



Image Credit: Town of Orangeville

ORANGEVILLE LAND NEEDS ASSESSMENT AND COMMERCIAL MARKET ANALYSIS

PREPARED FOR TOWN OF ORANGEVILLE



2 March 2016,



Ms. Nancy Tuckett,
Director of Economic Development, Planning and Innovation,
Department of Economic Development, Planning and Innovation
Town of Orangeville
87 Broadway,
Orangeville, Ontario
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Dear Nancy,

RE: Orangeville Land Needs Assessment and Commercial Market Analysis

urbanMetrics inc. has been retained by the Town of Orangeville, together with MHBC, to evaluate the land needs for the Town of Orangeville as part of their five year review of their Official Plan. urbanMetrics inc. is pleased to submit our report which examines:

- The future demand for commercial space in the Town of Orangeville to full build out;
- Recommendations with respect to benefits of commercial/retail development relative to employment development;
- Market and economic recommendations in terms of types of employment uses for the currently vacant employment corridors (i.e. Hansen Boulevard, Veterans' Way, Parkinson Crescent, etc.);
- The economic impact and merits of the current and/or re-designation of the Humber Lands (12.02 ha) in the town (highest and best use);

We appreciate the opportunity to conduct this assignment on your behalf and we look forward to discussing the results of our report with you.

Yours truly,
urbanMetrics inc.



Rowan F.J. Faludi, MCIP, RPP, PLE, CMC
Partner

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1 Introduction

1.1 BACKGROUND

urbanMetrics inc. has been retained by the Town of Orangeville, together with MHBC, to evaluate the land needs for the Town of Orangeville as part of their five year Official Plan review. Based on the projected population and employment forecasts for the Town of Orangeville and the lands needs analysis prepared by MHBC (hereafter referred to as the “MHBC Study”), urbanMetrics has prepared a Commercial Demand and Market Analysis to identify the future commercial space required to meet the Town’s projected population growth. As part of the overall study, MHBC was requested to develop employment and land use targets based on the future allocation of reserved employment by Dufferin County. We have also considered the impacts to the land use needs arising from these employment targets. We have also prepared a review of the Labour Market in the Town of Orangeville and provided specific market recommendations to the Town on a number of land use issues.

1.2 OBJECTIVES

The purpose of the study is to provide direction to the Town of Orangeville regarding the future demand for commercial space, as well as providing strategic market recommendations in relation to the vacant employment and institutional lands that exist in the north-west of the Town.

Specifically, the fundamental inquiries of this study area addressed by urbanMetrics are as follows:

1. **What is the future demand for commercial space in the Town of Orangeville to full build out?**
2. **Recommendations with respect to benefits of commercial/retail development relative to employment development;**
3. **Market and economic recommendations in terms of types of employment uses for the currently vacant employment corridors (i.e. Hansen Boulevard, Veterans’ Way, Parkinson Crescent, etc.); and**
4. **The economic impact and merits of the current and/or re-designation of the Humber Lands (12.02 ha) in the town (highest and best use).**

1.3 APPROACH

The following provides an overview of the various work steps that have been undertaken by urbanMetrics in preparing this study

- **Collection, Review and Analysis of Relevant Background Materials**

We have collected and reviewed a variety of relevant background information from the Town of Orangeville, as well as through our own independent research. This includes a review of the Towns' existing Official Plan policies; Development Charges background studies, recent market demand and impact analyses undertaken in the Town of Orangeville; development application statistics; as well as population and employment forecasts prepared by the Town of Orangeville, Dufferin County and other nearby municipalities.

- **Determination of the Town of Orangeville's Market Characteristics**

We have undertaken a detailed demographic and trend analysis for the Town as a whole, including a review of the Town's growth projections, economic and labour characteristics and demographics.

- **Analysis of the Town of Orangeville's Commercial Needs Assessment**

We have undertaken a detailed per capita space market demand analysis by major store type; including Food Store Retail (FSR) and Non-Food Store Retail (NFSR) and Services. In particular, this analysis has relied on build out population estimates and this analysis has been used to project commercial space needs in the Town to full build out. Similarly, this analysis has also been used to determine how well the existing supply of commercial land and space will be able to accommodate existing and future retail and service commercial needs throughout this period.

- **Market Recommendations**

Based on the results of the various research and analysis described in the previous work steps, we have provided a summary of our key research findings and conclusions. We have also developed a number of recommendations as to how the Town should plan to best market its vacant employment corridors and the vacant Humber Lands including what future uses could be accommodated on these lands based on the Industrial, Commercial and Institutional (ICI) Land Use Analysis conducted by MHBC. For further details on the land needs assessments analysis, the "Land Needs Assessment, Town of Orangeville", 2016, prepared by MHBC should be referenced (the "MHBC Study"). The market recommendations prepared by urbanMetrics have considered the findings of the MHBC Study's "Land Needs Assessment". Cross-references to the MHBC Study are included as part of the urbanMetrics report. The urbanMetrics study should be read together with the MHBC Study.

1.4 ASSUMPTIONS

In any analysis requiring estimates of future conditions, it is necessary to make certain basic assumptions, as follows:

- Over the forecast period, a reasonable degree of economic growth and stability will prevail in Canada, Ontario and specifically in Dufferin County.
- The population and employment forecasts are assumed reasonable and will not vary significantly from actual counts in the future.

The findings and recommendations presented in this report represent our best judgment based upon the information available to us as of the date of our research.

If, for any reason, there are significant deviations from any of these assumptions, the report and its conclusions should be reviewed or re-examined.

2 Orangeville Market Characteristics

2.1 GROWTH PROJECTIONS

We have reviewed the growth projections at Provincial, County and Municipal level for Dufferin County and the Town of Orangeville to assess the potential growth of the Town's population and employment base. The results are summarised as follows.

2.1.1 Growth Plan for the Greater Golden Horseshoe

Amendment 2 to the Growth Plan for the Greater Golden Horseshoe ("Growth Plan") sets out the growth projections for the County of Dufferin. The County's population growth is projected to grow moderately to 2036 at a rate of 200 persons per year, increasing to 800 persons per year in the last years of the forecast, between 2036 and 2041.

Employment growth to 2036 is projected to grow at a significantly higher rate than the population growth. However, it is projected to slow down in the five year period to 2041.

Figure 2-1: Growth Plan Projections: Dufferin County

| GROWTH PLAN, AMENDMENT NO. 2 PROJECTIONS | | | |
|---|-------------|-------------|-------------|
| County of Dufferin | 2031 | 2036 | 2041 |
| Population | 80,000 | 81,000 | 85,000 |
| Annual Growth | | 200 | 800 |
| Average Annual Growth Rate | | 0.3% | 1.0% |
| Employment | 29,000 | 31,000 | 32,000 |
| Annual Growth | | 400 | 200 |
| Average Annual Growth Rate | | 1.4% | 0.6% |

SOURCE: Schedule 3 Distribution of Population and Employment for the Greater Golden Horseshoe to 2041, Amendment 2 to the Growth Plan for the Greater Golden Horseshoe (2013).

2.1.2 Dufferin County Official Plan

The Dufferin County Official Plan ("County Official Plan") was approved in March 25, 2015 and is now in effect with the exception of three sections which are under appeal. The growth allocations are not subject to any of these appeals. At the time of the Official Plan's preparation, the County was unable to distribute the total population and employment growth allocated. As a result, there are reserved future population and employment allocations to 2036. The reserved population is intended to be accommodated within the three urban settlements (i.e. Town of Orangeville, Town of Shelburne and Town of Grand Valley).

The Dufferin County Official Plan allocates the County's overall population growth projections, as follows:

Figure 2-2: County of Dufferin: Population Forecasts

| COUNTY OF DUFFERIN, POPULATION FORECASTS AND ALLOCATIONS TO LOCAL MUNICIPALITIES | | | |
|---|--|---------------|---------------|
| | 2011 (excluding under- count) | 2031 | 2036 |
| Orangeville | 27,975 | 36,490 | 36,490 |
| Shelburne ¹ | 5,846 | 8,400 | 8,400 |
| Grand Valley | 2,726 | 7,478 | 7,503 |
| Amaranth | 3,963 | 4,680 | 4,710 |
| East Garafraxa | 2,595 | 3,150 | 3,180 |
| Melancthon | 2,839 | 3,410 | 3,430 |
| Mono | 7,546 | 9,770 | 9,890 |
| Mulmur | 3,391 | 4,290 | 4,340 |
| Sub-Total Excluding Future Reserved Allocation | | 79,268 | 79,543 |
| Future Reserved Allocation | | 2,332 | 3,057 |
| Total for the County of Dufferin | 56,881 | 80,000 | 81,000 |

SOURCE: Dufferin County Official Plan, Table 3.2a (Approved: March 25, 2015)

¹ 1,600 persons of Future Reserved Allocation is intended to be accommodated in Shelburne for a total of 10,000 persons.

The Dufferin County Official Plan allocates the County's overall employment growth projections, as follows:

Figure 2-3: County of Dufferin: Employment Forecasts

| COUNTY OF DUFFERIN, EMPLOYMENT FORECASTS AND ALLOCATIONS TO LOCAL MUNICIPALITIES | | | |
|---|-------------------|---------------|---------------|
| | Employment | | |
| | 2011 Stats | 2031 | 2036 |
| | Canada | | |
| Orangeville | 14,681 | 14,740 | 14,740 |
| Shelburne | 2,866 | 3,560 | 3,560 |
| Grand Valley | 634 | 1,190 | 1,190 |
| Amaranth | 701 | 810 | 810 |
| East Garafraxa | 295 | 570 | 570 |
| Melancthon | 332 | 380 | 380 |
| Mono | 1,851 | 2,020 | 2,020 |
| Mulmur | 640 | 820 | 820 |
| No Fixed Place of Work Employment | | 2,910 | 2,910 |
| Future Reserved Allocation | | 2,000 | 4,000 |
| Total for the County of Dufferin | 22,000 | 29,000 | 31,000 |

SOURCE: Dufferin County Official Plan, Table 3.2a (Approved: March 25, 2015)

The County is projected to increase its employment base by 9,000 jobs between 2011 and 2036. Based on these projections, there is negligible employment growth projected between now and 2031 (and 2036) for the Town of Orangeville. However, there are an additional 4,000 jobs planned to 2036 as a "future reserved allocation" which are not yet allocated. The reserved employment growth is to be allocated within the urban settlements and community settlement areas.

Based on the existing allocations, the Town of Orangeville is expected to accommodate at least 45% of the County's total population base of 81,000 and 48% of the total employment base by 2036 (excluding allocations in reserve).

2.1.3 Town of Orangeville Official Plan

The Town of Orangeville Official Plan ("Official Plan") was approved by the Ministry on October 21, 1985 and was last consolidated on September 24, 2013. Section C2 of the Official Plan sets out the growth projections for the Town of 36,490 persons and 14,740

jobs by 2031. These projections are in line with the Dufferin County 2031 projections. The Official Plan also recognises that the population projections are contingent on adequate sewage capacity and water supply to accommodate the additional growth.

2.1.4 Population Forecast Summary

Based on the population projections reviewed by the MHBC Study, which considers the growth projections prepared for the Town as part of the Watson & Associates 2014 Development Charges Background Study (“Watson Study”) as well as servicing capacity, a future population of 36,490 persons is projected for the Town. This would result in an increase of **6,950 persons** between early 2014 and full build out.

2.1.5 Employment Forecast Summary

Based on the population increase to 36,490 persons as forecasted in the Watson Study, total employment for the Town of Orangeville (excluding work at home and No Fixed Place of Work (NFPOW) employment) is anticipated to reach approximately 12,230 at buildout based on Watson Study¹. The resulting increase in employment growth as a result is 870 jobs.

As discussed in Section 2.1.2, the Dufferin County Official Plan has not allocated additional employment growth to the Town of Orangeville at this time. However, we note that the County’s projections include 4,000 jobs that are reserved for future allocation. As the Town of Orangeville is the largest and most urbanised settlement in Dufferin County, the logical location for the majority of these jobs will be to the Town. As part of this overall study, MHBC have prepared employment *targets* based on achieving a target ratio of 1 job for every two persons which results in a total target of **3,475 jobs at full build out**. This approach is discussed in further detail in Section 3 of the MHBC Study which states that establishing a target will guide the Town toward being a complete community in conformity with the Growth Plan and County Plan.

Utilizing the same breakdown in employment growth sectors completed in the Watson Study, MHBC have provided a breakdown of the total targeted 3,475 jobs. These *employment targets* have been replicated for reference purposes in the following table.

¹ Discrepancies between total employment forecasts for the Town of Orangeville are due to the inclusion of Work at Home jobs. Dufferin County employment projections for the Town of Orangeville exclude “Work at Home”. Town of Orangeville employment projections include “Work at Home”.

Figure 2-4: Employment Targets

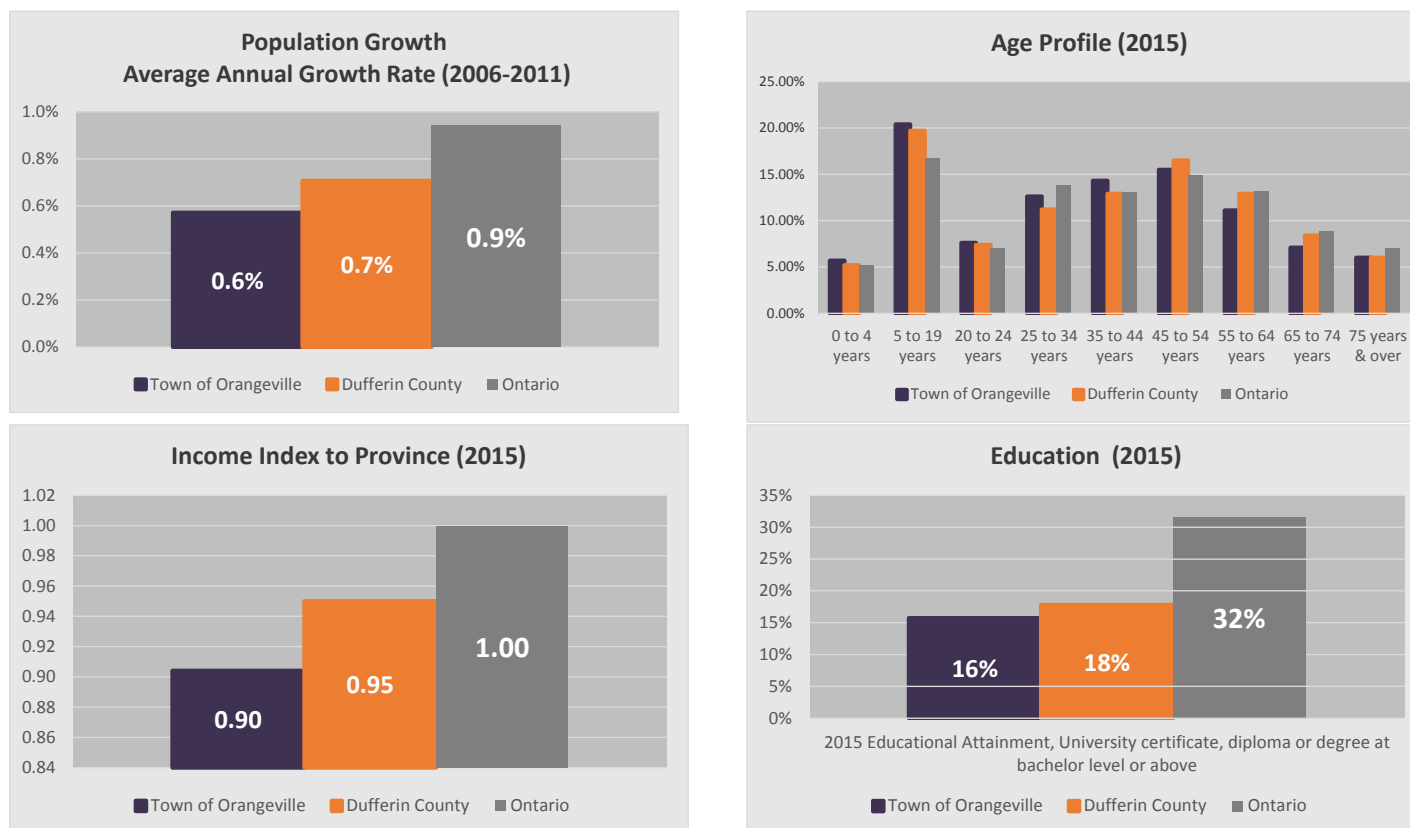
| Type | Future Jobs | New Jobs |
|---------------|-------------|--------------|
| Industrial | 61% | 2,120 |
| Commercial | 30% | 1,043 |
| Institutional | 9% | 313 |
| Work at Home | n.a. | n.a. |
| Total | 100% | 3,475 |

SOURCE: MHBC Land Needs Assessment, Town of Orangeville, 2016, Table 8

2.2 DEMOGRAPHIC CHARACTERISTICS

The following section provides a comparative review of the Town of Orangeville's demographics to Dufferin County and the Province. Overall, the Town of Orangeville's population is younger and each household is slightly larger than average. The Town of Orangeville has lower income levels, lower education attainment levels and has grown at historically lower rates than both the Province and County.

Figure 2-5: Demographic Indicators



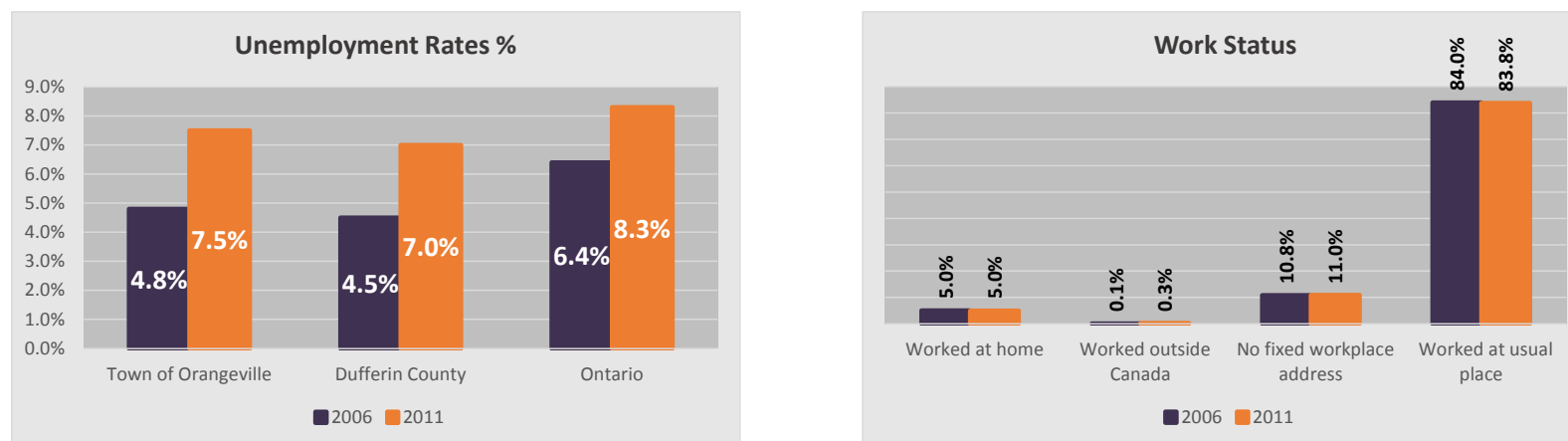
SOURCE: urbanMetrics inc. based on Statistics Canada (2006 Census and 2011 National Household Survey) and 2015 Environics Analytics data.

2.3 LABOUR MARKET

Based on Statistics Canada 2011 National Household Survey, the Town of Orangeville had an unemployment rate of 7.5%. While lower than the Provincial average, it is slightly higher than the 7% rate in Dufferin County at that time. The Town's unemployment rate has increased significantly from 4.8% in 2006. A similar rise in County-wide unemployment rates also occurred during this time

period. Both the Town and County have experienced increases in their unemployment rates at a much higher levels than the Province.

Figure 2-6: Labour Market



SOURCE: urbanMetrics inc. based on Statistics Canada (2006 Census and 2011 National Household Survey).

Note: Dufferin County includes the Town of Orangeville for all Labour Market Indicators including unemployment rates)

There has been little change to the overall composition of work place categorization (i.e. work status) in which Orangeville residents are employed. Based on commuting flows, 55% of all residents travel outside of the Town of Orangeville for work. Mississauga and Brampton each account for 14% of all journey-to-work trips. The proportion of residents who travel outside of the Town for work (i.e. outflow) is higher than the inflow of workers to the Town. Out-of-town workers are attracted from a range of places owing to the Town's proximity to a wide range of rural communities. Approximately 21% of these commuters travel from Mono, Caledon and Shelburne. (See Appendix A for further details).

With respect to the number of jobs in each employment industries in the Town of Orangeville, as shown in Figure 2-7, the key change in the types of industries employing workers is the decline in occupations relating to manufacturing since 2006. In the same time, there Town has experienced increases in more service and healthcare orientated industries.

While this employment data points to the general scale and trends within each NAICS (North American Industrial Classification System) category, it has certain limitations that must be recognized. First, due to the changing nature of Statistics Canada data, the three years shown in this table are not directly comparable. The 2006 figures are considered most reliable as they are based on the 2006 Census (20% survey). The 2011 figures are derived from the less reliable Household Voluntary Survey completed in tandem with the 2011 Census, while the 2014 figures are estimates compiled by Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) analyst web-based tool prepared for the *Town's Orangeville Annual Economic Development Report 2014*.

As shown in Figure 2-7, between 2006 and 2014 the number of manufacturing jobs has declined by 34% (i.e. a decline of 776 employees). However, the data suggests that most of this decline occurred between 2006 and 2011, with a slight upsurge in manufacturing jobs in more recent years between 2011 and 2014 (+169).

In the same period between 2006 and 2014, the top industries with the biggest gains in actual job numbers include Health Care and Social Assistance (+450 jobs); Construction (+237 jobs); Accommodation and Food Services (+204 jobs); Retail Trade (+194 jobs); Administrative and support waste management and remediation services (+188 jobs); Information and cultural industry (+164 jobs); and Finance and insurance (+124 jobs)

The industries which showed the highest levels of relative growth in that same period, include Information & cultural industries (increase of 76%); Construction (+64%); Public Administration (+48%); Administrative and support waste management and remediation services (+42%); Finance and insurance (+35%) and Health care and social assistance (+30%).

As noted above there was a very significant decline in manufacturing employment between 2006 and 2014. This is consistent with broader statistical trends, although the figures shown on the table may not be precise owing to the different employment survey methodologies. The smaller changes between periods are less likely to be conclusive.

Secondly, the NAICS categories were not designed from a land use perspective, so that a translation of the size of each category or changes over time into the need for specific land uses (e.g. employment lands, commercial, institutional etc.) is very complex and will vary between municipalities.

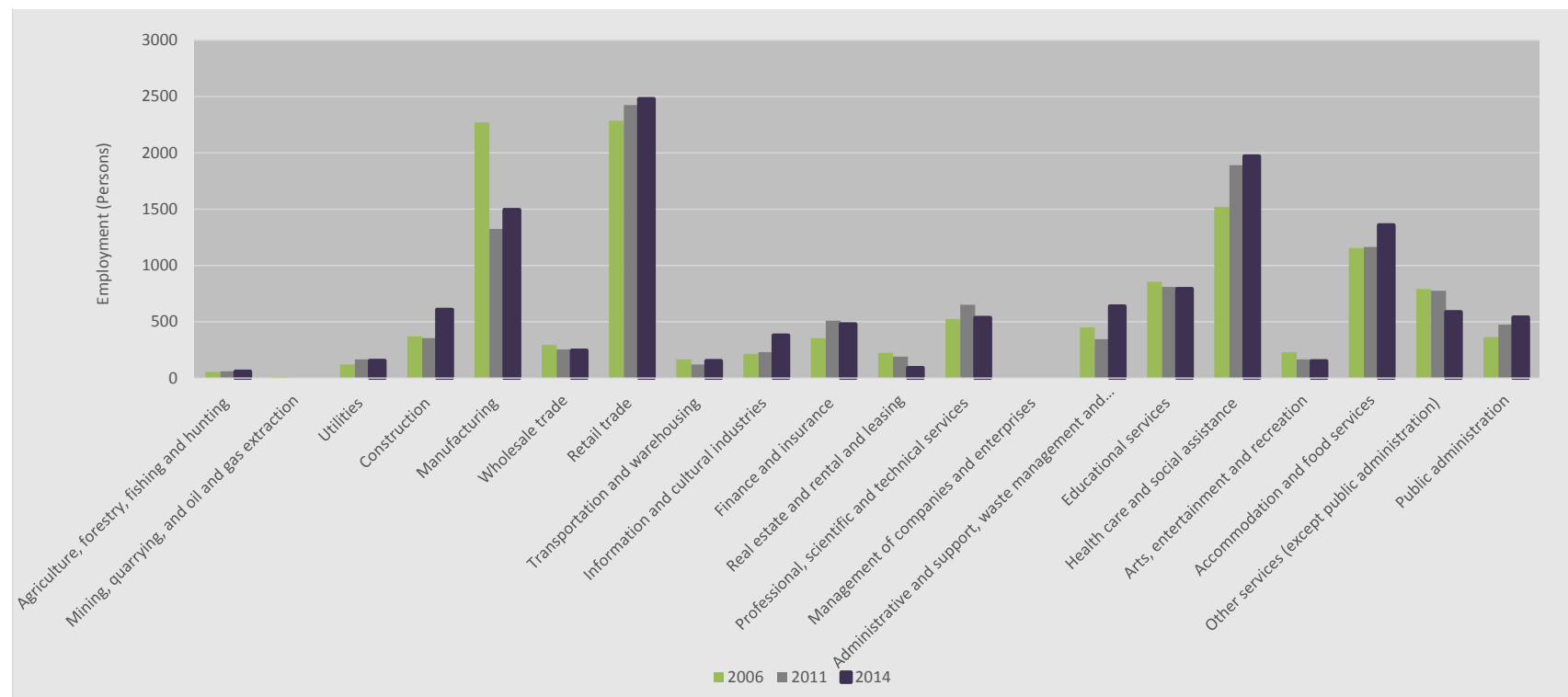
For example, the Finance and Insurance category includes head office functions that would locate in major office buildings; as well as; a wide array of bank branches; lending outlets; and small scale agencies that would be more likely to locate in retail or smaller scale commercial outlets. Growth in this category in a small to mid-sized community, such as Orangeville may not translate into a need for specialised office space, as it may be of the type more appropriately accommodated within retail commercial facilities.

Information and cultural industries includes a wide range of employment types, such as film and recording studios, producers, as well as, movie theatres, and film festivals. Growth in this type of employment may require large studio space, such as might be accommodated in employment lands, but would also require a wide range of other types of space, including traditional office space and home-offices, as well as movie theatres.

Health care and social assistance would include hospitals, clinics, a wide range of social service providers, as well as day-care centres.

As a result, this data should be used as a general guide to employment trends within the community, but not as a definitive source to explain land use needs.

Figure 2-7: Employment by Industry: Town of Orangeville (2006, 2011 and 2014) - Graph



SOURCE: Statistics Canada, Place of Work data (2006 & 2011); and Town of Orangeville, "Orangeville Annual Economic Development Report 2014" by Town of Orangeville Economic Development/ SBEC, Sector Performance data compiled by OMAFRA Analyst Data EMSI 2014.3

Figure 2-8: Employment by Industry: Town of Orangeville (2006, 2011 and 2014) - Data

| Industry | 2006 | 2011 | 2014 | 2006 to 2014 | |
|---|---------------|---------------------------|--|-------------------------|-----------------------------|
| | Census | National Household Survey | Town of Orangeville, OMAFRA Analyst Data | Change (#) 2006 to 2014 | % Change Increase/ Decrease |
| Agriculture, forestry, fishing and hunting | 55 | 60 | 58 | 3 | 5% |
| Mining, quarrying, and oil and gas extraction | 10 | - | - | -10 | -100% |
| Utilities | 120 | 165 | 154 | 34 | 28% |
| Construction | 370 | 355 | 607 | 237 | 64% |
| Manufacturing | 2,270 | 1,325 | 1,494 | -776 | -34% |
| Wholesale trade | 295 | 255 | 245 | -50 | -17% |
| Retail trade | 2,285 | 2,425 | 2,479 | 194 | 8% |
| Transportation and warehousing | 165 | 120 | 152 | -13 | -8% |
| Information and cultural industries | 215 | 230 | 379 | 164 | 76% |
| Finance and insurance | 355 | 510 | 479 | 124 | 35% |
| Real estate and rental and leasing | 225 | 190 | 91 | -134 | -60% |
| Professional, scientific and technical services | 525 | 650 | 535 | 10 | 2% |
| Management of companies and enterprises | - | - | - | - | 0% |
| Administrative and support, waste management and remediation services | 450 | 345 | 638 | 188 | 42% |
| Educational services | 855 | 810 | 792 | -63 | -7% |
| Health care and social assistance | 1,520 | 1,890 | 1,970 | 450 | 30% |
| Arts, entertainment and recreation | 230 | 165 | 151 | -79 | -34% |
| Accommodation and food services | 1,155 | 1,165 | 1,359 | 204 | 18% |
| Other services (except public administration) | 790 | 775 | 587 | -203 | -26% |
| Public administration | 365 | 475 | 539 | 174 | 48% |
| TOTAL EMPLOYMENT | 12,255 | 11,910 | 12,709 | 454 | 4% |

SOURCE: Statistics Canada, Place of Work data (2006 & 2011); and Town of Orangeville, "Orangeville Annual Economic Development Report 2014" by Town of Orangeville Economic Development/ SBEC, Sector Performance data compiled by OMAFRA Analyst Data EMSI 2014.3
 Industry classification based on North American Industry Classification System (NAICS) 2007

3 Commercial Market Analysis

3.1 COMMERCIAL SUPPLY

Based on recent work conducted by urbanMetrics in 2010, there was approximately 1.3 million square feet of food and non-food retail space, excluding services, in the Town of Orangeville². There was an estimated 235,100 square feet of service space in the downtown area. Large vacant units at that time included the 31,000 square feet former Sobeys supermarket at Westdale Mall on Broadway. This space has since re-opened under the FreshCo banner.

The Town's newest commercial area, the Westside Market Village located on Riddell Road, includes this relocated Sobeys as its anchor tenant (46,000 square feet). Other big box stores that have developed in the Westside Market Village include the Brick, LCBO, Dollarama and a number of other retailers. Directly opposite the Westside Market Village is the Westside Business Centre (50,519 square feet), which is a mixed use plaza anchored by Sears, Fabricland and Anytime Fitness. In 2012, the Town approved OPA 111 that re-designated the site from Employment Area to Neighbourhood Commercial to permit commercial uses in the existing building. There are a number of available commercial units in both these new commercial areas.³

Other notable changes to the commercial market since 2010 include the re-tenanting of the former Zellers, located at Orangeville Mall, to a HomeSense and SportChek.

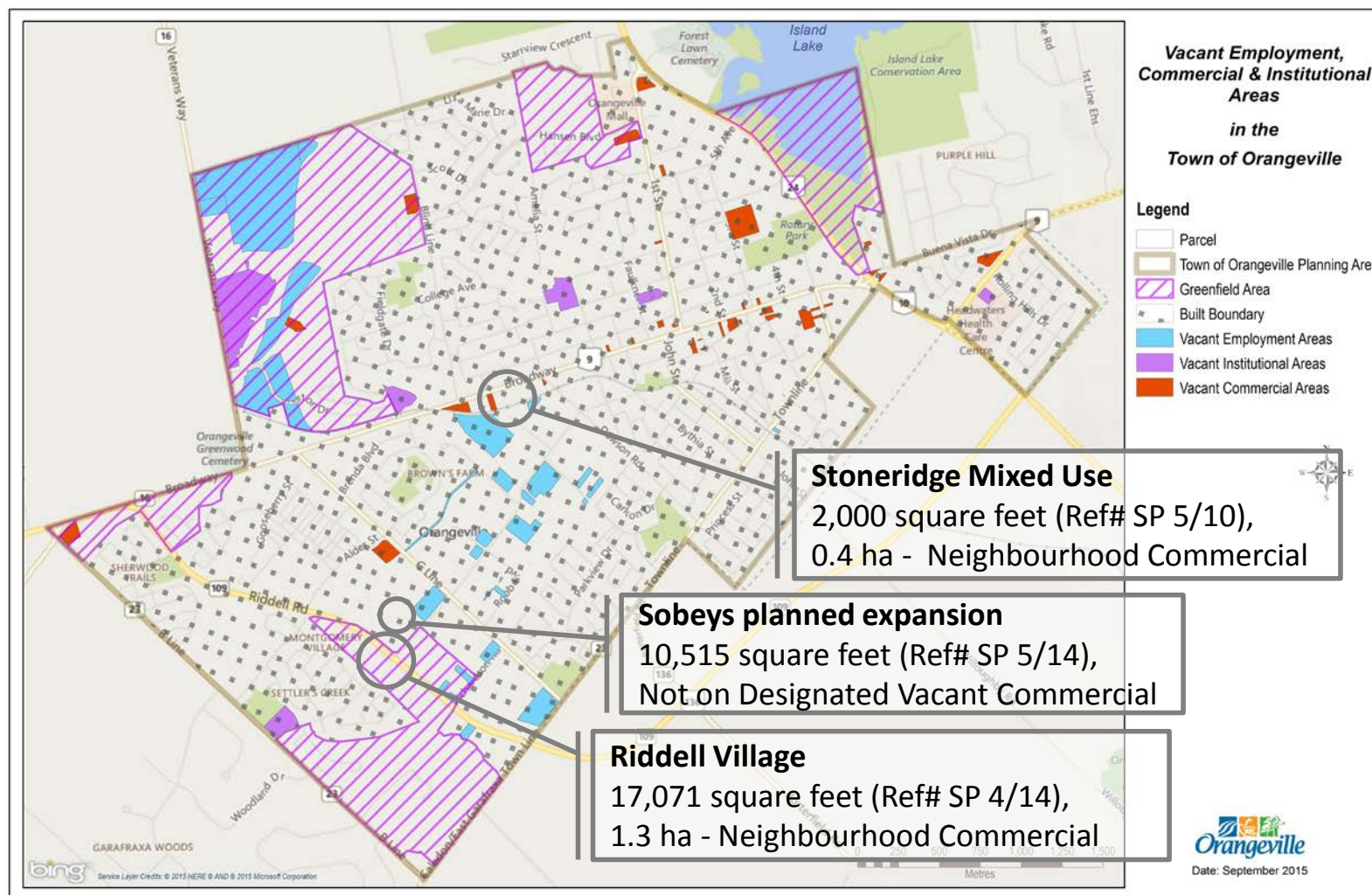
Based on a review of the Town of Orangeville's development applications, there are three key commercial applications of note⁴.

² Peer Review of the September 10, 2010, *Retail Market Demand and Impact Analysis, Town of Orangeville*, prepared by Tate Economic Research Inc. ("TER") on behalf of Southdown Builders (Wesdale) Limited.

³ <http://www.blackwoodpartners.com/retail-opportunities/Details/24llage>
<http://www.blackwoodpartners.com/retail-opportunities/Details/25/westside-business-centre-riddell-road-centennial-road-orangeville-ontario>

⁴ Town of Orangeville, Current Official Plan and Zoning Amendments and Other Planning Applications, February 2015 (accessed October 2015).

Figure 3-1: Development Applications with Commercial Space Proposed



SOURCE: urbanMetrics based on development application information provided by the Town of Orangeville.

The proposed Riddell Village, located at Riddell Road and Spencer Avenue includes approximately 17,071 square feet of commercial space and is expected to include three restaurants, a pharmacy, a gas station, a convenience retail building and two commercial units⁵. The proposed development has been approved through settlement at the OMB.

The second application of note includes the expansion of the existing Sobeys by approximately 10,000 square feet.

A third application relates to a four-storey mixed use building on Broadway by Stoneridge Holdings that includes two commercial units (approximately 2,000 square feet in total) and forty -three apartment units.

We are also aware that the Town recently refused a proposed development at the South West Corner of C Line & Alder Street by 2203256 Ontario Ltd. Leaders Group. The applicants sought an Official Plan Amendment and re-zoning to allow a mixed use development (from Neighbourhood Commercial to Neighbourhood Mixed Use). The application is currently under appeal to the Ontario Municipal Board. The site has existing permission for a 30,000 square feet commercial plaza. The current applicants are seeking a re-designation of the site to include residential uses and less than 4,000 square feet of commercial space, reasoning that the commercial facility is not economically feasible for the property⁶. We have excluded the site from consideration in terms of planned commercial space given the uncertainty regarding the future development concept for this site.

Based on the above therefore, there is approximately **29,600 square feet** (rounded) of commercial space in the development pipeline.

We also note that there are Employment Lands located in the north-west of the Town in an area referred to as Veteran's Way South Community that are subject to a Specific Area Policy in the Town of Orangeville Official Plan which includes a provision for commercial facilities to serve the immediate residential community and planned Humber College campus (Policy E8.64). For the purposes of this study, the lands are considered part of the vacant employment land inventory. However, we recognise that these lands may also accommodate future commercial space.

3.2 COMMERCIAL DEMAND

For selected retail and service categories, a per capita space analysis has been undertaken. This approach applies typical space per capita ratios to the forecast population growth to estimate future market need (i.e. the addition of 6,950 persons) recognizing that typical space needs requirements are usually in the 40± square feet per capita range.

⁵ <http://www.orangeville.ca/documents/2015/08/10/august-10-2015-council-news>

⁶ Based on Report PL-2014-36, Town of Orangeville, Council Meeting Agenda, December 8, 2014

The following summarizes the methodology and assumptions utilized in our analysis, which is detailed in Figure 3-2:

Column A:

Based on our experience in other similar sized Ontario markets, as well as our review of the existing retail/service supply situation in Orangeville, we have estimated new residents' space per capita space requirements for each retail and service category.

Column B:

The space per capita ratios are applied to the anticipated population to provide an estimate of the total space required by new residents. This space would include locations both within Orangeville and elsewhere (i.e. Brampton and Caledon).

Column C:

Target local shares, or the percentage of space that could be supported locally in Orangeville by new residents have been estimated for food store retailers (FSR), non-food store retailers (NFSR), and a range of service establishments. We have not included department stores or building/ out-door supply stores in our calculations recognizing that certain population thresholds are required to support store types of this type and scale.

The Orangeville shares have been varied by category. For local serving retail and services (e.g. supermarkets, convenience food, health care, personal services), a higher target local share has been utilized, with lower target shares for comparison goods (e.g. general merchandise, apparel, home furnishings) and services which could be served regionally.

Column D:

The target local shares have been applied to the square feet that could be supported by Study Area residents in Orangeville to calculate the supportable space locally by new residents

Column E:

In Column E, we have estimated inflow factors. The inflow factors generally reflect what could be achieved on the subject site and assume that some sales would be derived from elsewhere due to the location of the site on Highway 10, a major route through this area of Ontario.

Column F:

An estimate of the total space that could be supported in Orangeville, including inflow from outside residents, has been calculated in Column F. The resulting figures indicate the amount of additional retail and service space would be warranted in Orangeville to build out.

Figure 3-2: Per Capita Space Analysis (Square Feet)

| Category | Orangeville Residents Per Capita Space Requirements (1) | Total Space Required by Future New Orangeville Residents | Target Trade Area Capture Rate | Orangeville Space Supported by Future New Orangeville Residents | Inflow | Total Demand for Space in Orangeville by Future New Residents (rounded) |
|--|---|--|--------------------------------|---|----------|---|
| Study Area | A | B | C | D | E | F |
| Population Growth to Build Out 6,950 | | (A X Pop'n) | | (B X C) | | D/(1-E) |
| FOOD STORE RETAIL (FSR) | | | | | | |
| FSR: Convenience & Specialty Food | 1.2 | 8,340 | 90.0% | 7,506 | 20% | 9,400 |
| FSR: Supermarket & Grocery | 3.8 | 26,410 | 90.0% | 23,769 | 20% | 29,700 |
| SUB TOTAL | 5.0 | 34,750 | 90.0% | 31,275 | | 39,100 |
| NON FOOD STORE RETAIL (NFSR) | | | | | | |
| NFSR: Department Store | 5.0 | 34,750 | 0.0% | 0 | 20% | 0 |
| NFSR: Other General Merchandise (e.g. Canadian Tire) | 1.5 | 10,425 | 80.0% | 8,340 | 20% | 10,400 |
| NFSR: Building & Outdoor Supply Stores | 3.0 | 20,850 | 0.0% | 0 | 20% | 0 |
| NFSR: Health and Personal Care Stores | 1.5 | 10,425 | 80.0% | 8,340 | 20% | 10,400 |
| NFSR: Clothing & Accessories Stores | 2.0 | 13,900 | 50.0% | 6,950 | 20% | 8,700 |
| NFSR: Furniture, Home Furnishings & Electronics Stores | 3.0 | 20,850 | 50.0% | 10,425 | 20% | 13,000 |
| NFSR: Selected Automotive | 0.5 | 3,475 | 75.0% | 2,606 | 20% | 3,300 |
| NFSR: Other (Sporting Goods, Hobby stores etc.) | 4.5 | 31,275 | 60.0% | 18,765 | 20% | 23,500 |
| SUB TOTAL | 21 | 145,950 | 38.0% | 55,426 | | 69,300 |

Continued....

Figure 3-3: Per Capita Space Analysis continued (Square Feet)

| Category | Orangeville Residents Per Capita Space Requirements (1) | Total Space Required by Future New Orangeville Residents | Target Trade Area Capture Rate | Orangeville Space Supported by Future New Orangeville Residents | Inflow | Total Demand for Space in Orangeville by Future New Residents (rounded) |
|---|---|--|--------------------------------|---|--------------|---|
| | A | B (A X Pop'n) | C | D (B X C) | E | F D/(1-E) |
| Study Area | | | | | | |
| Population Growth to Build Out 6,950 | | | | | | |
| OTHER RETAIL | | | | | | |
| Other: Liquor / Beer / Wine | 0.5 | 3,475 | 85.0% | 2,954 | 20% | 3,700 |
| SUB TOTAL | 0.5 | 3,475 | 85.0% | 2,954 | | 3,700 |
| SERVICES | | | | | | |
| Services: Financial Services (including banks & other financial) | 1.0 | 6,950 | 75.0% | 5,213 | 20% | 6,500 |
| Services: Eating & Drinking Establishments | 3.5 | 24,325 | 75.0% | 18,244 | 40% | 30,400 |
| Services: Personal Care Services | 1.5 | 10,425 | 90.0% | 9,383 | 10% | 10,400 |
| Services: Entertainment & Fitness Establishments | 3.0 | 20,850 | 80.0% | 16,680 | 10% | 18,500 |
| Services: Other Services (e.g. auto-repair, educational services) | 2.5 | 17,375 | 70.0% | 12,163 | 20% | 15,200 |
| Services: Insurance and Real Estate Services | 0.8 | 5,560 | 70.0% | 3,892 | 20% | 4,900 |
| Services: Health Care Services | 1.5 | 10,425 | 75.0% | 7,819 | 20% | 9,800 |
| Services: Professional, Scientific & Technical Services | 0.8 | 5,560 | 75.0% | 4,170 | 20% | 5,200 |
| TOTAL | 15 | 101,470 | 76.4% | 77,562 | | 100,900 |
| GRAND TOTAL | 41 | 285,645 | 58.5% | 167,217 | 27.4% | 213,000 |

SOURCE: urbanMetrics inc.

1) urbanMetrics inc. estimates based on our market experience and existing service levels in Orangeville. Rounded to the nearest 100.

As indicated in Figure 3-2 and Figure 3-3, based on future population growth and our target shares and inflow factors, additional retail and service space will be required in Orangeville in future years. By total build out, an **estimated 213,000 square feet** of additional retail and service space could be accommodated in Orangeville.

3.3 RECONCILIATION OF SUPPLY & DEMAND – COMMERCIAL SPACE

Based on the results of our per capita space analysis, it is estimated that there is market demand for **213,000 square feet** of commercial space in Orangeville. To determine what this means in terms of demand for commercial lands, we must first consider what factors are influencing the supply of commercial space and how this impacts the overall demand for space.

Based on the review of development applications in Section 3.1, we conservatively estimated that there is the potential to develop **29,600 square feet of commercial space in the near future** (potentially more pending the outcome of the appeal on lands located at C Line & Alder Street). The 231,000 square feet warranted commercial space, less this 29,600 square feet of commercial space proposed in the development application pipeline results in a net demand for approximately **183,400 square feet of additional commercial space**.

3.4 RECONCILIATION OF SUPPLY & DEMAND – COMMERCIAL LANDS

In estimating the amount of commercial land that would be required to facilitate 183,400 square feet, we have applied a lot coverage estimate.

Based on a conservative lot coverage rate of 25% lot coverage, we estimate that **6.8 hectares** of commercial land would be required to accommodate 183,400 square feet (and serve the needs of an additional 6,950 persons in Orangeville). We recognise that the demand for commercial lands could be less than this if higher lot coverage rates were to be achieved, through mixed use development.

Based on the vacant land inventory prepared by the Town of Orangeville and MHBC, there are 14.6 hectares of vacant commercial lands in Orangeville (MHBC Land Needs Assessment, Town of Orangeville, 2016, Table 10). Excluding the lands subject to development applications reviewed in Section 3.1 - Commercial Supply, the remaining supply of vacant commercial lands is 11.9 hectares.

As the additional population will only require an estimated 6.8 hectares of vacant commercial land to accommodate their future commercial needs, this suggests an over-supply of commercial lands amounting to **5.1 hectares**. This over-supply could in fact be even greater given that the existing commercial uses in the Town can be expected to accommodate a portion of these needs within the community and particularly those that are convenience and local serving uses. Additionally, some of the space needs could also

be accommodated in existing vacant units in Orangeville such as at the new commercial centres described in Section 3.1, as well as opportunity for some commercial uses on the Employment Lands in the Veteran's Way South Community.

Overall therefore, there is a sufficient supply of designated commercial lands to meet the projected demand from new population.

The vacant Commercial Land inventory shows a wide range of commercial designated sites within the Town to suit the market needs of new retailers. In terms of serving the local needs of new residents, a review of the designated vacant neighbourhood commercial sites in the Town show that these sites are located close to developing residential areas and are expected to serve the needs of new residents.

3.5 COMPARISON WITH MHBC COMMERCIAL LAND USE PROJECTIONS

It is important to note that this 6.8 ha of commercial land use demand relates to traditional retail and service uses commonly found in urban commercial areas i.e. in shopping centres, plazas and downtown commercial cores. The MHBC Study, conducted on the basis of targeting 1 job for each two persons, establishes a target number of "Commercial Employment" jobs which we have summarised previously in Figure 2-4.

Based on the targeted 1,043 *Commercial Employment* jobs, the MHBC Study suggests that this would result in demand for 22.5 ha of commercial land, which is notably higher than the demand for 6.8 ha projected by our market analysis. (Please refer to *MHBC Study, Table 12: Overview of ICI Land Demand and Land Supply in Orangeville*).

However, the two definitions of commercial in this instance differ significantly as the types and range of jobs categorised as *Commercial Employment* are much wider than the types of retail uses considered in a typical market analysis. For example, *Commercial Employment* include jobs associated with accommodations (i.e. hotels/ motels), a broad range of arts, entertainment and recreational facilities (i.e. golf courses, museums, recreation facilities), establishments such as funeral homes, places of worship and institutions as well as jobs such as domestic servants/ maids among many others. The resulting demand for commercial land use based on an employment target approach will be much higher than the retail market analysis as it includes a much broader range of jobs/ land uses.

It is also important to recognise that the retail and services space market projections conducted by us are directly related to the needs of the future population. For the most part, the other uses in the *Commercial Employment* analysed by MHBC are associated with very different demand characteristics (such as golf courses, funeral homes and cemeteries, recreation and entertainment, professional and community organisations, accommodations etc.) and would be more sporadic in terms of development phasing and timing. The MHBC target of 22.6 hectares would include both retail and these other uses. For this reason, the market based demand projection of 6.8 ha of commercial land to serve the projected population increase of 6,950 persons is considered to be the most appropriate methodology in assessing the future designated retail commercial land needs.

4 Issue #1: Commercial/ Retail Development vs Employment Development

The Town has asked for our recommendations with respect to the benefits of commercial/retail development relative to more traditional employment development. As shown in Figure 4-2, “Retail Trade” is now the second largest industry in Canada in terms of employment (second to Health Care and Social Assistance). Therefore, retail employment represents a key opportunity to provide significant employment opportunities to meet the needs of the growing Town’s population base. A retail building typically provides 3 to 5 times as many jobs as the same sized industrial building. It also provides important socio-economic benefits such as a gateway to the workforce for youths as well as flexible employment for older adults. The retail trade industry also acts as an incubator for small businesses.

In Section 2.3, we reviewed the employment trends within each NAICS category for the Town of Orangeville based on available data (Figure 2-7). One of the categories that showed significant recent job growth is “Retail Trade”. Other categories with high growth rates were Health Care and Social Assistance; Accommodation and Food Services; Administrative and support waste management and remediation services; Information and cultural industry; and Finance and insurance. Many of these other growing industries can be accommodated in retail commercial structures. Commercial structures that house retail facilities, e.g. shopping centres, plazas, street front units, etc. are both very flexible in the type of employment that they can maintain and very adaptable to changing demand patterns.

Although in most commercial structures, “Retail Trade” is the most common NAICS code among businesses, it is very common that for many commercial structures to house businesses in a broad range of NAICS categories. For example,

- Finance and Insurance (e.g. banks, financial advisory offices);
- Information and Cultural Industries (e.g. cinemas, cell phone outlets)
- Real Estate and Real Estate Leasing (e.g. real estate offices, mall management offices)
- Educational services (e.g. commercial schools, learning and language centres)
- Health and social assistance (e.g. doctors/dentist offices, day care centres)
- Accommodation and food services (restaurants, fast food outlets)
- Other services (e.g. dry cleaners, hair salons)
- Public administration (e.g. government service centres, libraries)

- Administrative and Support, Waste Management and Remediation (e.g. travel agencies, employment centres)
- Professional, Scientific and Technical Services (e.g. tax preparation offices, veterinary clinics)

Many of these non-retail uses require street front access to serve their clientele and would commonly locate in retail commercial buildings.

It is also important to note that many retail facilities have the ability to be transitioned to other uses as economic conditions changed. Large retail vacant units, for example, are now being converted to call centres, government and community offices, public libraries, schools, courthouses, and medical centres.

Notwithstanding this, industrial development will continue to be important to the town in terms of accommodating a range of employment generating uses, such as manufacturing and distribution facilities, as well as other uses that are not appropriate for commercial lands. However, we caution that over-designating employment lands is a financial risk when traditional employment sectors are in decline, and could result in the loss of tax and development charge revenues from more readily marketable uses.

Furthermore, the employment data presented in Figure 2-7 suggests a reduction in the Town's manufacturing/warehousing employment which implies a reduced need for facilities and land to accommodate these types of jobs. This reduction of 776 manufacturing jobs between 2006 and 2014 indicates that the existing manufacturing operations are likely operating with reduced staffing levels. As a result, there may be excess capacity within the existing structures/ buildings as manufacturing uses operate on reduced staff levels. A portion of the future growth in the traditional employment sectors may therefore be accommodated in existing employment areas and buildings, as may not necessarily require significant new built space.

Overall, based on the significant role that retail can play in accommodating employment opportunities, the Town of Orangeville should encourage the benefits of supporting commercial/ retail development uses as legitimate employment generators.

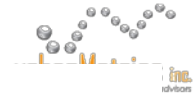
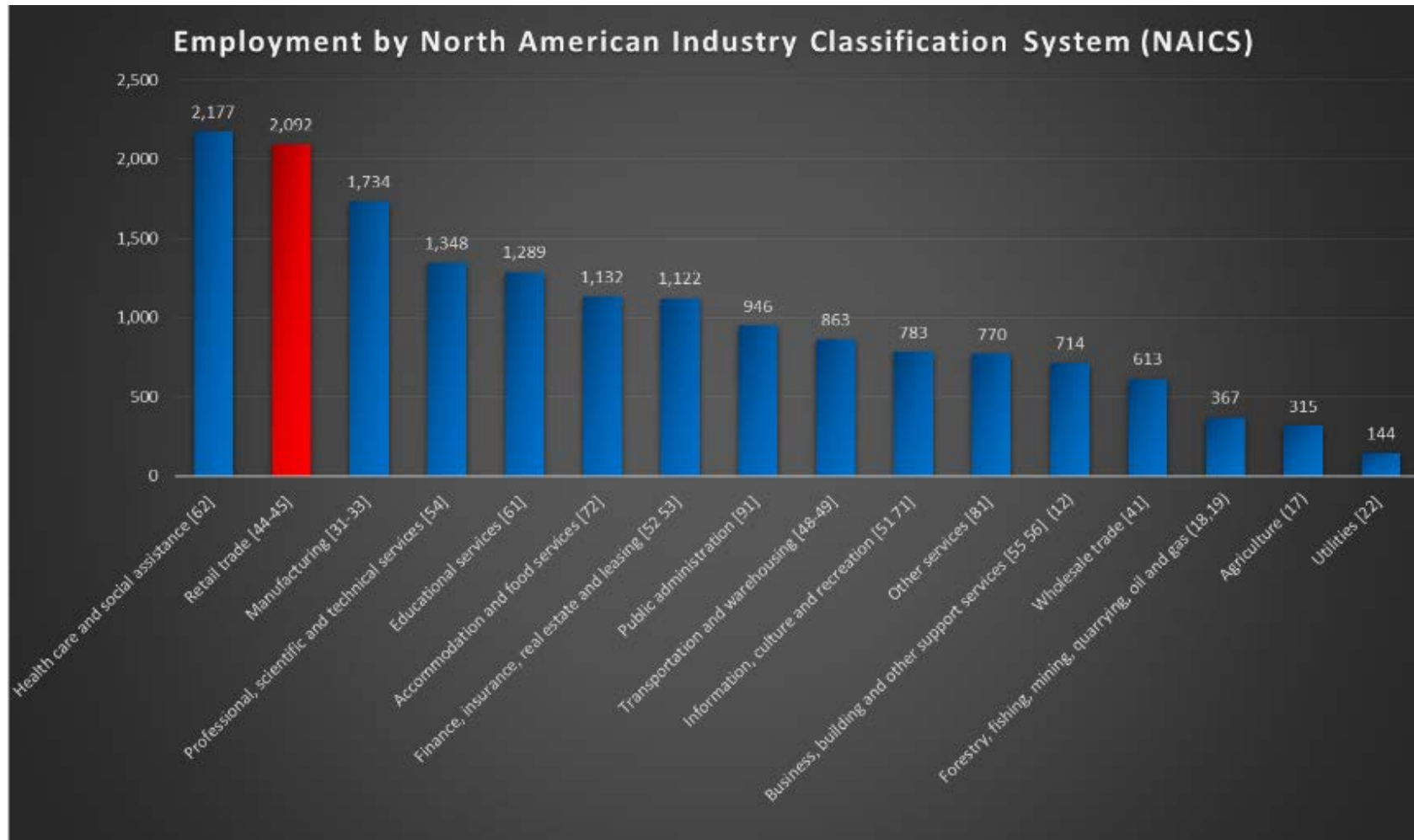


Figure 4-1: Employment by Industry (2014)



SOURCE: Statistics Canada

5 Issue #2: Vacant Employment Corridors

As shown in the land needs analysis prepared in the MHBC Study, a total of 67.7 hectares of vacant employment lands have been identified within the Town. Of these lands, 46.8 hectares are located outside of the built boundary. These vacant lands are mostly concentrated in the north-west of the Town in vacant corridors along both existing and planned roadways. As a result, the Town has requested that we provide market and economic recommendations in terms of types of employment uses for the currently vacant employment corridors (i.e. Hansen Boulevard, Veterans' Way, Parkinson Crescent).

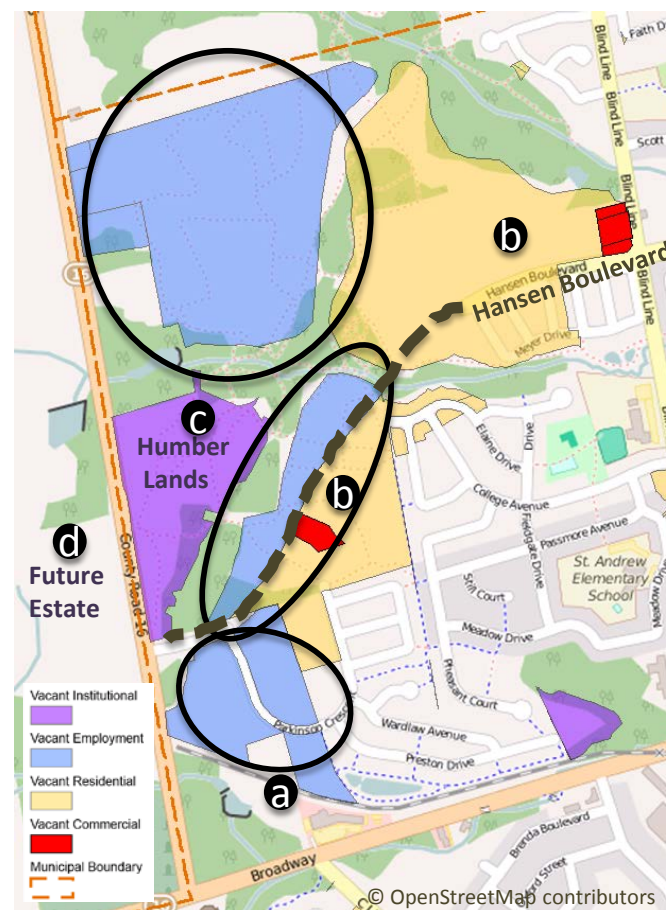
5.1 CORRIDOR DESCRIPTION

There are eight parcels of vacant employment lands measuring between 0.36 hectares and 27.3 hectares all of which are privately owned, totalling 45.7 hectares. The lands are located in the north-west of the Town. The sites are accessed via County Road 16 (a local road) which provides access primarily to the northerly and southerly parcels. The south parcels located south of Parkinson Crescent adjoin the decommissioned CN rail line.

The lands are located on the opposite side of the Town to Highway 10, and are also located away from any major 400 Series highway which limits their exposure and restricts accessibility from a regional perspective. The GTA West Corridor project (connecting Highway 401 to Highway 410), was planned for a route 28km south of the Town via Highway 10, along the southern parts of the Town of Caledon and the northern parts of the City of Brampton. In December 2015, the Province suspended work on the corridor with an update due in Spring 2016. Based on the planned location of the corridor away from Highway 10, should the GTA West corridor proceed it will not significantly improve the overall connectivity and accessibility of the vacant land corridor.

The large parcel of employment land in the north-west, located at the south-east corner of the County Road 16 and the Municipal boundary, is also a

Figure 5-1: Vacant Employment Corridors



SOURCE: urbanMetrics inc.

brownfield site and once operated as a gravel pit. As a result, it will require significant investment to redevelop and service.

All other vacant lands are located internally without frontage to County Road 16. These sites will have future access and frontage to the planned Hansen Boulevard extension. We understand that servicing is available for these lands in the future. These internal sites are also located adjacent to residential designated lands which are developing. The Humber Lands are located close to a large number of the vacant employment parcels, although the Humber Lands are separated by Open Space Conservation lands.

County Road 16 also forms the municipal boundary between the Town of Orangeville and the Township of Amaranth. The Township has designated greenbelt lands and planned estate residential west of County Road 16. The Township has also designated Employment Areas further west along County Road 109 (Broadway). There are approximately 116.5 ha of lands designated Employment owned by Blackwood Development in the Township of Amaranth and there is an additional 30 ha of employment lands in Amaranth and 34 ha in East Garafraxa within a 1km of Orangeville's boundary.

5.2 LAND USE DESIGNATION

The lands are designated as Employment Area and are located in the Greenfield. The Employment Area designation permits the following primary uses:

- *Industrial facilities including manufacturing, assembling, processing, fabricating, refining, repairing, warehousing, and wholesaling, offices, transportation and communication uses, research and information processing facilities, recreational uses and accessory uses (Section E3.2 of the Town of Orangeville Official Plan)*

Other secondary permitted uses which are subject to various conditions, include:

- *accessory retail*
- *limited service commercial to support employment uses (e.g restaurants, print shops, computer service facilities, business/computer supply and service establishments);*
- *limited industrial/commercial uses including automotive uses, building contractor's yards, and lumber yards*
- *day care facilities which do not have an outdoor play area*
- *residential dwelling units required for essential operational personnel*
- *adult entertainment parlours in free standing structures*
- *hotels or motels, including supporting conference and restaurant facilities that are located on the same property as the hotel or motel, subject to the property being located adjacent to an arterial road (Section E3.3 of the Town of Orangeville Official Plan)*

As discussed in Section 3.1, lands located north and south of Hansen Boulevard are subject to a Specific Area Policy in the Town of Orangeville Official Plan that include a provision for residential and commercial facilities (Policy E8.64). These employment designated lands are considered part of the vacant employment land inventory; however we recognize that they may also accommodate future commercial and residential space which effectively further reduces the vacant supply of Employment Lands along these corridors.

5.3 MARKET RECOMMENDATIONS

Based on the MHBC Study's land needs analysis conducted on the existing allocation of 870 jobs, there is demand for 11.5 ha of industrial land which can be sufficiently accommodated on the 20.9 ha of vacant employment lands within the built boundary. As a result, directing new investment to vacant employment sites and buildings in the existing industrial areas should be the priority where possible.

That said, we recognize that MHBC have prepared an employment target for the Town which amounts to 2,120 employment related jobs. Based on these 2,120 targeted jobs, the resulting land needs analysis prepared by MHBC suggests that there could be demand for up to 46 ha of employment lands. Therefore, should the Town be successful in attracting employment to the levels targeted, this would result in a demand for employment lands outside of the 20.2 ha of employment lands located within the built boundary i.e. on a portion of the vacant 45.7 ha Greenfield employment corridor lands.

Based on a review of the permitted uses, as well as the limited growth in employment in manufacturing and other traditional employment land uses, the demand for traditional types of employment uses on the vacant employment corridors lands is limited. We also recognise that these sites are not readily accessible to the wider region in terms of highway access and that parts of the vacant lands are located close to residential areas. One of the key challenges is therefore the marketability of these lands based on their locational characteristics when compared with other urban centres in the surrounding counties such as Caledon, Vaughan and Brampton, with vacant employment lands and future lands coming in stream. The fact that the Policy E8.64 above permits a broad range of uses beyond traditional manufacturing also provides an opportunity for job creation.

That said, based on a consideration of the targeted growth prepared by MHBC, it is recommended that the Town retain these lands as employment areas. The retention of these employment areas would also allow the Town to assertively proceed with an attraction strategy and work towards its employment targets.

Figure 5-2: Special Policy Area E8.64, Schedule B, Town of Orangeville Official Plan



6 Issue #3: Humber Lands

As part of the land needs inventory prepared in Phase 1 of this study, a total of 20.1 ha of vacant institutional lands have been identified within the Town. Of these lands, 12 hectares are located outside of the built boundary on the one parcel referred to as the Humber Lands. Humber College had intended to develop a campus serving 2,000 students on these lands but the college decided not to proceed with these plans. The Town has requested that we provide market and economic recommendations in terms of economic impact and merits of the current and/or re-designation of the Humber Lands.

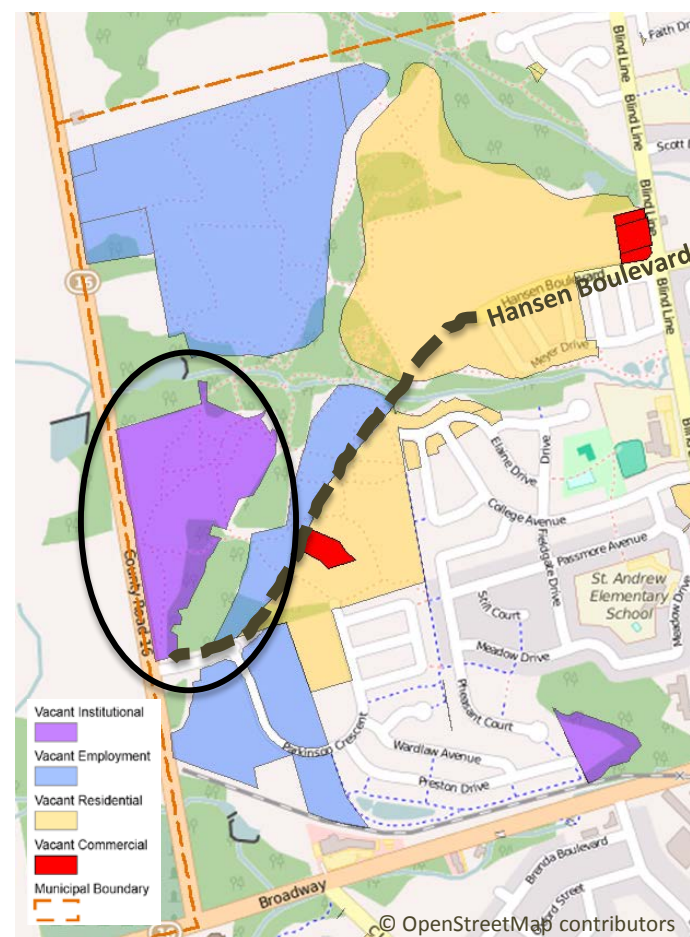
6.1 EXISTING CONDITIONS

The 12 hectare Humber Lands are located on County Road 16 (Veteran's Way) in north-west Orangeville. The Humber Lands are designated *Institutional* by the Town of Orangeville Official Plan (September 2013) and are located outside of the Built Boundary on Greenfield lands. As a result, the Town of Orangeville, as owners of the site, are exploring development options.

Immediately surrounding the site are lands designated *Open Space Conservation*. Beyond these open space lands are vacant *Employment* lands located north, and south (within the Town of Orangeville).

The Township of Amaranth is located to the west of County Road 16. These lands are part designated *Greenfield Protected Countryside – Rural* and *Estate Residential*. There are plans by Valley Grove Investments Inc. and Hamount Investments Ltd. to construct a residential development on these lands.

Figure 6-1: Humber Lands



SOURCE: urbanMetrics inc.

6.2 PERMITTED USES - INSTITUTIONAL LANDS

Permitted uses on designated *Institutional* lands include:

- Public and semi-public buildings and establishments
- Religious institutions
- Public and private schools
- Parks
- Cemeteries
- Hospitals
- Medical centres
- Convalescent homes
- Public or charitably supported senior citizens homes

6.3 MARKET RECOMMENDATIONS

Based on the land needs analysis, there are sufficient vacant institutional lands within the built boundary to meet normal population based demand. The need for the 12 ha institutional site will be driven by a specialized user. A future user will also need to be compatible with the surrounding Open Space Conservation areas and should not detract from the developability or marketability of nearby Vacant Employment lands in the future. Based on a review of the permitted uses, retirement living facilities or long term care facilities could potentially be an option for the lands (i.e. the “Convalescent Homes” and “Senior Citizens Homes” uses permitted by the Town’s Official Plan).

Furthermore, the Town could consider potentially re-designating part of the lands to residential uses to permit senior’s housing (non-institutional) to complement retirement living facilities. The market for senior living accommodation is growing significantly, and a senior residential development project in Orangeville could attract from a wider regional market i.e. serving the surrounding Dufferin County market and other nearby markets such as Caledon.

As with many municipalities across Ontario, Orangeville is anticipated to experience a significant growth in its senior’s population, which will require additional services and housing to serve. The most current Ministry of Finance Population Projections⁷, which can be used as a general guide to demographic trends, project that between 2013 and 2031, that Dufferin County’s senior’s population

⁷ Ministry of Finance Ontario Population Projections, 2013-2041.

(over age 60) will grow by some 9,950 persons, which is almost double the current total. More significantly, however, is the fact that this growth in senior's population represents over 85% of total population growth over this period. Over the longer period to 2041, the over age 60 population is projected to comprise 70% of total population growth. While we recognize that Ministry of Finance projections assumptions may vary from year to year, these projections do indicate that the demand for new services and housing in Dufferin County to 2031 and 2041 will be heavily driven by the senior's population.

From a housing perspective, age 70 is a key trigger point when seniors often look to downsize from their traditional family homes. By 2031, this population in the County is projected to increase by approximately 7,000 persons and by 2041, the over age 70 population in the County is projected to increase by over 11,000 persons.

As of the 2011 Census, apartments comprised only 10% of the housing stock or about 2,000 units, with row housing adding another 1,000 units. The vast majority of apartment and row house unit types are situated within Orangeville. In our opinion, the current housing stock is not well positioned to serve either the Orangeville or the County population as it ages. There will be need for a significant increase in housing stock to serve this significantly growing population. Facilitating a site specific residential use to permit senior's housing and associated services (i.e. medical center) could improve the marketability of the site, create socio-economic benefits in terms of fulfilling the potential demand for seniors living accommodation; providing revenue to the Town in terms of taxes and development charges while also recognising and protecting the existing supply of residential lands (which are deemed sufficient to meet projected demand).

In terms of the economic impact and merits of a part re-designation of the lands, we have reviewed Recommendation No. 5 in the MHBC Study that includes an alternative option which would permit a combination of Prestige Industrial uses adjacent to Veteran's Way, in addition to a master planned residential community geared to seniors in the south-easterly portion of the lands and a major open space area on the north-east corner to create a connected open space system with the environmentally sensitive lands to the east.

We consider this option as the highest and best future use for the Humber lands based on existing land needs and growth projections.

7 Overall Findings

Overall, the Town of Orangeville is projected to grow by 6,950 persons. Based on existing allocations, the Town is forecasted to increase its employment base by 870 jobs at full build out.

However, it is recognised that Dufferin County has an unallocated future reserve employment growth of 4,000 jobs. Recognising Dufferin County's obligations to growth conformity, the MHBC Study includes employment targets based on 1 job for each two persons of additional population growth, recognising that Orangeville is the largest urbanised settlement in the County and is a logical location for the majority of these jobs. This targeted approach results in a total employment target of 3,475 jobs in Orangeville.

Based on the allocated and targeted growth, the following summarises our findings:

- **Commercial Land Needs:** The demand for commercial space to serve an additional 6,950 future residents is estimated at 213,000 square feet, which can be accommodated on the existing designated commercial lands, as well as within the proposed commercial developments and on existing vacant spaces within the Town. Based on our market analysis, there is no identified need to re-designate land for commercial uses within the Town.
- **Retail vs. Employment Uses:** In terms of planning for future employment growth, our study has outlined the benefits of retail employment versus the more traditional employment land uses, including socio-economic benefits such as flexible working opportunities for youth and senior populations. Our retail market analysis shows that additional retail and services space will be required and will need to be accommodated within the community. Although in most commercial structures, "Retail Trade" is the most common NAICS code among businesses, it is very common that commercial structures house businesses in a broad range of NAICS categories, which include many other growing industries. Based on these current employment trends, overall increases in non-traditional employment sectors suggest a greater need to accommodate office and retail/service uses, which typically operate at substantially higher densities than traditional manufacturing or warehousing activities. As a result, the Town should continue to support commercial/ retail development uses as legitimate employment generators.
- **Vacant Employment Corridors:** Based on the allocated 870 jobs, the land needs analysis conducted by MHBC found that the demand for future employment lands could be accommodated within the built boundary of the Town and that the market for the vacant employment corridors in the north-west of the Town, outside of the built boundary and located away from a

major highway, was limited. However, the employment targets prepared by MHBC, which target 3,475 jobs in total, results in a much higher demand for land use than that previously considered. Recognizing the increased land use demand based on the employment target of 2,120 industrial jobs, achieving this targeted industrial job growth would require employment lands from outside of the built boundary i.e. on lands located within the vacant employment corridors. As a result, we recommend retaining these employment lands as it is important to have available lands as part of an attraction strategy. The Town should retain these employment lands to ensure that they can accommodate any future allocations of Dufferin County's additional 4,000 jobs.

- **Humber Lands:** For the Humber Lands, we have recommended that the Town may wish to consider the development of retirement living facilities (i.e. based on the permitted uses of the Official Plan's Institutional lands that include "Convalescent Homes" and "Senior Citizens Homes"). There is also the opportunity to potentially re-designate part of the lands to residential uses to permit senior's housing to complement retirement living facilities. Furthermore, recommendation No. 5 in the MHBC Study includes an alternative option which would permit a combination of Prestige Industrial uses adjacent to Veteran's Way, in addition to a master planned residential community geared to seniors in the south-easterly portion of the lands.

Appendix A: Commuter Flows

Figure A-1: Commuter Flows, 2011

ORANGEVILLE COMMUTING FLOWS

| RESIDENTS OF ORANGEVILLE | | |
|--------------------------|---------------|---------------|
| Place of Work | Total | % |
| Orangeville, T | 5,385 | 44.7% |
| Mississauga, CY | 1,725 | 14.3% |
| Brampton, CY | 1,705 | 14.2% |
| Caledon, T | 805 | 6.7% |
| Toronto, C | 710 | 5.9% |
| Mono, T | 340 | 2.8% |
| Shelburne, T | 185 | 1.5% |
| Vaughan, CY | 170 | 1.4% |
| Milton, T | 140 | 1.2% |
| New Tecumseth, T | 135 | 1.1% |
| Oakville, T | 120 | 1.0% |
| Aurora, T | 85 | 0.7% |
| Amaranth, TP | 75 | 0.6% |
| Guelph, CY | 70 | 0.6% |
| Newmarket, T | 55 | 0.5% |
| Erin, T | 55 | 0.5% |
| Markham, T | 50 | 0.4% |
| Halton Hills, T | 50 | 0.4% |
| Cambridge, CY | 50 | 0.4% |
| Burlington, CY | 45 | 0.4% |
| Wellington North, TP | 30 | 0.2% |
| Waterloo, CY | 30 | 0.2% |
| King, TP | 25 | 0.2% |
| Total | 12,040 | 100.0% |
| Outflow | 6,655 | 55% |

| PERSONS WORKING IN ORANGEVILLE | | |
|--------------------------------|---------------|--------------|
| Place of Residence | Total | % |
| Orangeville, T | 5,385 | 53.5% |
| Mono, T | 945 | 9.4% |
| Caledon, T | 690 | 6.9% |
| Shelburne, T | 475 | 4.7% |
| Brampton, CY | 350 | 3.5% |
| East Garafraxa, TP | 335 | 3.3% |
| Erin, T | 245 | 2.4% |
| East Luther Grand Valley, TP | 220 | 2.2% |
| Toronto, C | 200 | 2.0% |
| Centre Wellington, TP | 185 | 1.8% |
| Mulmur, TP | 170 | 1.7% |
| Wellington North, TP | 145 | 1.4% |
| Mississauga, CY | 115 | 1.1% |
| New Tecumseth, T | 115 | 1.1% |
| Halton Hills, T | 75 | 0.7% |
| Guelph, CY | 65 | 0.6% |
| Southgate, TP | 55 | 0.5% |
| Bradford West Gwillimbury, T | 55 | 0.5% |
| Clearview, TP | 45 | 0.4% |
| Grey Highlands, MU | 40 | 0.4% |
| Richmond Hill, T | 30 | 0.3% |
| Essa, TP | 30 | 0.3% |
| Clarington, MU | 25 | 0.2% |
| Innisfil, T | 25 | 0.2% |
| Kitchener, CY | 20 | 0.2% |
| West Grey, MU | 20 | 0.2% |
| Total | 10,060 | 83.6% |
| Inflow | 4,675 | 46% |

SOURCE: urbanMetrics inc. based on Statistics Canada (2006 Census and 2011 National Household Survey)