BARRY	787	KING STREET	0.42
24	JOHN B DANIELLS ENTERPRISES	797	KING STREET	0.41
25	KING MIDLAND PROPERTIES LIM	877	KING STREET	0.66
26	ROBITAILLE LEO	781	KING STREET	0.55
27	THE LAND BANC OF CANADA INC	189	PILLSBURY DRIVE	4.21
28	ECKRON PROPERTIES INC	630	PROSPECT BOULEVARD	4.13
29	690822 ONTARIO INC	16728	HIGHWAY 12	2.31
30	ECKLER JOHN DAVID	16736	HIGHWAY 12	0.10
31	PROSPECT PROPERTIES (MIDLAND	16736	HIGHWAY 12	2.08
32	NORTH AMERICAN (MIDLAND) CORPORATION	8797	COUNTY ROAD 93	9.93
33	BURGIS GROUP INC	512	HUGEL AVENUE	0.03
34	BAIN RAYMOND	845	KING STREET	0.49
35	MID-MALL SHOPPING CENTRES LIMITED	9183	COUNTY ROAD 93	0.03
36	CLARKANEN INVESTMENTS INC	93	WOODLAND DRIVE	0.03
37	KINGSIDE LEASING INC	9170	COUNTY ROAD 93	0.05
38	847 VINDIN STREET LIMITED	847	VINDIN STREET	1.00
39	1467316 ONTARIO INC	295	KING STREET	0.08
40	MARINA & ANDREAS HOLDINGS LIMITED	349	KING STREET	0.02
41	PACHISI INVESTMENTS LIMITED	268	FRANKE KINDRED ROAD	0.01
42	12112200 ONTARIO INC	781	BALM BEACH ROAD EAST	0.04
43	GEOCAM INC	270	KING STREET	0.10
44	HIGHWAY 93 PROPERTY HOLDINGS	9226	COUNTY ROAD 93	14.80
45	D & S MIDLAND HOLDINGS LTD	854	YONGE STREET	0.01
46	G'NADJIWON KI ABORIGINAL ASSOICATION	640	BALM BEACH ROAD EAST	18.50
47	DALTON ROBERT JAMES	148	PILLSBURY DRIVE	0.21
48	HELICON PROPERTIES LTD	164	PILLSBURY DRIVE	0.21
49	WEBB MERVYN	120	PILLSBURY DRIVE	0.66
50	GENERAL MILLS CANADA CORP	159	PILLSBURY DRIVE	2.53
51	R K PAULSON CORPORATION	174	PILLSBURY DRIVE	0.16
52	MIDLAND TOWN	16530	HIGHWAY 12	1.92
53	WILCOX JOHN DAVID	269	WHITFIELD CRESCENT	0.43
54	PRESS GORDON BRYAN	265	WHITFIELD CRESCENT	0.42
55	2053228 ONTARIO INC	249	WHITFIELD CRESCENT	0.42
56	IMPERIAL OIL LIMITED	1000	WILLIAM STREET	0.91
57	STONETOP HOLDINGS INC	289	WHITFIELD CRESCENT	0.38
58	MANAGEMENT BOARD SECRETARIAT	185	ALBERT STREET	3.13
59	ENBRIDGE GAS DISTRIBUTION IN	947	WILLIAM STREET	0.12
60	DON SHERK CONSTRUCTION LIMIT	279	WHITFIELD CRESCENT	0.73
61	MAZZER FLAVIO	225	WHITFIELD CRESCENT	0.43
62	HABITAT FOR HUMANITY NORTH S	245	WHITFIELD CRESCENT	0.53
63	SHERK FARMS LTD	17036	HIGHWAY 12	10.05
64	COLAND DEVELOPMENTS CORPORAT	16928	HIGHWAY 12	6.01
65	1315012 ONTARIO INC	16828	HIGHWAY 12	5.65
66	796542 ONTARIO LTD	679	PROSPECT BOULEVARD	0.69
67	FRANKE KINDRED CANADA LIMITE	16468	HIGHWAY 12	0.85
68	COMMERCIAL SPRING AND TOOL C	475	CRANSTON CRESCENT	0.40
69	C COUTTS MANAGEMENT CORPORAT	619	PROSPECT BOULEVARD	2.23
70	NOBLEDALE CONSTRUCTION LIMIT	16533	HIGHWAY 12	17.40
71	GENERAL MILLS CANADA CORP		PILLSBURY DR	4.05
72	OZ INVESTMENTS INC	1000	WYE VALLEY ROAD	10.91
73	JAIN HARI	999	WILLIAM STREET	2.45

APPENDIX C: COMMERCIAL INVENTORY

Location	Address	Street Name	Store Name	Area	Naics	Trade Group
Downtown BIA	225	King St	Saturday Afternoons Home Store	1540	40	Home Furnishings Stores
Downtown BIA	226	King St	Templeton Windows Inc.	500	40	Home Furnishings Stores
Downtown BIA	256	King St	Artistic Dimensions	500	40	Home Furnishings Stores
Downtown BIA	305	King St	Blair Interious & Window Fashions	1,800	40	Home Furnishings Stores
Downtown BIA	323	King St	Simply Country	4,340	40	Home Furnishings Stores
Downtown BIA	287	King St	Miller's Vac Shop	1,200	60	NFSR: Home Electronics & Appliance Stores
Downtown BIA	257	King St	Benjamin Moore	1,100	80	NFSR: Specialized Building Materials & Garden Stores
Downtown BIA	277	King St	Maurice's Valu Mart	15,500	90	Supermarkets
Downtown BIA	212	King St	Sweet And Savoury	600	100	Grocery/Convenience and Specialty Food Stores
Downtown BIA	235	King St	The Elegant Gourmet	900	100	Grocery/Convenience and Specialty Food Stores
Downtown BIA	244	King St	Serendipitea	1,157	100	Grocery/Convenience and Specialty Food Stores
Downtown BIA	253	King St	Georgian Bakery	965	100	Grocery/Convenience and Specialty Food Stores
Downtown BIA	276	King St	Health & Bulk Food Market	703	100	Grocery/Convenience and Specialty Food Stores
Downtown BIA	290	King St	Gianetto's Fruit Market	3,250	100	Grocery/Convenience and Specialty Food Stores
Downtown BIA	319	King St	Dino's Fresh Food Deli	1,447	100	Grocery/Convenience and Specialty Food Stores
Downtown BIA	286	King St	Arcade Guardian Pharmacy	2,700	120	Pharmacies and Personal Care Stores
Downtown BIA	286	King St	Ida Guardian Pharmacy	3,514	120	Pharmacies and Personal Care Stores
Downtown BIA	514	Dominion Av	Ice Clothing Boutique	338	140	Clothing Stores
Downtown BIA	213	King St	School Bus Surf Shop	2,315	140	Clothing Stores
Downtown BIA	221	King St	Mimosa	1,500	140	Clothing Stores
Downtown BIA	252	King St	Cashmere Blue	900	140	Clothing Stores
Downtown BIA	303	King St	Indulge Boutique	1,000	140	Clothing Stores
Downtown BIA	309	King St	Little Monkey's Treehouse	1,600	140	Clothing Stores
Downtown BIA	317	King St	Sharron's Boutique Plus	1,157	140	Clothing Stores
Downtown BIA	321	King St	A Passion For Fashion	1,250	140	Clothing Stores
Downtown BIA	261	King St	Shoes To Boot	1,206	150	Shoe, Clothing Accessories and Jewellery Stores
Downtown BIA	307	King St	Ice Art	240	150	Shoe, Clothing Accessories and Jewellery Stores
Downtown BIA	485	Bay St	Bay Street Books	1,000	160	Sporting Goods, Hobby, Music and Book Stores
Downtown BIA	485	Bay St	Kiss This	1,736	160	Sporting Goods, Hobby, Music and Book Stores
Downtown BIA	239	King St	Graffiti Art	1,000	160	Sporting Goods, Hobby, Music and Book Stores
Downtown BIA	250	King St	Cottage Books New And Used	1,230	160	Sporting Goods, Hobby, Music and Book Stores
Downtown BIA	280	King St	Johnstone'S Musicland	500	160	Sporting Goods, Hobby, Music and Book Stores
Downtown BIA	294	King St	The Cottage Scrapbook	1,600	160	Sporting Goods, Hobby, Music and Book Stores
Downtown BIA	313	King St	Minds Alive! Toys And Games	2,000	160	Sporting Goods, Hobby, Music and Book Stores
Downtown BIA	229	King St	Downtown Variety & Video	1,929	180	Other General Merchandise Stores
Downtown BIA	270	King St	Shop Midland	5,200	180	Other General Merchandise Stores
Downtown BIA	285	King St	The Bargain Shop	3,472	180	Other General Merchandise Stores
Downtown BIA	506	Dominion Av	The Hock King	1,230	190	NFSR: Miscellaneous Store Retailers
Downtown BIA	212	King St	Fresh Gift Shoppe	1,000	190	NFSR: Miscellaneous Store Retailers
Downtown BIA	226	King St	The Lighthouse Store	1,000	190	NFSR: Miscellaneous Store Retailers
Downtown BIA	236	King St	The Crow's Nest	8,000	190	NFSR: Miscellaneous Store Retailers
Downtown BIA	258	King St	Global Pet Foods	1,537	190	NFSR: Miscellaneous Store Retailers
Downtown BIA	265	King St	Uncle Buck's	1,447	190	NFSR: Miscellaneous Store Retailers
Downtown BIA	295	King St	Evape	500	190	NFSR: Miscellaneous Store Retailers
Downtown BIA	298	King St	Homecoming	2,100	190	NFSR: Miscellaneous Store Retailers
Downtown BIA	321	King St	Perrin'S Flower Shop	836	190	NFSR: Miscellaneous Store Retailers
Downtown BIA	230	King St	Cash Store	1,200	210	Finance
Downtown BIA	237	King St	Assante/Sutherland Financial Services	900	210	Finance
Downtown BIA	243	King St	Bmo Bank Of Montreal	1,500	210	Finance
Downtown BIA	255	King St	Mortgage Centre	100	210	Finance
Downtown BIA	271	King St	Royal Bank Of Canada	10,000	210	Finance
Downtown BIA	274	King St	CIBC	3,600	210	Finance
Downtown BIA	291	King St	Scotia Bank	3,000	210	Finance
Downtown BIA	295	King St	Waterside Management	1,000	210	Finance
Downtown BIA	295	King St	TD Canada Trust & TD Waterhouse	4,000	210	Finance
Downtown BIA	299	King St	Cash-A-Cheque & Western Union	900	210	Finance
Downtown BIA	267	King St	In Touch Realty	1,427	220	Insurance and Real Estate
Downtown BIA	267	King St	Royal Lepage	1,500	220	Insurance and Real Estate
Downtown BIA	512	Dominion Av	Seguin Accountants	1,230	230	Professional, Scientific & Technical Services
Downtown BIA	515	Dominion Av	Liberty Tax Service	800	230	Professional, Scientific & Technical Services
Downtown BIA	486	Hugel Av	Matyas Consulting Inc.	1,100	230	Professional, Scientific & Technical Services
Downtown BIA	212	King St	Decarli Contractors	550	230	Professional, Scientific & Technical Services
Downtown BIA	251	King St	Cabin Boy	2,400	230	Professional, Scientific & Technical Services

Location	Address	Street Name	Store Name	Area	Naics	Trade Group
Downtown BIA	505	Dominion Av	Resource Centre	733	240	Selected Office Administrative Services
Downtown BIA	262	King St	Carlson Wagonlit Travel	600	240	Selected Office Administrative Services
Downtown BIA	295	King St	Kumon	1,100	245	Schools and Instruction
Downtown BIA	505	Dominion Av	Hurononia Pregnancy Centre	500	250	Health Care Services
Downtown BIA	516	Elizabeth St	Dr. Dan Laurin	600	250	Health Care Services
Downtown BIA	516	Elizabeth St	Dr. R. J. Sorgini	600	250	Health Care Services
Downtown BIA	512	Hugel Av	Dr. Douglas McClure	1,200	250	Health Care Services
Downtown BIA	512	Hugel Av	Groleau Chiropractic And Natural Health	1,200	250	Health Care Services
Downtown BIA	212	King St	Hurononia Crisis Pregnancy Centre	600	250	Health Care Services
Downtown BIA	274	King St	Dr. D. Neville	1,800	250	Health Care Services
Downtown BIA	205	King St	Bayshore Lanes	4,000	260	Entertainment
Downtown BIA	260	King St	Ladi Fitness	1,400	260	Entertainment
Downtown BIA	282	King St	Hunt Fitness	8,300	260	Entertainment
Downtown BIA	297	King St	Curves For Women	1,800	260	Entertainment
Downtown BIA	478	Bay St	Tim Hortons	3,014	270	Food Services and Drinking Places
Downtown BIA	212	King St	Subway	1,100	270	Food Services and Drinking Places
Downtown BIA	215	King St	Den's Skillet	1,500	270	Food Services and Drinking Places
Downtown BIA	223	King St	Lily's Italian	1,820	270	Food Services and Drinking Places
Downtown BIA	231	King St	Perfect Pizza	1,700	270	Food Services and Drinking Places
Downtown BIA	233	King St	Double Happiness Chinese Restaurant	2,500	270	Food Services and Drinking Places
Downtown BIA	248	King St	Ciboulette Et Cie Cafe	3,000	270	Food Services and Drinking Places
Downtown BIA	249	King St	The Riv Bistro	1,400	270	Food Services and Drinking Places
Downtown BIA	289	King St	Uncle Roy Restaurant	3,300	270	Food Services and Drinking Places
Downtown BIA	292	King St	Grounded Cafe	965	270	Food Services and Drinking Places
Downtown BIA	295	King St	The Ultimate Eatery	1,000	270	Food Services and Drinking Places
Downtown BIA	301	King St	Papas Pizza	527	270	Food Services and Drinking Places
Downtown BIA	311	King St	Midland Fish & Chips	868	270	Food Services and Drinking Places
Downtown BIA	278	King St	Juanita's Sew And Serge	1,400	280	Personal and Household Goods Repair and
Downtown BIA	513	Dominion Av	Smartphone Repair	1,208	282	Personal and Household Goods Repair and
Downtown BIA	489	Dominion Av	Atlantis Tanning & Swimwear	1,200	290	Personal Care Services
Downtown BIA	518	Elizabeth St	Maureen's Professional Hair Care	250	290	Personal Care Services
Downtown BIA	212	King St	Quik Kuts	250	290	Personal Care Services
Downtown BIA	217	King St	The Works Hair Design	600	290	Personal Care Services
Downtown BIA	219	King St	Image Salon	792	290	Personal Care Services
Downtown BIA	232	King St	Spiker's Barbershop	772	290	Personal Care Services
Downtown BIA	247	King St	Planet Beauty	400	290	Personal Care Services
Downtown BIA	288	King St	Creative Cut Unisex Hair Design	1,100	290	Personal Care Services
Downtown BIA	485	Dominion Av	Vacant	1,000	9999	Vacant
Downtown BIA	487	Dominion Av	Vacant	1,447	9999	Vacant
Downtown BIA	512	Hugel Av	Vacant	1,200	9999	Vacant
Downtown BIA	512	Hugel Av	Vacant	1,200	9999	Vacant
Downtown BIA	512	Hugel Av	Vacant	1,000	9999	Vacant
Downtown BIA	228	King St	Vacant	1,048	9999	Vacant
Downtown BIA	257	King St	Vacant	603	9999	Vacant
Downtown BIA	264	King St	Vacant	3,000	9999	Vacant
Downtown BIA	266	King St	Vacant	3,031	9999	Vacant
Downtown BIA	268	King St	Vacant	1,200	9999	Vacant
Downtown BIA Total				195,572		
Hurononia Mall	9225	Highway 93	Fast Forward Audio and Video	2,315	60	NFSR: Home Electronics & Appliance Stores
Hurononia Mall	9225	Highway 93	Bulk Barn	5,102	100	Grocery/Convenience and Specialty Food Stores
Hurononia Mall	9225	Highway 93	Mac's	1,085	100	Grocery/Convenience and Specialty Food Stores
Hurononia Mall	9225	Highway 93	Phoenix Jewellery	1,543	150	Shoe, Clothing Accessories and Jewellery Stores
Hurononia Mall	9225	Highway 93	Dollarama	8,681	180	Other General Merchandise Stores
Hurononia Mall	9225	Highway 93	Giant Tiger	15,867	180	Other General Merchandise Stores
Hurononia Mall	9225	Highway 93	Sears Catalogue Service	4,823	180	Other General Merchandise Stores
Hurononia Mall	9225	Highway 93	Ivy Basket	1,447	190	NFSR: Miscellaneous Store Retailers
Hurononia Mall	9225	Highway 93	Pet Valu	2,411	190	NFSR: Miscellaneous Store Retailers
Hurononia Mall	9225	Highway 93	Rogers Video	4,051	200	Consumer Services Rental
Hurononia Mall	9225	Highway 93	Scotiabank	965	210	Finance
Hurononia Mall	9225	Highway 93	Royal LePage	2,411	220	Insurance and Real Estate
Hurononia Mall	9225	Highway 93	The Cooperators	2,411	220	Insurance and Real Estate
Hurononia Mall	9225	Highway 93	Chin Orr Lawyers	723	230	Professional, Scientific & Technical Services
Hurononia Mall	9225	Highway 93	Mcdonald's	4,823	270	Food Services and Drinking Places
Hurononia Mall	9225	Highway 93	Pizzaville Pizza & Panzerotto	2,701	270	Food Services and Drinking Places
Hurononia Mall	9225	Highway 93	Quiznos	1,543	270	Food Services and Drinking Places
Hurononia Mall	9225	Highway 93	Tim Hortons	2,546	270	Food Services and Drinking Places
Hurononia Mall	9225	Highway 93	All You Can East Sushi and Grill	4,051	270	Food Services and Drinking Places
Hurononia Mall	9225	Highway 93	Tantrum Tanning Salon	1,206	290	Personal Care Services

Location	Address	Street Name	Store Name	Area	Naics	Trade Group
Huronia Mall	9225	Highway 93	Hairwaves	675	290	Personal Care Services
Huronia Mall	9225	Highway 93	Vacant	1,543	9999	Vacant
Huronia Mall	9225	Highway 93	Vacant (Pet Valu expansion soon)	1,736	9999	Vacant
Huronia Mall				74,661		
Mountainview	9226	Highway 93	The Brick	25,103	30	Furniture Stores
Mountainview	9226	Highway 93	Bell World	1,151	60	NFSR: Home Electronics & Appliance Stores
Mountainview	9226	Highway 93	The Source	2,300	60	NFSR: Home Electronics & Appliance Stores
Mountainview	9226	Highway 93	Food Basics	38,173	90	Supermarkets
Mountainview	9226	Highway 93	The Wine Rack	1,102	110	Beer, Wine and Liquor Stores
Mountainview	9226	Highway 93	B.P. Sportswear	732	140	Clothing Stores
Mountainview	9226	Highway 93	Northern Reflections	2,285	140	Clothing Stores
Mountainview	9226	Highway 93	Bluenotes	3,016	140	Clothing Stores
Mountainview	9226	Highway 93	Suzu Shier	3,134	140	Clothing Stores
Mountainview	9226	Highway 93	Tan Jay	2,871	140	Clothing Stores
Mountainview	9226	Highway 93	Bentley	1,319	150	Shoe, Clothing Accessories and Jewellery Stores
Mountainview	9226	Highway 93	Claire's	824	150	Shoe, Clothing Accessories and Jewellery Stores
Mountainview	9226	Highway 93	Naturestep	1,203	150	Shoe, Clothing Accessories and Jewellery Stores
Mountainview	9226	Highway 93	Peoples Jewellers	1,639	150	Shoe, Clothing Accessories and Jewellery Stores
Mountainview	9226	Highway 93	Coles	3,059	160	Sporting Goods, Hobby, Music and Book Stores
Mountainview	9226	Highway 93	Toys R Us Express	7,324	160	Sporting Goods, Hobby, Music and Book Stores
Mountainview	9226	Highway 93	Sportchek	6,077	160	Sporting Goods, Hobby, Music and Book Stores
Mountainview	9226	Highway 93	Zellers	112,046	170	Department Stores
Mountainview	9226	Highway 93	Hallmark	1,600	190	NFSR: Miscellaneous Store Retailers
Mountainview	9226	Highway 93	Lotto Booth	60	190	NFSR: Miscellaneous Store Retailers
Mountainview	9226	Highway 93	Easy Home	3,362	200	Consumer Services Rental
Mountainview	9226	Highway 93	Royal LePage	2,065	220	Insurance and Real Estate
Mountainview	9226	Highway 93	H&R Block	1,687	230	Professional, Scientific & Technical Services
Mountainview	9226	Highway 93	Midland Physiotherapy Rehabilitation Clinic	1,960	250	Health Care Services
Mountainview	9226	Highway 93	North Simcoe Family Health Team	1,076	250	Health Care Services
Mountainview	9226	Highway 93	Galaxy Theatres	26,153	260	Entertainment
Mountainview	9226	Highway 93	Burger King	4,000	270	Food Services and Drinking Places
Mountainview	9226	Highway 93	Gourmet House	628	270	Food Services and Drinking Places
Mountainview	9226	Highway 93	Teddy's Burger Pit	400	270	Food Services and Drinking Places
Mountainview	9226	Highway 93	Tim Hortons	500	270	Food Services and Drinking Places
Mountainview	9226	Highway 93	Things Engraved	312	282	Personal and Household Goods Repair and
Mountainview	9226	Highway 93	A&M Nails	513	290	Personal Care Services
Mountainview	9226	Highway 93	Imperial Tailoring And Alterations	346	290	Personal Care Services
Mountainview	9226	Highway 93	The Total Man	852	290	Personal Care Services
Mountainview	9226	Highway 93	Vacant	3,127	9999	Vacant
Mountainview	9226	Highway 93	Vacant	2,495	9999	Vacant
Mountainview	9226	Highway 93	Vacant	10,216	9999	Vacant
Mountainview	9226	Highway 93	Vacant	1,503	9999	Vacant
Mountainview	9226	Highway 93	Vacant	786	9999	Vacant
Mountainview	9226	Highway 93	Vacant	988	9999	Vacant
Mountainview	9226	Highway 93	Vacant	1,443	9999	Vacant
Mountainview	9226	Highway 93	Vacant	2,320	9999	Vacant
Mountainview	9226	Highway 93	Vacant	325	9999	Vacant
Mountainview	9226	Highway 93	Vacant	646	9999	Vacant
Mountainview	9226	Highway 93	Vacant	788	9999	Vacant
Mountainview	9226	Highway 93	Vacant	790	9999	Vacant
Mountainview	9226	Highway 93	Vacant	1,075	9999	Vacant
Mountainview	9226	Highway 93	Vacant	1,232	9999	Vacant
Mountainview	9226	Highway 93	Vacant	2,440	9999	Vacant
Mountainview	9226	Highway 93	Vacant	2,760	9999	Vacant
Mountainview Mall Total				291,806		
SmartCentres	16775	Highway 12	Home Depot	85,000	70	Home Centres and Hardware Stores
SmartCentres	16825	Highway 12	Mark's Work Wearhouse	7,716	140	Clothing Stores
SmartCentres	16821	Highway 12	Payless Shoesource	1,736	150	Shoe, Clothing Accessories and Jewellery Stores
SmartCentres	16821	Highway 12	EB Games	955	160	Sporting Goods, Hobby, Music and Book Stores
SmartCentres	16845	Highway 12	Walmart	108,528	170	Department Stores
SmartCentres	16825	Highway 12	Dollar Tree	7,716	180	Other General Merchandise Stores
SmartCentres	16821	Highway 12	Georgian Shores Dental	1,374	250	Health Care Services
SmartCentres	16821	Highway 12	Huronia Optical	868	250	Health Care Services
SmartCentres	16815	Highway 12	Tim Hortons	1,447	270	Food Services and Drinking Places
SmartCentres	16835	Highway 12	Boston Pizza	2,440	270	Food Services and Drinking Places
SmartCentres	16821	Highway 12	First Choice Haircutters	694	290	Personal Care Services
SmartCentres	16821	Highway 12	Nice One Nails	868	290	Personal Care Services
SmartCentres Total				219,343		

Location	Address	Street Name	Store Name	Area	Naics	Trade Group
Other Midland	542	Bay St	STIHL and RVs	-	20	Automotive
Other Midland	347	Cranston Cres	Factory Recreation	-	20	Automotive
Other Midland			Automotive (From JW)	223,506	20	Automotive (TBA)
Other Midland	577	Bay St	The Rec Room Furniture And Appliance	1,447	30	Furniture Stores
Other Midland	354	King St	Matress World (Closing)	2,800	30	Furniture Stores
Other Midland	900	King St	Barber And Haskill	4,836	30	Furniture Stores
Other Midland	1209	Sundowner Rd	United Floors - Therrien Flooring	1,085	40	Home Furnishings Stores
Other Midland	711	Yonge St	Aim Chimney	1,447	40	Home Furnishings Stores
Other Midland	361	King St	Compusolve	1,042	50	Computer and Software Stores
Other Midland	780	Balm Beach Rd	Alpha Security	1,085	60	NFSR: Home Electronics & Appliance Stores
Other Midland	780	Balm Beach Rd	Kinetic	1,085	60	NFSR: Home Electronics & Appliance Stores
Other Midland	780	Balm Beach Rd	The Water Stop	723	60	NFSR: Home Electronics & Appliance Stores
Other Midland	9170	Highway 93	Full Line Electronics	1,085	60	NFSR: Home Electronics & Appliance Stores
Other Midland	363	King St	Telus	1,042	60	NFSR: Home Electronics & Appliance Stores
Other Midland	1004	King St	The Water Store	1,700	60	NFSR: Home Electronics & Appliance Stores
Other Midland	255	Midland Av	Huronian Alarm	2,894	60	NFSR: Home Electronics & Appliance Stores
Other Midland	526	Dominion Av	Jeffrey Pro Hardware	5,000	70	Home Centres and Hardware Stores
Other Midland	159	Fourth St	Home Hardware	16,500	70	Home Centres and Hardware Stores
Other Midland	9320	Highway 93	Rona	40,500	70	Home Centres and Hardware Stores
Other Midland	200	Third St	TimBr Mart	14,000	70	Home Centres and Hardware Stores
Other Midland			Home Improvement (From JW)	-	70	Home Centres and Hardware Stores
Other Midland	760	Balm Beach Rd	House of Glass	3,667	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland	785	Balm Beach Rd	Belanger Aluminum	4,700	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland		Balm Beach	Midland Décor	10366	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland	527	Bay St	Scott's R & S Heating Systems	723	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland	538	Bay St	Norsim Equipment	5,200	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland	305	Cranston Cres	Wisners Climate Care	1,600	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland	345	Cranston Cres	Fastenal Industrial and Construction Supplies	7,902	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland	8945	Highway 93	Huronian Steel Sales	3,000	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland	479	Hugel Av	Garraway's Electrical	694	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland	479	Hugel Av	Iron Shoppe	500	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland		King St	Ideal Supply	8692	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland	397	Russell St	WYE River Flooring	7,500	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland		Vindin St	Georgian Kitchens	7774	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland		Whitfield Cres	Restore	6314	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland	365	William St	The Woodworks Fireplaces	3,500	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland	830	Yonge St	Norman's Garden Gallery	18,850	80	NFSR: Specialized Building Materials & Garden Stores
Other Midland	795	Balm Beach Rd	Foodland	24,982	90	Supermarkets
Other Midland	9292	Highway 93	The Real Canadian Superstore	77,164	90	Supermarkets
Other Midland	478	Elizabeth St	The Globe Delicatessen And Restaurant	723	100	Grocery/Convenience and Specialty Food Stores
Other Midland		Highway 12	Sunoco Convenience	500	100	Grocery/Convenience and Specialty Food Stores
Other Midland	9315	Highway 93	Ct Convenience	600	100	Grocery/Convenience and Specialty Food Stores
Other Midland	9319	Highway 93	M & M Meat Shops	723	100	Grocery/Convenience and Specialty Food Stores
Other Midland	815	King St	Convenience +	1,447	100	Grocery/Convenience and Specialty Food Stores
Other Midland	229	Midland Av	Meat Land	1,157	100	Grocery/Convenience and Specialty Food Stores
Other Midland	293	Midland Av	Mac's	2,170	100	Grocery/Convenience and Specialty Food Stores
Other Midland	679	Vindin St	Daisy Mart	868	100	Grocery/Convenience and Specialty Food Stores
Other Midland		Vindin St	Shell Foodstore	500	100	Grocery/Convenience and Specialty Food Stores
Other Midland	727	William St	Mac's	2,411	100	Grocery/Convenience and Specialty Food Stores
Other Midland	93	Woodland Dr	Neil's Convenience	1,312	100	Grocery/Convenience and Specialty Food Stores
Other Midland	741	Yonge St	Little Lake Convenience	500	100	Grocery/Convenience and Specialty Food Stores
Other Midland	438	Bay St	LCBO	4,500	110	Beer, Wine and Liquor Stores
Other Midland		Highway 93	The Beer Store	2,170	110	Beer, Wine and Liquor Stores
Other Midland	293	Midland Av	The Beer Store	3,617	110	Beer, Wine and Liquor Stores
Other Midland	9226	Highway 93	Shoppers Drug Mart	18,512	120	Pharmacies and Personal Care Stores
Other Midland	578	King St	The Hearing Rehab Centre	1,200	120	Pharmacies and Personal Care Stores
Other Midland	815	King St	Herbal Magic	723	120	Pharmacies and Personal Care Stores
Other Midland	339	King St	Georgian Bay Windsurfing	723	140	Clothing Stores
Other Midland	371	Midland Av	Rub Of The Green	868	140	Clothing Stores
Other Midland	543	Bay St	Little Ed's Ski and Bike Shop	1,929	160	Sporting Goods, Hobby, Music and Book Stores
Other Midland	475	Dominion Av	Tucker's Bait	1,061	160	Sporting Goods, Hobby, Music and Book Stores
Other Midland	9170	Highway 93	The Bike Shop	1,500	160	Sporting Goods, Hobby, Music and Book Stores
Other Midland	347	King St	Upper Canada Coins And Collectables	723	160	Sporting Goods, Hobby, Music and Book Stores
Other Midland	900	King St	West Marine	10,340	160	Sporting Goods, Hobby, Music and Book Stores
Other Midland	659	Balm Beach Rd	Buck And Up's Close Outs	7,650	180	Other General Merchandise Stores
Other Midland	551	Bay St	Duggers Milk And Variety	1,447	180	Other General Merchandise Stores
Other Midland	9315	Highway 93	Canadian Tire	51,362	180	Other General Merchandise Stores
Other Midland	509	King St	Kings Convenience	800	180	Other General Merchandise Stores

Location	Address	Street Name	Store Name	Area	Naics	Trade Group
Other Midland	401	William St	Tiffin Variety	675	180	Other General Merchandise Stores
Other Midland	649	Balm Beach Rd	Salvation Army Thrift Store	8,736	190	NFSR: Miscellaneous Store Retailers
Other Midland	781	Balm Beach Rd	Team Red Thrift Store	2,532	190	NFSR: Miscellaneous Store Retailers
Other Midland	781	Balm Beach Rd	Torzatop Folding	1,085	190	NFSR: Miscellaneous Store Retailers
Other Midland	305	Cranston Cres	Claire's Fine Wines	2,600	190	NFSR: Miscellaneous Store Retailers
Other Midland	347	King St	Ruths Custom Framing	362	190	NFSR: Miscellaneous Store Retailers
Other Midland	349	King St	Coin Laundry	405	190	NFSR: Miscellaneous Store Retailers
Other Midland	431	King St	Gallery Gale Art	2,000	190	NFSR: Miscellaneous Store Retailers
Other Midland	509	King St	Great Lakes Winery	1,000	190	NFSR: Miscellaneous Store Retailers
Other Midland	889	King St	Huronias Pools	5,334	190	NFSR: Miscellaneous Store Retailers
Other Midland	285	Midland Av	Swap Shop	1,852	190	NFSR: Miscellaneous Store Retailers
Other Midland	372	Midland Av	Claustro Paintings	1,447	190	NFSR: Miscellaneous Store Retailers
Other Midland	1272	Vindin St	Marinex Boat Sales	1,447	190	NFSR: Miscellaneous Store Retailers
Other Midland	516	Yonge St	Mobility Centre	482	190	NFSR: Miscellaneous Store Retailers
Other Midland	727	William St	Pop-In-Video	965	200	Consumer Services Rental
Other Midland	800	Yonge St	Rent to Own	1,400	200	Consumer Services Rental
Other Midland	525	Bay St	Edward Jones Investments	1,085	210	Finance
Other Midland	9281	Highway 93	National Bank	5,000	210	Finance
Other Midland	338	King St	Investment Planning Counsel	2,000	210	Finance
Other Midland	437	King St	Georgian Shores Wealth Management	2,000	210	Finance
Other Midland	479	King St	Investment Group	2,000	210	Finance
Other Midland	490	King St	Atherton Financial Group	2,000	210	Finance
Other Midland	512	Yonge St	RBC Dominion Services	2,170	210	Finance
Other Midland	808	Yonge St	Webb and Associates Financial Solutions	2,000	210	Finance
Other Midland	527	Bay St	Hazell Underwriting Group	434	220	Insurance and Real Estate
Other Midland	547	Bay St	State Farm	1,447	220	Insurance and Real Estate
Other Midland	578	Bay St	Sutton Realty	700	220	Insurance and Real Estate
Other Midland	248	First St	The Co-Operators	1,447	220	Insurance and Real Estate
Other Midland	341	King St	Swick Bauman Insurance	1,085	220	Insurance and Real Estate
Other Midland	344	King St	BJ Roth Real Estate	2,000	220	Insurance and Real Estate
Other Midland	349	King St	Harbour Insurance Service Limited	405	220	Insurance and Real Estate
Other Midland	365	King St	Ned Insurance	1,493	220	Insurance and Real Estate
Other Midland	382	King St	Sutton Realty	3,000	220	Insurance and Real Estate
Other Midland	578	King St	South Georgian Bay Realty	1,000	220	Insurance and Real Estate
Other Midland	841	King St	Remax Georgian Bay Realty	3,400	220	Insurance and Real Estate
Other Midland	845	King St	Citi Financial	1,447	220	Insurance and Real Estate
Other Midland	727	William St	Homelife Georgian Heights	1,206	220	Insurance and Real Estate
Other Midland	230	Aberdeen	Avionics Design Service	965	230	Professional, Scientific & Technical Services
Other Midland	544	Dominion Av	Dave Northcot Barristers	1,000	230	Professional, Scientific & Technical Services
Other Midland	476	Elizabeth St	Deacon Taws	4,600	230	Professional, Scientific & Technical Services
Other Midland	523	Elizabeth St	Grm Communications	434	230	Professional, Scientific & Technical Services
Other Midland	529	Elizabeth St	Preston Nicholson Havey Inc. Land Surveyor	434	230	Professional, Scientific & Technical Services
Other Midland	540	Elizabeth St	Thomas Industrial Networking	500	230	Professional, Scientific & Technical Services
Other Midland	540	Elizabeth St	Georgian Bay Technologies	500	230	Professional, Scientific & Technical Services
Other Midland	540	Elizabeth St	Solution Consulting	500	230	Professional, Scientific & Technical Services
Other Midland	12	Fifth St	Mtn Communication Systems	579	230	Professional, Scientific & Technical Services
Other Midland	356	First St	Keenans Accounting Services	723	230	Professional, Scientific & Technical Services
Other Midland	366	First St	Joseph Blake	1,085	230	Professional, Scientific & Technical Services
Other Midland	206	Fourth St	Sun Sport Graphics And Signs	482	230	Professional, Scientific & Technical Services
Other Midland	435	Hugel Av	Titain Home Design	1,085	230	Professional, Scientific & Technical Services
Other Midland	390	King St	Anderson Accountants	2,000	230	Professional, Scientific & Technical Services
Other Midland	479	King St	Blake Accountants	2,000	230	Professional, Scientific & Technical Services
Other Midland	531	King St	Ferguson Barristers	3,500	230	Professional, Scientific & Technical Services
Other Midland	687	King St	Heritage Animal Hospital	2,346	230	Professional, Scientific & Technical Services
Other Midland	815	King St	Stewart Vincent Photography	723	230	Professional, Scientific & Technical Services
Other Midland	323	Midland Av	Prost Associated Law	1,200	230	Professional, Scientific & Technical Services
Other Midland	331	Midland Av	Tax Depot	2,835	230	Professional, Scientific & Technical Services
Other Midland	362	Midland Av	John J Winter Law Office	1,157	230	Professional, Scientific & Technical Services
Other Midland	366	Midland Av	Brabant & Kretzschmann	1,447	230	Professional, Scientific & Technical Services
Other Midland	373	Midland Av	Premier Financial Planning Services	868	230	Professional, Scientific & Technical Services
Other Midland	512	Yonge St	Mink Insurance Services	2,170	230	Professional, Scientific & Technical Services
Other Midland	518	Yonge St	Hgr Lawyers	1,447	230	Professional, Scientific & Technical Services
Other Midland	537	Yonge St	Douglas Everett Accountants	2,200	230	Professional, Scientific & Technical Services
Other Midland	765	Yonge St	Midland Veterinary Service	1,500	230	Professional, Scientific & Technical Services
Other Midland	527	Bay St	Terri's Travel	723	240	Selected Office Administrative Services
Other Midland	480	Elizabeth St	Midland Copy Shoppe	723	240	Selected Office Administrative Services
Other Midland	264	First St	Atkinson Travel	482	240	Selected Office Administrative Services
Other Midland	765	Balm Beach Rd	Roys Driving School	1,800	245	Schools and Instruction

Location	Address	Street Name	Store Name	Area	Naics	Trade Group
Other Midland	230	Aberdeen	Tiffin Medical Clinic	482	250	Health Care Services
Other Midland	451	Dominion Av	Wellness Centre	1,400	250	Health Care Services
Other Midland	536	Dominion Av	Optometrist Dr. Fujimoto	723	250	Health Care Services
Other Midland	546	Dominion Av	Stamp Denture Clinic	482	250	Health Care Services
Other Midland	229	First St	Dr Dino Muraao Chiropractor	1,157	250	Health Care Services
Other Midland	306	First St	Dr's Office	289	250	Health Care Services
Other Midland	310	First St	Dr Edward Chiropractor	2,411	250	Health Care Services
Other Midland	340	First St	Genesis Dental Hygiene	2,500	250	Health Care Services
Other Midland	344	First St	Theraputic Massage	1,085	250	Health Care Services
Other Midland	527	Hugel Av	Downtown Medical Centre	2,000	250	Health Care Services
Other Midland	349	King St	Georgian Bay Clinic	405	250	Health Care Services
Other Midland	357	King St	Health Works Chiropractic And Wellness Clinic	1,447	250	Health Care Services
Other Midland	357	King St	Massage Matters	868	250	Health Care Services
Other Midland	392	King St	Dentistry by the Bay	3,000	250	Health Care Services
Other Midland	505	King St	Groleau Chiropractic	1,000	250	Health Care Services
Other Midland	578	King St	Midland Chiropractic Clinic	900	250	Health Care Services
Other Midland	701	King St	Lifestyle Health and Wellness Centre	4,784	250	Health Care Services
Other Midland	238	Midland Av	Better Life Chiropractic	651	250	Health Care Services
Other Midland	309	Midland Av	Daniel Scanlan Eye Physician	1,600	250	Health Care Services
Other Midland	310	Midland Av	Midland Optical	1,085	250	Health Care Services
Other Midland	337	Midland Av	Mental Health/Addiction	2,400	250	Health Care Services
Other Midland	347	Midland Av	Midland Dental	912	250	Health Care Services
Other Midland	354	Midland Av	Catholic Family Services	1,750	250	Health Care Services
Other Midland	375	Midland Av	Midland Denture Clinic	1,157	250	Health Care Services
Other Midland	375	William St	Midland Physio	3,600	250	Health Care Services
Other Midland	93	Woodland Dr	Medical Place	656	250	Health Care Services
Other Midland	741	Yonge St	Cameron Pain Injury Clinic	500	250	Health Care Services
Other Midland	788	Yonge St	Palmer Wellness	800	250	Health Care Services
Other Midland	298	First St	Prime Time Nursery	2,000	255	Social Services
Other Midland	349	King St	Heavy Metal Fitness	405	260	Entertainment
Other Midland	843	King St	Lot 102	6,500	260	Entertainment
Other Midland	306	Midland Av	T Zone Health	1,085	260	Entertainment
Other Midland	713	Vindin St	The Bar Adult Entertainment (Perks)	6,050	260	Entertainment
Other Midland	375	William St	Driven Fitness	3,600	260	Entertainment
Other Midland	727	William St	No Border Fitness	1,206	260	Entertainment
Other Midland	93	Woodland Dr	The Dancer's Studio	656	260	Entertainment
Other Midland	741	Yonge St	School of Dance Georgian Bay	500	260	Entertainment
Other Midland	758	Yonge St	Vivacious Fitness	482	260	Entertainment
Other Midland	358	Eighth St	Tymes Restaurant	1,447	270	Food Services and Drinking Places
Other Midland	9271	Highway 93	A & W	1,085	270	Food Services and Drinking Places
Other Midland		Highway 93	Harvey's/Swiss Chalet	1,929	270	Food Services and Drinking Places
Other Midland	526	Hugel Av	Library Restaurant	2,218	270	Food Services and Drinking Places
Other Midland	177	King St	Boathouse Eatery	2,894	270	Food Services and Drinking Places
Other Midland	337	King St	Cellarmans Ale House	2,170	270	Food Services and Drinking Places
Other Midland	342	King St	Lady Bug Cafe	868	270	Food Services and Drinking Places
Other Midland	349	King St	Mr Sub	506	270	Food Services and Drinking Places
Other Midland	375	King St	KFC	1,447	270	Food Services and Drinking Places
Other Midland	395	King St	Pizza Pizza	1,085	270	Food Services and Drinking Places
Other Midland	509	King St	Burger Bar	1,000	270	Food Services and Drinking Places
Other Midland	815	King St	King's Buffet	1,447	270	Food Services and Drinking Places
Other Midland	815	King St	Pizza Nova	723	270	Food Services and Drinking Places
Other Midland	830	King St	Tim Hortons	2,368	270	Food Services and Drinking Places
Other Midland	845	King St	Fish and Chips	2,246	270	Food Services and Drinking Places
Other Midland	917	King St	Kelsey's	4,013	270	Food Services and Drinking Places
Other Midland	285	Midland Av	Happy Days	1,500	270	Food Services and Drinking Places
Other Midland	200	Pillsbury Dr	The Original Mom's Restaurant	1,809	270	Food Services and Drinking Places
Other Midland	847	Vindin St	The Windrifter Bar	1,447	270	Food Services and Drinking Places
Other Midland	401	William St	Sergio's Italian Cucina	1,543	270	Food Services and Drinking Places
Other Midland	727	William St	TH Diner	965	270	Food Services and Drinking Places
Other Midland	740	Yonge St	Bleu Garden Restaurant	1,447	270	Food Services and Drinking Places
Other Midland	741	Yonge St	Our Place Homestyle Restaurant	500	270	Food Services and Drinking Places
Other Midland	741	Yonge St	Dominos Pizza	500	270	Food Services and Drinking Places
Other Midland	771	Yonge St	The Arch Steakhouse	2,411	270	Food Services and Drinking Places
Other Midland	776	Yonge St	Dairy Queen	4,560	270	Food Services and Drinking Places
Other Midland	854	Yonge St	Jinjin Restaurant	1,997	270	Food Services and Drinking Places
Other Midland	255	Midland Av	Golden Seam Alterations	347	280	Personal and Household Goods Repair and
Other Midland	366	Midland Av	Quality McPherson Accounting	1,447	280	Personal and Household Goods Repair and
Other Midland	727	William St	Seams To Please	965	280	Personal and Household Goods Repair and

Location	Address	Street Name	Store Name	Area	Naics	Trade Group
Other Midland	651	Yonge St	Wilkinsons Upholstery	1,200	280	Personal and Household Goods Repair and
Other Midland	620	Bay St	DS Collision	-	281	Personal and Household Goods Repair and
Other Midland	821	Vindin St	Huronina Auto Glass	-	281	Personal and Household Goods Repair and
Other Midland	184	Pillsbury Dr	Rainbow International	3,014	282	Personal and Household Goods Repair and
Other Midland	521	Bay St	Mane Event	579	290	Personal Care Services
Other Midland	527	Bay St	Dog's House Of Hair	434	290	Personal Care Services
Other Midland	475	Dominion Av	Alternative Nails and Skin Spa	463	290	Personal Care Services
Other Midland	479	Dominion Av	French Dry Cleaners	1,230	290	Personal Care Services
Other Midland	540	Dominion Av	Precision Fine Hairstyling	482	290	Personal Care Services
Other Midland	527	Elizabeth St	Hair We Are/Don'S Barber Shop	434	290	Personal Care Services
Other Midland	528	Elizabeth St	Permanent Solution	386	290	Personal Care Services
Other Midland	538	Elizabeth St	Massage Matters	1,000	290	Personal Care Services
Other Midland	264	First St	Coco Skin Care Clinic	482	290	Personal Care Services
Other Midland	492	Hannah St	The Laundry Room	800	290	Personal Care Services
Other Midland	479	Hugel Av	Dive Day Spa	694	290	Personal Care Services
Other Midland	479	Hugel Av	Transitions Hair	600	290	Personal Care Services
Other Midland	527	Hugel Av	Laser Health Works	1,809	290	Personal Care Services
Other Midland	335	King St	One Stop Beauty Shop	700	290	Personal Care Services
Other Midland	347	King St	The Hair Studio	2,170	290	Personal Care Services
Other Midland	349	King St	Coin Laundry	405	290	Personal Care Services
Other Midland	357	King St	Panache Spa Works	1,447	290	Personal Care Services
Other Midland	255	Midland Av	Michelle Added Touch Nails	347	290	Personal Care Services
Other Midland	316	Midland Av	The Strand Hairstyling	2,109	290	Personal Care Services
Other Midland	352	Midland Av	One Stop Beauty Shop	1,870	290	Personal Care Services
Other Midland	358	Midland Av	Midland Hair Fantasy	1,447	290	Personal Care Services
Other Midland	753	Vindin St	Country Clean Laundromat	500	290	Personal Care Services
Other Midland		Vindin St	Laundromat	1,500	290	Personal Care Services
Other Midland	727	William St	Washing Well Coin Laundry	965	290	Personal Care Services
Other Midland	413	Yonge St	Clean Scene Laundromat	1,500	290	Personal Care Services
Other Midland	574	Yonge St	Dion's Laundry	1,100	290	Personal Care Services
Other Midland	741	Yonge St	Hygenics Studio	500	290	Personal Care Services
Other Midland	758	Yonge St	Joseph Hair Design	482	290	Personal Care Services
Other Midland	788	Yonge St	Coastal Rays Tanning	800	290	Personal Care Services
Other Midland	551	Dominion Av	Vacant	723	9999	Vacant
Other Midland	248	First St	Vacant	800	9999	Vacant
Other Midland	9319	Highway 93	Vacant	1,447	9999	Vacant
Other Midland	422	King St	Vacant	1,085	9999	Vacant
Other Midland	845	King St	Vacant	362	9999	Vacant
Other Midland	93	Woodland Dr	Vacant	656	9999	Vacant
Other Midland	854	Yonge St	Vacant	1,085	9999	Vacant
Other Midland	854	Yonge St	Vacant	1,085	9999	Vacant
Other Midland Total				898,703		
GRAND TOTAL				1,680,085		

APPENDIX D: RETAIL AND SERVICES CLASSIFICATION

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RETAIL/SERVICE STORE CLASSIFICATION, BASED ON NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM (NAICS)

Trade Group	NAICS	Description
FOOD		
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 (excludes retailers or only ceramic or only hardwood flooring which are in Building Supply)
	44229	Other Home Furnishings Stores (e.g. window treatments, fireplace/accessories, 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 (includes retailing new computers, computer peripherals, pre-packaged software, game software and related products)
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 (includes tool stores)
80	Specialized Building Materials and Garden Stores	
	44412	Paint and Wallpaper Stores
	44419	Other Building Material Dealers (excluding manufacturing and construction firms) (includes doors, windows, kitchen cabinets, electrical, glass, plumbing, ceramic floor, roofing materials, fencing)
	44421	Outdoor Power Equipment Stores (lawn mowers, tractors, hedge trimmers, snow blowers)
	44422	Nursery Stores and Garden Centres
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)

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RETAIL/SERVICE STORE CLASSIFICATION, BASED ON NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM (NAICS) (Continued)

Trade Group	NAICS	Description
NON-FOOD STORE RETAIL (NFSR) (Continued)		
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 (includes athletic shoe retailers)
	44831	Jewellery Stores
	44832	Luggage and Leather Goods Stores
General Merchandise Stores		
170	Department Stores	
	45211	Department Stores
175	45211	Department Stores with a Large food component (i.e. Walmart Supercentres)
180	Other General Merchandise Stores	
	45291	Warehouse Clubs and Superstores
	45299	All Other General Merchandise Stores: <i>Home & Auto (i.e. Canadian Tire)</i> <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 (excludes athletic shoe retailers)
	45112	Hobby, Toy and Game Stores (excludes computer games and software)
	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 Retailers	
	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 (excludes art galleries)
	45399	All Other Miscellaneous Store Retailers (e.g. tobacco supplies, artist supplies, collectors items, beer & wine making, swimming pool/spas/accessories, religious goods and accessories)

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RETAIL/SERVICE STORE CLASSIFICATION, BASED ON NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM (NAICS) (Continued)

Trade Group	NAICS	Description
SERVICES		
200	Consumer Goods Rental	
	53221	Consumer Electronics and Appliance (Appliance rental and leasing, rental of consumer audio-visual equipment (including rent-to-own), Television rental and leasing, Video recorder and player rental and leasing, Washers and dryers rental)
	53222	Formal Wear and Costume Rental
	53223	Video Tape and Disc Rental
	53229	Other Rental (sporting goods, garden equipment, home health, fitness etc.)
	53231	General Rental Centres (including contractors' and builders' tools and equipment, home repair tools, lawn and garden equipment, moving equipment and supplies, and party and banquet equipment and supplies)
210	Finance	
	52211	Banks
	52213	Credit Unions
215	52239	Other Financial (including cheque cashing, mortgage brokers, other financial services (e.g. Edward Jones))
220	Insurance and Real Estate	
	52421	Insurance Agencies and Brokerages
	53121	Offices of Real Estate Agents and Brokers
	53132	Office of Real Estate Appraisers
230	Professional, Scientific & Technical Services	
	54111	Offices of Lawyers
	54119	Other Legal Services (e.g.. Paralegal, Title search, immigration consultation, notaries)
	54121	Offices of Accountants, Tax Preparation Services, Bookings, Payroll
	54131	Architectural Services
	54132	Landscape Architecture (includes urban planners, industrial development planning, landscape architects)
	54134	Drafting Services
	54137	Survey and Mapping Services
	54138	Testing Labs (excluding medical, auto, veterinary)
	54141	Interior Design Services
	54143	Graphic Design Services (includes art studios)
	54149	Other Specialized Design Services (e.g. clothing, jewellery, fashion)
	54151	Computer Systems Design and Related Services (e.g. computer consulting and programming)
	54161	Management Consulting Services
	54162	Environmental Consulting Services
	54169	Other Scientific and Technical Consulting (e.g. economic, hydrology, safety)
	54171	Research & Development in the Physical, Engineering and Life Sciences (includes medical research labs)
	54172	Research & Development in the Social Sciences and Humanities (e.g.. demographic, education, psychology research)
	54181	Advertising Agencies
	54182	Public Relations Services (e.g. lobbyists, political consultants)
	54191	Marketing Research & Public opinion polling
	54192	Photographic Services (e.g. passport photography, photo studios portrait photography studies)
	54193	Translation and Interpretation Services
	54194	Veterinary Services (excludes pet care (81291))
	54199	All Other Professional, Scientific and Technical Services (includes consumer credit counselling)
240	Selected Office Administrative Services	
	56131	Employment Services (includes placements, executive search, casting agencies etc.)
	56141	Document Preparation Services (proofreading, word processing, desktop publishing etc.)
	56142	Telephone Call Centres
	56143	Business Service Centres (e.g.. printing, copying, mail centres) (excludes commercial printing)
	56144	Collection Agencies
	56145	Credit Bureaus
241	Travel Services	
	56151	Travel Agencies
	56159	Other Travel Arrangement & Reservation Services (e.g.. ticket sales agency, tourist info, bus ticket offices, etc.)
	56162	Security Systems (includes security system sales, installation and monitoring; locksmiths (excluding key duplication - 81149))
245	Selected Educational Services	
	61161	Fine Arts Schools (e.g. dance, drama, music, art, handicrafts)
	61162	Athletic Instruction (e.g. aerobic dance, gymnastics, judo, karate, martial arts, scuba, swimming) (excludes athletic instruction in sport and recreation facility)
	61163	Language Schools
	61169	All Other Schools and Instruction (e.g. driving instruction, public speaking, Kumon, Oxford)

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RETAIL/SERVICE STORE CLASSIFICATION, BASED ON NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM (NAICS) (Continued)

Trade Group	NAICS	Description
SERVICES (Continued)		
250	Health Care	
	63111	Offices of Physicians
	62121	Offices of Dentists
	62131	Offices of Chiropractors
	62132	Offices of Optometrists (excludes eyeglass stores - 44613)
	62133	Offices of Mental Health Practitioners (psychologists, psychiatric social workers)
	62134	Offices of Physical, Occupational, Speech Therapists and Audiologists
	62135	Offices of Other Health Practitioners (e.g.. acupuncturists, dental hygienists, dieticians, naturopath, podiatrists)
	62141	Family Planning Centres
	62142	Outpatient Mental Health and Substance Abuse Centres
	62149	Other Outpatient Care Centres (e.g. public health clinics, hearing testing, dialysis)
	62151	Medical and Diagnostic Laboratories (e.g. medical, x-ray, dental lab (excluding making of dentures, ortho appliances, teeth)
255	Social Services	
	62411	Child and Youth Social Services (e.g. Children's aid, youth centres, adoption)
	62149	Other Individual and Family Services (e.g.. AA, marriage counselling, outreach)
	62441	Child Day Care
260	Cultural, Entertainment and Recreation	
261	71312	Amusement Arcades (e.g. indoor play areas, pinball arcades, video game arcades)
262	71394	Fitness & Recreational Sports Centres (includes athletic clubs, spas (w/o accommodation), aerobic dance centres, health clubs)
263	71395	Bowling Centres
264	71399	All other Amusement and Recreation Industries (includes billiards parlours)
265	51213	Motion Picture and Video Exhibition (includes cinemas)
270	Food Services and Drinking Places	
271	72211	Full-Service Restaurants
272	72221	Limited-Service Eating Places
273	72232	Caterers (includes banquet halls)
274	72241	Drinking Places (Alcoholic Beverages) -(includes night clubs, bars (including those with gaming), pubs, taverns
280	Personal and Household Goods Repair and Maintenance	
281	81111	Automotive Mechanical & Electrical Repair & Maintenance (includes engine repair, exhausts, transmission, electrical system repair)
281	81112	Automotive Body, Paint, Interior and Glass Repair (includes collision repair, auto upholstery, paint & body shops)
281	81119	Other Automotive Repair & Maintenance (includes auto detail, washing, diagnostic centres, lube, rust proofing, undercoating, emissions testing)
282	81121	Electronic and Precision Equipment Repair and Maintenance (includes ink jet cartridges (cleaning and refilling), TV repair)
	81141	Home and Garden Equipment and Appliance Repair & Maintenance (e.g. small engine repair)
	81142	Reupholstery and Furniture Repair
	81143	Footwear and Leather Goods Repair (e.g. shoe repair)
282	81149	Other Personal and Household Goods Repair and Maintenance (includes key cutting, china firing/decorating, jewellery repair, sharpening of knives, skate sharpening, watch repair etc.)
290	Personal Care Services	
	81211	Hair care and Esthetic Services (includes barber, beauty, hair salons)
	81219	Other Personal Care services (includes day spa, diet centres, hair removal, massage parlours, tanning salons, tattoo parlours, weight reduction centres)
	81231	Coin-operated Laundries and dry cleaners (self service)
	81232	Dry Cleaning and Laundry services (except coin operated)
	81233	Linen and Uniform Supply (includes work clothing supply services - industrial)
	81291	Pet Care (except veterinary)
	81292	Photofinishing Services
	81299	All other Personal Services (e.g. fortune tellers, dating services, psychic services, shoeshine)
295	Civic and Social Organizations	
	81341	Civic and Social Organizations (includes clubs)
	81391	Business Associations (includes board of trade, real estate boards etc.)
	Transportation	
296	49111	Postal Service (post office)
300	VACANT	
	9999	VACANT RETAIL/SERVICE SPACE