Town of Midland Official Plan Review and Update Project

Growth Management Strategy

Prepared by

MERIDIAN
PLANNING CONSULTANTS INC.

in association with

pA
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and

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PERSEQUI QUALITATEM VITAE

Table of Contents

List of Figures:

1. INTRODUCTION

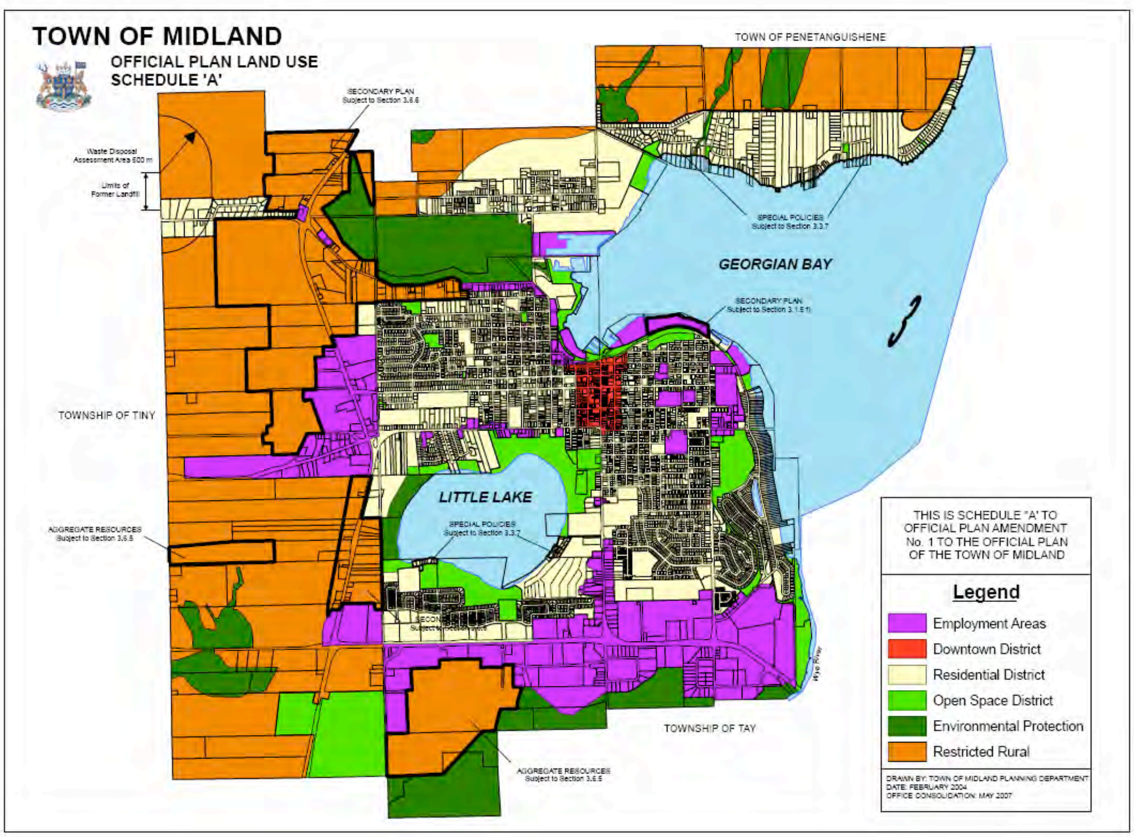
Meridian Planning Consultants, in conjunction with urbanMetrics inc. and planningAlliance, have been retained by the Town of Midland to develop a Growth Management Strategy. The Growth Management Strategy will provide input and guidance to the Town's Official Plan Review and Update Project. There are three components to the Midland Growth Management Study:

- Employment Areas Strategy
- Commercial Areas Strategy
- Intensification Strategy

1.1 Background

The Town of Midland Official Plan has six (6) land use designations (Figure 1.1). This study will focus on the first three designations, including Employment Areas (includes Commercial and Industrial Lands), Downtown District, and Residential District.

Figure 1.1



1.2 Goal and Objectives

The goal of this study is to provide guidance to the Town of Midland with respect to the amendments required to update the Official Plan. In particular, this study will address employment lands, commercial lands and structure, and intensification issues in part to assist in 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 are:

- 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.

1.3 Approach

To develop the Growth Management Strategy, the following steps were undertaken:

- Data compilation and review of existing planning documents and mapping;
- Employment Land Analysis;
- Employment Land Forecast;
- Inventory of existing retail/service space in Midland;
- Commercial Space and Land Forecast;
- Review of Commercial Trends;
- Site reconnaissance;
- Identification of potential sites for Residential Intensification;
- Development of criteria/matrix for consideration of proposals for Residential Intensification;
- Provision of graphics demonstrating potential residential intensification options for two sites.

2. ECONOMIC PROFILE

This section will highlight Midland's local economic base, with a focus on demographic, income and labour force characteristics.

2.1 Population

Based on the 2006 Census, the Town of Midland's population reached 16,300, a growth of 0.5% over the previous 2001 Census. Compared with Simcoe County's growth rate of 12.0% and provincial growth rate of 6.6%, the Town of Midland's population was almost stagnant between 2001 to 2006 (Figure 2.1).

Figure 2.1

TOWN OF MIDLAND - POPULATION CHANGE

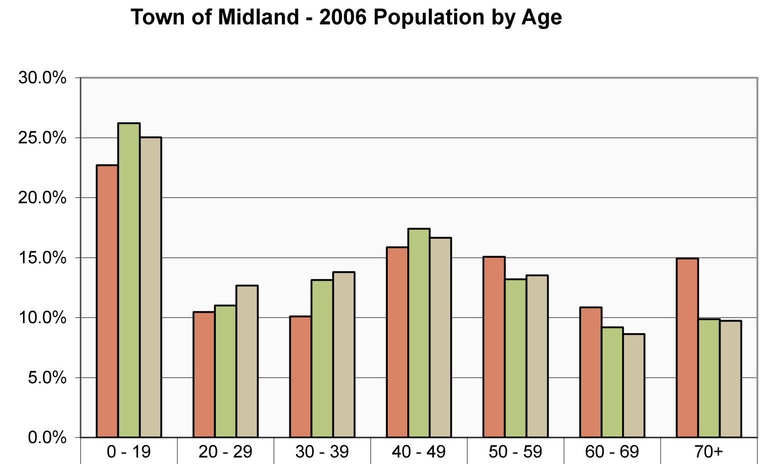
	Midland	Change	Simcoe County	Change	Ontario	Change
1996	16,347	-	329,865	-	10,753,573	-
2001	16,214	-0.8%	377,050	14.3%	11,410,046	6.1%
2006	16,300	0.5%	422,204	12.0%	12,160,282	6.6%

Source: Statistics Canada 1996 - 2006 Census. Does not include undercount.

Figure 2.2 illustrates the population age distribution for the Town of Midland compared to Simcoe County and Ontario. Overall, Midland has a significantly older population than the County or the Province, with lower representation in the under 20 cohorts and higher representation in the over 50 cohorts.

The age of the local population is an important factor determining the amount and type of commercial expenditures made in an area. As households age, their needs and spending habits shift. In very broad terms, young adults tend to spend a higher proportion of their income on fashion, entertainment and recreation merchandise. As they get married and have children, spending shifts to items and services related to housing and childrearing. Also, when family size increases and children age, housing, home furnishings and home décor occupy a much greater share of household expenditures. Following retirement, housing and furnishing needs are typically reduced. In addition, as consumers' age there is a greater emphasis on service and health related expenditures.

Figure 2.2



	0 - 19	20 - 29	30 - 39	40 - 49	50 - 59	60 - 69	70+
Midland	22.7%	10.5%	10.1%	15.9%	15.1%	10.9%	14.9%
Simcoe County	26.2%	11.0%	13.1%	17.4%	13.2%	9.2%	9.9%
Ontario	25.0%	12.7%	13.8%	16.6%	13.5%	8.6%	9.7%

Source: Statistics Canada, 2006 Census

As indicated in Figure 2.3, projections prepared by Simcoe County, forecast Midland's population to grow to approximately 19,700 by the year 2031, an increase of 2,800 people from 2006 levels. Midland's population by 2031 will comprise approximately 3.0% of the County's total population, compared to about 4.0% in 2006.

Figure 2.3

POPULATION PROJECTIONS

Municipality	2006	2031	Change 2006 - 2031	% of Simcoe County Total in 2031
Adjala-Tosorontio	11,100	14,200	3,100	2.1%
Bradford West Gwillimbury	25,000	49,700	24,700	7.5%
Clearview	14,600	26,000	11,400	3.9%
Collingwood	18,000	30,200	12,200	4.5%
Essa	17,600	22,900	5,300	3.4%
Innisfil	32,400	65,000	32,600	9.7%
Midland	**16,900**	**19,700**	**2,800**	**3.0%**
New Tecumseth	28,800	49,000	20,200	7.3%
Oro-Medonte	20,800	28,100	7,300	4.2%
Penetanguishene	9,700	12,300	2,600	1.8%
Ramara	9,800	15,500	5,700	2.3%
Severn	12,500	20,200	7,700	3.0%
Springwater	18,100	26,500	8,400	4.0%
Tay	10,100	11,300	1,200	1.7%
Tiny	11,200	13,900	2,700	2.1%
Wasaga Beach	15,600	35,000	19,400	5.2%
COUNTY TOTAL	272,200	439,500	167,300	65.9%
Barrie and Orillia	166,400	227,500	61,100	34.1%
SIMCOE AREA TOTAL	**438,600**	**667,000**	**228,400**	**100.0%**

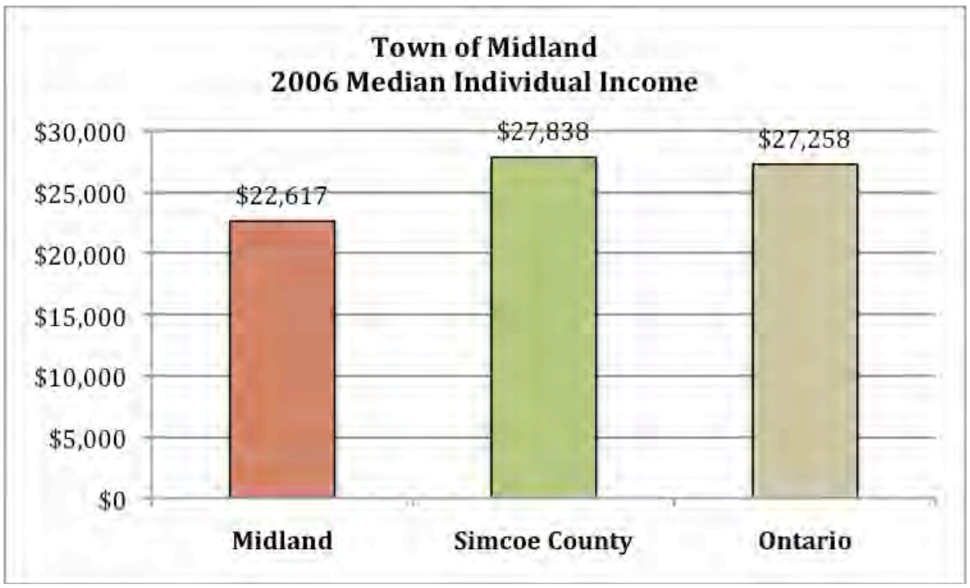
Source: County of Simcoe Official Plan 2008

Note: 2006 population is total population, adjusted to include 4% undercoverage.

2.2 Income Levels

Figure 2.4 illustrates Midland's median individual and household income levels compared to Simcoe County and Ontario. According to 2006 Census data, Midland had a median individual income of $22,617, below the Simcoe County average of $27,838 and the Ontario average of $27,258. Midland's median household income at $45,256 was also significantly below the County average of $62,328 and the Ontario average of $60,455. Income levels are a strong indicator of the spending power of residents. The below average incomes in Midland are also related to the large retiree population in the community.

Figure 2.4



2.3 Commuting Flows

The Town of Midland is an important employment centre for surrounding communities. Based on Commuting Flow (usual place of work) data for 2006 provided by Statistics Canada, 45.3% of Midland's employment is filled by Midland residents. Residents from the surrounding communities of Tay, Tiny and Penetanguishene comprise 45.5% of the employment in Midland (Figure 2.5).

In terms of outflow, 31.4% of working Midland residents commute outside of the Town to work, with the largest share commuting to other municipalities such as Penetanguishene and Barrie. The result is that Midland is a net importer of approximately 3,470 workers (inflow – outflow).

The 2006 Census data underscores that Midland is an important employment centre in the area and the economy depends heavily on inflow commuters from outside the Town to support its workforce requirements.

Figure 2.5

MIDLAND COMMUTING FLOWS

	PERSONS WORKING IN MIDLAND	
Place of Residence	**Total**	**%**
Midland [1]	4,645	45.3%
Tay	2,095	20.4%
Tiny	1,315	12.8%
Penetanguishene	1,250	12.2%
Oro-Medonte	175	1.7%
Barrie	165	1.6%
Springwater	155	1.5%
Georgian Bay	105	1.0%
Severn	90	0.9%
Orillia	50	0.5%
Toronto	40	0.4%
Wasaga Beach	40	0.4%
Other [2]	120	1.2%
Total	**10,245**	**100.0%**
Inflow [3]	**5,600**	**54.7%**

	RESIDENTS OF MIDLAND	
Place of Work	**Total**	**%**
Midland [1]	4,645	68.6%
Penetanguishene	1,015	15.0%
Barrie	310	4.6%
Tay	215	3.2%
Orillia	90	1.3%
Tiny	90	1.3%
Severn	85	1.3%
Springwater	85	1.3%
New Tecumseth	65	1.0%
Toronto	60	0.9%
Mississauga	60	0.9%
Georgian Bay	35	0.5%
Oro-Medonte	20	0.3%
Total	**6,775**	**100.0%**
Outflow [3]	**2,130**	**31.4%**

1) Includes work at home

2) Includes communities with minimal flows

3) Inflow/Outflow equals the Total minus those Midland residents who work/live in the Town

Source: Statistics Canada 2006 Census

2.4 Employment and Labour Force Levels

The manufacturing sector comprises the largest share (28.8%) of the Town's employment base with 2,955 jobs in 2006, followed by Retail Trade with 1,995 jobs and Health Care and Social Assistance with 1,320 jobs. In 2006, Midland's employment (i.e. the number of jobs located in Midland) was 10,245, an increase of 775 jobs from 2001. The industry sectors that experienced the most employment growth included Retail Trade and Educational Services. Midland's labour force (i.e. residents of Midland employed inside or outside the municipality) was 8,030 in 2006, an increase of 665 people from 2001. The industry sectors that experienced the most labour force growth included Retail Trade and Health Care and Social Assistance. Between 2001 and 2006, the greatest change occurred in the manufacturing sector with a loss of 195 jobs and a labour force decline of 150 (Figure 2.6).

Figure 2.6

MIDLAND EMPLOYMENT AND LABOUR FORCE CHANGE - 2001 to 2006

	Employment (Jobs in Midland)			Labour Force (Residents of Midland)		
Industry Sectors (NAICS)	**2001**	**2006**	**Change 01 - 06**	**2001**	**2006**	**Change 01 - 06**
11 Agriculture, Forestry, Fishing and Hunting	30	25	-5	45	15	-30
21 Mining and Oil and Gas Extraction	20	80	60	25	55	30
22 Utilities	35	50	15	70	105	35
23 Construction	190	210	20	335	410	75
31-33 Manufacturing	3,150	2,955	-195	2,035	1,885	-150
41 Wholesale Trade	115	195	80	115	125	10
44-45 Retail Trade	1,465	1,995	530	960	1,250	290
48-49 Transportation and Warehousing	205	170	-35	260	265	5
51 Information and Cultural Industries	145	85	-60	85	95	10
52 Finance and Insurance	230	310	80	140	200	60
53 Real Estate and Rental and Leasing	200	215	15	100	125	25
54 Professional, Scientific and Technical Services	295	325	30	235	265	30
55 Management of Companies and Enterprises	0	0	0	0	10	10
56 Administrative and Support, Waste Management and Remediation Services	135	160	25	200	255	55
61 Educational Services	360	505	145	410	480	70
62 Health Care and Social Assistance	1,260	1,320	60	905	1,015	110
71 Arts, Entertainment and Recreation	175	160	-15	225	260	35
72 Accommodation and Food Services	790	810	20	615	580	-35
81 Other Services (except Public Administration)	425	405	-20	335	355	20
91 Public Administration	245	270	25	270	280	10
Total	**9,470**	**10,245**	**775**	**7,365**	**8,030**	**665**
			8.2%			**9.0%**

Source: Statistics Canada 2001 and 2006 Census

2.5 Businesses by Industry

Statistics Canada's Canadian Business Pattern Data provides a record of business establishments by industry type and employee size range. This information was obtained from Statistics Canada survey program data and the Business Number registration source collected from the Canada Revenue Agency (CRA). The business data collected for Midland includes all local business which meet at least one of the three following criteria:

1. Have an employee workforce for which they submit payroll remittances to CRA; or
2. Have a minimum of $30,000 in annual sales revenue; or
3. Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

The Canadian Business Patterns Data records business counts by "Total", "Indeterminate", and "Subtotal categories". The establishments in the "Indeterminate" category include the self-employed, i.e. those who do not maintain an employee payroll, but may have a workforce consisting of contracted workers, family members or business owners. However, the Canadian Business Patterns Data does not have this information available and therefore assigns the establishments as "Indeterminate". For our purposes, the following table for Midland are business establishments by "Total" which include the "Indeterminate" category.

Figure 2.7 summarizes the number and size of business establishments in Midland. As of June 2008, there were 1,137 businesses in the Town, with the greatest concentration of businesses found in the retail trade (16.5%); professional, scientific and technical services (10.5%); and construction (10.0%) sectors. With the exception of the indeterminate category, the majority of firms in the Town are relatively small employing 1 to 4 employees. Firms with more than 100 employees are found mostly within the manufacturing sector.

Figure 2.7

TOWN OF MIDLAND - NUMBER OF BUSINESSES BY INDUSTRY, JUNE 2008

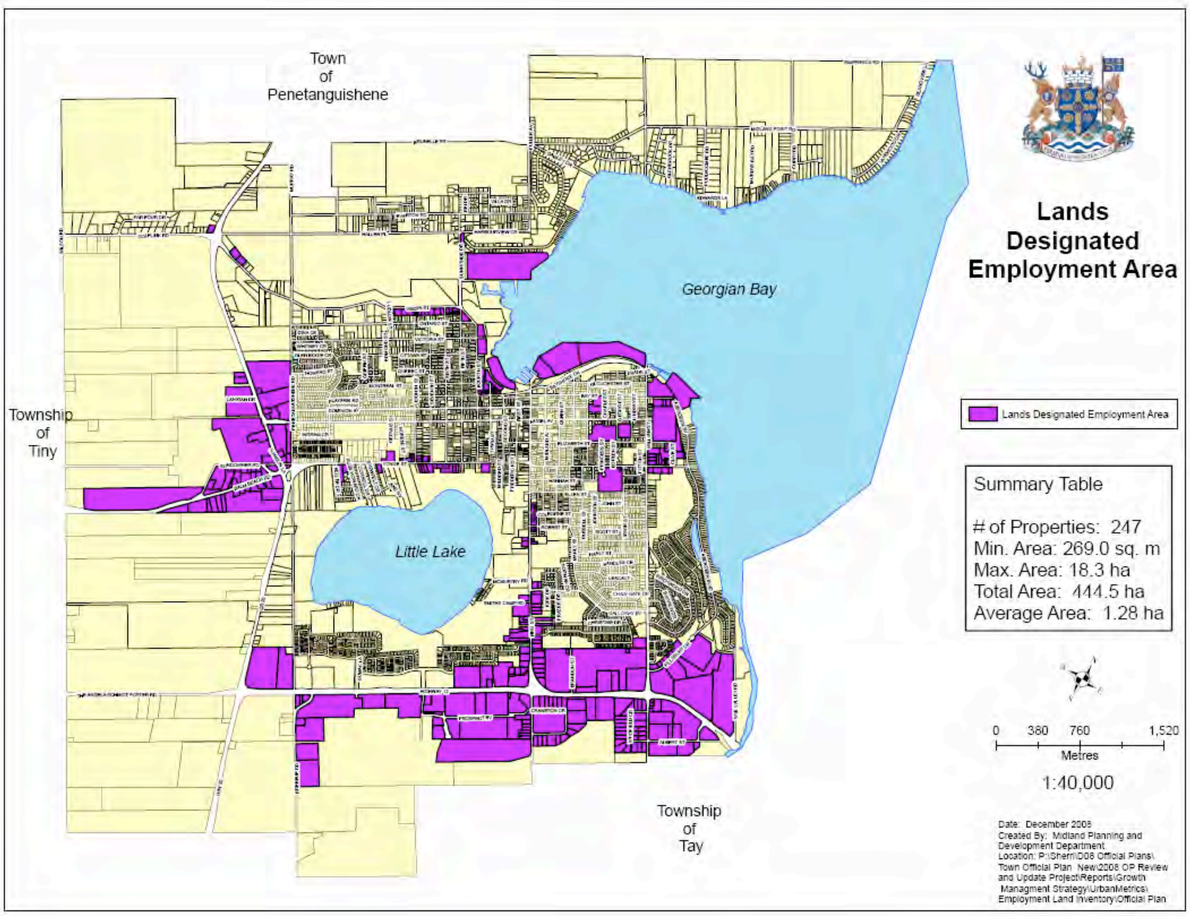
			Employee Size Range						
Industry (NAICS)	**# of Businesses**	**% of total businesses**	**1 - 4**	**5 - 9**	**10 - 19**	**20 - 49**	**50 - 99**	**100+**	**Indeterminate**
11 - Agriculture, Forestry, Fishing and Hunting	21	1.8%	4	2	1	1	0	0	13
21 - Mining, Quarring, and Oil and Gas Extraction	1	0.1%	0	0	0	0	0	0	1
22 - Utilities	3	0.3%	0	0	0	1	0	0	2
23 - Construction	114	10.0%	31	13	8	4	0	0	58
31-33 - Manufacturing	63	5.5%	9	10	4	2	5	11	22
41 - Wholesale Trade	43	3.8%	11	5	6	2	0	0	19
44-45 - Retail Trade	188	16.5%	48	34	28	14	5	5	54
48-49 - Transportation and Warehousing	39	3.4%	12	0	1	0	1	1	24
51 - Information and Cultural Industries	10	0.9%	0	2	2	2	0	0	4
52 - Finance and Insurance	66	5.8%	16	5	6	2	0	1	36
53 - Real Estate and Rental and Leasing	98	8.6%	15	2	1	0	1	1	78
54 - Professional, Scientific and Technical Services	119	10.5%	34	7	5	4	0	0	69
55 - Management of Companies and Enterprises	26	2.3%	3	0	0	0	0	0	23
56 - Administrative and Support, Waste Management and Remediation Services	61	5.4%	16	7	3	2	1	0	32
61 - Educational Services	9	0.8%	1	1	1	0	0	0	6
62 - Health Care and Social Assistance	92	8.1%	40	17	10	5	1	4	15
71 - Arts, Entertainment and Recreation	23	2.0%	6	1	2	2	2	0	10
72 - Accommodation and Food Services	73	6.4%	11	15	9	10	5	1	22
81 - Other Services (except Public Administration)	86	7.6%	41	13	2	1	0	1	28
91 - Public Administration	2	0.2%	0	0	1	0	0	1	0
Total	**1,137**	**100.0%**	**298**	**134**	**90**	**52**	**21**	**26**	**516**

Source: Statistics Canada, Canadian Business Patterns, June 2008

3. EMPLOYMENT AREAS STRATEGY

Figure 3.1 illustrates lands in Midland designated Employment Area. 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.

Figure 3.1



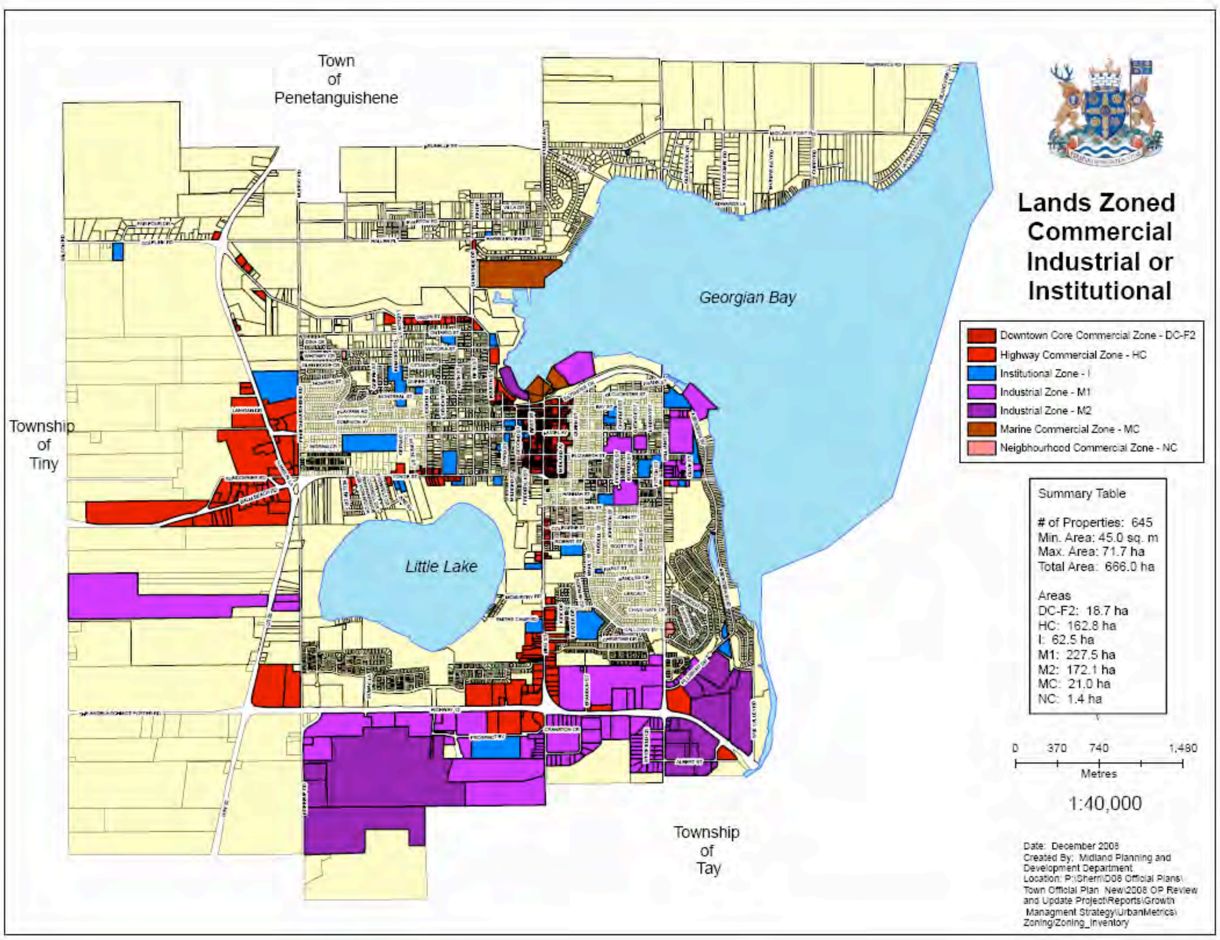
3.1 Industrial, Commercial and Institutional Land Uses

Figure 3.2 illustrates employment areas under the following zoning categories:

- Industrial Zone – M1
- Industrial Zone – M2
- Downtown Core Commercial Zone
- Highway Commercial Zone
- Marine Commercial Zone
- Neighbourhood Commercial Zone
- Institutional Zone

The majority of industrial lands are located in the southern portion of the Town along Highway 12. Commercial areas are concentrated in the Downtown, Highway 12 & King Street (SmartCentres), and along Penetanguishene Road (Mountainview and Huronia Mall).

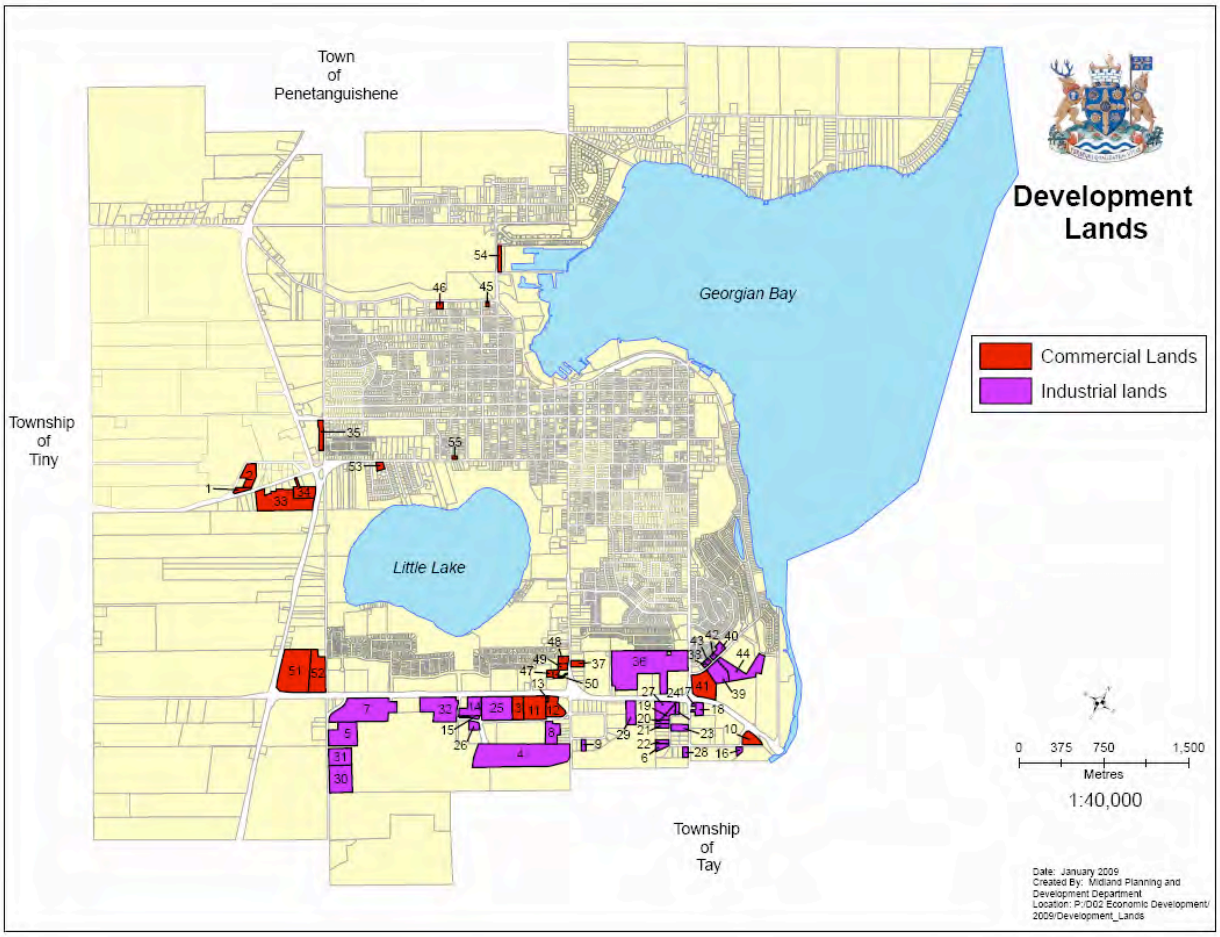
Figure 3.2



3.2 Vacant Employment Lands

Figure 3.3 illustrates vacant developments lands (both commercial and industrial) within the Town of Midland. The majority of these lands are located along Highway 12 in the southern portion of Midland. There are currently 138.4 hectares (342 acres) of vacant designated employment land.

Figure 3.3



3.3 Current Supply of Serviced Employment Lands

Within the total supply of vacant employment lands, the largest portion of development land (75.87 hectares) is within the Industrial Zone "M1"classification, followed by the Highway Commercial Zone at 46.75 hectares and the Industrial Zone "M2" at 15.75 hectares (see Appendix A) for permitted uses for Industrial Zones M1 and M2.. Of this total land supply, 72.6 hectares is serviced and 65.8 hectares is unserviced (Figure 3.4).

Figure 3.4

TOWN OF MIDLAND - SUMMARY OF DEVELOPMENT LANDS

		Area			Servicing (ha)	
Land Area by Zone		**Square Metres**	**Hectares**	**Acres**	**No**	**Yes**
HC	Highway Commercial Zone	467,539.1	46.75	115.5	32.67	14.07
M1	Industrical Zone "M1"	758,667.0	75.87	187.4	20.85	55.03
M2	Industrial Zone "M2"	157,503.1	15.75	38.9	12.25	3.5
Total		**1,383,709.2**	**138.4**	**341.8**	**65.8**	**72.6**

Source: Town of Midland, January 2009

The majority of these lands are located along Highway 12 in the southern portion of Midland with the largest property at 17.4 hectares and the smallest at 0.1 hectare. The size and servicing of these development lands are summarized in Figure 3.5. Of the 55 properties listed as development lands, 30 are under 1 hectare, 22 are between 1 – 10 hectares, and 3 are 10+ hectares in size.

Figure 3.5

TOWN OF MIDLAND - DEVELOPMENT LANDS

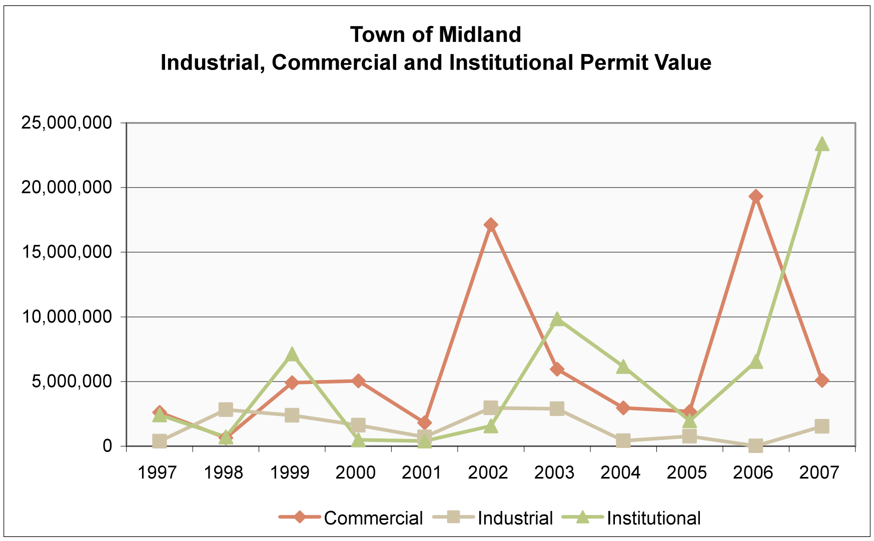
Map ID	Property Location	Area (sq. m)	Area (ha)	Zoning	Servicing
1	710 BALM BEACH ROAD EAST	5,375.6	0.54	HC	No
2	1277 SUNDOWNER ROAD	20,440.2	2.04	HC	No
3	16736 HIGHWAY 12	20,839.5	2.08	HC	Yes
4	1070 KING STREET	165,524.1	16.55	M1	Yes
5	1029 BREBEUF ROAD	47,888.1	4.79	M1	No
6	245 WHITFIELD CRESCENT	5,331.4	0.53	M1	Yes
7	16984 HIGHWAY 12	100,479.3	10.05	M1	No
8	619 PROSPECT BOULEVARD	22,257.5	2.23	M1	Yes
9	475 CRANSTON CRESCENT	4,048.5	0.4	M1	Yes
10	1001 KINDRED ROAD	14,727.9	1.47	HC	No
11	630 PROSPECT BOULEVARD	41,313.7	4.13	HC	Yes
12	16728 HIGHWAY 12	23,136.8	2.31	HC	Yes
13	16736 HIGHWAY 12	1,023.8	0.1	HC	Yes
14	1001 BEAMISH ROAD	25,961.9	2.6	M1	Yes
15	HERITAGE DR S/S	3,227.4	0.32	M1	Yes
16	107 ALBERT STREET	3,219.5	0.32	M2	No
17	947 WILLIAM STREET	1,167.8	0.12	M2	Yes
18	16468 HIGHWAY 12	8,502.1	0.85	M2	Yes
19	279 WHITFIELD CRESCENT	7,303.7	0.73	M1	Yes
20	269 WHITFIELD CRESCENT	4,256.9	0.43	M1	Yes
21	265 WHITFIELD CRESCENT	4,238.7	0.42	M1	Yes
22	249 WHITFIELD CRESCENT	4,165.3	0.42	M1	Yes
23	1000 WILLIAM STREET	9,086.6	0.91	M1	Yes
24	289 WHITFIELD CRESCENT	3,755.8	0.38	M1	Yes
25	16828 HIGHWAY 12	56,522.7	5.65	M1	Yes
26	679 PROSPECT BOULEVARD	6,865.2	0.69	M1	Yes
27	16530 HIGHWAY 12	19,212.4	1.92	M1	Yes
28	225 WHITFIELD CRESCENT	4,294.3	0.43	M1	Yes
29	16590 HIGHWAY 12	17,768.8	1.78	M1	Yes
30	1053 BREBEUF ROAD	48,834.4	4.88	M2	No
31	BREBEUF RD N/S	30,000.4	3	M2	No
32	16928 HIGHWAY 12	60,084.1	6.01	M1	No
33	739 BALM BEACH ROAD EAST	75,911.9	7.59	HC	No
34	783 BALM BEACH ROAD EAST	21,085.0	2.11	HC	No
35	1099 HUGEL AVENUE	10,846.0	1.08	HC	Yes
36	16533 HIGHWAY 12	173,994.1	17.4	M1	Yes
37	877 KING STREET	6,564.9	0.66	HC	Yes
38	174 PILLSBURY DRIVE	1,618.7	0.16	M1	Yes
39	159 PILLSBURY DRIVE	25,285.8	2.53	M2	Yes
40	120 PILLSBURY DRIVE	6,628.4	0.66	M1	Yes
41	189 PILLSBURY DRIVE	42,070.0	4.21	HC	No
42	148 PILLSBURY DRIVE	2,066.9	0.21	M1	Yes
43	164 PILLSBURY DRIVE	2,086.4	0.21	M1	Yes
44	PILLSBURY DR E/S	40,492.9	4.05	M2	No
45	691 VINDIN STREET	1,332.8	0.13	HC	Yes
46	803 VINDIN STREET	3,464.5	0.35	HC	Yes
47	908 KING STREET	3,431.5	0.34	HC	Yes
48	870 KING STREET	5,988.8	0.6	HC	Yes
49	880 KING STREET	4,670.7	0.47	HC	Yes
50	906 KING STREET	4,697.5	0.47	HC	Yes
51	8797 COUNTY ROAD 93	99,196.6	9.92	HC	No
52	HIGHWAY 12 N/S	47,927.2	4.79	HC	No
53	935 RUSS HOWARD DRIVE	4,654.2	0.47	HC	Yes
54	165 SUNNYSIDE DRIVE	7,510.6	0.75	HC	Yes
55	764 YONGE STREET	1,329.3	0.13	HC	Yes

Source: Town of Midland, January 2009

3.4 Growth Trends in Industrial Activity

Non-residential development benefits communities through employment and assessment growth. The value of commercial building permits issued between 1997 and 2007 has fluctuated, with significant spikes in 2002 and 2006, but overall permit values remain fairly steady. Industrial building permits during the 1997 to 2007 period have remained fairly steady (Figure 3.6).

Figure 3.6



Source: Town of Midland

3.5 Employment Targets

3.5.1 Employment Growth Forecasts to 2031

The province's Places to Grow "Growth Plan" forecasts employment growth in Simcoe County to reach 254,000 by 2031. In order to reach the targets in Places to Grow, Simcoe County has further allocated employment to each lower tier municipality, with Midland forecasts to have employment levels of 16,000 by 2031, an increase of 4,000 jobs from 2006 levels (Figure 3.7).

Figure 3.7

EMPLOYMENT PROJECTIONS

Municipality	2006	2031	Change 2006 - 2031	% of Simcoe County Total in 2031
Adjala-Tosorontio	1,600	2,100	500	0.8%
Bradford West Gwillimbury	8,000	16,200	8,200	6.4%
Clearview	4,400	5,800	1,400	2.3%
Collingwood	10,800	14,400	3,600	5.7%
Essa	7,700	10,300	2,600	4.1%
Innisfil	5,700	13,100	7,400	5.2%
Midland	**12,000**	**16,000**	**4,000**	**6.3%**
New Tecumseth	19,700	26,300	6,600	10.4%
Oro-Medonte	4,700	6,200	1,500	2.4%
Penetanguishene	5,300	7,000	1,700	2.8%
Ramara	1,900	2,500	600	1.0%
Severn	3,900	5,300	1,400	2.1%
Springwater	5,000	6,700	1,700	2.6%
Tay	1,500	2,000	500	0.8%
Tiny	1,400	1,900	500	0.7%
Wasaga Beach	3,100	4,100	1,000	1.6%
COUNTY TOTAL	96,400	139,900	43,500	55.1%
Barrie and Orillia	87,100	114,100	27,000	44.9%
SIMCOE AREA TOTAL	**183,500**	**254,000**	**70,500**	**100.0%**

Source: County of Simcoe Official Plan 2008

Note: Employment includes persons with no fixed place of work

It should be noted that there are issues regarding the population and employment numbers allocated to the Town of Midland by Simcoe County. Based on draft approved and registered plans, the Town has 2,579 residential units available to accommodate future growth which would result in 5,712 persons. This would result in 1,078 more residents than growth allocated to Midland by the County Official Plan to the year 2031.

The County has allocated 4,000 new jobs to the Town of Midland between 2006 and 2031. However, the employment targets set by Simcoe County will likely be difficult to achieve given the allocated population growth. The employment growth without the corresponding population growth in Midland would result in population having to be accommodated in neighbouring municipalities. This would encourage a less sustainable form of development, while encouraging greater commuting distances.

Similarly, even accounting for the net inflow of workers into Midland, the 2006 activity rate (employment/population) is extraordinarily high at 74% based on Simcoe County estimates. As noted previously, Midland has a very high seniors population, which will undoubtedly grow in the future. The high seniors population would suggest a lower activity rate, which would decrease over time. The County's projections, however, suggest the opposite.

Despite these issues, for the purposes of this report, population and employment targets allocated to the Town of Midland by Simcoe County have been used for the employment land forecast. In our opinion, however, a higher rate of future population growth will be required to sustain the County's employment allocation to Midland.

3.6 Demand for Employment Land

The decline of the manufacturing sector suggests to us that Midland will need to critically assess what industries should realistically be targeted for business attraction over the next 25 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 clear Provincial policy direction found in the Places to Grow Plan and the Provincial Policy Statement. The new Provincial policy context places a clear 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 help determine the amount of employment land that the Town should expect to see developed over the next 25 years. The analysis builds upon the population growth forecast. 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 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 approached which involves applying an activity rate to a future population forecast. The population and activity rate used in this report for the base year 2006 is derived from the Simcoe Area Growth Plan conducted by Hemsom Consulting in 2008. Population and employment forecasts for 2031 are derived from the new Proposed Simcoe County Official Plan 2008 which is based on data from the Hemson Simcoe Area Growth Plan.

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 2001 to 60% 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 B 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 a 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 2006, a total of 4,417 "employment land based jobs" were identified in the Town using 2006 place of work by industry data. 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. It is important to note that jobs in this sector currently account for some 28.8% of the employment land jobs in the Town. 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 45.0% in 2006 to 40% by 2031.

Employment Land Job Density

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

Recognizing that many employers in Midland have the capacity to grow their operations and add employment without absorbing any additional land, a 10% adjustment factor has been applied. This 10% adjustment also takes into consideration the fact that new businesses (and therefore new jobs) will also be established within vacant industrial premises already built.

Employment Land Demand

Over the forecast period, the Town of Midland will need to accommodate some 4,000 new jobs (per the County of Simcoe Official Plan). Assuming that only a portion of these will be jobs located on employment land, we have conservatively estimated that, over the 2006 to 2031 period, approximately 575 new jobs should be expected within the Town's industrial areas (i.e. employment on employment lands jobs).

Assuming 30 employees per hectare and a 10% allocation of jobs to already occupied industrial properties, the total amount of new industrial land required over the next 25 years is forecast at 18 hectares (Figure 3.8). In other words, the Town of Midland is anticipated to absorb industrial lands at a rate 0.7 hectares per year over the next 25 years. By 2031, there is forecasted to be a 74 hectare supply of vacant industrial land.

It is important to note that our employment land demand analysis is conservative in the sense that it has not taken into account the population and employment growth from other communities in the region. While some of the employment growth will be contained locally, based on the greater inflow of workers into Midland, it is expected that the labour force in surrounding municipalities will continue to rely on Midland as an important employment centre.

Figure 3.8

TOWN OF MIDLAND - EMPLOYMENT LAND FORECAST

		Forecast →					
	2006	**2011**	**2016**	**2021**	**2026**	**2031**	Notes
Population (live in Midland)	**16,300**	**16,860**	**17,420**	**17,980**	**18,540**	**19,700**	(1
Incremental Growth		560	560	560	560	1,160	
Activity Rate	74%	76%	78%	80%	82%	81%	(2
Employment (work in Midland)	**12,000**	**12,800**	**13,600**	**14,400**	**15,200**	**16,000**	(3
Minus: Work at Home	430	512	544	576	608	640	(4
Minus: No Fixed Place of Work	1,755	2,304	2,448	2,592	2,736	2,880	(5
Sub-Total (Usual Place of Work)	9,815	9,984	10,608	11,232	11,856	12,480	
Employment Share Analysis							
Population/Tourism-Based Employment	5,398	5,591	6,047	6,515	6,995	7,488	(6
Share	55%	56%	57%	58%	59%	60%	
Employment on Employment Lands	4,417	4,393	4,561	4,717	4,861	4,992	(7
Share	45%	44%	43%	42%	41%	40%	
Employment on Employment Lands	**4,417**	**4,393**	**4,561**	**4,717**	**4,861**	**4,992**	
Incremental Growth		(24)	168	156	144	131	
Employment Land Job Density (Jobs per net hectare)	30	30	30	30	30	30	(8
Employment Land Demand							
Employment Land Required (net hectares)		146	152	157	162	166	
Less: Expansion Land Potential (10%) (net hectares)		15	15	16	16	17	(9
Total of Employment Land Required		132	137	142	146	150	
Cumulative Land Required (net hectares)			**5**	**10**	**14**	**18**	
Employment Land Supply							
Vacant Employment Lands (net hectares)		**91.62**					(10
LAND SURPLUS (net hectares)			**87**	**82**	**78**	**74**	

Source: urbanMetrics inc.

Notes:

1) 2006 based on Statistics Canada. Forecast for 2031 based on Simcoe County Proposed New Official Plan, 2008. Includes census undercoverage (4%). 2011-2026 forecast based on straight line projection from 2031 estimate.
2) Activity Rate for 2006 based on Hemson Consulting Ltd, *Simcoe Area Growth Plan, May 2008.* Forecast activity rates for 2011 - 2031 based on straight line projection estimates.
3) Calculates as the population multiplied by the activity rates.
4) Work at Home employment is anticpated to remain constant at the Census 2006 level of 4%.
5) 'No Fixed Place of Work' employment is anticpated to remain constant at the Census 2006 level of 18%.
6) Population-based employment is employment that exits in response to a resident population. It includes jobs in the retail, tourism and institutional uses. See Appendix A for further details. The share of population based employment is anticipated to increase by 0.2% annually.
7) Employment land employment includes jobs in the following sectors: Primary, manufacturing, wholesale trade, construction, transportation and storage and other utility. See Appendix A for further details. The share of employment land based employment is anticipated to decrease by 0.2% annually.
8) The density assumption of 30 jobs/net hectare reflects typical employment densities on employment land in the region.
9) Expansion Land Potential recognizes the opportunity for future growth to be accommodated on existing (occupied) employment lands. A conservative adjustement of 10% has been used as an estimate.
10) Vacant Employment Lands include Industrial Development Lands only

3.7 Policy Context for Employment Areas

3.7.1 Places to Grow Plan (2006)

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.

3.7.2 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.*

3.7.3 County of Simcoe Official Plan (2008) (adopted but not yet approved)

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-five 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.

3.7.4 Town of Midland Official Plan (2003)

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.

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.

3.8 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 25 years.

In Midland, there is currently some 91.6 hectares of vacant designated (industrial) employment lands, which is well above anticipated employment land job growth. By 2031, there is forecasted to be 74 hectares of vacant industrial lands in the Town. This large supply of employment land more than adequately provides for future accommodation of growth and allows for a variety of business investment and employment uses. It should be noted, however, that several parcels of land south of Highway 12 and east of Brebeuf Road surround a large aggregate operation that is estimated to have a resource period of 30+ years. Approximately 45.97 hectares (50.2%) of vacant employment land abut the aggregate operation. This may affect the ability of these surrounding lands to develop a wide range of future employment uses.

However, the current vacant employment land inventory translates into an over 130 year supply given anticipated absorption rates. This is well in excess of what will be required over the next 25 years. Within this context, Midland should consider potential modifications to its Official Plan to broaden the range of uses permitted in industrial zones. Potential uses could include tourism, accommodation, recreation, cultural, or institutional uses. These potential uses should be compatible with existing surrounding and adjacent uses and should also not conflict with uses in the downtown.

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 presents an opportunity to expand the Town's role as a recreation and tourism centre.

Section 3.1.4.1 of the Official Plan indicates that:

> "Current industrial lands should generally be reserved for manufacturing and related uses. Lands on the periphery of industrial areas, or adjacent to major roads, may be considered for commercial and service related uses as long as these uses are viewed as being compatible and would not interfere with adjacent industrial uses"

Section 3.1.3 identifies a wide range of commercial uses that may be appropriate for employment areas, including:

> "retail, commercial and business uses. These uses may include, but are not limited to, retail uses, personal services, recreation and tourism, golf courses, tourism accommodation, entertainment uses, business and professional offices, eating establishments, service shops, automotive, community facilities, day care centers, nursing homes and medical services"

In light of the extensive employment land supply and the importance of tourism and recreation to the local economy, the Town should include a stronger statement with regards to the role of tourism and recreation, and contain policies which specifically provide for tourism and recreation related uses within industrial areas. Tourism related uses could include accommodations, entertainment uses, indoor and outdoor recreation uses, and eating and drinking establishments.

While the Provincial Policy Statement discourages the conversion of employment lands for local serving uses (e.g. commercial), it does not recognize commercial uses which serve essentially a non-local role, such as tourism. To this end, it is important that the Official Plan specifically identifies these uses and their importance in terms of job creation.

4. COMMERCIAL AREAS STRATEGY

4.1 Existing Commercial Land Uses

Figure 4.1 illustrates the distribution of commercial space in the Town by store type. Based on the current inventory there is just over 1.5 million square feet of commercial space in Midland. The detailed inventory has been included in Appendix C and a detailed listing of the retail space classification system has been included in Appendix D.

Food Store Retail (FSR) – Included within this category are supermarkets, grocery stores, convenience and specialty food stores. This category accounts for 192,200 square feet of space or 12.1% of total commercial space.

Non-Food Store Retail (NFSR) – This category includes most retail space excluding food stores and services. Comprising over 1.0 million 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 over 300,000 square feet of space or 19.3% of total commercial space.

Other Retail – This category includes Beer, Wine and Liquor which amounted to 6,889 square feet of space or 0.4% of Midland's total commercial space.

Vacant – This accounts for 45,383 square feet of retail/service space or 2.9% of Midland's total commercial space.

Figure 4.1

TOWN OF MIDLAND - RETAIL AND SERVICE COMMERCIAL INVENTORY

Category	Trade Group	Area (s.f.)	% of Total
Food Store Retail (FSR)	Grocery/Convenience and Specialty Food Stores	36,117	2.3%
	Supermarkets	155,819	9.9%
Food Store Retail (FSR) Total		**191,936**	**12.1%**
Non-Food Store Retail	Clothing Stores	38,770	2.5%
	Computer and Software Stores	1,042	0.1%
	Department Stores	220,574	13.9%
	Furniture Stores	34,186	2.2%
	Home Centres and Hardware Stores	231,818	14.7%
	Home Electronics and Appliance Stores	16,555	1.0%
	Home Furnishings Stores	16,723	1.1%
	Miscellaneous Store Retailers	43,823	2.8%
	Other General Merchandise Stores	113,698	7.2%
	Pharmacies and Personal Care Stores	18,830	1.2%
	Shoe, Clothing Accessories and Jewellery Stores	9,710	0.6%
	Specialized Building Materials and Garden Stores	18,850	1.2%
	Sporting Goods, Hobby, Music and Book Stores	43,554	2.8%
	Automotive (TBA)	223,506	14.1%
Non-Food Store Retail Total		**1,031,639**	**65.2%**
Services	Consumer Services Rental	11,995	0.8%
	Entertainment	40,328	2.5%
	Finance and Insurance	37,880	2.4%
	Food Services and Drinking Places	90,358	5.7%
	Health Care Services	36,928	2.3%
	Insurance and Real Estate	17,985	1.1%
	Personal and Household Goods Repair and Maintenance	4,159	0.3%
	Personal Care Services	26,549	1.7%
	Professional, Scientific & Technical Services	35,749	2.3%
	Selected Office Administrative Services	4,114	0.3%
Services Total		**306,045**	**19.3%**
Beer, Wine and Liquor Stores		6,889	0.4%
Vacant		**45,383**	**2.9%**
Grand Total		**1,581,893**	**100.0%**

Source: urbanMetrics, March 2009

Notes:

1) Ground floor commercial space was inventoried.

2) Automotive Tires, Batteries, and Accessories (TBA) based on data from John Winter Associates Ltd. The Commercial Component of the The Villages of Midpark on the Lake, Midland. Prepared for Marshall Macklin Monaghan. May, 2000.

3) Home Centres and Hardware Stores based on data from John Winter Associates Ltd. The Commercial Component of the The Villages of Midpark on the Lake, Midland. Prepared for Marshall Macklin Monaghan. May, 2000, with an addition of Home Depot.

Figure 4.2 compares Midland's commercial space inventory with that of three other mid-sized Ontario municipalities, namely Collingwood, Stratford and Peterborough. These municipalities serve surrounding municipalities and have a seasonal resident or tourist population. In comparison to the other municipalities, Midland has the lowest vacancy rate. Midland also has the highest proportion of Non-Food Store Retail space, and the smallest services component in percentage terms. This points to the strength of Midland as a retail destination serving a large non-local population.

Figure 4.2

COMPARISON OF COMMERCIAL SPACE

	Midland	%	Collingwood	%	Stratford	%	Peterborough	%
Food Store Retail (FSR)	191,936	12.1%	169,781	9.2%	238,700	8.6%	511,200	12.1%
Non-Food Store Retail (NFSR) & Other Retail (1	1,038,528	65.7%	893,100	48.3%	1,028,600	37.0%	2,160,300	51.2%
Services	306,045	19.3%	658,900	35.6%	1,340,960	48.2%	1,275,550	30.2%
Vacant	45,383	2.9%	126,700	6.9%	173,700	6.2%	270,800	6.4%
Total (S.F.)	1,581,893	100.0%	1,848,481	100.0%	2,781,960	100.0%	4,217,850	100.0%
Population (2	16,300		17,290		30,461		74,898	
Inventory Year (3	2009		2006		2007		2007	

Souce: urbanMetrics

Notes:

1) Other retail includes Beer, Wine, and Liquor

2) 2006 Census population (unadjusted)

3) Collingwood and Stratford inventories conducted by Malone Given Parsons

4.1.1 Vacant Commercial Space

Figures 4.3 and 4.4 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 amount of vacant space in the Town has increased from the 2000 level[1] of 36,220 square feet (2.2%) to 45,383 square feet or 2.9%. The highest vacancy rates are found at Mountainview Mall at 6% and Downtown Midland at 3.7%. Overall, vacancy rates in Midland are well below or within the range of 5 - 10%, which is often cited as indicative of a balanced market.

Figure 4.3

TOWN OF MIDLAND - VACANCY RATES

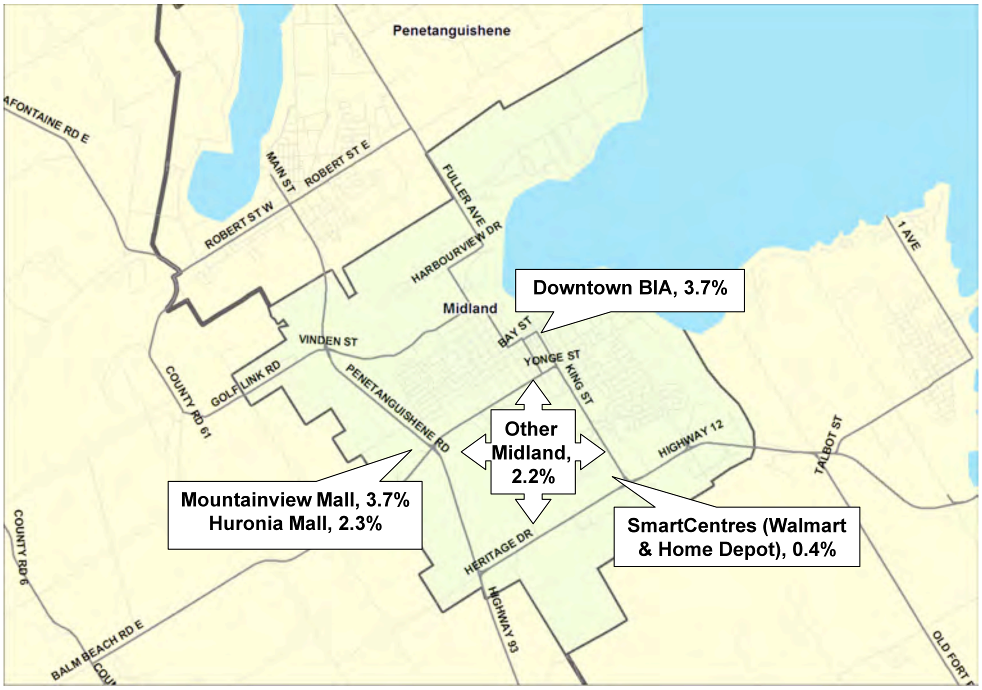
Location	Total Vacant	Total S.F.	Vacancy Rate
Downtown BIA	7,078	189,321	3.7%
Huronia Mall	1,736	76,108	2.3%
Mountainview Mall	17,419	291,806	6.0%
SmartCentres	868	196,674	0.4%
Other	18,281	827,984	2.2%
Grand Total	**45,383**	**1,581,893**	**2.9%**

Source: urbanMetrics, March 2009

[1] John Winter Associates Ltd. The Commercial Component of the The Villages of Midpark on the Lake, Midland. Prepared for Marshall Macklin Monaghan. May, 2000.

Figure 4.4

Town of Midland Commercial Vacancy Rates



4.1.2 Proposed Retail Space

There are currently no proposed commercial developments in the Town.

4.2 Forecasts of Future Demand/Space Requirements

With Midland's low vacancy rate, the current supply of vacant space in the Town should be considered somewhat constrained. As a result, the per capita space analysis for 2009 has been adjusted to allow for additional space in the market with a target vacancy rate of approximately 5%.

4.2.1 Per Capita Space Analysis

This section examines the distribution of space in Midland on a per capita basis, which provides a general indication of service level and the amount of commercial space required to serve a community. As summarized in Figure 4.5, based on a population in 2009 of 17,200, and our assumptions of target space per capita ratios, local capture and inflow rates, we have estimated that Midland could accommodate approximately 1,620,000 square feet of retail and service space. Warranted food store space, which includes supermarkets, grocery stores, convenience stores and specialty food stores, has been estimated at some 188,000 square feet. Warranted Non-Food retail space has been estimated at approximately 1,000,000 square feet, which includes drug store space; GAFO or department store type merchandise stores (e.g. general merchandise stores, apparel stores, home furnishings, and other specialty retail stores); home centres and hardware stores; and automotive tires/batteries/accessories stores. Some 330,000 square feet of service space would be warranted, including restaurant/fast food space, financial services, personal services, medical services and other services.

Figure 4.5

TOWN OF MIDLAND - PER CAPITA SPACE ANALYSIS

Commercial Needs - Retail Category	*Midland, Sq. Ft. Per Capita 2009*	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
Midland Population (2009) ***17,200***		A	B (A X Pop'n)	C	D (B X C)	E	F (D/(1-E))	G (F / Pop'n)
FOOD STORE RETAIL (FSR)								
Grocery/Specialty Food	*2.1*	1.5	25,800	90%	23,220	30%	33,200	*1.9*
Supermarket	*9.1*	5.0	86,000	90%	77,400	50%	154,800	*9.0*
SUB TOTAL	*11.2*	6.5	111,800		100,620		188,000	*10.9*
NON FOOD STORE RETAIL (NFSR)								
GAFO	*32.4*	24.0	412,800	75%	309,600	50%	619,200	*36.0*
Pharmacies and Personal Care Stores	*1.1*	1.3	22,360	75%	16,770	40%	28,000	*1.6*
Home Centres and Hardware Stores	*13.5*	9.0	154,800	75%	116,100	50%	232,200	*13.5*
Automotive (TBA)	*13.0*	10.0	172,000	75%	129,000	40%	215,000	*12.5*
SUB TOTAL	*60.0*	44.3	761,960		571,470		1,094,400	*63.6*
OTHER RETAIL								
Beer / Liquor / Wine	*0.4*	0.4	6,880	75%	5,160	30%	7,400	*0.4*
SUB TOTAL	*0.4*	0.4	6,880		5,160		7,400	*0.4*
SERVICES								
Consumer Services Rental	*0.7*	*0.7*	12,040	75%	9,030	30%	12,900	*0.8*
Entertainment	*2.3*	*2.3*	39,560	75%	29,670	30%	42,400	*2.5*
Finance and Insurance	*2.2*	*2.3*	39,560	75%	29,670	30%	42,400	*2.5*
Food Services and Drinking Places	*5.3*	*5.3*	91,160	75%	68,370	30%	97,700	*5.7*
Health Care Services	*2.1*	*2.5*	43,000	75%	32,250	30%	46,100	*2.7*
Insurance and Real Estate	*1.0*	*1.0*	17,200	75%	12,900	30%	18,400	*1.1*
Personal and Household Goods Repair and Maintenance	*0.2*	*0.2*	3,440	75%	2,580	30%	3,700	*0.2*
Personal Care Services	*1.5*	*1.5*	26,549	75%	19,912	25%	26,500	*1.5*
Professional, Scientific & Technical Services	*2.1*	*2.1*	36,120	75%	27,090	25%	36,100	*2.1*
Services	*0.2*	*0.2*	3,440	75%	2,580	25%	3,400	*0.2*
SUB TOTAL	*17.8*	18.1	312,069		234,052		329,600	*19.2*
TOTAL	89.4	69.3	1,192,709		911,302		1,619,400	94.2

Source: urbanMetrics inc

Note:

Based on data from John Winter Associates Ltd. The Commercial Component of the The Villages of Midpark on the Lake, Midland. Prepared for Marshall Macklin Monaghan. May, 2000.

Based on a population in 2031 of 19,700, and our assumptions of target space per capita ratios, local capture and inflow rates, we have estimated that Midland could accommodate approximately 1,855,000 square feet of retail and service space (Figure 4.6). Warranted food store space, which includes supermarkets, grocery stores, convenience stores and specialty food stores, has been estimated at some 215,000 square feet. Warranted Non-Food retail space has been estimated at approximately 1,254,000 square feet, which includes drug store space; GAFO or department store type merchandise stores (e.g. general merchandise stores, apparel stores, home furnishings, and other specialty retail stores); home centres and hardware stores; and automotive (tires/batteries/accessories) stores.

Some 378,000 square feet of service space would be warranted, including restaurant/fast food space, financial services, personal services, medical services and other services.

Figure 4.6

TOWN OF MIDLAND - PER CAPITA SPACE ANALYSIS

Commercial Needs - Retail Category	*Midland, Sq. Ft. Per Capita 2009*	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
Midland Population (2031) ***19,700***		A	B (A X Pop'n)	C	D (B X C)	E	F (D/(1-E))	G (F / Pop'n)
FOOD STORE RETAIL (FSR)								
Grocery/Specialty Food	2.1	1.5	29,550	90%	26,595	30%	38,000	1.9
Supermarket	9.1	5.0	98,500	90%	88,650	50%	177,300	9.0
SUB TOTAL	11.2	6.5	128,050		115,245		215,300	10.9
NON FOOD STORE RETAIL (NFSR)								
GAFO	32.4	24.0	472,800	75%	354,600	50%	709,200	36.0
Pharmacies and Personal Care Stores	1.1	1.3	25,610	75%	19,208	40%	32,000	1.6
Home Centres and Hardware Stores	13.5	9.0	177,300	75%	132,975	50%	266,000	13.5
Automotive (TBA)	13.0	10.0	197,000	75%	147,750	40%	246,300	12.5
SUB TOTAL	60.0	44.3	872,710		654,533		1,253,500	63.6
OTHER RETAIL								
Beer / Liquor / Wine	0.4	0.4	7,880	75%	5,910	30%	8,400	0.4
SUB TOTAL	0.4	0.4	7,880		5,910		8,400	0.4
SERVICES								
Consumer Services Rental	0.7	0.7	13,790	75%	10,343	30%	14,800	0.8
Entertainment	2.3	2.3	45,310	75%	33,983	30%	48,500	2.5
Finance and Insurance	2.2	2.3	45,310	75%	33,983	30%	48,500	2.5
Food Services and Drinking Places	5.3	5.3	104,410	75%	78,308	30%	111,900	5.7
Health Care Services	2.1	2.5	49,250	75%	36,938	30%	52,800	2.7
Insurance and Real Estate	1.0	1.0	19,700	75%	14,775	30%	21,100	1.1
Personal and Household Goods Repair and Maintenance	0.2	0.2	3,940	75%	2,955	30%	4,200	0.2
Personal Care Services	1.5	1.5	30,408	75%	22,806	25%	30,400	1.5
Professional, Scientific & Technical Services	2.1	2.1	41,370	75%	31,028	25%	41,400	2.1
Services	0.2	0.2	3,940	75%	2,955	25%	3,900	0.2
SUB TOTAL	17.8	18.1	357,428		268,071		377,500	19.2
TOTAL	89.4	69.3	1,366,068		1,043,759		1,854,700	94.1

Source: urbanMetrics inc

Note:

Based on data from John Winter Associates Ltd. The Commercial Component of the The Villages of Midpark on the Lake, Midland. Prepared for Marshall Macklin Monaghan. May, 2000.

4.3 Means to Strengthen Commercial Activity

Between 2009 to 2031, there would be a need for approximately 235,000 square feet of additional commercial space in Midland. Based on this amount of warranted space, approximately 9.5 hectares (23.5 acres) of vacant commercial land could be developed. This would comprise 20.3% of the Town's 46.75 hectares (115.5 acres) of vacant Highway Commercial Development Lands.

Midland currently has 3 major commercial areas: the Downtown, Huronia Mall and Mountainview Mall, and Smartcentres (Highway 12 & King St). The Downtown, located along King St, is in a healthy state in terms of the vacancy rate (3.7%) and range of stores and services, such as banks, restaurants and specialty shops. The two malls are located on the western side of Midland and offer mainly chain stores, and general merchandise retailers. The highest vacancy rate within Midland is found at Mountainview Mall. At 6.0% the mall is still within a healthy market range. The Smartcentres development is anchored by Walmart and Home Depot. These 3 commercial areas are well distributed throughout Midland and provide a range of shopping options for the local population and surrounding communities.

The type of future commercial uses should include neighbourhood or convenience retail located in new residential areas to serve future population growth. Additionally, commercial uses should be considered for areas identified for intensification and mixed-use development.

4.4 Emerging Trends in Commercial Development

In recent years, North American retailing and retail development has been more evolutionary than revolutionary. Power centres continue to enhance their tenant selections and design standards, while enclosed mall owners are expanding, remerchandising and repositioning their properties to maintain their competitiveness and relevance to today's consumers. A cycle can be observed in which formats that are filling a market niche thrive, reach the peak of their popularity and success and then lose their position and are superseded and replaced by others. In this section we discuss some of the more prevalent trends in the retail and retail development industries, including:

- Power Centres and Large Format Retailers;
- The Broadening of Shopping Centre Merchandising;
- Lifestyle Centres and Town Centre Developments;
- Blurring of the Retail Hierarchy;
- Redevelopment of Obsolete Malls;
- Rebuilding Neighbourhood Retail.

4.4.1 Power Centres and Large Format Retailers

Some of the most sweeping changes that have been experienced in recent years have been the transition of the shopping centre industry with the evolution of the “power centre” and other new retail formats. The advent of larger and larger store sizes and the increasing popularity of lower cost, quasi industrial style retail warehouse stores have altered the competitive position of the traditional regional shopping centre.

In Canada, many power centres began with tenants such as a warehouse membership club and home improvement centre. They have evolved from their “bare bones” discount warehouse beginnings to account for the greatest portion of new retail real estate in the 1990s and since. Big boxes and new format retailers have not only absorbed most new market growth, but they are cutting into the markets of existing traditional centres, particularly with the inclusion of more fashion retailers.

Traditionally, big box stores fell largely into two categories: 1) Those focused on using their sizes to achieve cost savings to the consumer (e.g. Costco, Winners, etc.); and 2) those that used their scale to provide the maximum assortment of styles, brands and merchandise within a single category (e.g. Golf Town, Indigo/Chapters, Home Depot, PetSmart, Office Depot, etc.)

In the last few years, due to competitive pressures, a greater variety of retailers have developed ‘big box’ formats. Supermarkets and drugstores, for example, are seeking the same locations as power centres. Now these stores are becoming significantly larger relying on a broader population base. Many retailers are now changing from a strategy of multiple outlets serving local communities to much fewer regional serving operations. This has had an impact on small and mid-sized shopping nodes.

This trend of large retail floor plates and stores with regional draws has distinct land use implications. Large format retailers seek large vacant land parcels in locations which offer high profile highway and arterial access. Unlike community and neighbourhood retailing large format retailers do not necessarily require the proximity to residential areas since their offerings and merchandising approach encourage consumers to travel via arterial roads from a further distance.

Large format retailers have typically followed three locational models:

- Low cost locations on industrial designated lands or greenfield sites that provide for expansive parking areas and regional accessibility. Because industrial lands are often designated in highway corridors, they have ideal locational characteristics for large format retailers.

- Clustering around existing regional shopping centres and older power centres. This is accomplished though both redevelopment and greenfield development and results in super regional retail clusters. Some examples include: 400/Highway 407 in Vaughan, Yonge and Davis Drive in Newmarket, Gardiners Road in Kingston, among many others.

- Brownfield industrial conversions, whereby older industrial sites are transformed into power centres.

As with several Ontario communities, Midland has experienced big box retail development. Located at the southern end of the Town at Highway 12 and King Street, big box retailers include Walmart and Home Depot.

4.4.2 The Broadening of Shopping Centre Merchandising

The wave of power centre development is having a profound impact on the shopping centre industry, both indirectly and directly. Indirectly, Wal-Mart and the big box specialty sector have been rapidly eroding the market shares once attributable to the traditional department store sector. The newly introduced Wal-Mart Supercentre, with its large food component, is also having an impact on supermarket retailers.

With increased competition to power centre competitors, the major mid-market department stores in Canada have not faired well. As a result, many traditional mall anchor tenants have been lost across the country. While some top tier malls have had success in replacing vacant department store space by attracting existing department stores away from their competitors, many are strategically targeting large format specialty retailers to play an anchor role. This strategy can take on several not necessarily mutually exclusive forms:

- Large format stores positioned in former department store units to retain high traffic volumes between mall extremities;

- High visibility large format units, such as theme restaurants and multi-plex theatres are positioned to animate the shopping centre exterior and enhance exposure to passing traffic;

- Out-parcel development to accommodate large format retailers desiring a freestanding unit that would otherwise have located within a power centre; and,

- The replacement of “traditional” department store anchors with large format trendy/innovative retailers with the goal of repositioning a centre to a more tailored and sophisticated market.

In many cases, mall owners have noticed overall mall performance improvements following the replacement of traditional anchors with new format retailers. With the increasing movement of apparel retailers to power centres and the attraction of big box tenants to traditional shopping centres, there is a growing competitive overlap between these two retail forms, not only for new shoppers but also for the same tenants.

Unfortunately, many smaller malls have often been unable to attract replacement anchors and have been forced into redevelopment or reformatting to include largely non-retail uses (e.g. call centres).

Enclosed malls, however, still have a significant environmental and layout advantage, which translates into the ability to offer customers and retailers the cross shopping opportunities that are not well facilitated at power centres. At the same time, with the loss of department stores and changes in the apparel sector, enclosed malls have broadened their merchandise and tenant mix. This enables them to better distinguish themselves from their power centre competitors and compete better within those store categories where overlap exists.

A trend that has been developing over the past decade is for large format retailers to be attracted in the vicinity of successful regional shopping centres, creating an overall node that can reach several times the size of the original shopping centre. For example, the vicinity of Upper Canada Mall in Newmarket at Highway 11 and Davis Drive has developed into a retail "super cluster" comprising both the regional mall together with representation from every major big box category and a wide range of small and big box tenants.

As part of a similar trend, enclosed shopping centres are also attracting big box retailers to replace the anchor function formally fulfilled by the department stores.

4.4.3 Lifestyle Centres and Town Centre Developments

As an alternative to the power centre, which has been criticized for not adapting to non-automobile trips and lacking the aesthetic form and appeal required to attract the upscale market, some development companies are turning to so-called "lifestyle centres" and other hybrids.

The so-called "lifestyle centres" have been operating in the United States for over 20 years, however, what constitutes a lifestyle centre is often considered a difficult question to answer as more are built and the format evolves to fit different market needs. Not only has the size of "lifestyle centres" changed over the years, but also their design and tenant mix. The term "lifestyle centre" is now being referred to as a "catchall term"[2] for a number of diverse projects across North America.

Lifestyle centres are aiming to strike a balance between the mall shopping experience and the need for big box specialty tenants to create a regional draw. Currently, lifestyle centres are mainly developed in the United States and can have both interior and exterior components. In Canada, the first "lifestyle centre" was developed as part of Park Royal Shopping Centre in North Vancouver. Many of these centres focus on high fashion and include upscale retailers such as Pottery Barn, Williams Sonoma, Restoration Hardware, Ann Taylor, etc. To differentiate lifestyle centres from typical power centres, developers have used theming, internal pedestrian connections, high quality design, and entertainment.

Industry experts have often questioned why the lifestyle centre concept has been slow to emerge in Canada. As indicated in a recent publication by the Centre for the Study of Commercial Activity (CSCA),[3] lifestyle developments in Canada have been minimal due to a few significant differences between the Canadian and American marketplace, including:

- The cold climate through the long-winter means shoppers will not want to walk around a lifestyle streetscape with an open-air configuration;

- The lack of upscale suburban neighbourhoods, and therefore the lack of interest on the part of upscale retailers to enter or expand within the Canadian marketplace; and,

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[2] Urban Land, January 2005, "*Lost in Translation*", pg. 77.

[3] CSCA (Ryerson University), *Lifestyle Centres in Canada*, 2007

- The comparative conservatism of Canadian retail development compared to south of the border, which has created reluctance to enter into a perceived higher risk development.

The CSCA indicates, however, that open-air centres in the form of power centres have been successful in Canada based on their widespread growth, indicating that Canadians are more "hardy" when it comes to dealing with cold temperatures. In the U.S., the cold climate has not had an impact as there are numerous open-air lifestyle centres that have been developed in the northern snowbelt region with design and technology to offer shelter from the elements. For example, Oakbrook Center and Old Orchard are two successful open-air shopping centres in the Chicago area, a colder region in the US. The lack of lifestyle centres in Canada has likely more to do with income characteristics and shortage of high end specialty retailers. The CSCA indicates that, "unlike the US, Canada has not witnessed the same degree of suburbanization of affluence; instead Canadian suburbs are immersed in the "middle-ground", making it harder to identify markets for lifestyle type developments.

Despite the fact that lifestyle type centres have been slow to emerge in Canada, there is increased impetus to develop alternative retail formats. The CSCA indicates that the traditional power centre has entered the mature stage of its lifecycle and that consumers are fatigued with the concept. New forms of retail development with so-called "lifestyle" components are emerging in Canada. In addition, existing centres are re-inventing themselves with the addition of new "lifestyle-focused" components. As indicated by the CSCA, in some cases, the new format centres can be considered as "more sophisticated power centres with design features to soften the function and form of the centres". Terms such as "power town", "power plus centre", and "omni-centre" are being used to describe centres which incorporate aspects of power centre, lifestyle centres and malls. This has led to a number of new format centres with lifestyle components being built across Canada in recent years, with others planned or under construction. The proposed Park Place in Barrie is an example of a lifestyle centre type concept to be introduced in Canada. Other proposed lifestyle commercial developments include the development of Don Mills Centre in Toronto and the redevelopment of the Shoppes on Steeles in Markham.

Another approach in community planning is the emergence of "new urbanism" or neo-traditional development which has resulted in a renewed focus on town centre and pedestrian focused "main street" retailing in new community developments. The town centre is usually seen as the focal point for residential and employment development. In some new communities, town centres are developed in an open air, pedestrian friendly format, combining commercial, entertainment, institutional and civic uses. Sidewalk cafes, live-work units, public squares and recreation trails are incorporated to introduce humanizing elements into the suburban landscape.

While there a number of well known and successful examples in the United States, town centre retailing has been much more difficult to implement in Canada. Nonetheless, McKenzie Town High Street in South-East Calgary represents a unique Canadian example of integrating street related retailing into a greenfield residential neighbourhood. The High Street comprises a linear commercial avenue lined with shops and services. At the top of the commercial street is a supermarket, which acts as an anchor for the retail district. Community and institutional uses are also included within the commercial area.

4.4.4 Blurring of the Retail Hierarchy

The gradual progression of changes in retail formats has altered the role and function of existing and planned commercial areas. The presence and number of department store tenants is no longer a factor distinguishing levels of the retail hierarchy.[4] Although the size of a power centre can provide some guidance as to where in the hierarchy it might fit, size alone is not a good determinant of function in today's retail environment. For example, a 300,000 square foot power centre with a Loblaw's Superstore and a Canadian Tire, will serve different needs than a similar sized centre containing a Wal-Mart and Costco. Furthermore, large format retailers often develop over time on adjoining sites and not necessarily as a single planned shopping centre. Often times this leads to a patch work of Official Plan Amendments and land use designations within what is effectively a single commercial cluster or "power node".

Another drawback to this development pattern is that smaller stand-alone community shopping centres, which anchored the commercial structural foundation of neighbourhoods often can not compete with emerging power centres and power nodes. As a result, conveniently located shopping centres are being replaced by larger broader serving retail clusters, with a much greater selection of merchandise than could be offered by traditional community shopping centres.

As a result, the retail hierarchy has flattened out to resemble a system of retail clusters and corridors.

4.4.5 The Redevelopment of Obsolete Malls and Large Format Stores

Across Canada older and uncompetitive community scale shopping centres are being renewed either as power centres or with non-retail uses. In many cases community shopping centres in mature neighbourhoods are being redeveloped as high density residential projects with much smaller retail components. This is occurring due to the competitive challenges posed by large format retailers and power centres.

An emerging trend is the reuse of space left behind after large format or big box stores have closed or relocated. These new uses have included schools, seniors centres, church, and offices. Communities in the United States have also introduced policies that require retailers to help redevelop the space that is left behind after big box stores are no longer operating. Some policies have required retailers to tear down stores that are empty for more than a year, while others have introduced design standards that require landscaping and more than one main entrance so the building can accommodate multiple tenants in the future.

4.4.6 Rebuilding Neighbourhood Retail

Over the past five decades, retailing in many urban neighbourhoods has hollowed out, due to suburban shopping centre competition combined with related demographic change. More

[4] At one time the number of traditional department stores (e.g. Eatons, Sears, The Bay, Simpsons) was a defining characteristic of the upper levels of the retail hierarchy and also dictated the size a centre was likely to achieve. A shopping centre with one traditional department store was classified as a "sub-regional centre". A shopping centre with two traditional department stores was classified as a "regional centre" and a shopping cent re with three or more traditional department stores was classified as a "super regional centre".

recently, however, a return of high income families to older urban neighbourhoods has led to the revitalization of some neighbourhood pedestrian retail strips.

Opportunities to re-establish retailing along neighbourhood commercial streets will likely increase in the future. Urban lifestyles are becoming more popular among empty nesters, and an increasing number of elderly and immigrants. Municipalities across North America are adopting policies to redirect growth back into existing communities through investment incentives and innovative planning policies. Ontario's Places to Grow Legislation is an example of this type of policy initiative to focus intensification in older town centres.

4.4.7 Midland Context

As with other communities in Ontario, the issue facing Midland is how to balance big box development, which increases regional drawing power to the Town, with continued commercial investment in the core and at the neighbourhood level. Overall, the downtown is functioning well, and future commercial development outside of the core should be monitored to ensure that the downtown continues to remain viable. Future commercial uses should include Neighbourhood or convenience retail located in new residential areas to serve future population growth. Additionally, commercial uses should be considered for areas identified for intensification and mixed-use development. Demographics and economic growth (including tourism) will play a key role in determining the future market opportunity for retail space in Midland and the attraction of new forms of retail development.

4.4.8 Summary

Based on our research, significant changes in the retail landscape are expected over the next decade with the integration of power centres, malls and lifestyle centres into hybrid developments that will be differentiated from each other to some extent through style, architecture and the needs of the community.

Although the potential for widespread development of the more traditional lifestyle centres found in the United States is unlikely to occur in Canada, there will be more developments which incorporate lifestyle components, including redevelopment of existing shopping centres/power centres, the addition of more design elements including "main-street" and town centre initiatives, and the combination of mixed-uses (i.e. retail, office, residential) recognizing trends for new urbanism and smart growth initiatives.

The strength of the Canadian economy and shifting age cohorts are expected to fuel future changes in the retail landscape. As the large "Baby Boom" generation ages, it is expected that opportunities for more niche lifestyle developments will emerge. As also indicated by the CSCA, the mass middle-ground consumer may start to expect more from their traditional power centre shopping experience, which is already evident in the increased addition of fashion and restaurant tenants in power centres.

The demand for developers to create unique formats and to satisfy the needs of consumers with unique tenants is having a positive impact on the retail landscape. Retailers are introducing additional concepts in order to remain competitive in the marketplace. Foreign retailers from Europe and the Pacific Rim are also entering oversaturated U.S. markets, with Canada often the incubator for these retailers. Midland, like many municipalities, must plan to achieve a balance between big box retailing and other commercial formats.

4.5 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 or within the Downtown District. 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 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.

Employment Areas provide for a wide range of non-residential uses, including industrial, commercial and institutional activities. 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 or 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.

5. INTENSIFICATION STRATEGY

As part of the Town of Midland Official Plan Review it is necessary to consider the implications of the Provincial Policy Statement, County of Simcoe Official Plan and the Growth Plan relative to the ability of the Town to accommodate new development through residential intensification and infilling within the existing built boundary. This portion of the report addresses those requirements as they relate to the Town of Midland. Details relating to the specific policies are found in the Provincial Plan and Policy Review Conformity Report (Town of Midland, March 2009). The following is a brief summary of those provisions.

5.1 Provincial Policy Statement

The Provincial Policy Statement (PPS) requires that targets for intensification be established and that intensification of existing built up areas be considered as a priority prior to further development within undeveloped (Greenfield) areas that are designated for development within the Municipality. Specifically, the PPS states that:

Section 1.1.2 states that:

"Sufficient lands shall be made available through intensification and redevelopment and, if necessary designated growth areas, to accommodate an appropriate range and mix of employment opportunities, housing and other land uses to meet projected needs for a time horizon or up to 20 years."

Section 1.1.3.3 states that:

"Planning Authorities shall identify and promote opportunities for intensification and redevelopment where this can be accommodated taking into account existing building stock or areas, including brownfield sites and the availability of suitable, existing or planned infrastructure and public service facilities required to accommodate the projected needs."

Section 1.1.3.5 states that:

"Planning authorities shall establish and implement minimum targets for intensification and redevelopment within built up areas. However, where Provincial targets are established trough Provincial plans the Provincial target shall represent the minimum target for effected areas".

Section 1.1.3.6:

"Planning authorities shall establish and implement phasing policies to ensure that specific targets for intensification and redevelopment are achieved prior to or concurrent with, new development within designated growth areas."

In order to be consistent with the PPS, the Midland Official Plan will need to establish targets for intensification, establish policies that will encourage such development and establish a development phasing policy that will require new development through intensification projects to be considered prior to new greenfields development projects.

5.2 Growth Plan for the Greater Golden Horseshoe

The Growth Plan for the Greater Golden Horseshoe was approved in June 2006. The purpose of the Plan is to direct growth primarily to built-up areas within existing settlements in the area affected by the Growth Plan.

The specific policies to be considered in this Study include the following:

2.2.3.1
By the year 2015 and for each year thereafter, a minimum of 40% of all residential development occurring annually within each upper and single tier municipality will be within the built-up area.

2.2.4
The Minister of Public Infrastructure Renewal may review and permit an alternative minimum intensification target for an upper or single tier municipality located within the outer ring to ensure the intensification target is appropriate, given the size, location and capacity of the built up area.

2.2.6
All municipalities will develop and implement through their Official Plan and other supporting documents a strategy and policies to phase in and achieve intensification and the intensification target.

2.2.7
All intensification areas will be planned and designed to:

- *a) cumulatively attract a significant portion of population and employment growth;*
- *b) provide a diverse and compatible mix of land uses including residential and employment uses to support vibrant neighbourhoods;*
- *c) provide high quality open spaces with site design and urban design standards that achieve attractive vibrant places;*
- *d) support transit, walking and cycling for every day activities;*
- *e) generally achieve higher densities than the surrounding areas;*
- *f) achieve an appropriate transition of built form to adjacent areas.*

The criteria identified in the Growth Plan above will be used to assess intensification opportunities within the Town of Midland.

5.3 County of Simcoe Official Plan

The new County of Simcoe Official Plan (November 2008) has been approved by County Council but has not yet been approved by the Ministry of Municipal Affairs and Housing. However, it will be necessary for the Town of Midland Official Plan to be consistent with the County of Official Plan once it has been approved. As such, the Town of Midland has embarked on a process to ensure its Official Plan implements the policy direction of the County of Simcoe Official Plan.

Within the County Official Plan each Municipality has been allocated growth based on the projections and forecasts contained within the Growth Plan. The Town of Midland has been allocated a population growth of 2,800 persons from 2006 to 2031 and employment growth of 4,000 jobs. As indicated in the Policy Conformity Review Report prepared by the Town's Planning Development Department, the Town has advised the County that it currently has registered and draft approved residential developments comprising over 2,780 residential units, capable of providing for a potential population of 5,840 persons. There is therefore an apparent inconsistency with what is currently approved and draft approved as it relates to the allocation made to the Town. The Town must address the potential to accommodate a target of infill and intensification that is consistent with the County Official Plan and the Growth Plan.

Section 3.5 of the new County Official Plan provides policies related to intensification targets and densities. Section 3.5.17 states that:

3.5.17
The compact development of settlements as stated in Section 3.5.2 and 3.5.7 shall be based on specific target densities for local municipalities in Simcoe County. Accordingly, it is a policy of this Plan that Greenfield development in the following municipalities shall be at a minimum of 50 persons and/or jobs per hectare.

- *Town of Midland*

3.5.18
Intensification or directing of development to already built or serviced areas contributes to a compact development form. Accordingly it is a policy of this Plan that 40% of all new residential units shall be developed within the built boundaries of settlement areas by the year 2015 and for each year thereafter in following local municipalities:

- *Town of Midland*

3.5.19
Local municipalities shall promote the intensification and efficient use of land in built-up areas, the development of mixed-use communities within settlements, the revitalization and redevelopment of developed areas where appropriate and the development of cost effective and land-effective development standards. It is an objective in the growth and development of settlement to direct intensified forms of development to areas within settlements that are already fully serviced and built up, while protecting the community character of the settlement. Target in relation to this objective are stated in Section 3.5.18 of this Plan.

With an intensification target of 40% it would be necessary to provide for 533 new units created within existing built up areas.

5.4 Intensification Assessment

Figure 5.1 shows the current built-up area for the Town of Midland. This built up area is as determined by the County of Simcoe and the Ministry of Environment and Infrastructure (formerly PIR).

Figure 5.1

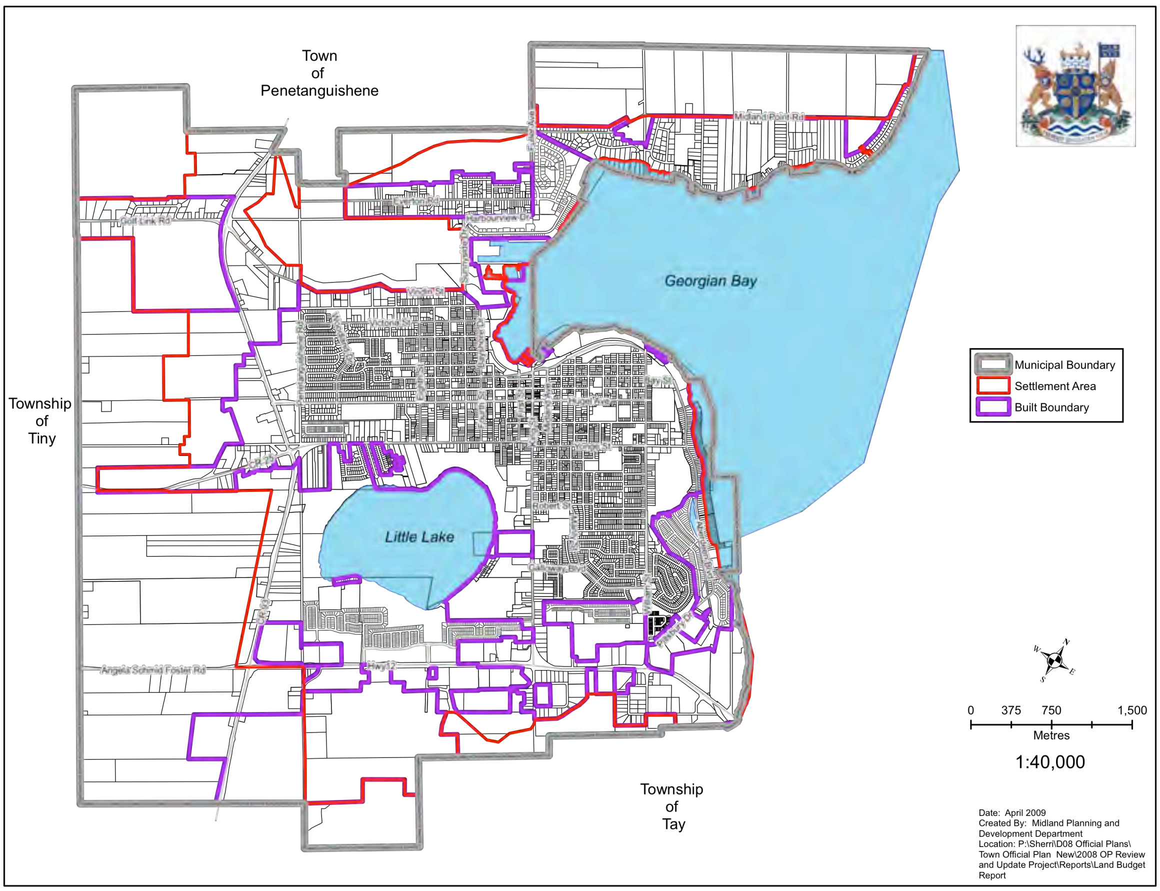


Figure 5.2 shows existing approved developments as well as Draft Plan approved developments within the built boundary of the Town of Midland. It is noted that of the over 2,800 residential units currently in the approved or draft approved stage, the majority of those units currently exist within the Settlement Area boundary, but only 7% of the registered and draft approved units are within the built boundary in Midland. Consequently it is important for the Town to identify intensification opportunities within the built boundary. Although, achieving population targets without further consideration of intensification can easily be achieved within the Municipality, there is also a

requirement through the Provincial documentation and the County Plan to promote intensification within the existing built boundary in order to make the most efficient use of services and infrastructure. From that perspective, an analysis has been undertaken of the opportunities for infill and intensification (excluding those current applications that are approved or draft approved). The focus of this analysis is within the current built-up area of the Town, excluding Greenfield development sites.

Figure 5.2 provides an outline of the existing and draft approved residential developments within Midland and associated number of development unit yields for each development.

Figure 5.2

Map Number	Owner	Total Units	Single Detached	Semi Detached	Townhouses	Apartment	Built
Approved Development							
1	J. Stollar Construction	65	65	0	0	0	8
2	J. Stollar Construction	31	31	0	0	0	13
3	Little Lake Village Homes	38	0	0	38	0	7
4	Helicon Properties	6	0	0	6	0	0
5	Marina Park Resort	55	0	0	0	55	55
6	Georgian Landing	41	0	0	41	0	0
7	Captain's Cove	165	61	0	0	104	26
8	Tiffin Pier	92	0	0	0	92	92
9	Mundy's Harbour	12	0	0	12	0	0
Draft Approved Development **							
10	LRG Midland	163	8	40	115	0	0
11	Bay Port Village	570	63	0	177	330	0
12	Midland Bay Estates	100	79	0	21	0	0
13	Hanson Development	1126	570	0	556	0	0
14	Midland Shores	145	145	0	0	0	0
15	Tiffin By The Lake	47	47	0	0	0	0
16	Sunrise Pier	126	0	0	0	126	0
Application for Development **							
17	Pratt Homes	198	120	0	78	0	0
18	Sayward Investments	30	0	0	0	30	0

*** all plans that are not approved are subject to change*

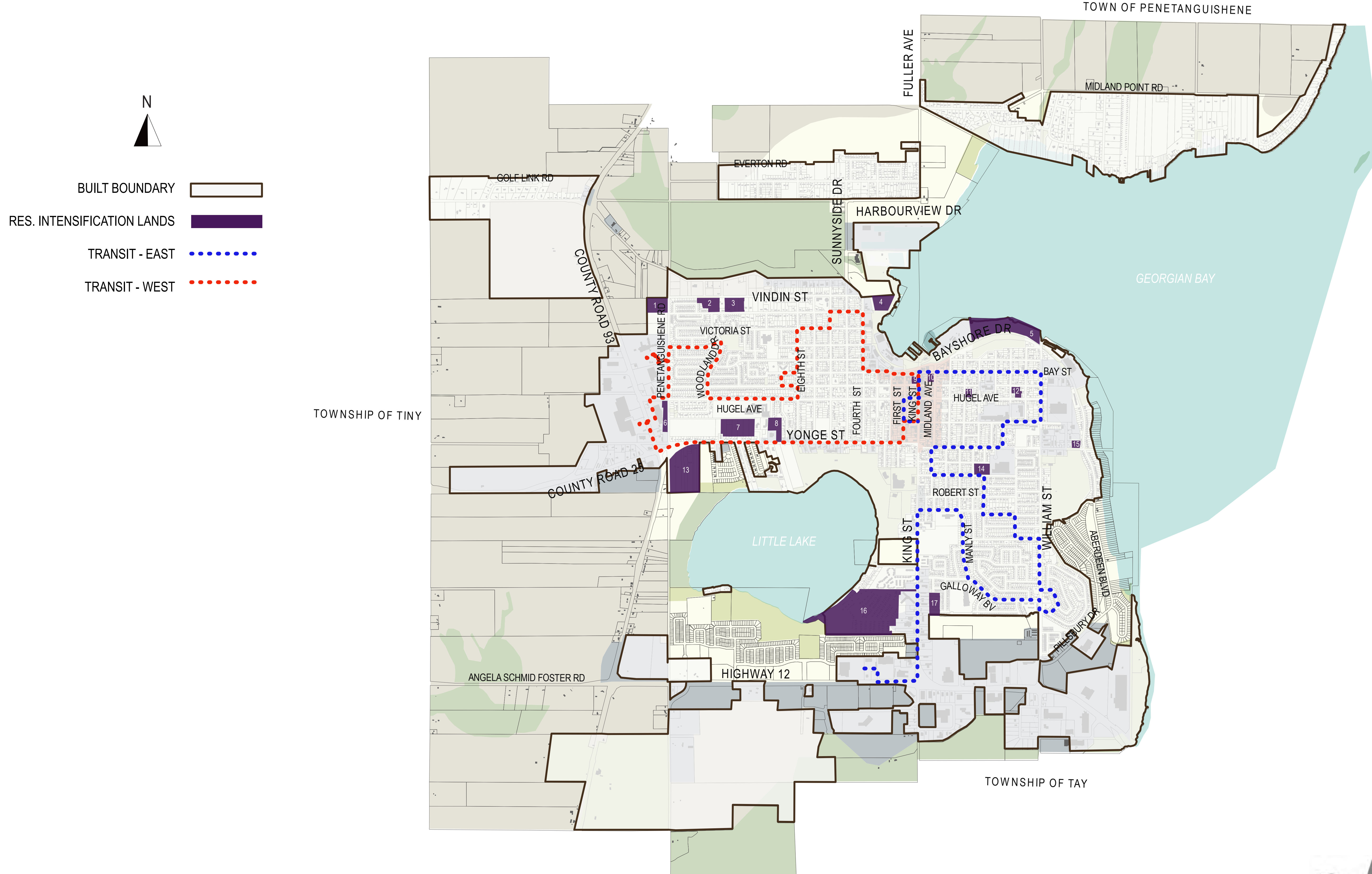
Potential Development Lands

	Zoning	Area
19	RT-H & RA-H	6.6 ha
20	R1-H	4.4 ha
21	R1-H	4.2 ha
22	R1-H & EP	17.4 ha
23	I	0.5 ha
24	R1-H & OS	6.5 ha

Zoning Symbols
RT - Residential Townhouses Zone
R1 - Residential Zone "R1"
RA - Residential Apartment Zone
OS - Open Space Zone
EP - Environmental Protection
"H" - Holding Provision

Date: January 2009
Location: P:\Sherri\D02 Economic Development\Statistics_Table

In order to examine opportunities for intensification within the built area, in conjunction with Town planning staff, the project team identified potential sites for infilling. Seventeen sites were identified by the Town of Midland, Meridian Planning and Planning Alliance. The potential sites are identified in Appendix E. Figures 5.3 and 5.4 show the Official Plan designations, the built boundary and existing transit routes. Reference was made to potential intensification sites that had been identified as part of the Intergovernmental Action Plan (IGAP) report completed by Dillon Consulting Limited (2005).

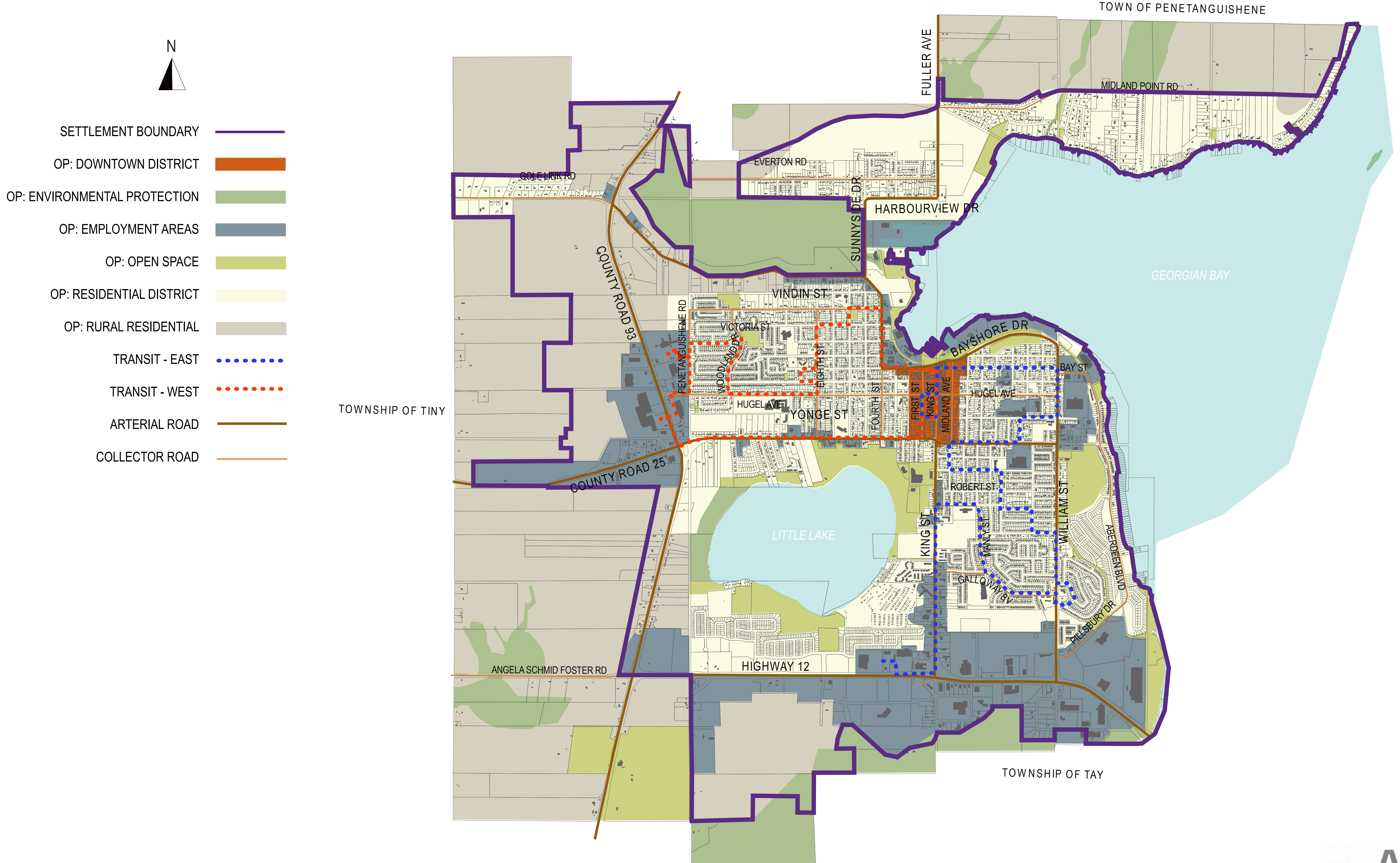


TOWN OF MIDLAND - PROPOSED

SCALE 1:3000

pA

planningAlliance



TOWN OF MIDLAND - OFFICIAL PLAN
SCALE 1:3000

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Figure 5.5 provides a matrix of analysis for the seventeen sites that were identified. The sites have been reviewed in the context of criteria that are set out within the Growth Plan, County of Simcoe Official Plan and the current Official Plan for the Town of Midland. These criteria include:

- Existing Official Plan compliance;
- Compliance with County and Provincial Plans;
- Within built boundary;
- Not employment lands;
- Physical suitability of the site;
- Minimal environmental impact;
- Capacity in abutting road system;
- Market potential/support;
- Under-utilized site;
- Viable brownfields redevelopment;
- Increased density on site;
- Adaptive reuse of buildings;
- Compatibility with surrounding uses;
- Compatibility with the character of adjacent buildings and lands;
- Compatibility with culture and heritage features;
- Walking distance (5 minutes or less) to transit;
- Close proximity to public amenities and local services;
- Available municipal, sewage, water and stormwater services; and,
- Will not remove public amenities and services.

Figure 5.6 provides an assessment of each site in conjunction with these criteria. The Table was completed through site visits, aerial photography and review of the Town of Midland Official Plan in the context of Provincial and County planning documents.

One of the key considerations in reviewing infill and intensification opportunities is the compatibility of the proposed use in the context of the surrounding community. It is noted that many of the zones within the Town of Midland limit the height of buildings to two storeys. However it is clear from the recent developments that have occurred within the Municipality that heights in the neighbourhood of five and six storeys are and have been permitted through amendments to the Zoning By-law and perhaps to the Official Plan. Therefore, a height limit has not been considered in terms of establishing a potential density on each site.

The current Official Plan for the Town of Midland provides for the following residential densities:

Single detached	-	18 upha
Semi detached	-	25 upha
Medium density	-	30 upha
High density	-	60 uph

The Provincial Policy Statement (PPS) and Growth Plan call on municipalities to increase their permitted densities in order to make the most efficient use of available infrastructure and serviced land. While Greenfield areas are intended to develop at 50 persons per hectare in accordance with the Growth Plan, infill development is not expected to develop at that density if it is incompatible with the surrounding land uses, cultural features, heritage features and the ability of the infrastructure to accommodate the use.

Figure 5.6 provides an assessment of the potential densities that can be achieved on each of the seventeen identified sites. These densities have been approximated based on the criteria used to review the sites and, in particular the compatibility with the surrounding land uses. Potential densities have been calculated using both a density approach and a floor area yield per site approach.

Using a density approach, where sites are located in closed proximity to low-density residential uses, an intensification density of 18 units per hectare has generally been used. Within the downtown area and lands that are in close proximity to higher residential densities or non-residential uses, a density figure of 30 units per hectare has been used to calculate potential yields. Sites suitable for high density use have been assigned 60 units per hectare. The yield using this approach is 1,671 units.

Considering the potential impact of the development on the adjacent lands, a floor area approach has been used. In this approach the maximum densities permitted in the Official Plan have not been used. The result is a somewhat lower unit yield, 1,018 units, yet still far above the targets set out in the Growth Plan and the County of Simcoe Plan.

5.5 Implementation

The Town of Midland is in an unusual position with respect to implementation of the Growth Plan. The ability to accommodate new growth within Midland far exceeds the growth allocations to the community. The ability to meet an intensification target in accordance with the provisions of the Growth Plan and the County of Simcoe Plan far exceed the targets that are necessary to implement the Plan. Therefore, there is a need to consider phasing as an option for implementation of the Growth Plan within the Town of Midland.

The PPS and Growth Plan give preferential encouragement to the development of lands through infilling and intensification. This can be done through policy or policy and mapping, which may include a phasing schedule for development within the urban area.

Based on the criteria developed to review the potential intensification sites it is recommended that the policies in the Official Plan contain similar criteria used to prioritize development sites, once policies establishing a priority for infill and intensification sites have been established.

It is recommended that the priorities for infill sites include the following:

1. Viable brownfield redevelopment;

2. Close proximity to transit;

3. Close proximity to public amenities and services;

4. Compatible with surrounding uses;

5. Capacity in abutting road system; and,

6. Proximity to the downtown.

Of the seventeen sites examined five sites have been identified as preferred sites following a more detailed assessment and further site review. These sites are described in greater detail in Section 5.6 of this report.

The Town of Midland is not constrained by capacity issues in either the sewage treatment system or water supply system. In municipalities where there are such constraints, the municipality can impose a policy indicating that allocation of sewage capacity will be given priority to those projects that represent intensification and infilling in the downtown core. Given the amount of development that is Draft Plan approved, such a policy would have little or no effect in encouraging infill and intensification within the community.

In order to encourage infill and intensification the Town of Midland may wish to consider the following steps:

1. Reduce or eliminate Development Charges for infill and intensification projects;

2. Bonusing provisions in the Zoning By-law to allow increased height and density for infill and intensification projects;

3. Provisions to reduce required parking for infill and intensification projects, in particular for housing projects for affordable housing or meeting the needs for senior or other specialized housing; and,

4. Assist property owners in accessing Provincial or Federal funding for rehabilitation of brownfield sites.

These incentives can be provided without having an adverse effect on the character of the surrounding area or the availability of housing choices within the community.

5.6 Preferred Sites

After a review of the seventeen potential sites (see Appendix E) and an analysis of the potential of those sites in the context of the criteria, the following sites have been identified as high priority sites for infilling and intensification.

Figure 5.7 – Corner of Bay and King Streets

Site #9 is located in downtown Midland at the corner of Bay Street and King Street. This site is the site of a former gas station and hence provides an opportunity for brownfield development while contributing to the vitality of the core of downtown Midland. Surrounding development is mixed-use downtown commercial with second storey residential use. The site is directly across Bayshore Drive from Midland Harbour and therefore provides an opportunity for an excellent view of the waterfront while providing a downtown location. A four or five storey building located in this area, carefully designed to match the architectural style of the historic buildings in downtown Midland, could provide up to 32 residential units on upper floors and additional commercial use on lower floors.

Figure 5.8 - Site Locations

Figure 5.9 - 475 Bay Street

Site #10 is also located in the downtown core - at the corner of Bay Street and Midland Avenue. It is a vacant brownfield site located adjacent to the Main Street commercial area and is of sufficient size to provide for a number of units plus surface parking. It is estimated that up to 20 units could be developed on this site, again in a four or five storey building while providing for street level parking. Surrounding buildings are in need of some rehabilitation as are most rear and side parts of buildings located in the Main Street area and redevelopment of this site could encourage investment of surrounding sites within the downtown core.

Figure 5.10 – Hugel/Barnett Avenue

The advantage to Site #12 is that it has frontage on two streets and is just east of the core of the community. The surrounding lands consist of low density residential uses use and therefore a two-storey building would be appropriate. Given the access on two road frontages, this would be an ideal site for a townhouse development that could provide approximately 20 units on site, along with surface parking. Such a development would be in keeping with the character of the surrounding area and would represent a new investment in an area that is in need of such consideration.

Figures 5.11 and 5.12 show the current site and a conceptual infill development on the site

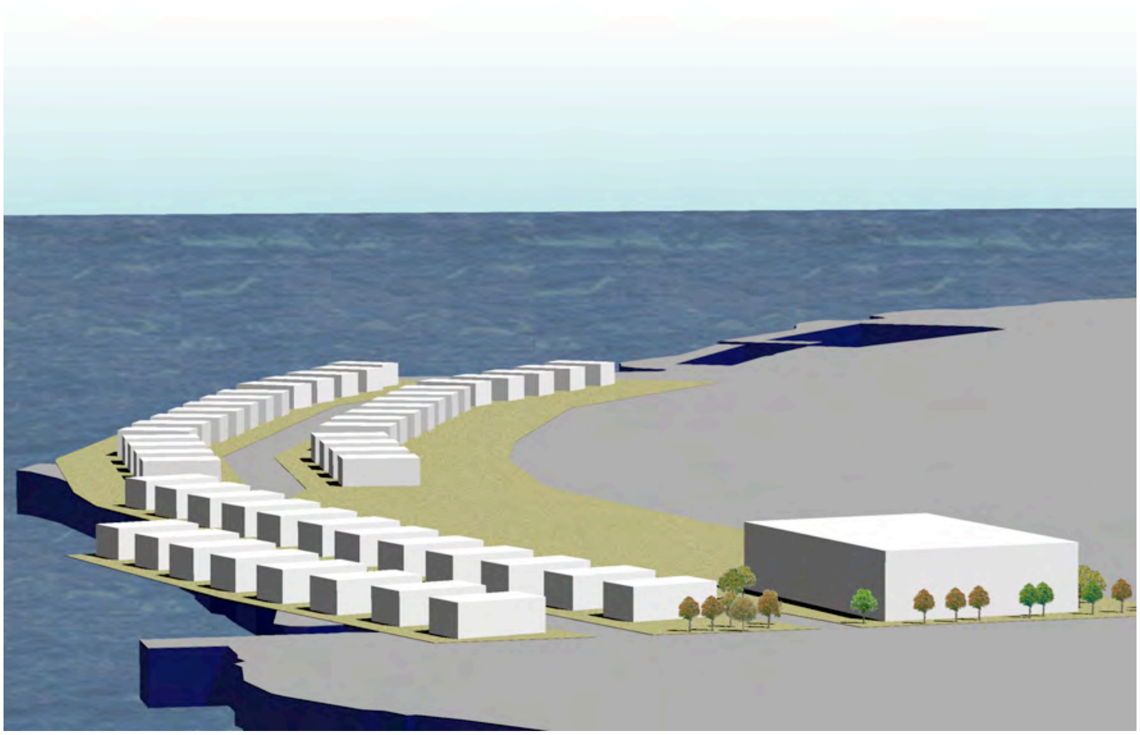
Figure 5.11 – Existing Site

Figure 5.12 Potential Development Concept

Figure 5.13 – 288 Bayshore Drive

Site #5 provides an excellent opportunity for waterfront development in close proximity to the downtown core. The site is designated as an Employment Area at the present time. Conversion to a residential designation could be done as part of this comprehensive review. The site consists of 7.7 ha and could accommodate 465 units at 60 units per ha. However, given the lower density of development in the vicinity, a mix of lower density and medium density housing forms may be more appropriate. Figure 5.13 illustrates a block plan for this site with a yield of 312 units.

Figure 5.14 – Development Concept - Site 5



5.7 Summary

Although the Province's Growth Plan encourages intensification throughout built up areas, it does not suggest that residential intensification is appropriate in all locations. It is our recommendation that intensification should be encouraged in areas in Midland where it will have a positive influence on the existing neighbourhood.

The Intensification Strategy for the Town of Midland has determined that there are several and sufficient opportunities to meet the targets set out in both the Growth Plan and in accordance with the population allocated by the County of Simcoe.

APPENDIX A: Industrial Zone Permitted Uses

INDUSTRIAL ZONE – M1

General Purpose of Zone:

Within an Industrial Zone – M1, no person shall use any land, erect, alter, enlarge, use or maintain any building or structure for any use other than as permitted in this Section and also such use, building or structure, shall be in accordance with the regulations contained or referred to in this Section.

SECTION 4.14.1 PERMITTED USES:

1. Manufacturing, Processing, Fabrication and Assembly
2. Enclosed Warehousing and Storage
3. Self Storage Units
4. Welding and Metal Fabrication Plant
5. Contractors Shop
6. Rent-all Shop
7. Multi Occupancy Building
8. Factory Outlet
9. Printing Establishment
10. Office Uses Accessory to a Permitted Use
11. Professional Office
12. Radio and Communication Use
13. Data Processing Center
14. Eating Establishment
15. Mobile Fast Food Facility
16. Catering Establishment
17. Automobile Service Station
18. Automobile Body Shop
19. Automobile Sales Agency
20. Automobile Body Shop
21. Automobile Gas Bar
22. Automobile Car Wash
23. Marina Dry Land
24. Recreational Vehicle and Vessel Sales and Rental Agency
25. Ambulance Depot
26. Commercial/Industrial School
27. Training and Rehabilitation Centre
28. Banquet Hall
29. Commercial Entertainment Establishment
30. Conference Centre
31. Health or Fitness Club
32. Place of Assembly
33. Adult Entertainment Parlour
34. Private Club

35. Auction Centre
36. Laboratory
37. Animal Hospital
38. Day Care Centre
39. Attached Accessory Dwelling Unit
40. Public Use

SECTION 4.14.2 ZONE REQUIREMENTS:

Minimum Lot Area: 4000 m^2
Minimum Lot Frontage: 30 .0 m
Maximum Lot Coverage: 60%
Minimum Yard Setbacks:

- Front 7.5 m
- Rear 8.8 m
- Interior side 6.0 m
- Exterior side 7.5 m

Maximum Building Height: 11.0 m

SECTION 4.14.3 ZONE REGULATIONS:

1. Outside storage is permitted but it shall be concealed from sight from all adjacent streets and residential zones.

SECTION 4.14.4 ZONE EXCEPTIONS:

The following Zone Exceptions shall have the same permitted uses and zone provisions as the regular M1 Zone except as noted.

INDUSTRIAL ZONE – M2

General Purpose of Zone:

Within an Industrial Zone – M2, no person shall use any land, erect, alter, enlarge, use or maintain any building or structure for any use other than as permitted in this Section and also such use, building or structure, shall be in accordance with the regulations contained or referred to in this Section.

SECTION 4.15.1 PERMITTED USES:

1. Manufacturing, Processing and Fabrication and Assembly
2. Factory Outlet
3. Enclosed Warehousing and Storage
4. Food Processing Plant
5. Welding and Metal Fabrication Plant
6. Bulk Aggregate Storage and Processing
7. Multi Occupancy Building

8. Automobile Service Station
9. Automobile Body Shop
10 Radio and Communications Use
11 Eating Establishment
12 Construction Equipment Rental Business
13. Transportation Terminal
14. Tow Truck Depot and Storage Yard
15. Pit and Quarry
16. Asphalt Batching Plant
17. Concrete Mixing Plant
18. Public Use

SECTION 4.15.2 ZONE REQUIREMENTS:

Minimum Lot Area: 2.0 ha
Minimum Lot Frontage: 60 .0 m
Maximum Lot Coverage: 60%
Minimum Yard Setbacks:

- Front 7.5 m
- Rear 8.8 m
- Interior side 6.0 m
- Exterior side 7.5 m

Maximum Building Height: 11.0 m

SECTION 4.15.3 ZONE REGULATIONS:

1. Outside storage of material or product is permitted, but it shall be concealed from sight from all adjacent streets and residential zones.
2. Pits and quarries shall be regulated by those requirements specified from time to time under the *Aggregate Resources Act*, R.S.O. 1990, or any subsequent legislation.
3. Asphalt Batching Plants, buildings and structures, shall be located no closer than 75.0 m from any zoned boundary.

SECTION 4.15.4 ZONE EXCEPTIONS:

The following Zone Exceptions shall have the same permitted uses and zone provisions as the regular M2 Zone except as noted.

APPENDIX B: 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	Adminstration & 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 C: Midland Commercial Inventory

TOWN OF MIDLAND RETAIL AND SERVICE COMMERCIAL INVENTORY, MARCH 2009

Sum of Area					
Location	**Address**	**Street Name**	**Trade Group**	**Store Name**	**Total (S.F.)**
Downtown BIA	212	King St	Food Services and Drinking Places	Subway	1,100
			Grocery/Convenience and Specialty Food Stores	Sweet And Savoury	600
			Health Care Services	Huronia Crisis Pregnancy Centre	600
			Personal Care Services	Quik Kuts	250
			Professional, Scientific & Technical Services	Decarli Contractors	550
	213	King St	Clothing Stores	School Bus Surf Shop	2,315
	215	King St	Food Services and Drinking Places	Den's Skillet	1,500
	217	King St	Personal Care Services	The Works Hair Design	600
	219	King St	Personal Care Services	Image Salon	792
	221	King St	Clothing Stores	Mimosa	1,500
	223	King St	Food Services and Drinking Places	Whimpy's Diner	1,820
	225	King St	Home Furnishings Stores	Saturday Afternoons Home Store	1,540
	226	King St	Home Furnishings Stores	Templeton Windows Inc.	500
			Miscellaneous Store Retailers	The Lighthouse Store	1,000
	228	King St	Vacant	Vacant	1,048
	229	King St	Other General Merchandise Stores	Downtown Variety & Video	1,929
	230	King St	Sporting Goods, Hobby, Music and Book Stores	Angel's Fairway Golf	1,200
	231	King St	Food Services and Drinking Places	Perfect Pizza	1,700
	232	King St	Personal Care Services	Spiker's Barbershop	772
	233	King St	Food Services and Drinking Places	Uncle Roy	2,500
	235	King St	Grocery/Convenience and Specialty Food Stores	The Elegant Gourmet	900
	236	King St	Miscellaneous Store Retailers	The Crow's Nest	8,000
	237	King St	Finance and Insurance	Assante/Sutherland Financial Services	900
	239	King St	Sporting Goods, Hobby, Music and Book Stores	Graffiti Art	1,000
	243	King St	Finance and Insurance	Bmo Bank Of Montreal	1,500
	244	King St	Grocery/Convenience and Specialty Food Stores	Serendipitea	1,157
	247	King St	Personal Care Services	Planet Beauty	400
	248	King St	Finance and Insurance	National Bank Of Canada	3,000
	249	King St	Food Services and Drinking Places	The Riv Bistro	1,400
	250	King St	Sporting Goods, Hobby, Music and Book Stores	Cottage Books New And Used	1,230
	251	King St	Home Furnishings Stores	Lalonde's 'A Home Store'	2,400

TOWN OF MIDLAND RETAIL AND SERVICE COMMERCIAL INVENTORY, MARCH 2009

Sum of Area					
Location	**Address**	**Street Name**	**Trade Group**	**Store Name**	**Total (S.F.)**
	252	King St	Clothing Stores	Cashmere Blue	900
	253	King St	Grocery/Convenience and Specialty Food Stores	Georgian Bakery	965
	255	King St	Personal Care Services	European Body Works & Hair Studio	100
	256	King St	Home Furnishings Stores	Artistic Dimensions	500
	257	King St	Clothing Stores	The Modern Man	603
			Professional, Scientific & Technical Services	Cabin Boy	500
	258	King St	Miscellaneous Store Retailers	Global Pet Foods	1,537
	259	King St	Home Furnishings Stores	Living Lighting	579
	260	King St	Finance and Insurance	The Mortgage Centre	1,400
	261	King St	Shoe, Clothing Accessories and Jewellery Stores	Shoes To Boot	1,206
	262	King St	Selected Office Administrative Services	Carlson Wagonlit Travel	600
	264	King St	Vacant	Vacant	3,000
	265	King St	Miscellaneous Store Retailers	Uncle Buck's	1,447
	266	King St	Vacant	Vacant	3,031
	267	King St	Insurance and Real Estate	In Touch Realty	1,427
				Royal Lepage	1,500
	268	King St	Pharmacies and Personal Care Stores	Mobility Centre	1,200
	270	King St	Other General Merchandise Stores	Only Green	5,200
	271	King St	Finance and Insurance	Royal Bank Of Canada	10,000
	274	King St	Finance and Insurance	CIBC	3,600
			Health Care Services	Dr. D. Neville	1,800
	276	King St	Grocery/Convenience and Specialty Food Stores	Health & Bulk Food Market	703
	277	King St	Supermarkets	Maurice's Valu Mart	15,500
	278	King St	Clothing Stores	Sugar Baby	1,400
	280	King St	Sporting Goods, Hobby, Music and Book Stores	Johnstone'S Musicland	500
	282	King St	Entertainment	Hunt Fitness	8,300
	285	King St	Other General Merchandise Stores	The Bargain Shop	3,472
	286	King St	Pharmacies and Personal Care Stores	Arcade Guardian Pharmacy	2,700
				Ida Guardian Pharmacy	3,514
	287	King St	Home Electronics and Appliance Stores	Miller's Vac Shop	1,200
	288	King St	Personal Care Services	Creative Cut Unisex Hair Design	1,100
	289	King St	Home Electronics and Appliance Stores	Watson's Camera Shop	3,300

TOWN OF MIDLAND RETAIL AND SERVICE COMMERCIAL INVENTORY, MARCH 2009

Sum of Area					
Location	**Address**	**Street Name**	**Trade Group**	**Store Name**	**Total (S.F.)**
	290	King St	Grocery/Convenience and Specialty Food Stores	Gianetto's Fruit Market	3,250
	291	King St	Finance and Insurance	Scotia Bank	3,000
	292	King St	Food Services and Drinking Places	Rye Café	965
	294	King St	Sporting Goods, Hobby, Music and Book Stores	The Cottage Scrapbook	1,600
	295	King St	Finance and Insurance	A Faber & Partners Inc.	1,000
				TD Canada Trust & TD Waterhouse	4,000
			Food Services and Drinking Places	The Ultimate Eatery	1,000
			Miscellaneous Store Retailers	Aaron Artistry With Kristy's Kiosk	1,100
			Selected Office Administrative Services	Huronia Works	500
	297	King St	Entertainment	Curves For Women	1,800
	298	King St	Miscellaneous Store Retailers	Homecoming	2,100
	299	King St	Finance and Insurance	Cash-A-Cheque & Western Union	900
	301	King St	Food Services and Drinking Places	Papas Pizza	527
	303	King St	Clothing Stores	Indulge Boutique	1,000
	305	King St	Home Furnishings Stores	Blair Interious & Window Fashions	1,800
	307	King St	Shoe, Clothing Accessories and Jewellery Stores	Ice Art	240
	309	King St	Clothing Stores	Little Monkey's Treehouse	1,600
	311	King St	Food Services and Drinking Places	Midland Fish & Chips	868
	313	King St	Sporting Goods, Hobby, Music and Book Stores	Minds Alive! Toys And Games	2,000
	317	King St	Clothing Stores	Sharron'S Boutique Plus	1,157
	319	King St	Grocery/Convenience and Specialty Food Stores	Dino's Fresh Food Deli	1,447
	321	King St	Clothing Stores	A Passion For Fashion	1,250
			Miscellaneous Store Retailers	Perrin'S Flower Shop	836
	323	King St	Home Furnishings Stores	Simply Country	4,340
	478	Bay St	Food Services and Drinking Places	Tim Hortons	3,014
	485	Bay St	Grocery/Convenience and Specialty Food Stores	Bus Stop Scoop Shop	1,000
			Sporting Goods, Hobby, Music and Book Stores	Kiss This	1,736
		Dominion Av	Personal Care Services	Tangles	1,000
	486	Hugel Av	Professional, Scientific & Technical Services	Justice Paralegal Services Inc.	500
				Matyas Consulting Inc.	600
	488	Dominion Av	Professional, Scientific & Technical Services	David Northcott	600
	489	Dominion Av	Personal Care Services	Atlantis Tanning & Swimwear	1,200

TOWN OF MIDLAND RETAIL AND SERVICE COMMERCIAL INVENTORY, MARCH 2009

Sum of Area					
Location	**Address**	**Street Name**	**Trade Group**	**Store Name**	**Total (S.F.)**
	505	Dominion Av	Finance and Insurance	Direct North Financial	500
	506	Dominion Av	Miscellaneous Store Retailers	John'S Buy & Sell	1,230
	509	King St	Personal and Household Goods Repair and Maintenance	Creative Sewing & Alterations	200
	512	Dominion Av	Professional, Scientific & Technical Services	Warren And Associates Law Office	1,230
		Hugel Av	Health Care Services	A Balanced Path Acupuncture Clinic	1,200
				Dr. Douglas Mcclure	1,200
				Dr. Linda Reid	1,200
				Groleau Chiropractic And Natural Health Services	1,200
				Natural Health Services	1,000
	513	Dominion Av	Miscellaneous Store Retailers	Candies In Bloom	1,015
			Personal Care Services	Hazzard County Tattoo	193
	514	Dominion Av	Clothing Stores	Ice Clothing Boutique	338
	515	Dominion Av	Miscellaneous Store Retailers	Huronia Reptile	800
	516	Elizabeth St	Health Care Services	Dr. Dan Laurin	600
				Dr. R.J. Sorgini	600
	520	Elizabeth St	Personal Care Services	Maureen's Professional Hair Care	250
	(blank)	Elizabeth St	Professional, Scientific & Technical Services	Backyard Vacations	150
Downtown BIA Total					**189,321**
Huronia Mall	9225	Highway 93	Clothing Stores	Joy B.K.	1,543
				Patricia Fashions	2,315
			Consumer Services Rental	Rogers Video	4,051
			Finance and Insurance	Scotiabank	965
			Food Services and Drinking Places	Pizzaville Pizza & Panzerotto	2,701
				Quiznos	1,543
				Tim Hortons	2,546
				Town Grill Restaurant	4,051
				Mcdonald's	4,823
			Grocery/Convenience and Specialty Food Stores	Bulk Barn	5,102
				Mac's	1,085
			Insurance and Real Estate	Royal Lepage	2,411
				The Cooperators	2,411

TOWN OF MIDLAND RETAIL AND SERVICE COMMERCIAL INVENTORY, MARCH 2009

Sum of Area					
Location	**Address**	**Street Name**	**Trade Group**	**Store Name**	**Total (S.F.)**
			Miscellaneous Store Retailers	Ivy Basket	1,447
				Pet Valu	2,411
			Other General Merchandise Stores	Dollarama	8,681
				Giant Tiger	15,867
				Sears Catalogue Service	4,823
			Personal Care Services	Dessert Sands Tanning Salon	1,206
				Hairwaves	675
			Professional, Scientific & Technical Services	Chin Orr Lawyers	723
				Stewart Vincent Photography	1,447
			Shoe, Clothing Accessories and Jewellery Stores	Phoenix Jewellery	1,543
			Vacant	Vacant	1,736
Huronia Mall Total					**76,108**
Mountainview Mall	9226	Highway 93	Beer, Wine and Liquor Stores	The Wine Rack	1,102
			Clothing Stores	B.P. Sportswear	732
				Cotton Ginny	1,503
				Northern Reflections	2,285
				Stitches	3,016
				Suzy Shier	3,134
				Tan Jay	2,871
			Consumer Services Rental	Easy Home	3,362
			Department Stores	Zellers	112,046
			Entertainment	Galaxy Theatres	26,153
			Finance and Insurance	National Trust	3,127
			Food Services and Drinking Places	Burger King	4,000
				Gourmet House	628
				Teddy's Burger Pit	400
				Tim Hortons	500
			Furniture Stores	The Brick	25,103
			Grocery/Convenience and Specialty Food Stores	Lindor	2,495
			Health Care Services	Midland Physiotherapy Rehabilitaion Clinic	1,960
				North Simcoe Family Health Team	1,076
			Home Electronics and Appliance Stores	Bell World	1,151

Sum of Area					
Location	**Address**	**Street Name**	**Trade Group**	**Store Name**	**Total (S.F.)**
			Insurance and Real Estate	Midland Real Estate	2,065
			Miscellaneous Store Retailers	Carlton Card Shop	1,600
				Lotto Booth	60
				Mountainview Mall Florist	786
			Personal Care Services	A&M Nails	513
				Imperial Tailoring And Alterations	346
				The Total Man	852
			Pharmacies and Personal Care Stores	Shoppers Drug Mart	10,216
			Professional, Scientific & Technical Services	H&R Block	1,687
			Shoe, Clothing Accessories and Jewellery Stores	Bentley	1,319
				Naturestep	1,203
				Peoples Jewellers	1,639
				Claire's	824
			Sporting Goods, Hobby, Music and Book Stores	Coles	3,059
				Fabricland	7,324
				Sport Mart	6,077
			Supermarkets	Food Basics	38,173
			Vacant	Vacant	17,419
Mountainview Mall Total					**291,806**
SmartCentres	16775	Highway 12	Home Centres and Hardware Stores	Home Depot	63,197
	16815	Highway 12	Food Services and Drinking Places	Tim Hortons	1,447
	16821	Highway 12	Health Care Services	Georgian Shores Dental	1,374
			Personal Care Services	First Choice Haircutters	694
			Shoe, Clothing Accessories and Jewellery Stores	Payless Shoesource	1,736
			Sporting Goods, Hobby, Music and Book Stores	EB Games	955
			Vacant	Vacant	868
	16825	Highway 12	Clothing Stores	Mark's Work Wearhouse	7,716
			Other General Merchandise Stores	Dollar Giant	7,716
	16835	Highway 12	Food Services and Drinking Places	Boston Pizza	2,440
	16845	Highway 12	Department Stores	Walmart	108,528
SmartCentres Total					**196,674**
Other Midland	12	Fifth St	Professional, Scientific & Technical Services	Mtn Communication Systems	579

TOWN OF MIDLAND RETAIL AND SERVICE COMMERCIAL INVENTORY, MARCH 2009

Sum of Area					
Location	**Address**	**Street Name**	**Trade Group**	**Store Name**	**Total (S.F.)**
	93	Woodland Dr	Entertainment	The Dancer's Studio	656
			Grocery/Convenience and Specialty Food Stores	Neil's Convenience	1,312
			Health Care Services	Medical Place	656
			Vacant	Vacant	656
	177	King St	Food Services and Drinking Places	Scully's Crab Shack	2,894
	184	Pillsbury Dr	Other General Merchandise Stores	Boomerang Liquidation	3,014
	200	Pillsbury Dr	Food Services and Drinking Places	The Originial Mom's Restaurant	1,809
	206	Fourth St	Professional, Scientific & Technical Services	Sun Sport Graphics And Signs	482
	229	First St	Health Care Services	Dr Dino Maurao Chiropractor	1,157
		Midland Av	Grocery/Convenience and Specialty Food Stores	Meat Land	1,157
	230	Aberdeen	Health Care Services	Tiffin Medical Clinic	482
			Professional, Scientific & Technical Services	Avionics Design Serivce	965
	238	Midland Av	Health Care Services	Better Life Chiropractic	651
	248	First St	Insurance and Real Estate	The Co-Operators	1,447
			Vacant	Vacant	800
	255	Midland Av	Health Care Services	Handled With Care Massage Therapy	347
			Home Electronics and Appliance Stores	Huronia Alarm	2,894
			Personal and Household Goods Repair and Maintenance	Golden Seam Alterations	347
	264	First St	Personal Care Services	Coco Skin Care Clinic	482
			Selected Office Administrative Services	Atkinson Travel	482
	285	Midland Av	Food Services and Drinking Places	Happy Days	1,500
				Smokies BBQ Cookhouse	694
			Professional, Scientific & Technical Services	Liberty Tax Service	1,157
	293	Midland Av	Beer, Wine and Liquor Stores	The Beer Store	3,617
			Grocery/Convenience and Specialty Food Stores	Mac's	2,170
	306	First St	Health Care Services	Dr's Office	289
		Midland Av	Vacant	Vacant	1,085
	310	First St	Health Care Services	Dr Edward Chiropractor	2,411
		Midland Av	Health Care Services	Midland Optical	1,085
	316	Midland Av	Personal Care Services	The Strand Hairstyling	2,109
	331	Midland Av	Professional, Scientific & Technical Services	Tax Depot	2,835
	333	King St	Vacant	Vacant	8,000

TOWN OF MIDLAND RETAIL AND SERVICE COMMERCIAL INVENTORY, MARCH 2009

Sum of Area					
Location	**Address**	**Street Name**	**Trade Group**	**Store Name**	**Total (S.F.)**
	335	King St	Personal Care Services	One Stop Beauty Shop	700
	337	King St	Food Services and Drinking Places	Cellarmans Ale House	2,170
	339	King St	Clothing Stores	Georgian Bay Windsurfing	723
	341	King St	Insurance and Real Estate	Swick Bauman Insurance	1,085
	342	King St	Food Services and Drinking Places	Freda's Restaurant	868
	344	First St	Health Care Services	Theraputic Massage	1,085
	347	King St	Food Services and Drinking Places	The Explorers Café	2,170
			Miscellaneous Store Retailers	Ruths Custom Framing	362
			Sporting Goods, Hobby, Music and Book Stores	Upper Canada Coins And Collectables	723
		Midland Av	Health Care Services	Midland Dental	912
	349	King St	Entertainment	Heavy Metal Fitness	405
			Food Services and Drinking Places	Mr Sub	506
			Health Care Services	Dr Melnyk	405
			Insurance and Real Estate	Harbour Insurance Service Limited	405
			Miscellaneous Store Retailers	Crates-A-Shop	405
			Personal Care Services	Coin Laundry	405
	352	Midland Av	Vacant	Vacant	1,870
	354	King St	Furniture Stores	Matress World (Closing)	2,800
		Midland Av	Health Care Services	Catholic Family Services	1,750
	356	First St	Professional, Scientific & Technical Services	Keenans Accounting Services	723
	357	King St	Health Care Services	Health Works Chiropractic And Wellness Clinic	1,447
				Massage Matters	868
			Personal Care Services	Panache Spa Works	1,447
	358	Eighth St	Food Services and Drinking Places	Tymes Restaurant	1,447
	361	King St	Computer and Software Stores	Compusolve	1,042
	362	Midland Av	Professional, Scientific & Technical Services	John J Winter Law Office	1,157
	363	King St	Home Electronics and Appliance Stores	Telus	1,042
	365	King St	Sporting Goods, Hobby, Music and Book Stores	T&G Fabrics	1,493
	366	First St	Professional, Scientific & Technical Services	Joseph Blake	1,085
		Midland Av	Personal and Household Goods Repair and Maintenance	Juanita's Sew And Serge	723
				Stitch In Time	723

TOWN OF MIDLAND RETAIL AND SERVICE COMMERCIAL INVENTORY, MARCH 2009

Sum of Area					
Location	**Address**	**Street Name**	**Trade Group**	**Store Name**	**Total (S.F.)**
			Professional, Scientific & Technical Services	Brabant & Kretzschmann	1,447
	371	Midland Av	Clothing Stores	Rub Of The Green	868
	372	Midland Av	Miscellaneous Store Retailers	The Carriage House Gallery	1,447
	373	Midland Av	Professional, Scientific & Technical Services	Premier Financial Planning Services	868
	375	King St	Food Services and Drinking Places	KFC	1,447
		Midland Av	Health Care Services	Midland Denture Clinic	1,157
	388	King St	Insurance and Real Estate	The Dunlop Team	820
	395	King St	Food Services and Drinking Places	Pizza Pizza	1,085
	401	William St	Food Services and Drinking Places	Sergio's Italian Cucina	1,543
			Other General Merchandise Stores	Tiffin Variety	675
	422	King St	Insurance and Real Estate	Prudential Sadie Moranis Realty	1,085
	435	Hugel Av	Professional, Scientific & Technical Services	Titain Home Design	1,085
	475	Dominion Av	Personal Care Services	Harolds Barber	463
	476	Elizabeth St	Professional, Scientific & Technical Services	Deacon Taws	4,600
	478	Elizabeth St	Grocery/Convenience and Specialty Food Stores	The Globe Delicatessen And Restaurant	723
	479	Dominion Av	Personal Care Services	French Dry Cleaners	1,230
		Hugel Av	Personal Care Services	Dive Day Spa	694
			Vacant	Vacant	694
	480	Elizabeth St	Selected Office Administrative Services	Midland Copy Shoppe	723
	487	Dominion Av	Vacant	Vacant	1,447
	512	Yonge St	Finance and Insurance	RBC Dominion Services	2,170
			Professional, Scientific & Technical Services	Mink Insurance Services	2,170
	516	Yonge St	Personal Care Services	Dion's Laundry And Dry Cleaners	482
	518	Yonge St	Professional, Scientific & Technical Services	Hgr Lawyers	1,447
	521	Bay St	Personal Care Services	Mane Event	579
	523	Elizabeth St	Professional, Scientific & Technical Services	Grm Communications	434
	525	Bay St	Finance and Insurance	Edward Jones Investments	1,085
	526	Hugel Av	Food Services and Drinking Places	Library Restaurant	2,218
	527	Bay St	Insurance and Real Estate	Hazell Underwriting Group	434
			Personal Care Services	Dog's House Of Hair	434
			Selected Office Administrative Services	Terri's Travel	723
		Elizabeth St	Personal Care Services	Hair We Are/Don'S Barber Shop	434

TOWN OF MIDLAND RETAIL AND SERVICE COMMERCIAL INVENTORY, MARCH 2009

Sum of Area					
Location	**Address**	**Street Name**	**Trade Group**	**Store Name**	**Total (S.F.)**
		Hugel Av	Personal Care Services	Laser Health Works	1,809
	529	Elizabeth St	Professional, Scientific & Technical Services	Preston Nicholson Havey Inc. Land Surveyor	434
	536	Dominion Av	Health Care Services	Optometrist Dr. Fujimato	723
	539	Bay St	Home Electronics and Appliance Stores	Scott's R & S Heating Systems	1,302
	540	Dominion Av	Personal Care Services	Precision Fine Hairstyling	482
	542	Bay St	Sporting Goods, Hobby, Music and Book Stores	Total Sports	1,302
	543	Bay St	Sporting Goods, Hobby, Music and Book Stores	Backwater Tackle	1,929
	546	Dominion Av	Health Care Services	Stamp Denture Clinic	482
	547	Bay St	Insurance and Real Estate	State Farm	1,447
	551	Bay St	Other General Merchandise Stores	Duggers Milk And Variety	1,447
		Dominion Av	Professional, Scientific & Technical Services	Mullen Donna And Associates	723
	577	Bay St	Furniture Stores	The Rec Room Furniture And Appliance	1,447
	578	King St	Health Care Services	Midland Chiropractic Clinic	900
			Pharmacies and Personal Care Stores	The Hearing Rehab Centre	1,200
			Professional, Scientific & Technical Services	Kumon	1,000
	600	Bay St	Professional, Scientific & Technical Services	Bj Sheba Fine Interiors	723
	651	Yonge St	Personal and Household Goods Repair and Maintenance	Wilkinsons Upholstery	1,200
	679	Vindin St	Grocery/Convenience and Specialty Food Stores	Daisy Mart	868
	687	King St	Professional, Scientific & Technical Services	Heritage Animal Hospital	2,346
	711	Yonge St	Home Furnishings Stores	The Place Setting	1,447
	713	Vindin St	Entertainment	Perky's Adult Entertainment	1,809
	727	William St	Consumer Services Rental	Pop-In-Video	965
			Entertainment	Hurontario Marshal Arts	1,206
			Food Services and Drinking Places	Martha's Place Restaurant	965
			Grocery/Convenience and Specialty Food Stores	Mac's	2,411
			Personal and Household Goods Repair and Maintenance	Seams To Please	965
			Personal Care Services	Washing Well Coin Laundry	965
	740	Yonge St	Food Services and Drinking Places	Bleu Garden Restaurant	1,447
	758	Yonge St	Personal Care Services	Joseph Hair Design	482
			Vacant	Vacant	482
	765	Balm Beach Rd	Vacant	Vacant	1,800

Sum of Area					
Location	**Address**	**Street Name**	**Trade Group**	**Store Name**	**Total (S.F.)**
		E			
		Yonge St	Professional, Scientific & Technical Services	Midland Veterinary Service	1,500
	771	Yonge St	Food Services and Drinking Places	The Arch Steakhouse	2,411
	776	Yonge St	Food Services and Drinking Places	Dairy Queen	4,560
	780	Balm Beach Rd E	Home Electronics and Appliance Stores	Alpha Security	1,085
			Miscellaneous Store Retailers	The Water Stop	723
	781	Balm Beach Rd E	Home Furnishings Stores	Midland Décor	2,532
			Sporting Goods, Hobby, Music and Book Stores	Georgian Bay Embroidery	1,085
	788	Yonge St	Health Care Services	Palmer Wellness	800
			Personal Care Services	Coastal Rays Tanning	800
	795	Balm Beach Rd E	Supermarkets	Iga	24,982
	815	King St	Food Services and Drinking Places	King's Buffet	1,447
				Pizza Nova	723
			Grocery/Convenience and Specialty Food Stores	Convenience +	1,447
			Health Care Services	Total Body Pain And Injury Clinic	723
			Personal Care Services	Herbal Magic	723
	830	King St	Food Services and Drinking Places	Tim Hortons	2,368
		Yonge St	Specialized Building Materials and Garden Stores	Norman's Garden Gallery	18,850
	845	King St	Consumer Services Rental	Rent-To-Own	2,170
			Insurance and Real Estate	Citi Financial	1,447
			Vacant	Vacant	362
	847	Vindin St	Food Services and Drinking Places	The Windrifter Bar	1,447
	854	Yonge St	Home Electronics and Appliance Stores	Fast Forward Electronics	1,997
			Selected Office Administrative Services	Career Essentials	1,085
	889	King St	Miscellaneous Store Retailers	Huronia Pools	5,334
	900	King St	Furniture Stores	Barber And Haskill	4,836
			Sporting Goods, Hobby, Music and Book Stores	West Marine	10,340
	911	King St	Grocery/Convenience and Specialty Food Stores	Euro Buns	5,000
	917	King St	Food Services and Drinking Places	Kelsey's	4,013
	937	King St	Food Services and Drinking Places	Bleachers Bar And Grill	6,138

TOWN OF MIDLAND RETAIL AND SERVICE COMMERCIAL INVENTORY, MARCH 2009

Sum of Area					
Location	**Address**	**Street Name**	**Trade Group**	**Store Name**	**Total (S.F.)**
	1209	Sundowner Rd	Home Furnishings Stores	United Floors - Therrien Flooring	1,085
	1272	Vindin St	Miscellaneous Store Retailers	Marinex Boat Sales	1,447
	9170	Highway 93 Penataguishene Road	Home Electronics and Appliance Stores	Full Line Electronics	1,085
				The Entertainment Gallery	1,500
	9271	Highway 93 Penataguishene Road	Food Services and Drinking Places	A & W	1,085
	9292	Highway 93 Penataguishene Road	Supermarkets	The Real Canadian Superstore	77,164
	9315	Highway 93 Penataguishene Road	Grocery/Convenience and Specialty Food Stores	Ct Convienence	600
			Other General Merchandise Stores	Canadian Tire	51,362
	9319	Highway 93 Penataguishene Road	Consumer Services Rental	Blockbuster	1,447
			Grocery/Convenience and Specialty Food Stores	M & M Meat Shops	723
	(blank)	Balm Beach Rd E	Miscellaneous Store Retailers	Salvation Army Thrift Store	8,736
			Other General Merchandise Stores	Buck And Up's Close Outs	7,650
		Dominion Av	Finance and Insurance	Canada Cash Advance	733
			Other General Merchandise Stores	Little Sams Dollar Mart	1,061
		Elizabeth St	Personal Care Services	Permanent Solution	386
		Highway 12	Grocery/Convenience and Specialty Food Stores	Sunoco Convenience	500
		Highway 93 Penataguishene Road	Beer, Wine and Liquor Stores	The Beer Store	2,170
			Food Services and Drinking Places	Harvey's/Swiss Chalet	1,929
		King St	Health Care Services	Quality Healthcare Professionals	4,784
			Other General Merchandise Stores	Lee's Little General Store	800
		Vindin St	Grocery/Convenience and Specialty Food Stores	Shell Foodstore	500
			Personal Care Services	Country Clean Laundromat	500
		Yonge St	Vacant	Vacant	1,085

TOWN OF MIDLAND RETAIL AND SERVICE COMMERCIAL INVENTORY, MARCH 2009

Sum of Area					
Location	**Address**	**Street Name**	**Trade Group**	**Store Name**	**Total (S.F.)**
		*	*Automotive (TBA)*	*Automotive (From JW)*	*223,506*
			Home Centres and Hardware Stores	*Home Improvement (From JW)*	*168,621*
Other Midland Total					**827,984**
Grand Total					**1,581,893**

Source: urbanMetrics, March 2009

Notes:

1) Downtown Midland Inventory based on data from Downtown Midland BIA and urbanMetrics inventory.

2) Automotive Tires, Batteries, and Accessories (TBA) based on data from John Winter Associates Ltd. The Commercial Component of the The Villages of Midpark on the Lake, Midland. Prepared for Marshall Macklin Monaghan. May, 2000.

3) Home Centres and Hardware Stores based on data from John Winter Associates Ltd. The Commercial Component of the The Villages of Midpark on the Lake, Midland. Prepared for Marshall Macklin Monaghan. May, 2000, with an addition of Home Depot by urbanMetrics.

APPENDIX D: Retail and Service Space Classification

urbanMetrics inc.

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

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

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
	44831	Jewellery Stores
	44832	Luggage and Leather Goods Stores

General Merchandise Stores

170	**Department Stores**	
	45211	Department Stores
180	**Other General Merchandise Stores**	
	45291	Warehouse Clubs and Superstores
	45299	All Other General Merchandise Stores:
	452991	*Home & Auto (i.e. Canadian Tire)*
	452999	*Other General Merchandise Stores (e.g. general stores, variety stores, "dollar" stores)*

Miscellaneous Retailers

160	**Sporting Goods, Hobby, Music and Book Stores**	
	45111	Sporting Goods Stores
	45112	Hobby, Toy and Game Stores
	45113	Sewing, Needlework and Piece Goods Stores
	45114	Musical Instrument and Supplies Stores
	45121	Book Stores and News Dealers
	45122	Pre-Recorded Tape, Compact Disc and Record Stores
190	**Miscellaneous Store**	
	45311	Florists
	45321	Office Supplies and Stationery Stores
	45322	Gift, Novelty and Souvenir Stores
	45331	Used Merchandise Stores
	45391	Pet and Pet Supplies Stores
	45392	Art Dealers
	45399	All Other Miscellaneous Store Retailers:
	453991	*Tobacco & Tobacco supplies*
	453992	*Artist Supplies*
	453993	*Collectors items (cards, stamps etc.)*
	453994	*Beer & Wine Making*
	453995	*Swimming Pool Accessories*
	453996	*Religious Goods and Accessories*

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

Map Number	Owner	Total Units	Single Detached	Semi Detached	Townhouses	Apartment	Built
Approved Development							
1	J. Stollar Construction	65	65	0	0	0	8
2	J. Stollar Construction	31	31	0	0	0	13
3	Little Lake Village Homes	38	0	0	38	0	7
4	Helicon Properties	6	0	0	6	0	0
5	Marina Park Resort	55	0	0	0	55	55
6	Georgian Landing	41	0	0	41	0	0
7	Captain's Cove	165	61	0	0	104	26
8	Tiffin Pier	92	0	0	0	92	92
9	Mundy's Harbour	12	0	0	12	0	0
Draft Approved Development **							
10	LRG Midland	163	8	40	115	0	0
11	Bay Port Village	570	63	0	177	330	0
12	Midland Bay Estates	100	79	0	21	0	0
13	Hanson Development	1126	570	0	556	0	0
14	Midland Shores	145	145	0	0	0	0
15	Tiffin By The Lake	47	47	0	0	0	0
16	Sunrise Pier	126	0	0	0	126	0
Application for Development **							
17	Pratt Homes	198	120	0	78	0	0
18	Sayward Investments	30	0	0	0	30	0

*** all plans that are not approved are subject to change*

Potential Development Lands

	Zoning	Area
19	RT-H & RA-H	6.6 ha
20	R1-H	4.4 ha
21	R1-H	4.2 ha
22	R1-H & EP	17.4 ha
23	I	0.5 ha
24	R1-H & OS	6.5 ha

Zoning Symbols
RT - Residential Townhouses Zone
R1 - Residential Zone "R1"
RA - Residential Apartment Zone
OS - Open Space Zone
EP - Environmental Protection
"H" - Holding Provision

Date: January 2009
Location: P:\Sherri\D02 Economic Development\Statistics_Table

APPENDIX E: Potential Intensification Sites