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**urban
Metrics**

BRADFORD HIGHLANDS

Commercial Needs Study

Bradford West Gwillimbury, Ontario

Prepared for **Bradford Highlands Joint Venture**

September 15, 2023



This document is available in alternative formats upon request by contacting:
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September 15, 2023

Nicole Sampogna
ARG Group
111 Creditstone Rd
Concord, ON
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Dear Ms. Sampogna:

RE: Bradford Highlands – Commercial Needs Study (Bradford West Gwillimbury, Ontario)

urbanMetrics inc. is pleased to submit this Commercial Needs Study for the proposed development of the Bradford Highlands property located at 23 Brownlee Drive, 2820, 2824 & 2848 Line 5 (“subject site”). This study has assessed the potential for commercial development on the subject property in context of the future population on the site and the additional population expected in the surrounding area and the broader Town of Bradford West Gwillimbury.

Our analysis shows that the site is physically isolated from any major roadways and ultimately a poor location for commercial space. There is also sufficient existing commercial space and available commercial development opportunities to support the future population in strategic commercial nodes. Ultimately, any retail commercial space included on the subject site would not be financially viable and would suffer from limited pedestrian and vehicular accessibility and low population densities in the areas surrounding the site.

It has been a pleasure conducting this study on behalf of the Bradford Highlands Joint Venture. We look forward to discussing our findings with you.

Regards,

A handwritten signature in black ink that reads "Rowan Faludi".

Rowan Faludi, MCIP, RPP, PLE, CMC
Partner,
urbanMetrics Inc.

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Executive Summary

Background

This study concerns the lands of the former Bradford Highlands Golf Club (“subject site”), located in the Town of Bradford West Gwillimbury, Ontario. The Bradford Highlands Joint Venture is proposing a redevelopment of the former golf course into a residential development with 998 ground-related units, consisting of a mix of single-detached, semi-detached, street townhouse, and back-to-back townhouse dwellings.

The Town of Bradford West Gwillimbury has requested that the proponent submit a commercial needs study to determine whether commercial space would be required on the subject site to support future growth on-site and in the surrounding area.

Planned Function of Commercial Facilities / Site Characteristics

Based on our review of the commercial structure in the Town, existing and proposed land uses surrounding the site and the nearby road network, we would conclude that any commercial space developed on the subject site would be local serving in nature — to serve the day-to-day or weekly shopping by residents in the southern part of the community. Within the Bradford West Gwillimbury Official Plan, local commercial sites would be designated as Neighbourhood Commercial, which could contain up to 2,500 square metres. Retail uses serving the entire Town and beyond are better placed in other locations, such as the downtown or Community Commercial areas along Holland Street and Bridge Street.

Typically, local commercial sites are best situated on arterial or collector roads at the gateway to a community, where they have access to traffic entering and leaving the community as well as passing traffic. Our experience is that internal commercial sites do not have sufficient accessibility to be successful, especially in low and medium density neighbourhoods.

The subject property is physically separated from the surrounding arterial and collector roads. To the north, lands are already developed with single-detached homes which block access to Line 6 except for a right-of-way for an access road (formerly, this was a maintenance road serving the golf course). To the west, adjacent lands are developed with large lot residential homes along Brownlee Drive. While the former golf course parking lot is located on Brownlee Drive, this road functions as a local residential street and is a cul-de-sac, preventing any pass-through traffic. This road would not be suitable for commercial development. To the south, the subject site is separated from Canal Road by the Holland Canal. The site only extends to 5th line for the purposes of road access. To the east, the site abuts a residential subdivision under construction, with residential lots along the site boundary.

In our opinion, there are no sites within the subject property appropriate for a local commercial development.

Study Area

A “trade area” represents the geographic extent from which a commercial node, retailer, or community would expect to draw most of its sales volume. As there are no suitable commercial sites with frontage on a major roadway within the proposed subdivision, the delineation of a trade area for an internal site would not be a reasonable exercise.

To test whether commercial needs can be met in southwest Bradford, we have defined a study area around the subject site with an approximately two-kilometre radius. The study area has been defined by the following boundaries: Holland Street to the north, Walker Avenue to the east, 5th Line / Canal Road to the south, and 10 Sideroad to the west. We have included businesses along the north side of Holland Street in our commercial inventory since travel times to these businesses would be roughly equivalent to those on the south side of the street for residents in this trade area.

The population of the study area is currently estimated at 21,300. Additional growth of 3,800 is projected to 2031 based on current planning applications and proposals for new residential developments. This would include the development of the subject site. Any growth beyond 2031 would primarily occur through intensification and redevelopment of existing sites.

It is also important to note that lands to the west of the subject site are outside of the Settlement Area and would require an expansion to the current urban boundary. It should be noted that the County of Simcoe is undertaking a review of its urban boundary as part of the ongoing municipal comprehensive review process. While there are active requests to have them brought into the Settlement Area, it would be premature to estimate the potential population on these lands or the commercial development that they might accommodate.

Availability of Commercial Space in the Study Area

In our opinion, the commercial needs of residents of the study area are met by the existing inventory of retail and services space, with almost 1,000,000 square feet of such spaces within a short distance of all residents of the study area.

In terms of major food stores, the study area is served by three full-size supermarkets, a Walmart Supercentre, and a Bulk Barn. Other major retailers in the trade area include a Canadian Tire, a Home Depot, and a Marshalls apparel/general merchandise outlet. In addition, the study area is served by five pharmacies, branches of all five major Canadian banks, over 60 restaurants and fast food outlets, and the full range of other retail uses and services required to serve daily and weekly shopping trips.

Every resident in the study area is situated within a two-kilometre radius of a major food store, which is a typical commercial planning ratio in a suburban community such as Bradford. In terms of active transportation, a two-kilometre distance can be reached by bicycle in about 5 to 8 minutes and can be walked in about 24 to 28 minutes. In our opinion, from a geographic perspective, residents of Bradford are well served by existing retail facilities.

Future Commercial Requirements

The proposed development on the subject site and other developments in the study area are estimated to generate approximately 3,800 residents, which would require approximately 145,000 square feet of commercial space. In addition to the 947,400 square feet of existing commercial space within and surrounding the study area, there is the potential for over 300,000 square feet of additional space capacity in the study area.

In our opinion, there is no need to add additional commercial space to serve existing or future need within the study area.

Localized Commercial Needs

It is recognized that there is currently no commercial space towards the south end of the study area (i.e., south of Line 6). However, this is due to low existing population densities in this part of Bradford and the fact that Bradford has developed a centralized commercial structure focused on Holland Street and the Downtown. In our opinion, despite the lack of commercial uses towards the south part of the community, residents in this part of Bradford are still a close distance to the full range of retail uses and services required to serve their day-to-day or weekly shopping needs. Even from the furthest south of the study area, residents can travel to at least one supermarket in a five-minute drive, a bike ride of under 10 minutes, or by bus in around 15 minutes.

Other Commercial Areas

Holland Street is the dominant commercial street serving the Town. It is centrally located within Bradford and is conveniently accessible for all residents of the Town. The Downtown, also situated on Holland Street, is an extremely important policy area within the Official Plan, with policies intended to “restore it to its rightful role as the heart of the community”. In our opinion, from a policy perspective, good planning would suggest that demand within the community would be better met by bolstering the Downtown commercial area or on other existing centrally located sites along Holland Street, rather than by directing retail to a small site isolated from significant traffic flows which would serve only a minimal population base without significantly impacting the walkability of the southern Bradford neighbourhoods.

Conclusion

In our opinion, the subject property has no suitable sites to accommodate commercial development. Existing residents of the study area are already well served by commercial space along Holland Street and the Downtown. There is more than sufficient commercial land supply to accommodate future growth. Future demand would be better served through bolstering the downtown or on existing underdeveloped sites along Holland Street. We would not recommend the development of commercial space within the proposed development.

1.0 Introduction

1.1 Background

urbanMetrics inc. “urbanMetrics” has been retained by the Bradford Highlands Joint Venture (“Bradford Highlands JV”, “BHJV”) to conduct a commercial needs study for the lands of the former Bradford Highlands Golf Club (“subject site”), located in the Town of Bradford West Gwillimbury, Ontario. The Bradford Highlands Joint Venture is proposing a redevelopment of the former Bradford Highlands golf course into a residential development with 998 ground-related units, consisting of a mix of single-detached, semi-detached, street townhouse, and back-to-back townhouse dwellings. The 148-acre property is situated internal to major roadways, with no suitable entryways or lots for a commercial site.

1.2 Purpose

This commercial needs study examines the market for commercial space on the subject property based on the applicant’s concept plan and existing and known future demand. This study is being completed as requested by the Town to support BHJV’s application. This study also includes recommendations to help inform the Town of where alternative commercial sites may be better situated, as needed to support the local population.

The subject site is in Rural-designated lands just outside of Bradford’s delineated Settlement Area. A planning process is underway to bring additional lands into the Settlement Area to support anticipated population growth to 2051. This study is not intended to address the questions around the broader urban expansion. While other lands may ultimately be added to the Town’s Settlement Area, it is not possible to identify the commercial needs arising from the development of these lands until planning decisions are made with respect to where and how the Town will grow in the future.

1.3 Approach

urbanMetrics has completed the following in this commercial needs study:

- **Site and Access.** We have analysed the commercial potential on the subject site based on its accessibility, surrounding land uses, and the concept plan provided by the client. This includes information relating to unit counts, expected population, and the planned road network.
- **Policy Context.** We have discussed the relevant Official Plan policies relating to surrounding land uses, commercial designations, and the zoning that could be applied to the subject site.
- **Study Area Delineation.** We have defined a study area which represents the area that would most likely be served by any commercial space that would locate on the subject site and other parts of south Bradford.
- **Subject Site Projected Population.** We have estimated the population that will be living within the proposed residential development based on the number and types of units proposed in the concept plan.

- **Study Area Population.** We have estimated the current and future population in the study area (i.e., the population which will primarily support any commercial space that would locate on the subject site).
- **Commercial Inventory.** We have conducted an inventory of all retail/service commercial space within and adjacent to the study area. We have also identified any proposed commercial development, commercial development opportunities, and vacant designated commercial land — all sources which can accommodate new commercial space.
- **Study Area Market Need.** We have conducted a per capita market demand analysis to estimate the amount and type of commercial space that would be warranted by the study area population.
- **Feasibility Analysis.** We have conducted a feasibility analysis for commercial space on the subject site based on its geographic characteristics, the total supply of commercial space, and where any new commercial space would be most strategically located in the study area and the Town as a whole.

2.0 Site Context

2.1 Site Location

The site is located at 23 Brownlee Drive, 2820, 2824 & 2848 Line 5 in the Town of Bradford West Gwillimbury, just outside of Bradford’s Settlement Area. The site is located internal to existing residential communities. The site is characterized by the following surroundings:

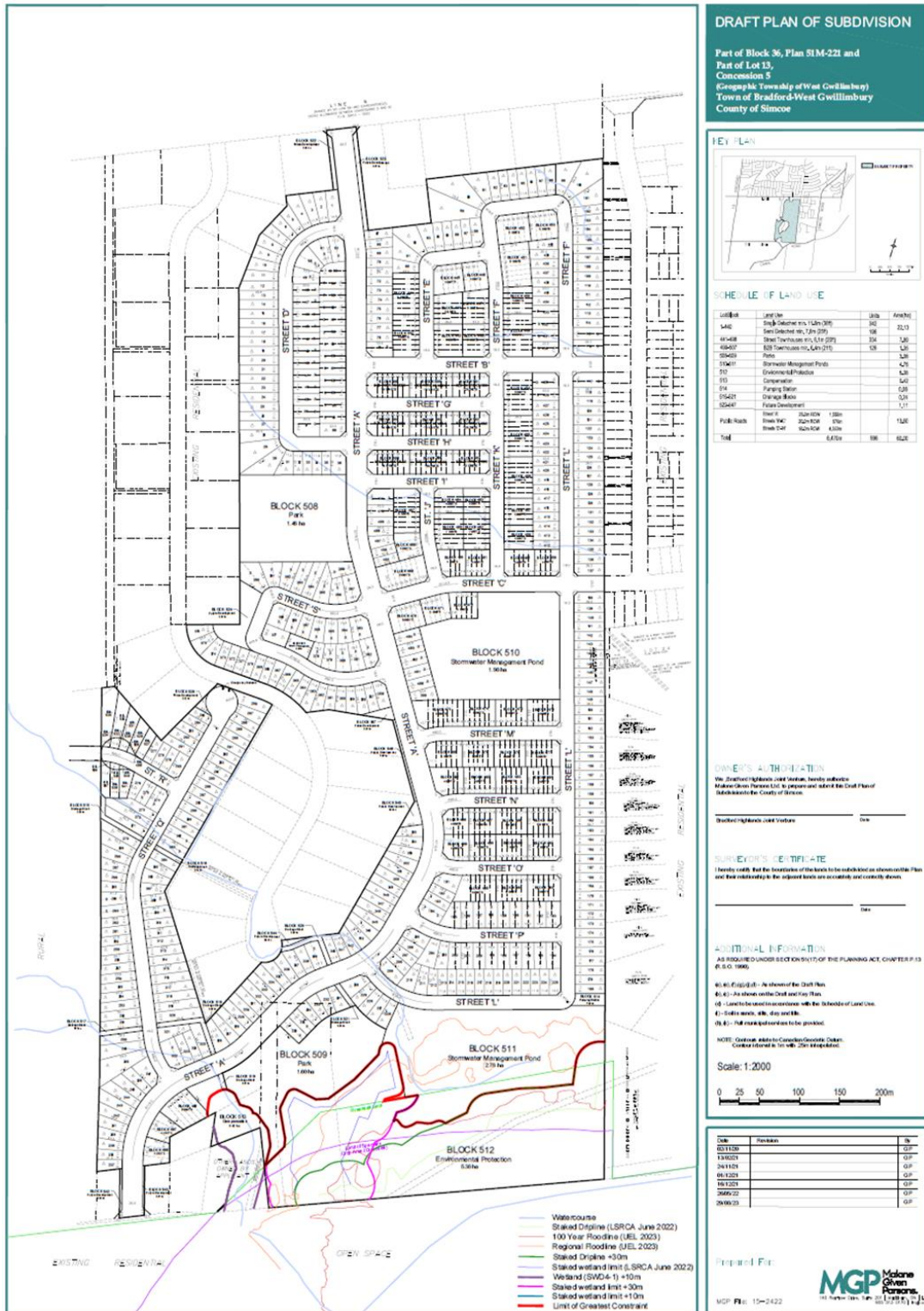
- North: The site is bordered by lots of residential units along Line 6, a Major Arterial road. The only portion of the site which fronts on to Line 6 is a right-of-way for a maintenance road used by the former golf course. Further north is a residential subdivision.
- East: Residential lots line the eastern boundary of the site, where it abuts a developing residential subdivision. Further east is Simcoe Road, a collector road, where several institutional uses (e.g., schools, cultural centres) are located, in addition to residential dwellings. The site plan for the subject site includes two access roads on the eastern side connecting to the adjacent residential neighbourhood via Inverness Way.
- South: The site is bounded by environmental protection lands (i.e., Greenbelt) to the south, which run adjacent to 5th Line/Canal Road. Canal Road delineates the southern boundary of Bradford’s Settlement Area. Further south are agricultural lands. The concept plan includes a proposed access road into 5th Line that would be created through the redevelopment of an existing residential lot. The subject property does not extend as far as 5th Line other than the proposed right-of-way for the future access road. Fifth Line currently functions as a rural road and is identified in the Bradford West Gwillimbury Official Plan as a “Local Street”.
- West: Estate residential homes mark the western edge of the site. Further west are agricultural lands.

The site is physically surrounded by residential and environmental uses. It currently only has one access point to an arterial or collector road, being the right-of-way for a maintenance road serving the former golf course. This right-of-way is not large enough or appropriately located to support commercial development.

Typically, commercial sites are best situated on arterial or collector roads at the gateway to a community, where they have access to traffic entering and leaving the community as well as passing traffic. Our experience is that internal commercial sites do not have sufficient accessibility to be successful, especially in low and medium density neighbourhoods.

The lack of access to a collector or arterial road seriously impedes any commercial development opportunity on the property. In our opinion, there are no sites within the subject property that would be appropriate for retail commercial development.

Figure 2-2: Concept Plan



SOURCE: MGP, dated August 29, 2023

Based on Persons Per Unit (PPU) factors from the Town’s 2019 Development Charges Background Study (“DCBS”), the proposed community will support an estimated population of 3,000 residents at full build-out.

Figure 2-3: Subject Site Population

	Units	PPU	Population
Single Detached	342	3.454	1,200
Semi Detached	196	3.454	700
Street Townhouse	334	2.44	800
Back-to-Back Townhouse	126	2.44	300
Total	998		3,000

SOURCE: urbanMetrics inc., based on data from Bradford Highlands Concept Plan by MGP. PPU from 2019 Development Charges Study. Population rounded to the nearest 50.

Vehicular Access

Currently, there are two vehicular access points to the former golf course on the subject site. The primary access to the site was on Brownlee Drive. This access point contained the parking lot and access to the clubhouse and was the access for players and other visitors to the former golf course during its operations. Brownlee Drive is a local road with a width of roughly 6.7 metres (21.9 feet) without painted street lines. Large lot single-detached homes line both sides of the road. Brownlee Drive is only accessible by Line 6 to the north and terminates in a cul-de-sac.

Figure 2-4: Existing Brownlee Drive Access



SOURCE: Google Earth

NOTES: The Brownlee Drive access point was the primary way of accessing the golf course that previously existed on the subject site, with the parking lot and clubhouse situated here. Under the proposed concept plan for the new residential development on the subject site, vehicles will not be able to access the site from Brownlee Drive.

The other access point is located on the northern boundary of the subject site via Line 6, a 3-lane major arterial road. According to the 2022 Transportation Master Plan, Line 6 is planned to be widened to four lanes. This access point was a narrow dirt road which was used as the maintenance access for the golf course and did not permit public access. This portion of the lot is roughly 28 metres in width and is bordered on either side by deep lots (roughly 75 metres and 125 metres deep) with single-detached homes.

Figure 2-5: Line 6 Access



SOURCE: Google Earth

NOTES: The Line 6 access point was the maintenance access for the former golf course on the subject site. It is proposed to be one of the primary access points of the subject site in the proposed concept plan. The access point is roughly 26 metres wide with rows of trees on residential lots bordering each side.

The proposed concept plan for the site would remove the Brownlee Drive access point to preserve privacy for the existing residential community along that road. It upgrades the access point along Line 6 and adds three new access points into the community. Two of the new access points would fall along the eastern boundary connecting directly to the adjacent residential neighbourhood. The other entry point would be in the southwest quadrant of the property connecting into Line 5, a two-lane collector road. This entry point would replace the existing residential building on 2848 Line 5 and would be bordered by two deep lots (both roughly 70 metres deep) containing a single-detached home on either side. Other than the proposed right-of-way for this road, the subject property does not extend to Line 5.

Figure 2-6: Line 5 Access



SOURCE: Google Earth

NOTES: The concept plan calls for a new access point on Line 5. The access point will replace the middle residential lot of three lots on the north side of Line 5. The access point is roughly 26 metres wide with residential lots bordering each side.

Public Transit Access

The community is car-oriented with minimal public transit access and frequency. One public transit route serves the subject site. Buses 2A and 2B, which run along Line 6, services the bus stops near Line 6 and Adams Street once every hour from the morning (7am) until the early evening (6pm).

Pedestrian Access

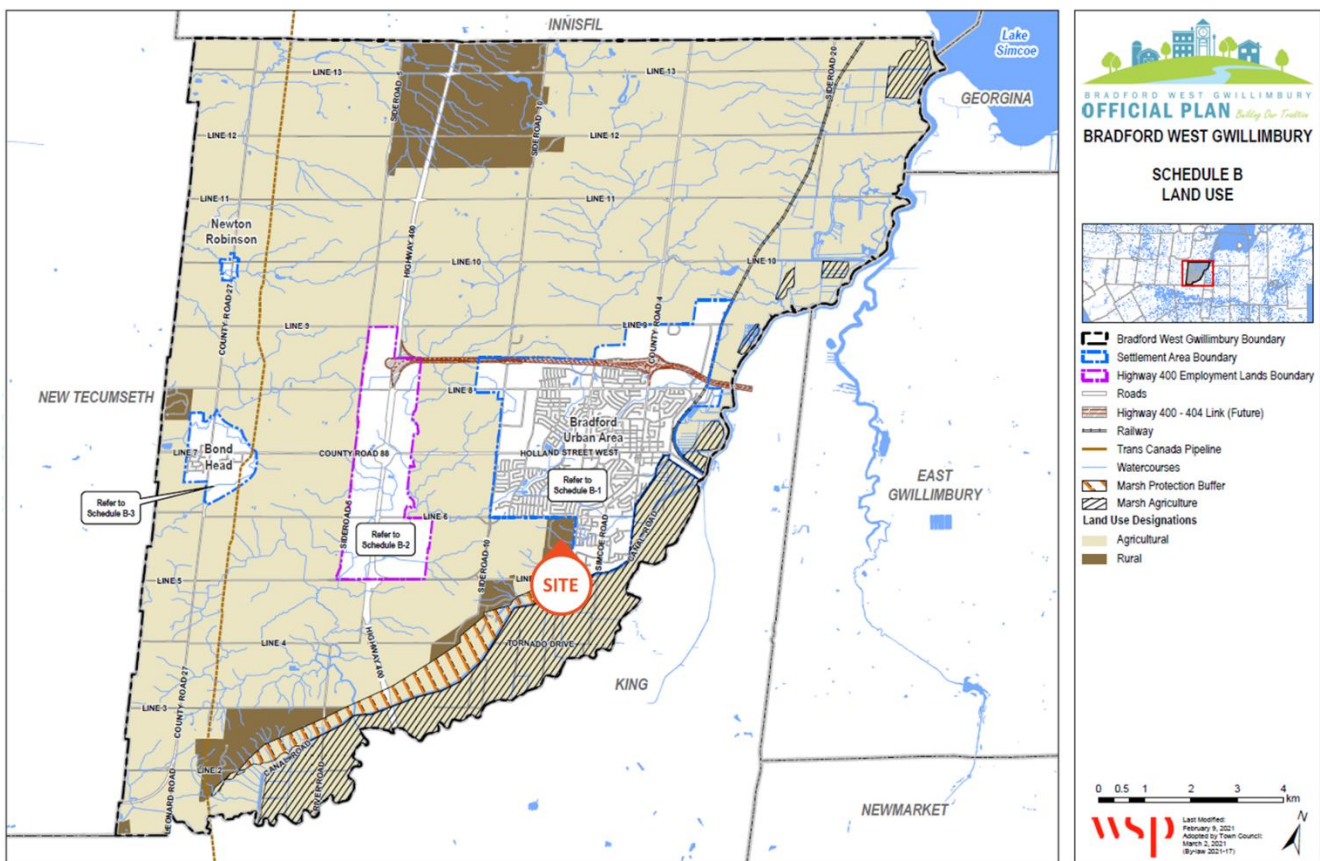
Both the north and south sides of Line 6 have sidewalks, but there are no nearby pedestrian crossings to the subject site. The nearest crosswalks are located to the east at Inverness Way (~300 metres from the subject site) and to the west at West Park Ave (~550 metres from the subject site). There is minimal pedestrian infrastructure in this community.

2.3 Policy Context

Land Use

In 2021, the Town of Bradford West Gwillimbury completed its Official Plan Review, with Council adopting a new Official Plan. The new Official Plan was approved by the County of Simcoe in March 2023. As per the OLT decision in August 2023 (OLT-23-000329), the new BWG Official Plan is now in full force and effect except for the subject site where there is currently an appeal on its designation.

Figure 2-7: Bradford West Gwillimbury Land Use



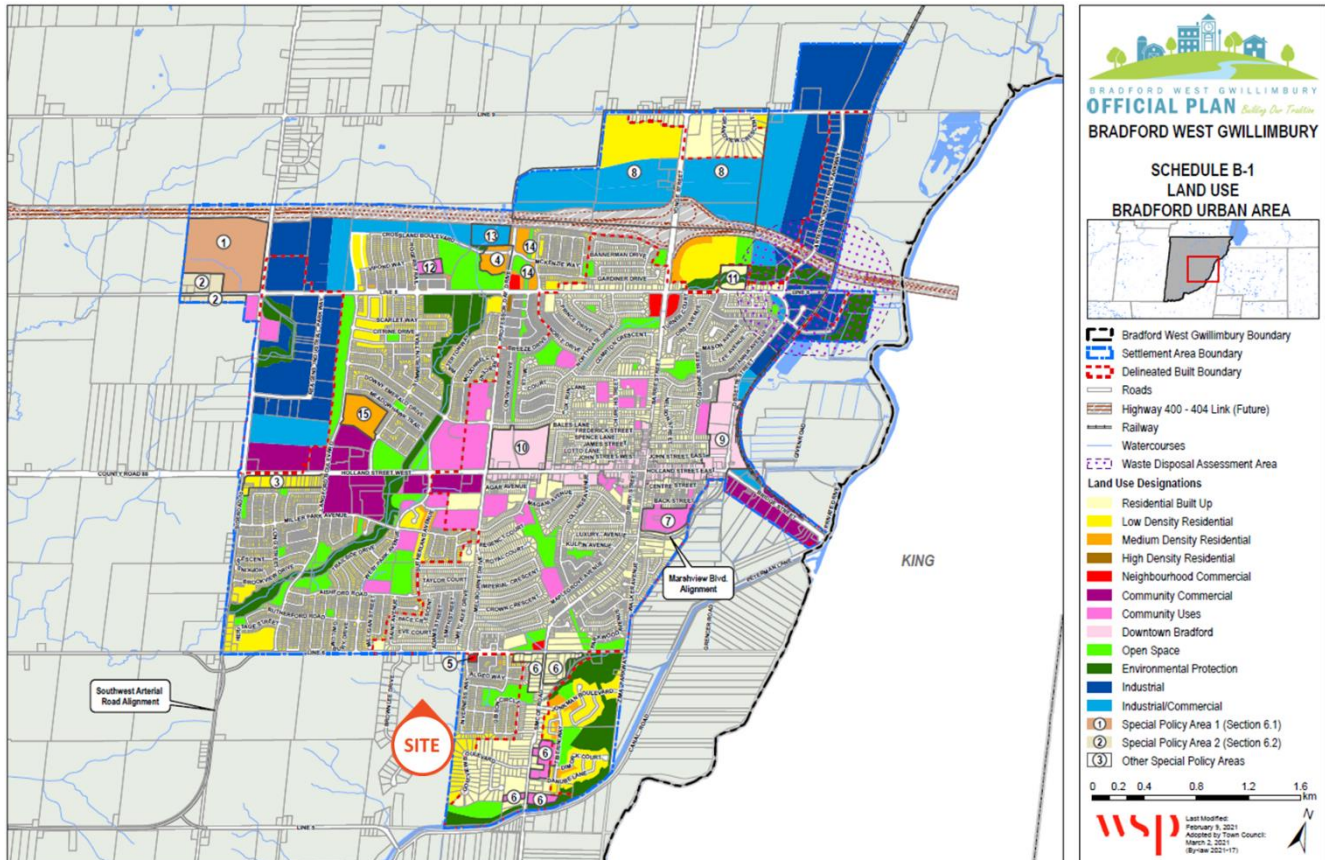
SOURCE: Town of Bradford West Gwillimbury Official Plan, Schedule B, February 2021

NOTES: The land use designations shown in this map are in full force and effect with the exception of the subject site, whose designation is currently under appeal.

As shown in Figure 2-7, the 2021 Official Plan proposes to designate the lands of the subject site as “Rural”, just outside of the settlement area boundary. This is the same designation as that in the 2002 Official Plan. This designation is under appeal, and the lands are currently in the process of an Official Plan Amendment

application to redesignate the lands to Residential and incorporate the lands within the settlement area boundary.

Figure 2-8: Bradford Urban Area Land Use

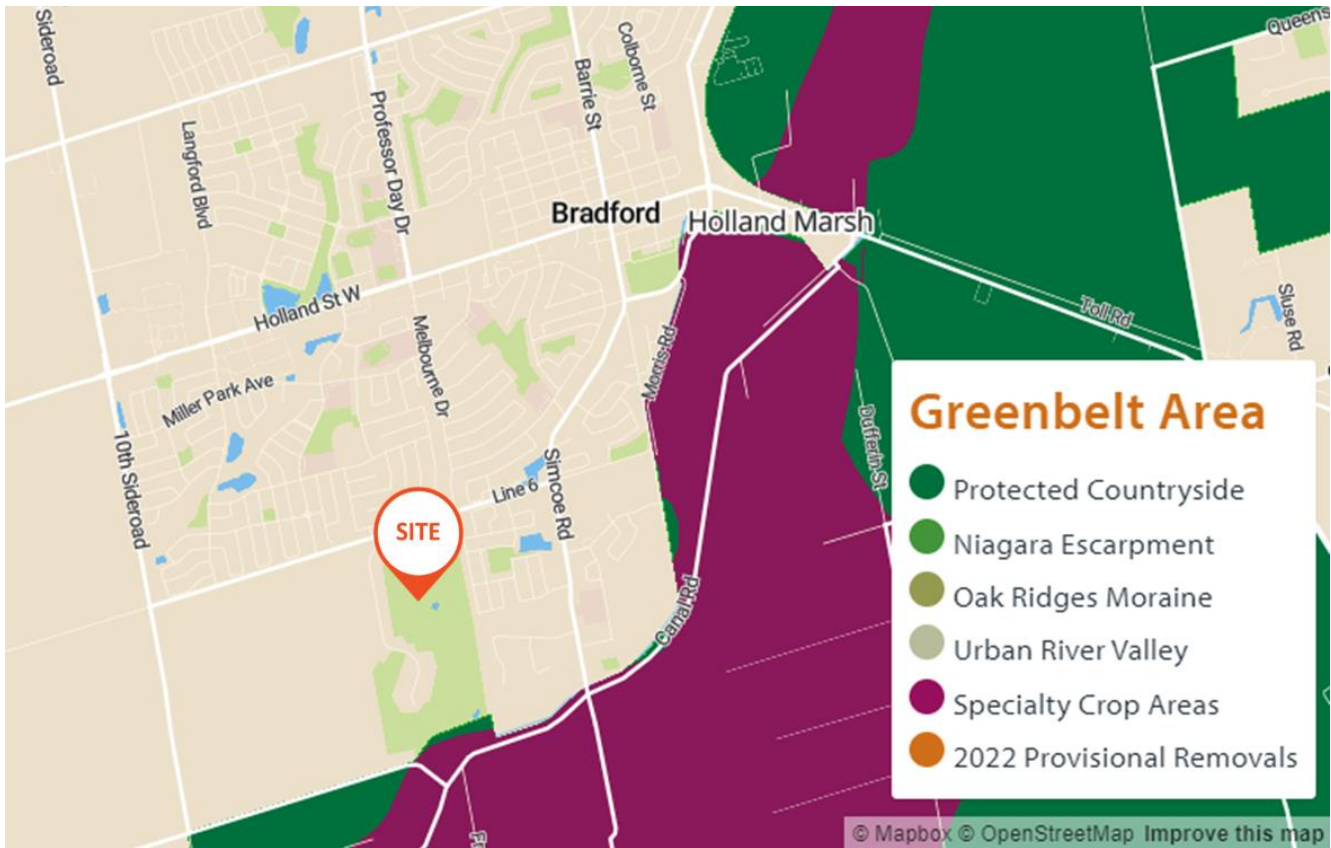


SOURCE: Town of Bradford West Gwillimbury Official Plan, Schedule B-1, February 2021

NOTES: The land use designations shown in this map are in full force and effect with the exception of the subject site, whose designation is currently under appeal.

Figure 2-8 shows the subject site in context of the land uses in the Bradford Urban Area, including nearby commercial uses. The lands to south of the subject site along Canal Road and Line 5 are Specialty Crop and Protected Countryside Greenbelt Areas, as illustrated in Figure 2-9 below. As such, there is no opportunity for additional development immediately south of the subject site, which would constrain the market area for commercial space on the subject site — an important consideration for determining the appropriateness of commercial space to be located on the site.

Figure 2-9: Greenbelt Boundaries



SOURCE: Greenbelt Foundation

Commercial Policy

The Official Plan has three designations that permit commercial and mixed uses: Downtown Bradford, Community Commercial, and Neighbourhood Commercial. The objectives for development on these lands include:

- 1) Provide a full range of services to residents and employees in a variety of scales and forms in the appropriate locations;
- 2) Maximize pedestrian activity and experience above all, by integrating uses into individual buildings or amongst buildings along the same streets and corridors;
- 3) Develop context-appropriate retail uses to provide services for all within the Town; and,
- 4) Treat motor vehicle parking as a shared supply and common pooled resource for all uses. (p.104)

The three designations are described as follows:

- Downtown Bradford: *Downtown Bradford is planned to be restored to its rightful role as the heart of the community. As the Town’s primary intensification and redevelopment area, it will accommodate*

growth and redevelopment that supports pedestrian, and social activity in a manner that provides for a high quality and vibrant public realm for all users. Development in the Downtown Bradford designation should accommodate uses serving the surrounding community in forms and with architecture consistent with the Design Guidelines for Downtown Bradford. (p.105)

- *Community Commercial: Existing commercial areas outside the Downtown Bradford designation and along the main highway accesses through the Town are located in this designation. Non-residential uses on these lands are intended to serve the entire Town and, to an extent, regional markets. (p.109)*
- *Neighbourhood Commercial: There are smaller commercial sites identified within the designated greenfield area for small-scale, neighbourhood-level commercial sites. These lands are intended to service convenience-level needs within the community. Future identification of lands for inclusion in this designation are a critical part of planning for complete communities in the Town. (p.109-110)*

Zoning

The subject site is currently zoned as open space recreational. Permitted uses include pre-existing agricultural use, conservation use, cross-country skiing facility, equestrian centre, golf course, golf driving range, miniature golf course, park, and accessory uses such as restaurants and stores. The ultimate zoning for the site will be determined as part of the planning process through which the site will be brought into the Settlement Area.

Commercial Needs and Official Plan Policies

The Official Plan speaks to commercial retail being developed in “appropriate locations” and that they should be “context-appropriate” so they can “provide services for all within the Town” (p. 104). Further, Neighbourhood Commercial sites are intended to fulfill “convenience-level needs within the community” and create complete communities (p. 109-110). Given the poor suitability of retail on the subject site, retail spaces on the site would likely fulfill only niche needs and provide services to only the small geographic area of the residential development. Developing retail on the site would not be aligned with the objectives of the Official Plan.

On the other hand, there is great potential to locate more retail on existing retail sites along Holland Street. These will enhance the pedestrian experience and would be more accessible by public transit, all of which are aligned with the Official Plan. Most of these sites are within three kilometres of the subject site and other residential properties in the southern portion of the Town. These existing commercial hubs have significant draw which serve the future residents of the subject site and the broader study area.

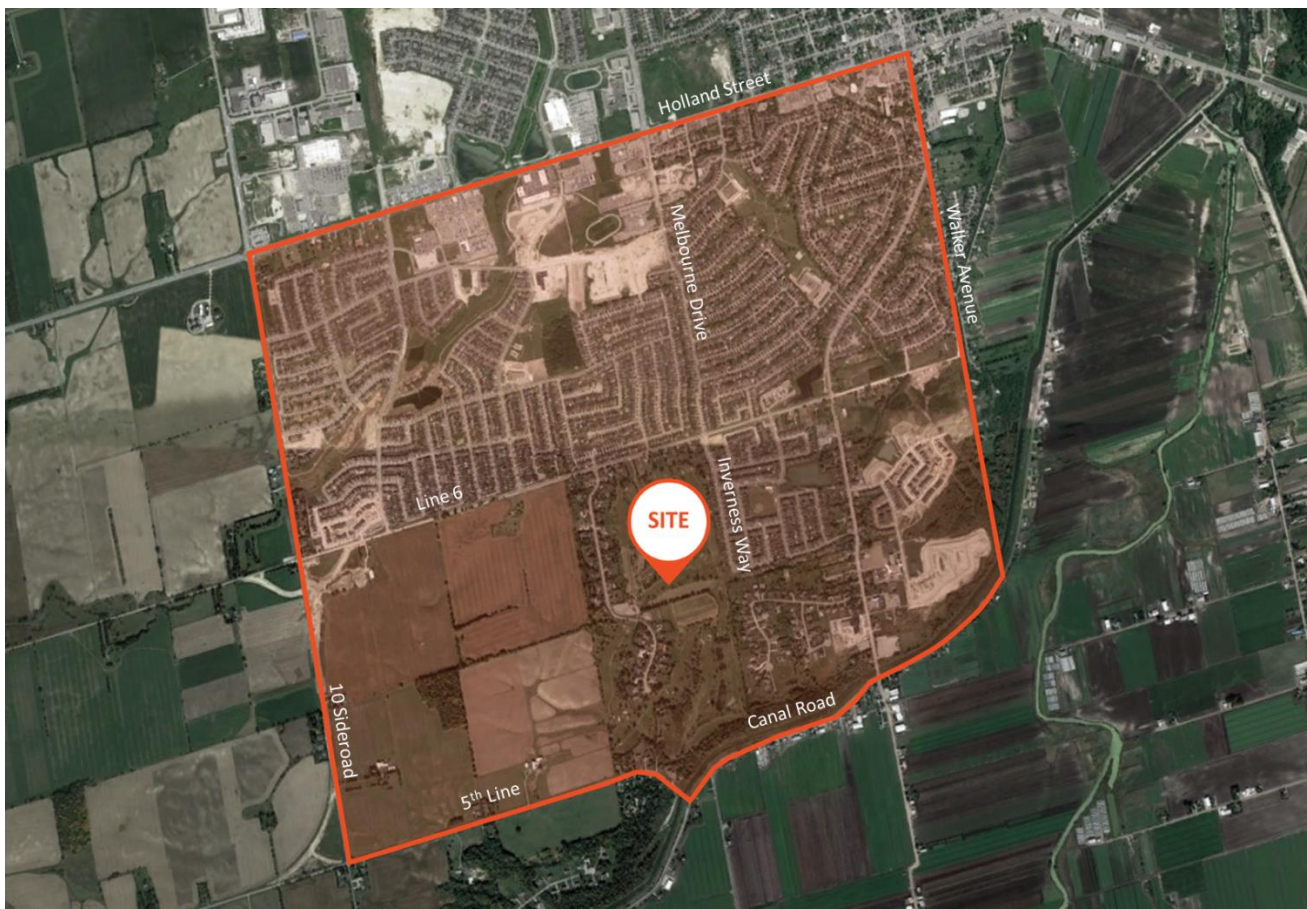
Furthermore, the Downtown is an important policy area within the Official Plan, with policies intended to “restore it to its rightful role as the heart of the community”. In our opinion, from a policy perspective, good planning would suggest that demand within the community would be better met by bolstering the downtown commercial area that could serve the entire Town rather than by directing retail to a small site which would serve a minimal population base.

3.0 Study Area Analysis

3.1 Study Area Delineation

A “trade area” represents the geographic extent from which a commercial node, retailer, or community would expect to draw most of its sales volume. Given that the subject site is bound by residential and environmental lands, any commercial space within the subject site would be internal to the proposed residential neighbourhood. In our opinion, retail in this area not fronting on a major roadway would not be viable due to the low population densities proposed on the subject site and adjacent neighbourhoods. The delineation of a trade area for an internal site would, therefore, not be a reasonable exercise.

Figure 3-1: Study Area



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

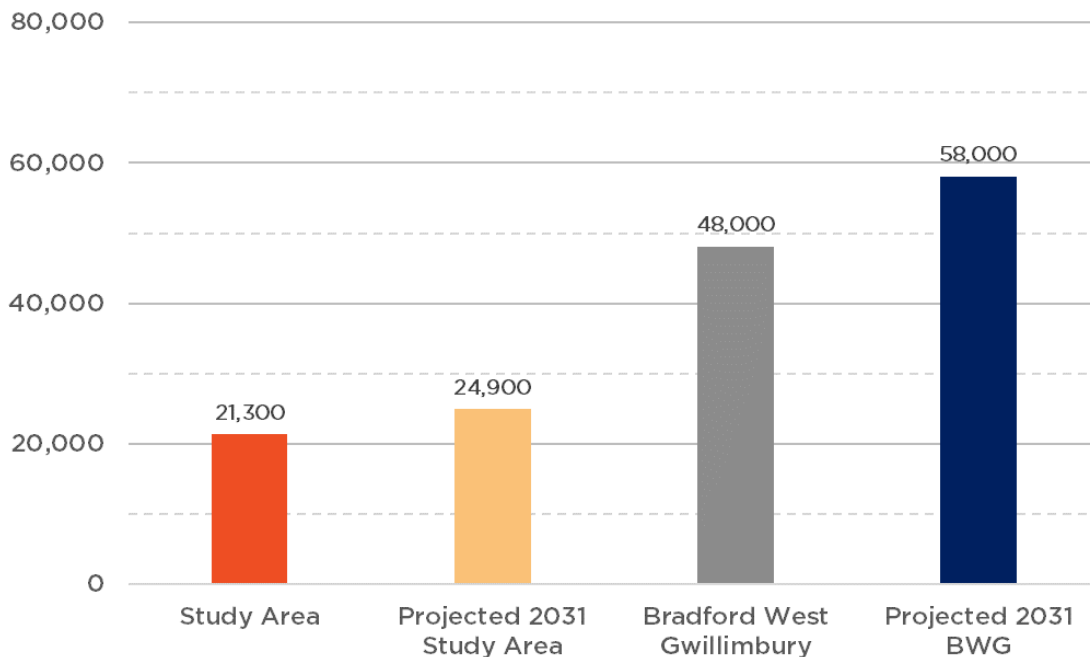
Thus, to test whether commercial needs can be met in southwest Bradford, we have defined a study area around the subject site with an approximately 2-kilometre radius. As illustrated in Figure 3-1, the study area is defined by the following boundaries: Holland Street to the north, Walker Avenue to the east, 5th Line / Canal Road to the south, and 10 Sideroad to the west. This study area delineation is consistent with that of a retail market study recently conducted for a site located east of the subject site, at the intersection of Inverness Way

and Line 6.¹ However, we have also included businesses along the north side of Holland Street in our commercial inventory since travel times to these businesses would be roughly equivalent to those on the south side of the street for residents in this area.

3.2 Population Counts and Projections

Bradford West Gwillimbury is a fast-growing town. Figure 3-2 shows the Census counts for the study area and for Bradford West Gwillimbury (adjusted for undercount), along with projections based on proposed developments in the Study Area and the 2022 County of Simcoe Land Needs.

Figure 3-2: Population, 2023 Estimates and 2031 Projections



NOTES: Population estimates are based on Census populations adjusted for undercount using Population Estimates and updated to 2023 estimates using residential development data. The BWG projections are based on the 2022 County of Simcoe Land Needs Assessment, while the study area projections are based on existing residential development applications. SOURCES: Census, Population Estimates, County of Simcoe Growth Forecasts and Land Needs Assessment (March 2022), Altus Data Studio.

As of 2023, the estimated population was 21,300 for the Study Area and 48,000 for the Town of BWG. The Town has been growing much faster than Simcoe County, as a whole. From 2006-2021, the population of the Town grew by 77% while the County only grew by 26%. This is due to the Town’s location at the southern end of the County, easily accessible to the GTA by Highway 400 and GO Transit.

¹ Retail Market Study – Updated Green Valley Secondary Plan, prepared for Bradford Capital Holdings Inc., August 24, 2021.

Bradford West Gwillimbury is projected to grow more slowly in the future. The projected 2031 population in the County of Simcoe Growth Forecast is 58,000. In part, the 2031 population is constrained by the limited urban land supply in the Town. Growth to 2051 would require that additional lands, such as the subject site, be brought into the Settlement Area. At this point, the Town is still reviewing how and where projected growth beyond 2031 will be accommodated.

Figure 3-3: Population Summary

	Current¹	Forecast²
	2023	2031
Subject Site	0	3,000
Study Area	21,300	25,100
<i>Avg Annual Growth</i>		475
<i>Avg Annual Growth %</i>		2.2%
Town of BWG	48,000	58,000
<i>Avg Annual Growth</i>		1,250
<i>Avg Annual Growth %</i>		2.6%

SOURCE: urbanMetrics inc. Rounded to the nearest 100.

¹ Based on 2021 Census, unit completions from Altus Data Studio.

² Based on concept plan, development applications, 2022 County of Simcoe Land Needs Assessment estimates. PPU from 2019 Development Charges Background Study

3.3 Development Pipeline

The study area is largely built out with the exception of the subject site and several subdivisions in the process of being completed. Lands to the west of the subject site are also outside of the Settlement Boundary, and, as we understand, they are also subject to applications to be brought into the Settlement Area. As the County has not finalized its urban expansion exercise, the potential population generated by these lands or any potential commercial sites that may be planned for them have not been considered as part of our study.

The concept plan for the subject site proposes a residential development that could accommodate approximately 3,000 new residents. Based on a review of the development pipeline, the rest of the study area could accommodate just over 800 new residents.

As a result, the current study area population of 21,300 is projected to reach 25,100 persons by 2031. Growth beyond 2031 would mainly involve infill development/redevelopment and/or lands added to the Town's Settlement Area.

Figure 3-4: Residential Development Applications within Study Area

Development Name	Units	Type	PPU	Population
558 Holland St W	122	Seniors' Residential	1.1	134
500 Holland St W	74	Seniors' Residential	1.1	81
2699 Sideroad 10	12	Townhome	2.44	29
391 West Park Ave	38	Townhome	2.44	93
Plan 51M-1245	29	Townhouse	2.44	71
563 Simcoe Road	6	Semi-detached	3.454	21
671 Simcoe Road	1	Single-detached	3.454	3
Block 403 51M-1063	15	Townhouse	2.44	37
240 Holland St W	20	Mixed-use apartment	1.636	33
210 Holland St W	20	Mixed-use apartment	1.636	33
54 and 64 Holland St W	112	Mixed-use apartment	1.636	183
	98	Seniors' Residential	1.1	108
Total				826

SOURCE: Town of Bradford East Gwillimbury, PPU from 2019 Development Charges Background Study

4.0 Market Analysis

4.1 Retail Market

The principal retail clusters within the Town of Bradford West Gwillimbury are found in the community of Bradford, which is also the primary population centre for the Town. The remainder of the population is found primarily in rural areas and small villages and hamlets.

Geographically, the community of Bradford is relatively small, measuring approximately 4 kilometres from north to south and a similar distance from east to west. Consequently, most Bradford residents live within approximately two kilometres of a supermarket or major food store as well as a variety of other stores and services. Two kilometres is a standard planning distance for food stores in low density suburban markets such as Bradford. By car, this distance represents a short drive. In terms of active transportation, a two-kilometre distance can be reached by bicycle in about 5 to 8 minutes and can be walked in about 24 to 28 minutes. In our opinion, residents of Bradford have reasonable access to retail facilities.

We examined retail market data from CoStar to get a general understanding of the retail market in Bradford West Gwillimbury. For this analysis, we include the commercial retail on the north side of Holland St. along with the study area. The data suggests Bradford West Gwillimbury has a reasonably healthy market for commercial retail space. The current population is appropriately served with retail space.

Figure 4-1 shows the data on the retail space market in the study area and Bradford West Gwillimbury. A year ago, the market for commercial retail space was extremely tight in the Town. Availability rates, which reflect marketed space available for rent, were at 1%. However, as of Q4 2022, the commercial retail market has become much healthier. Availability rates are at reasonable levels: 4% for the study area and 3.2% for the Town as a whole. In general, a vacancy rate of about 5% is considered representative of a balanced market.

Figure 4-1: Retail Space Market Data, 2023

	<u>Availability</u>			<u>Est. Market Rent / SF</u>			Total Inventory	Under Construction
	Q2 2023	Q1 2023	Q2 2022	Q2 2023	Q1 2023	Q2 2022		
Trade Area + Holland St. north side	4.0%	4.4%	1.0%	\$20.66	\$20.47	\$19.38	995	103
Bradford West Gwillimbury	3.2%	3.6%	1.0%	\$20.31	\$20.13	\$19.09	1,326	103

SOURCE: CoStar, accessed August 9, 2023.

4.2 Commercial Inventory

We have conducted an inventory (current as of August 2023) of the retail/service facilities within the study area. The inventory included all retail space in the study area as well as the retail outlets on the north side of Holland Street. Almost all of the commercial space within the study area is situated along Holland Street,

including large format and other arterial commercial uses as well as the western end of the Downtown. This inventory includes most of the retail/service space within the Town of Bradford West Gwillimbury, excluding only the retail plaza at Barrie Street and Line 8, Downtown Bradford east of Simcoe Road, and the community commercial uses on Bridge Street.

The inventory includes the following categories, as per the North American Industry Classification System (“NAICS”):

- Food Store Retail (“FSR”);
- Non-Food Store Retail (“NFSR”);
- Beer, Wine and Liquor (“BWL”);
- Services; and
- Vacant space.

See Appendix A for NAICS categories.

Figure 4-2 below details the types and quantities of retail/service commercial space in this inventory. There are some 540,800 square feet of retail space within the study area. This consists of 15,400 square feet of BWL space, 97,900 square feet of FSR, 223,400 square feet of NFSR, and 175,500 square feet of Services space. Approximately 5% of the total space is currently vacant, largely owing to a vacant 26,000-square-foot unit formerly occupied by a hardware store.

Including the retail space just north of the study area on Holland Street adds 406,600 square feet of total space, primarily in the NFSR and Services category. In total, the inventory is comprised of 947,400 square feet of retail service space concentrated along the Town’s most significant commercial corridor. The total vacancy rate is 3%, which while a little low, shows there is no immediately urgent need for additional commercial retail space to support existing residents in the study area.

In terms of major food stores, the study area is served by three full-size supermarkets, a Walmart Supercentre, and a Bulk Barn. Other major retailers in the study area include a Canadian Tire, a Home Depot, and a Marshalls apparel/general merchandise outlet. In addition, the study area is served by five pharmacies, branches of all five major Canadian Banks, over 60 restaurants and fast-food outlets, and the full range of other retail uses and services required to serve daily and weekly shopping trips. All of these stores and services are located within a very short drive or bicycle ride of all study area residents. In our opinion, the study area is exceptionally well-served in terms of daily and weekly shopping facilities.

Figure 4-2: Study Area Commercial Inventory by Category (SF)

Category	Study Area	North Side - Holland Street	Total (SF)	% of Total Inventory
Beer, Wine, Liquor (BWL)	15,400	0	15,400	1.6%
Food Store Retail (FSR)	97,900	42,500	140,400	14.8%
Convenience & Specialty Food	11,500	9,300	20,800	2.2%
Supermarkets & Grocery	86,400	33,200	119,600	12.6%
Non-Food Store Retail (NFSR)	223,400	209,400	432,800	45.7%
Apparel and Accessories	12,800	21,400	34,200	3.6%
Building and Outdoor Home Supply	101,700	1,500	103,200	10.9%
Furniture, Home Furnishings & Electronics Store	2,700	8,600	11,300	1.2%
General Merchandise	45,000	160,800	205,800	21.7%
Miscellaneous Retailers	29,000	2,300	31,300	3.3%
Pharmacies & Personal Care	32,200	14,800	47,000	5.0%
Services	175,500	153,400	328,900	34.7%
Cultural, Entertainment & Recreation	8,300	13,600	21,900	2.3%
Finance	10,900	19,700	30,600	3.2%
Food Services & Drinking Places	82,600	47,500	130,100	13.7%
Health Care	24,800	27,200	52,000	5.5%
Insurance and Real Estate	6,700	4,700	11,400	1.2%
Personal & Household Goods Repair & Maintenance	5,400	1,000	6,400	0.7%
Personal Care	16,700	15,800	32,500	3.4%
Professional, Scientific & Technical Services	2,000	9,400	11,400	1.2%
Selected Educational Services	7,400	8,600	16,000	1.7%
Selected Office Administrative Services	700	2,000	2,700	0.3%
Social Services	10,000	3,900	13,900	1.5%
Vacant	28,600	1,300	29,900	3.2%
Total	540,800	406,600	947,400	100.0%
Vacancy Rate (%)	5.3%	0.3%	3.2%	

SOURCE: urbanMetrics inc., based on desktop inventory, CoStar, site plans (where available), August 2023

4.3 Demand Assessment (Per Capita)

We have conducted a per capita analysis to determine the demand for retail/service space within the study area, both for the current and future population of the study area.

The per capita method relies on the following assumptions:

- Typical retail/service space needs per resident within the study area of markets of similar size, based on urbanMetrics' professional experience;
- The fraction of the retail/service space needs of residents within the study area that would likely be fulfilled by commercial space within the study area (as opposed to commercial space outside the study area); and,
- The amount of additional retail/service space within the study area that would be supported by inflow expenditures from people visiting from outside study area.

Note that this per capita space analysis also recognizes the commercial space located just north of the study area on Holland Street. The total space inventoried for this analysis comprises the majority of retail/service commercial space in the Town and supports a significant portion of BWG residents' commercial needs. This is reflected in our elevated study area capture and inflow rates.

Figure 4-3 below details the warranted space required for each retail/service category. Assuming full buildout of the subject site and active development applications by 2031, this analysis is based on the additional 3,800 persons that will reside within the study area. We have utilised a total space per capita estimate of 33 square feet per new resident based on town-wide ratios determined through other market studies. As a result, the anticipated population growth will warrant up to 143,200 square feet of new retail/service space.

We recognize that The Holland Street commercial corridor consists of many recognizable anchor tenants (e.g., Walmart, Home Depot) which support much higher customer volumes from broader study area than the current population levels in BWG. This corridor will continue to support the new population in the study area and across BWG, particularly with the addition of new retail pads in the existing plazas.

Figure 4-3: Per Capita Space Analysis, Net New Study Area Population (2031)

Commercial Needs - Retail Category	Typical Space Per Capita (Sq Ft)	Total Space Required by Residents (Sq Ft)	Target Capture	Space Required (Sq Ft)	Inflow	Total Warranted Space (Sq Ft)
Additional Population in Study Area (2031)	3,800					
	A	=	B	x	C	=
			D	x	E	=
						F
Store Categories						
Food Store Retail	4.0					
Convenience and Speciality Food	1.0	3,800	75%	2,850	55%	6,300
Supermarkets & Grocery	3.0	11,400	75%	8,550	40%	14,300
Beer, Wine Liquor	1.0	3,800	70%	2,660	55%	5,900
Non-Food Store Retail	14.0					
Apparel and Accessories	1.5	5,700	20%	1,140	55%	2,500
Building and Outdoor Home Supply	3.0	11,400	60%	6,840	55%	15,200
Furniture, Home Furnishings & Electronics Store	3.0	11,400	20%	2,280	55%	5,100
General Merchandise	3.0	11,400	50%	5,700	55%	12,700
Miscellaneous Retailers	2.0	7,600	30%	2,280	55%	5,100
Pharmacies & Personal Care Stores	1.5	5,700	75%	4,275	55%	9,500
Services	14.0					
Food Services & Drinking Places	3.0	11,400	60%	6,840	55%	15,200
Finance, Insurance and Real Estate	2.0	7,600	60%	4,560	55%	10,100
Health Care	1.5	5,700	80%	4,560	55%	10,100
Personal Care	2.0	7,600	80%	6,080	55%	13,500
Business Services ¹	1.5	5,700	60%	3,420	55%	7,600
Other ²	4.0	15,200	30%	4,560	55%	10,100
Total	33.0					143,200

SOURCE: urbanMetrics inc.

¹ Includes: Professional, Scientific and Technical Services, Select Civic and Social Organizations, Selected Office Administration and Selected Educational Services

² Includes: Cultural, Entertainment and Recreation, Personal & Household Goods Repair and Maintenance, & Social Services

4.4 Commercial Space Supply

We have identified the supply of future retail/service commercial space within and surrounding the study area. This is comprised of three main sources: active development applications which include a retail/service commercial component, future development opportunities identified by property owners of existing retail plazas, and vacant land zoned for commercial uses (if any).

In total, we have identified 301,500 square feet of additional retail/service commercial space within and near the study area (see Figure 4-5). These sources are primarily intensification (i.e., new pad) opportunities on

existing major shopping centres. As shown in Figure 4-4 below, SmartCentres Bradford has identified approximately 269,000 square feet of build opportunity, some 86% of the total commercial supply.

Figure 4-4: Build Opportunities (in Blue) at SmartCentres Bradford



SOURCE: SmartCentres

There is significant commercial supply concentrated along the Holland Street commercial corridor. Property owners of the major shopping centres recognize intensification opportunities on their sites which can support additional tenants and customers.

Holland Street is the core commercial location in the Town of BWG. All major banners across FSR, NFSR, and Services categories are located on this corridor, as well as destination tenants such as restaurants and specialty stores. This commercial corridor is within two kilometres of the subject site, an accessible distance to travel by motor vehicle or bicycle.

Figure 4-5: Commercial Supply

Supply	Est. GFA	Description
Development Applications		
566 Holland St W	4,500 sqft	Proposed gas station with Circle K convenience store and additional commercial unit. Estimated based on typical GFA of commercial uses of this type
Future Development / Build Opportunity		
SmartCentres Bradford	269,000 sqft	Estimate of build opportunity based on SmartCentres Bradford site plan
Shoppes at Summerlyn	15,000 sqft	Estimate of build opportunity based on Shoppes at Summerlyn site plan
Holland Street Square	13,000 sqft	Identified by Centre Corp on property plan, excluding area with active residential development application
Total Development Potential	301,500 sqft	

SOURCE: urbanMetrics inc., based on Town of BWG's Current Development Applications, future build opportunities identified by respective property owners, commercial designated vacant land.

NOTE: We have excluded the proposed service/office commercial at 210 and 240 Holland St W which are intended to cater to the needs of seniors' home residents, rather than the general population.

4.5 Warranted Space Summary

As detailed in Figure 4-6 below, the future study area population will warrant an additional 143,200 square feet of retail/service space. However, recognizing existing supply sources and that current vacancy rates/availability rates are reasonable at around 3%-4%, there is an excess of 158,300 square feet of commercial space potential. Our analysis suggests that there is sufficient allocated commercial potential within strategic commercial nodes to support the growing Town.

Commercial space is not required on the subject site to meet the day-to-day shopping needs of the community. This is further accentuated by the subject site's poor geographic positioning as a commercial node and the insufficient population levels within the proposed community to support a critical mass of commercial space.

Figure 4-6: Projected Warranted Space and Development Potential

Demand

Net New Warranted Space (2031) 143,200 sqft

Supply

Development Potential 301,500 sqft

Surplus Space Supply to 2051 158,300 sqft

SOURCE: urbanMetrics inc.

4.6 Localized Commercial Needs

It is recognized that there is currently no commercial space towards the south end of the study area (i.e., south of Line 6). This is due to low population densities in this part of Bradford and the fact that Bradford has developed a centralized commercial structure focused on Holland Street and the Downtown. In our opinion, despite the lack of commercial uses towards the south part of the community, residents in this part of Bradford are still situated a very close distance to the full range of retail uses and services required to serve their day-to-day or weekly shopping needs. Even from the furthest south of the study area, residents can travel to at least one supermarket by car in a five-minute drive, with a bike ride of under 10 minutes, or by bus in about 15 minutes.

Even if a small convenience centre could be justified in the southern part of the study area, it would have minimal impact on walkability as there would not be sufficient homes within walking distance to support it. Such a centre would require a predominantly driving customer base. This is exacerbated by the street pattern in the southern part of the community which is comprised of a patchwork of culs-de-sac and crescents in the neighbourhoods with limited mid-block pedestrian access points on the Major Arterial roads. It is also likely that a convenience centre in the south would serve a very small population base owing to the substantial competition along Holland Road — a short distance to the north.

In our opinion, there is no immediate need for a small commercial plaza in the south end of the community. The financial viability of such a plaza would be questionable and it would have minimal impact on the walkability of the community.

5.0 Conclusions

In this Commercial Needs Study, we have analyzed the various physical, policy, and market factors to consider whether the development of commercial retail space on the subject site should be required.

While the Town of Bradford West Gwillimbury is forecast to see increasing population growth, our study has shown that the Bradford Highlands site is a poor site to locate any commercial space within the proposed residential development. Four significant factors lend to the site's unfeasibility for retail/service space:

1. The only access points to the subject site from major streets are bordered by deep residential lots with significant tree barriers. Any retail on the subject site would not be visible from the street, limiting their traffic and desirability. The mid-block access points and being situated on the boundary of the Town make the site even worse for retail.
2. Despite past tightness in the commercial retail market, recent trends in availability rates shows the market is currently much healthier. There is no urgent need for additional commercial retail in the Town.
3. Existing retail sites meet the Town's commercial needs. Alternative existing vacant and underutilised sites, such as along Holland Street are more strategically located to accommodate new commercial space.
4. The Downtown is an extremely important policy area within the Official Plan. Strategically, new demand should be encouraged to be met on underutilised sites and vacant properties within the Downtown, which can serve the entire Town.

As such, it is our professional opinion that the Town of Bradford West Gwillimbury should not designate any portion of the subject site as commercial or require commercial retail to be built on the subject site.

Appendix A North American Industry Classification System (NAICS)

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

Trade Group	NAICS	Description
FOOD STORE RETAIL (FSR)		
90	Supermarkets	
	44511	Supermarkets and Other Grocery (except Convenience) Stores
100	Convenience and Specialty Food Stores	
	44512	Convenience Stores
	44521	Meat Markets
	44522	Fish and Seafood Markets
	44523	Fruit and Vegetable Markets
	44529	Other Specialty Food Stores, including Baked Goods Stores, & Confectionary & Nut
BEVERAGE STORES		
110	Beer, Wine and Liquor Stores	
	44531	Beer, Wine and Liquor Stores
NON-FOOD STORE RETAIL (NFSR)		
Automotive		
20	Used and Recreational Motor Vehicle and Parks Dealers (Tires, Batteries, Automotive Accessories component)	
	44131	Automotive Parts and Accessories Stores
	44132	Tire Dealers
Furniture, Home Furnishings and Electronics Stores		
30	Furniture Stores	
	44211	Furniture Stores
40	Home Furnishings Stores	
	44221	Floor Covering Stores (excludes retailers or only ceramic or only hardwood flooring which are in Building Supply)
	44229	Other Home Furnishings Stores (e.g. window treatments, fireplace/accessories, kitchen and tableware, bedding and linens, brooms and brushes, lamps and shades, and prints and picture frames).
50	Computer and Software Stores	
	44312	Computer and Software Stores (includes retailing new computers, computer peripherals, pre-packaged software, game software and related products)
60	Home Electronics and Appliance Stores	
	44311	Appliance, Television and other Electronics Stores
	44313	Camera and Photographic Supplies Stores
Building and Outdoor Home Supplies Stores		
70	Home Centres and Hardware Stores	
	44411	Home Centres
	44413	Hardware Stores (includes tool stores)
80	Specialized Building Materials and Garden Stores	
	44412	Paint and Wallpaper Stores
	44419	Other Building Material Dealers (excluding manufacturing and construction firms) (includes doors, windows, kitchen cabinets, electrical, glass, plumbing, ceramic floor, roofing materials, fencing)
	44421	Outdoor Power Equipment Stores (lawn mowers, tractors, hedge trimmers, snow blowers)
	44422	Nursery Stores and Garden Centres
Pharmacies and Personal Care Stores		
120	Pharmacies and Personal Care Stores	
	44611	Pharmacies and Drug Stores
	44612	Cosmetics, Beauty Supplies and Perfume Stores
	44613	Optical Goods Stores
	44619	Other Health and Personal Care Stores (includes stores retailing health and personal care items, such as vitamin supplements, hearing aids, and medical equipment and supplies)

Continued...

Trade Group	NAICS	Description
NON-FOOD STORE RETAIL (NFSR) (Continued)		
Clothing and Accessories Stores		
140	Clothing Stores	
	44811	Men's Clothing Stores
	44812	Women's Clothing Stores
	44813	Children's and Infant's Clothing Stores
	44814	Family Clothing Stores
	44819	Other Clothing Stores
150	Shoe, Clothing Accessories and Jewellery Stores	
	44815	Clothing Accessories Stores
	44821	Shoe Stores (includes athletic shoe retailers)
	44831	Jewellery Stores
	44832	Luggage and Leather Goods Stores
General Merchandise Stores		
170	Department Stores	
	45211	Department Stores
175	45211	Department Stores with a Large food component (i.e. Walmart Supercentres)
180	Other General Merchandise Stores	
	45291	Warehouse Clubs and Superstores
	45299	All Other General Merchandise Stores: <i>Home & Auto (i.e. Canadian Tire)</i> <i>Other General Merchandise Stores (e.g. general stores, variety stores, "dollar" stores)</i>
Miscellaneous Retailers		
160	Sporting Goods, Hobby, Music and Book Stores	
	45111	Sporting Goods Stores (excludes athletic shoe retailers)
	45112	Hobby, Toy and Game Stores (excludes computer games and software)
	45113	Sewing, Needlework and Piece Goods Stores
	45114	Musical Instrument and Supplies Stores
	45121	Book Stores and News Dealers
	45122	Pre-Recorded Tape, Compact Disc and Record Stores
190	Miscellaneous Store Retailers	
	45311	Florists
	45321	Office Supplies and Stationery Stores
	45322	Gift, Novelty and Souvenir Stores
	45331	Used Merchandise Stores
	45391	Pet and Pet Supplies Stores
	45392	Art Dealers (excludes art galleries)
	45399	All Other Miscellaneous Store Retailers (e.g. tobacco supplies, artist supplies, collectors items, beer & wine making, swimming pool/spas/accessories, religious goods and accessories)

Continued...

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

Continued...

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

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