

MARKET STUDY UPDATE

RETAIL COMMERCIAL DEMAND ANALYSIS

GEORGETOWN TRADE AREA

**UPDATED COMPETITIVE RETAIL COMMERCIAL INVENTORIES
UPDATED PROJECTIONS OF RESIDUAL MARKET DEMANDS**

February 2, 2016

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Acronyms:

FSR:	Food Store Retail
NFSR:	Non-Food Store Retail
GAFO:	General Merchandise / Apparel / Furniture, / Other
HI:	Home Improvement
HAAS:	Home and Auto Supply
TBA:	Tires, Batteries & Accessories
L/B/W:	Liquor/Beer/Wine
FIRE:	Finance / Insurance / Real Estate
SBM:	Services to Business Management
GLA:	Gross Leasable Area
WMC:	Warehouse Membership Club (Costco)
PZ:	Primary Zone
SZ:	Secondary Zone

Summary of Findings:

This February 2, 2016 Study Update revisits and updates the May 5, 2010 Retail Commercial Demand Study prepared for the Town of Halton Hills. The May 5, 2010 study investigated market demands in both the Acton and Georgetown Trade Areas, whereas this Study Update examines only the Georgetown Trade Area.

This 2015 Study Update is intended to provide market guidance regarding the planned commercial structure serving existing Georgetown residents, as well as an expanded commercial structure now being planned to accommodate future populations in other parts of Georgetown, including the Southwest Georgetown Urban Expansion Area with an expected population of $\pm 20,000$ persons by 2031.

The purpose of this 2016 Study Update is to recommend an optimal scale, timing, mix, and distribution of future warranted expansions of Georgetown's retail commercial infrastructure.

In today's context, some of the assumptions of the May 5, 2010 study have been overtaken by changes in the marketplace.

These include certain additions and other changes (e.g. closures / turnover / expansions) to Georgetown's inventory of retail commercial floorspace, as well as additions of regional retail space and other relevant changes to the competitive landscape in surrounding communities.

These changes impinge on the continued validity of the projections of residual market demands identified in the May 5, 2010 study.

Moreover, the population projections have changed. The May 5, 2010 study projected a Georgetown population in 2031 of 68,000 persons, and a Secondary Trade Area population of 32,000 persons, based on Halton Region's November 30, 2009 Best Planning Estimates incorporating Traffic Zone modifications for the Stewarttown Expansion Area and SW Georgetown. In contrast, this 2016 Study Update projects a 2031 Georgetown population of about 75,000 persons and a Secondary Trade Area population of about 30,000 persons based on Halton Region's Best Planning Estimates dated June 2011.

Along with updated population estimates, updated per capita expenditures, and more conservative "bump-ups" in future local capture rates (market shares), this 2016 Study Update yields lower amounts of residual / warranted space than estimated in the May 5, 2010 study.

The May 5, 2010 study estimated a demand for about **650,000** square feet of retail and selected commercial space by 2031 requiring **±60** acres of commercial land at 25% coverage.

This February 2, 2016 Study Update estimates a lower demand for about **540,000** ft² of retail and selected commercial space by 2031 requiring a rounded land allocation of **50** acres at 25% coverage and **40** acres at 30% coverage.

Current market trends suggest a growing shift towards higher density retail commercial development than the typical 25% coverage, particularly for multi-storied mixed-use developments. This shift towards higher density is coincident with the downscaling (aka "right-sizing" initiatives) of certain national chain stores. Both shifts contribute to lower land requirements over time (and presumably lower land costs as well).

Assuming 30% coverage and a rounded land allocation of 40 acres, the estimated distribution of such space within the SW Georgetown Urban Expansion Area would support up to:

- one Community Shopping Centre (±190,000 ft² on up to 15 acres total), plus
- two Neighbourhood Shopping Centres (±120,000 ft² on up to 9 acres total), plus
- three Convenience / Mixed Use Centres (±90,000 ft² on up to 6 acres total).

The estimated distribution of such space would support a further allocation for all other locations in Georgetown ($\pm 140,000$ ft² occupying up to 10 acres by 2031). This could be achieved through additional vacancy uptake, re-developing existing sites on multiple stories, converting to higher density parking to facilitate increased same-site commercial density, and conversion of non-commercial uses or land to retail commercial.

Potential short to medium term leasing prospects in Georgetown are tempered by the recent shake-out in the retail industry across Canada whereby a number of prominent retail chains have either closed (Target, Zellers, Future Shop) or downsized (e.g. Benix, Blacks, Bombay, Bowring, Herbal Magic, Holt Renfrew, Jacob, Mexx, Sears, Sony).

Georgetown has experienced a contraction of FSR, and NFSR space (by 5.8% and 2.5% respectively) since the May 5, 2010 study:

- The rationalization of Metro's two supermarkets to one supermarket accounts for most of the FSR decline to 325,000 ft² (rounded).
- The closure of Zellers accounts for a major part of the decline in NFSR space to 530,000 ft² (rounded).

In contrast to these declines, service commercial space (excluding "Other Services") held its own, rising marginally by 1.75% (to 344,000 ft²).

On the positive side, "Other Services" rose by a significant 70% (to 242,000 ft²).

On the negative side, vacancies more than doubled (to 85,000 ft²).

Looking ahead to the high growth decade following 2021, the leasing potential in the Southwest Georgetown Urban Expansion Area will favour the early provision of larger scale food retailing and lower order non-food retailing plus service commercial space in advance of full market support.

The provision of higher order comparison goods shopping will undoubtedly lag until closer to 2026 when threshold populations necessary for their support emerge.

It is an unlikely prospect for the Southwest Georgetown Urban Expansion Area to attract an additional department store (meaning a Canadian department store existing today) since the Georgetown market is tributary to much larger adjacent markets with overlapping department store trade areas in Milton, Oakville, Mississauga and Brampton. The new 187,000 ft² Wal-Mart at Brampton's Credit Ridge Commons (Mississauga Rd. south of Bovaird Dr.) for example, is almost twice as large as the re-developed 99,000 ft² Wal-Mart at Georgetown Marketplace Mall. The closest Wal-Mart to Georgetown's at Milton's First Gulf site (James Snow Pkwy. / Hwy. 401) is 1/3rd larger. Both these Wal-Mart stores will act as a brake on a second Wal-Mart store in Georgetown.

While an expansion of the existing Wal-Mart at Georgetown Marketplace Mall cannot be ruled out by 2031, it would be unlikely to expand given the proximity and draw-downs of the putative 250,000 ft² of department store space planned for the Osmington Regional City Centre site in Brampton (Bovaird Dr. / Mississauga Rd.). The 800,000 ft² first phase of Osmington's retail component has been appealed to the Ontario Municipal Board by Bramalea City Centre).

The 358,500 ft² first phase of the Toronto Premium Outlet Mall (Calloway REIT / Simons) in Halton Hills in the NE quadrant of Trafalgar Road and Highway 401 has expansion potential of 141,500 ft² that will take it to 500,000 ft².

The International Council of Shopping Centres defines an outlet mall as:

“a specific purpose-built centre type consisting of separate manufacturers' and retailers' outlet stores selling their brand-name goods at discounted prices, typically selling surplus stock, prior-season, or slow selling merchandise and especially designed merchandise. These centres are generally not anchored, although certain brand-name stores may serve as “magnet” tenants. Outlet centres can be either open-air or enclosed and are between 50,000 to 400,000 square feet (GLA) in most cases. The primary trade area is 20 to 50 kilometers”.

Average statistics regarding U.S. outlet centres, as well as average statistics for the two largest U.S. players (2011\$) are as follows:

Average sales per ft² in all U.S. outlet centres = \$330
Average store size in all U.S. outlet centres = 4,135 ft²

Averages for Simon's 58 Premium Outlet Malls
= total of 24.3 million ft²
= 420,000 ft² per centre
= \$500 per ft² sales performance
= \$200+ million in sales per centre

Appendix B-3 contains a core listing of classic American and Premium International brands common to all Simon's Premium Outlet Malls in the United States. Twenty-one of those core brands (highlighted in yellow) are currently found in the Toronto Premium Outlet Mall (NE Trafalgar / 401).

The Toronto Premium Outlet Mall currently contains 88 stores. It could potentially accommodate another 35 to 40 more stores assuming that the mall further expands to an aggregate floorspace test allocation of 500,000 ft² (as tested in the supporting market study entitled “Market Analysis & Impact Evaluation, Proposed Outlet Centre, Trafalgar Rd. and Highway 401, Halton Hills, Ontario, April 2011” prepared for Calloway REIT (Halton) Inc., prepared by Ms. Mimi Ward of Malone Given Parsons Ltd.).

Aside from potential outlet mall space, it is difficult to forecast what smaller scale anchor tenants might be attracted or even become available to locations elsewhere in Georgetown when Georgetown's population will approach 75,000 persons by 2031.

In today's leasing environment, prospective anchor tenants in the 10,000 ft² to 20,000 ft² range that cater to an urban population threshold of $\pm 75,000$ might include home décor themed tenancies (e.g. Kitchen Stuff Plus, Linen Chest, Bouclair Home, Bed Bath and Beyond, Sears Home, Hudson Bay's Urban Outfitters, Urban Barn, Sleep Country), fashion retailers (e.g. Fairweather, Urban Planet, Designer Depot, Old Navy, H&M), or regional chains such as the TSC Store (Tractor Supply Company), Value Village, or Giant Tiger. Petsmart (about 15,000 ft²) is slated to open in 2016 in the Canadian Tire / Price Chopper / Home Hardware node.

Georgetown Marketplace Mall (about 350,000 ft²) is made up of about 65% national chain stores, with a good array of anchor stores (Wal-Mart, Winners / Home Sense, Beer store and LCBO, Sport Chek, and Mark's Work Warehouse).

None-the-less, Georgetown Marketplace Mall's current vacancy rate (5.5% in 11 units comprising about 20,000 ft²) moderately exceeds Georgetown's relatively healthy average vacancy rate (5.3%).

Future leasing scenarios are difficult to predict without knowing what tenancies that exist today will still be around in 2031, or whether the Canadian retail market will spawn new home grown retailers, or will be augmented by any new entries from the United States or elsewhere.

This study has taken into account (through local capture rate adjustments) the growing marketplace reality that higher order anchor stores in surrounding communities will continue to sell into or otherwise cannibalize this smaller market without having to have a physical store presence in Georgetown (e.g. by attracting long distance comparison shopping trips by Georgetown residents to those surrounding communities or through e-commerce).

Such conservative adjustments to local capture rates have been made to ensure that the long term prospects for attracting new or replacement higher order comparison goods chain stores are not overstated in this study.

Aside from that qualifier, Georgetown can expect to attract sufficient numbers of higher order comparison goods anchor stores and smaller national chain stores to fill the recommended space allocations.

Recommendations:

Any future expansions of the retail commercial infrastructure will need to respect the integrity of Georgetown's existing retail structure, and strengthen and enhance Georgetown's retail commercial planned functions and local, sub-regional, and regional draws.

With 20,000± persons added in the period 2021 to 2031 to Southwest Georgetown, Stewarttown, and Southeast Georgetown, and through intensification in Georgetown's built boundary, the new commercial space and land requirements by 2031 amount to an estimated 540,000 ft² on 40 acres (rounded) at 30% coverage.

Under the conservative assumptions in this 2015 Update Study regarding future local capture rates and inflow, it is recommended that 30 acres of commercially designated land should be incorporated into the planning of the Southwest Georgetown Urban Expansion Area in order to accommodate about 400,000 ft² of retail commercial space in new community, neighbourhood, and convenience / mixed use commercial facilities.

It is further recommended that 140,000 ft² be accommodated elsewhere in Georgetown on existing commercially designated lands (through a combination of intensification / infill / re-development) or on lands suitable for conversion to retail commercial use.

The recommended breakdown of space is summarized as follows:

<u>SW Georgetown Urban Expansion Area:</u>		<u>30% Coverage</u>
One Community Shopping Centre	@ ±190,000 square feet	15 acres
Two Neighborhood Centres	@ ±120,000 square feet	9 acres
Three Convenience / Mixed Use Centres	@ ± 90,000 square feet	<u>6 acres</u>
Subtotal	@ ±400,000 square feet	30 acres
Other Georgetown:	@ ±140,000 square feet	<u>10 acres</u>
Total	@ ±540,000 square feet	40 acres

While many anchor stores are not yet represented in Georgetown, a sufficient number are expected to enter the Southwest Georgetown Urban Expansion Area, in conjunction with further planned intensification within Georgetown's built boundary, to fill the recommended longer term allocations of new space.

These recommendations will result in a long term equilibrium in which the market is neither over-stored nor under-stored.

Introduction:

The purpose of this 2016 Study Update is to revisit and recast the May 5, 2010 Retail Market Demand Analysis. It takes into account the “Sustainable Halton Preferred Growth Option” to 2031 that would accommodate an additional growth target of approximately 20,000 persons in Southwest Georgetown, plus two smaller areas, being Southeast Georgetown and the rounding of Stewarttown, in conjunction with further planned intensification within Georgetown’s built boundary.

This 2016 Study Update examines the need for any future expansions of the retail commercial infrastructure in Georgetown as a result of that 20,000 population increment, and what types of commercial facilities might best accommodate those market demands.

Methodology:

This 2016 Study Update’s methodology includes the following steps:

- in today’s market context (2015 base year and inventory), this 2016 Study Update estimates current local capture rates based on consultant judgment / interpretation of the consumer telephone survey results of the May 5, 2010 study;
- in order to make longitudinal comparisons of the **supply side** amounts and types of existing retail commercial space over time (previously in 1991, 2001, and 2009), this 2016 Study Update updates the floorspace inventory of existing retail, commercial, and vacant space within Georgetown (**Table 21**);
- with a 2015 base year and using Georgetown’s historical trade area definition, this 2016 Study Update updates key inputs in the analysis such as components of population growth and structure, population forecasts (**Appendix A-5**), per capita household incomes (**Appendices A-3** and **A-6**), per capita expenditure levels (**Appendices A-1** and **A-4**), real expenditure growth, department store and non-department store split of NFSR expenditure potential, supermarket/grocery and specialty food split of FSR expenditure potential, current local capture rates (as adapted from the May 5, 2010 study’s consumer telephone survey), future local capture rates, current and future inflow levels, and base year sales per square foot by retail commercial category, in order to quantify the **demand side** residual square footages by retail commercial category (**Tables 1-18**); and
- this 2016 Study Update re-examines the land requirements for an optimum distribution of the residual square footages by type of centre / planned function for accommodating the long term retail commercial demands in the Southwest Georgetown Urban Expansion Area and elsewhere in Georgetown (**Table 19**).

All expenditures in this February 2, 2016 Study Update are expressed in the 2015 value of the dollar to align with the 2015 base year and the 2015 retail commercial floor space inventory (market supply).

Residual market demands represent “ease of entry” calculations without sales transfers away from existing retail commercial operators.

Residual demand side projections are updated for the following retail/commercial categories:

Supermarket/Grocery (portion of FSR)

Specialty Food (portion of FSR)

Department Store NFSR (= GAFO / DRUG)

Non-Department Store NFSR (= GAFO / DRUG)

- **G**eneral Merchandise Stores (incl. Can. Tire + Home and Auto Supply + Tire stores)
- **A**pparel & Accessories Stores
- **F**urniture / Home Furnishings / Electronics Stores
- **O**ther Retail Stores
- DRUG = Pharmacy and Personal Care Stores

HI

Restaurant

L/B/W

Personal Service and Other Services - (e.g. Barber/Beauty, Travel Agency, Shoe Repair & Other Repair Services, Dry Cleaner/Laundromat/Laundry, Wine/Beer Making, and Other Services such as Video Rental, Tanning, Photography, Dance, and Other Studio, Locksmith, and Caterer)

Residuals beyond the **2015** base year include short to medium term demands in 2016 and 2021, and longer term demands in 2026 and 2031 (i.e. over a 16 year projection period).

Space planning ratios are also calculated for Personal Service, Other Service, Financial Institution, and Local Office space, the latter of which includes Finance/Insurance/Real Estate (FIRE) and Services to Business Management (SBM)

Assumptions:

The per capita income and expenditure levels of Georgetown trade area residents will remain at current levels (a general marketplace expectation).

The consumer telephone survey data from the May 5, 2010 study are assumed to be representative of the expenditure patterns of Georgetown trade area residents as adapted to the 2015 context by consultant judgment of market place changes in the interim.

All calculations are expressed in terms of the **2015** value of the dollar.

Other assumptions or clarifications are made at appropriate points in the text.

Any major change affecting the assumptions of this 2016 Study Update would warrant a re-visitation of this study's findings.

Market Parameters:

Georgetown Trade Area Definition:

The Georgetown trade area originally defined in the May 11, 2001 study was based on customer intercept surveys. The May 5, 2010 study conducted consumer telephone surveys within those historic trade area boundaries.

This 2016 Study Update adopts the same trade area definition.

Doing so enables longitudinal comparisons to be made of retail commercial floorspace inventories, population projections, and per capita space ratios for the study years 1991, 2001, 2010, and 2015.

Georgetown Trade Area Incomes & Expenditures:

Appendix A-1 and **Appendix A-3** provide regression equations that link per capita household incomes in the Primary and Secondary Zones to per capita FSR, NFSR (GAFO + Drugs), HI, L/B/W, and Restaurant expenditures.

Appendix A-2 features the final revised **2014** Ontario per capita FSR, NFSR (=GAFO + Drugs), and HI expenditures. These are converted into **2015** expenditures by a 5% assumed year-over-year inflationary and real increase.

Appendix A-3 calculates per capita household income indexes (1996, 2001, and 2006 Census data for income earned in each previous year) and per capita expenditure indexes for the Georgetown trade area (based on the footnoted regression equations) relative to the provincial average. Base year estimates for 2015 have been provided by *Environics Analytics*.

The average per capita household incomes in Georgetown's Primary and Secondary Zones are **18.7%** and **13.1%** respectively **above** the provincial average in 2015.

For Georgetown, this is higher than previous Census data. For the Secondary Zone, this is lower than previous census data (down from 19% above in 2001 and 2006).

Appendix A-4 calculates the resultant 2015 per capita expenditures by retail commercial space category (FSR + NFSR including HAAS/TBA + HAAS/TBA as a separate anchor store check calculation + HI + Restaurant + Liquor/Beer/Wine) for the Primary and Secondary Zones.

Appendix A-5 provides detailed calculations by Traffic Zone (sourced from Halton Region’s Best Planning Estimates, June 2011) of the projected population growth unadjusted for the Census undercount for the Primary and Secondary Zones of Georgetown’s trade area in 2011, 2016, 2021, 2026, and 2031.

Georgetown’s Longitudinal Floorspace Inventory Changes:

This 2016 Study Update incorporates the retail commercial floorspace inventory figures featured in **Appendix B-1**.

In **Table 21**, data are compared from inventories conducted in studies dated October, 1991, May 12, 2001, May 5, 2010, and February 2, 2016.

The data for 2015 versus 2010 show that the amounts of FSR space and NFSR space have declined principally because of the closure of one of two Metro supermarkets and Zellers.

Table 21 Overleaf demonstrates that over the 24 years between Georgetown’s 1991 and 2015 inventories, some 20,000+ ft² of new space has been added on average each year:

FSR:	5,650 ft ² per year
NFSR:	5,900 ft ² per year
Restaurant:	1,035 ft ² per year
Personal Services:	2,000 ft ² per year
Other Services:	<u>6,600</u> ft ² per year
	21,185 ft ² per year

The largest ft² gains were made between 2001 and 2010 in virtually all retail commercial categories except Canadian Tire (stayed the same) and TBA and HI (which decreased modestly).

Georgetown Floorspace Changes between 2010 and 2015:

The floorspace changes between 2010 and 2015 include the shrinkage of Georgetown’s department store representation (Zellers closed and the former Zellers site is occupied by the now-expanded Wal-Mart). The department store inventory has declined by about 1/3rd from 154,520 ft² to 99,013 ft².

This contraction in the amount of department store space in Georgetown to 99,013 ft² was coincident with the development in Brampton of a much larger Wal-Mart (about twice as big) about 4 miles away at the Credit Ridge Commons site on Mississauga Road south of Bovaird Drive -- also anchored by a 100,000 ft² Home Depot.

This means that Georgetown is blanketed by the draws of larger Wal-Mart department stores in Milton (First Gulf @ 134,226 ft²) and Brampton (Credit Ridge Commons @187,140 ft²)

Other changes in the retail landscape since the May 5, 2010 study include the development of the Toronto Premium Outlet Centre in the Northeast quadrant of Trafalgar Road and Highway 401 (358,000 ft² with assumed expansion potential to the 500,000 ft² test allocation analyzed by Malone Given Parsons on behalf of Calloway REIT in June 2011).

Licence Plate Survey at Toronto Premium Outlet Centre:

The Toronto Premium Outlet Centre was tested by licence plate survey on Thursday-Friday-Saturday June 4th to 6th, 2015 to determine how much of the NFSR space is “effective” in the Georgetown trade area. The licence plate survey data reveals that the outlet centre drew 8.44% of its licence plates from Georgetown, 0.70% from Acton, and 0.70% from other Halton Hills, and 90.16% from outside Georgetown’s trade area. The total sample size consisted of 569 analyzed plates. The recorded licence plates were processed by the Ontario Ministry of Transportation (MTO) and GEOmarketing Solutions Inc..

Test Allocations for Other Potential Regional Supply:

There are five designations that will exert regional draws into Georgetown’s trade area and take away some trade from residents of Georgetown’s trade area.

- 1) Brampton’s “Osmington” Regional City Centre, Bovaird Dr. / Mississauga Rd.

Reference:

Kircher Research Associates Ltd.’s (KRA’s) updated market study entitled “Osmington Regional City Centre, Retail Market Potential and Impact Analysis, Update: February 28, 2010”.

The proposal is for 800,000 ft² (phase 1) of retail commercial space with a first full year of operation in 2014 (now under appeal). Of this space, 250,000 ft² represents new department store space:

Department store	@ 250,000 ft ²
General Merchandise Stores (non-dep’t store)	@ 80,000 ft ²
Apparel & accessories Stores	@ 160,000 ft ²
Furniture / Home Furnishings / Electronics	@ 75,000 ft ²
Other Retailers	@ 50,000 ft ²
Pharmacy and Personal Care Stores	@ <u>20,000</u> ft ²
Subtotal GAFO + DRUG	@ 385,000 ft ²
Supermarkets and Grocery Stores	@ 50,000 ft ²
Liquor / Beer / Wine (L/B/W)	@ 15,000 ft ²
Services	@ 100,000 ft ²
SUBTOTAL PHASE 1	@ 800,000 ft²
RANGE	@ 725,000 ft² -- 857,000 ft²

SUBSEQUENT PHASES

Enclosed	@ 400,000 ft ²
Outdoor	@ <u>290,000</u> ft ²
SUBTOTAL	@ 700,000 ft ² (rounded)
TOTAL	@ 1,500,000 ft ² (rounded)

Note: Osmington's first phase is about double the size of a typical power of 400,000 ft² to 450,000 ft²

2) Halton Hills' "North American" site

This is an easterly extension of First Gulf's regional power centre node at James Snow Pkwy. / Hwy. 401 in Milton. It has not yet developed as expected in the May 5, 2010 study. This site has been slated for 188,000 ft² of NFSR space, or alternatively a 150,000 ft² WMC (Costco) or Home Improvement Centre.

- 3) Halton Hills' Toronto Premium Outlet Centre – tested at 500,000 ft²
- 4) SW Trafalgar / Steeles – tested at 100,000 ft²
- 5) Winston Churchill Gateway site – tested at 250,000 ft²

Derivation of "Effective" Space Estimates for Other Potential Regional Supply:

1) The "effective" space in Brampton's "Osmington" Regional City Centre

The impact of Osmington on Georgetown's department store and non-department store NFSR residuals can be approximated from KRA's study update.

KRA calculates dollar sales transfers for the department store and non-department store categories for Osmington's "Halton Hills Secondary Zone" which overlaps with Georgetown's trade area.

The department store transfers approximate 12.5% of Osmington's department store sales (or ft² proxy) and the non-department store transfers approximate 11.5% of Osmington's non-department store sales (or ft² proxy).

These factors are applied to Osmington's 250,000 ft² of proposed department store space (**Table 8**) and the 385,000 ft² of proposed non-department store NFSR space (**Table 10**).

2) The "effective" space in Halton Hills' "North American" site

The "effective" space is calculated from consumer telephone survey data for First Gulf's power centre which obtained 5.25% of its sales (or ft² proxy) from Georgetown trade area residents.

Reference:

W. Scott Morgan & Associates Limited's market study entitled "Retail Commercial Demand Study, Licence Plate Surveys, Consumer Telephone Survey & Updated Market Projections, Town of Milton, Current Direction, June 9, 2006".

This factor is applied to North American's 188,000 ft² of proposed non-department store NFSR space (**Table 10**).

3) The "effective" space in Halton Hills' Toronto Premium Outlet Mall

The "effective" space is calculated from the licence plate survey conducted at the Toronto Premium Outlet Centre that showed 10% of its sales (or ft² proxy) were derived from Georgetown trade area residents.

4) The "effective" space in Halton Hills' SW Trafalgar / Steeles site

Assume the same "effective" space as at the Toronto Premium Outlet Centre (10% of its sales or ft² proxy from Georgetown trade area residents).

5) The "effective" space in Halton Hills' Winston Churchill Gateway site

Assume the same "effective" space as at the Toronto Premium Outlet Centre (10% of its sales or ft² proxy from Georgetown trade area residents).

Residual Opportunities:

REFERENCE: Tables 1 to 2

Table 1 provides short to medium term population projections in 2016 and 2021, and longer term projections in 2026 and 2031. These data are adjusted for the census undercount in **Table 2**, and includes intensification.

In **Table 2**, the Primary Zone grows from 42,914 persons in the 2015 base year to reach 60,336 persons by the year 2026 and 74,814 persons by 2031. This represents growth of **31,900** persons in Georgetown over the 16 year forecast period.

The Secondary Zone grows from 26,404 persons in the 2015 base year to reach 29,502 persons by the year 2026 and 30,686 persons by 2031. This represents growth of **4,282** persons over the same period.

The Trade Area as a whole is projected to grow by **36,181** persons over and above the 2015 base of **69,318** persons to **105,500** persons in 2031.

REFERENCE: Tables 3 to 7

Tables 3 to 7 calculate expenditure potentials for the following categories by multiplying the projected population base by the corresponding per capita expenditures:

Table 3:	“NFSR” (GAFO / DRUG),
Table 4:	“HI”,
Table 5:	“FSR”,
Table 6:	Liquor/Beer/Wine (L/B/W), and
Table 7:	Restaurant

Per capita space planning ratios are applied to the Personal Service and “Other Service”, Financial Institution, and Local Office categories in **Table 18**.

The expenditure potentials in **Tables 3 to 7** incorporate real growth factors (exclusive of inflation) beyond the 2015 base year as follows:

- 0.5% to NFSR and HI expenditures to 2021 and 0.25% to 2026,
- 0.25% to FSR expenditures to 2026, and
- 0.25% to Restaurant and L/B/W expenditures to 2026.

REFERENCE: Tables 8 to 18

Table 8: Department Store NFSR Residual:

The department store shares of NFSR spending remain constant at 22% in the Primary Zone and 21% in the Secondary Zone.

The local capture rates increase modestly in the Primary Zone and remain constant in the Secondary Zone.

These estimates reflect the presence of larger Wal-Mart stores on regional sites in Brampton and Milton that smother additional department store opportunities in Georgetown.

Instead of a new store or second store opportunity, the Georgetown Marketplace Mall’s Wal-Mart is assumed to ramp up its sales over the forecast period from a base year performance of \$500 per ft² to \$575 per ft² in 2031. This reduces the residual opportunity accordingly.

The residuals are calculated at sales performance levels ranging from \$500 per ft² to \$600 per ft² with a mid-range performance of \$550 per ft².

From these ft² residuals is subtracted the “effective” space of the 250,000 ft² department store space at Osmington in Brampton.

The resulting rounded mid-range residuals (calculated at \$550 per square foot) are as follows:

- 2021: -8,500 ft²
- 2026: -6,500 ft²
- **2031: 10,000 ft²**

Under these assumptions, Georgetown will not support additional department store space in the Southwest Georgetown Urban Expansion Area.

Table 9: Non-Department Store NFSR Residuals:

Very modest increases in local capture rates are projected in the period 2021 to 2031 in both the Primary and Secondary Zones. This reflects the reduced department store opportunities that have a reciprocal effect on non-department store NFSR opportunities.

The existing 429,720 ft² of non-department store NFSR space performs at \$306 per ft² in the base year, rising to \$330 per ft² by 2031.

The “effective” ft² space in the Toronto Premium Outlet Centre is calculated at 10% (rounded) based on the June 2015 licence plate survey results, and is multiplied by a high sales performance of \$600 per ft².

Rounded mid-range residuals (calculated at \$325 per ft²) are as follows:

- 2021: 50,000 ft²
- 2031: 150,000 ft²
- **2031: 265,000 ft²**

Table 10: Non-Department. Store NFSR Aggregate Impacts:

From the rounded mid-range residual demands featured immediately above are subtracted the square footage draw downs of competitive non-department store NFSR space that comprises committed supply.

This includes a 25% reduction in vacant space (from a current vacancy rate of 5.3% to 4.0%).

The committed supply also includes the “effective” space in Halton Hills’ Toronto Premium Outlet Centre + Halton Hills’ SW Trafalgar / Steeles site + Halton Hills’ North American site + Halton Hills’ Winston Churchill Gateway site and Brampton’s Osmington site. Together, the committed supply totals 125,000 ft².

An unassigned notional test allocation of 140,000 ft² in 2031 could all be absorbed by the Southwest Georgetown Urban Expansion Area.

The impact on the performance of the existing space is negative only in the year 2021, after which sales gains are ascribed to the existing space.

Table 11: HAAS / TBA Residuals:

HAAS / TBA residual demands are already included in the previously calculated non-department store NFSR residual demands.

However, as a check calculation to determine if there would be opportunity for an additional HAAS / TBA anchor store, the HAAS / TBA component is analyzed separately.

The Canadian Tire store and other HAAS / TBA space are performing well in the base year at \$272 per ft² and will ramp up this performance to \$285 per ft² before the residual opportunities are calculated.

Rounded mid-range residuals (calculated at \$275 per ft²) are as follows:

- 2021: 5,000 ft²
- 2026: 25,000 ft²
- **2031: 45,000 ft²**

This would be sufficient to support an additional HAAS / TBA anchor store by 2026.

Table 12: “HI” Residuals:

The 57,000 ft² of existing space is performing well at about \$300 per ft².

The residual HI opportunities are diminished locally by the potential Home Improvement Centre (150,000 ft²) at Halton Hills’ North American site which is estimated to be 5.25% effective in Georgetown’s trade area.

Rounded mid-range residuals (calculated at \$350 per square foot) but adjusted for the draw-downs by an approved new format Home Improvement Centre at James Snow/401 are as follows:

- 2021: 0 ft²
- 2026: 15,000 ft²
- **2031: 30,000 ft²**

This would be sufficient to support a smaller scale HI facility after 2026.

Table 13: Supermarket Residuals:

The existing supermarket/grocery space (262,165 ft²) is performing well at about \$483 per ft² in the base year, before ramping up to \$500 per ft² before the residual opportunities are calculated.

The residual calculations feature a modest 1% increase in the supermarket share of FSR spending, but constant local capture rates.

Rounded mid-range residuals (calculated at \$550 per ft²) are as follows:

- 2021: 15,000 ft²
- 2026: 75,000 ft²
- **2031: 130,000 ft²**

This would be sufficient to support two or three or four supermarkets / grocery stores after 2021.

Table 14: Supermarket / Grocery Store Directional Impacts:

The directional impacts are sustainable with the introduction of up to 65,000 ft² in 2026 and another 65,000 ft² by 2031.

The combined test allocations of **130,000** ft² equals the 2031 residual opportunity identified in **Table 13**.

The directional impacts are such that no supermarket would be obliged to close or re-banner or down-scale, and all supermarkets would achieve healthy average sales of \$517 per ft² by 2031.

Table 15: Specialty Food Residuals:

The existing specialty food space (63,767 ft²) is performing reasonably well at about \$268 per ft² in the base year, before ramping up to a healthier \$300 per ft² before the residual demands are calculated.

The existing specialty food space represents 20% of FSR space. However, the specialty food sales represent just 11% of FSR base year sales.

By 2031, this sales ratio will have risen to 13% -- a modest improvement.

By comparison, in many markets, specialty food can represent up to 25% of FSR square footages and sales (versus supermarket/grocery @ 75% reciprocal).

The apparent imbalance in Georgetown is unlikely to resolve itself into higher specialty food shares of FSR spending.

The opposite expectation applies in Table 15 where the residual calculations feature a modest 1% decrease in the specialty food share of FSR spending, coupled with moderate increases in future local capture rates.

This expectation is due to the undeniable strength of Georgetown's supermarket sector -- a phenomenon expected to be continued over the forecast period.

Rounded mid-range residuals (calculated at \$300 per ft²) are as follows:

- 2021: 0 ft²
- 2026: 10,000 ft²
- **2031: 25,000 ft²**

Table 16: Restaurant Residuals:

The existing restaurant space (140,790 ft²) achieves productive sales performance levels of \$310 per ft² in the base year, before ramping up to \$315 per ft² before the residual opportunities are calculated.

Rounded mid-range restaurant residuals (calculated at \$325 per square foot) are as follows:

- 2021: 1,000 ft²
- 2026: 35,000 ft²
- **2031: 70,000 ft²**

Table 17: Liquor/Beer/Wine Residuals:

The existing L/B/W space (22,050 ft²) attains a high base year sales performance level of \$1,095 per ft² before ramping up to \$1,125 per ft² by 2021 before the residual opportunities are calculated.

Rounded mid-range residuals (calculated at \$1,050 per square foot) are as follows:

- 2021: 2,000 ft²
- 2026: 8,500 ft²
- **2031: 15,000 ft²**

Table 18: Summary Demands:

Rounded mid-range residuals for “Total Retail and Selected Commercial” space are as follows:

- 2021: -66,000 ft²
- 2026: 165,000 ft²
- **2031: 420,000 ft²**

Rounded mid-range residuals for “Total Retail and Selected Commercial” space *PLUS* “Other Warranted Space” Based on Per Capita Space Ratios are as follows:

- 2021: -50,000 ft²
- 2026: 230,000 ft²
- **2031: 540,000 ft²**

Table 19: New Land Requirements:

New commercial land requirements @ 30% and 25% coverage to meet these space needs are as follows:

	<u>30% Coverage</u>	<u>25% Coverage</u>
• 2021:	-3.8 acres	-4.6 acres
• 2026:	17.6 acres	21.1 acres
• 2031:	41.3 acres	49.6 acres

Recommendation: 30% coverage on 40 acres.

Discussion of Residual Opportunities:

In each retail category of **Tables 8 to 18**, the existing retail space achieves ramped up sales per square foot performances over the forecast period thus reducing the residual potential. These ramped up sales volumes do not greatly off-set the need for designating additional commercial lands.

The market is already under-stored in certain retail categories, and the commercially designated land supply is almost used up.

The existing space will probably not be able to meet much more of the increased demands, and not to the extent that it did in the past.

For example, **Table 21** Overleaf (Column 3) illustrates that from 1991 to 2015, the inventory in most retail and service commercial categories has increased but at different rates:

- Georgetown's inventory of Apparel and Accessories space has increased almost 5-fold (note: in a broader context, that is not even half the amount of Apparel & Accessories space in the Toronto Premium Outlet Mall).
- Personal Services and Other Services have both tripled.
- Canadian Tire and Drugstore / Cosmetics / Personal Care space has increased more than 2.5-fold.

At the same time, some categories lost space:

- Georgetown's General Merchandise inventory and Home Furnishings inventory have declined by more than half since 1991.

- Georgetown’s TBA and Specialty Food inventories declined by ±15% since 1991 and the Medical / Dental / Health Services inventory, by ±10%.

Overall, the inventory of all retail commercial space combined shows an increase of just 65% since 1991, equivalent to ±25,000 ft² per year since 1991 (per Column 2).

At the same time, the population in Georgetown has increased 4-fold (per **Table 20**).

Hence, the growth in the retail commercial inventory has not kept pace with population growth. To avoid longer-term under-storing, Georgetown will have to increase its supply of commercially designated land.

Comparing actual versus benchmark space planning ratios in Columns 5 and 6 of **Table 21** Overleaf reveals varying degrees of current under-storing in the department store, general merchandise, home furnishings, home improvement, and certain service categories (FIRE + SBM + Veterinary + Travel + Medical/Dental/Health Services).

In **Table 22**, longitudinal comparisons of Georgetown’s space planning ratios over time reveal gradual declines in most categories since 1991 with the exception of Drugs/Cosmetics/Personal Care, Apparel & Accessories, and Banking Services.

The implication is that current under-storing in these categories has led to relatively high unchecked outflow to many surrounding communities, with Mississauga being the principal destination.

Recommendations:

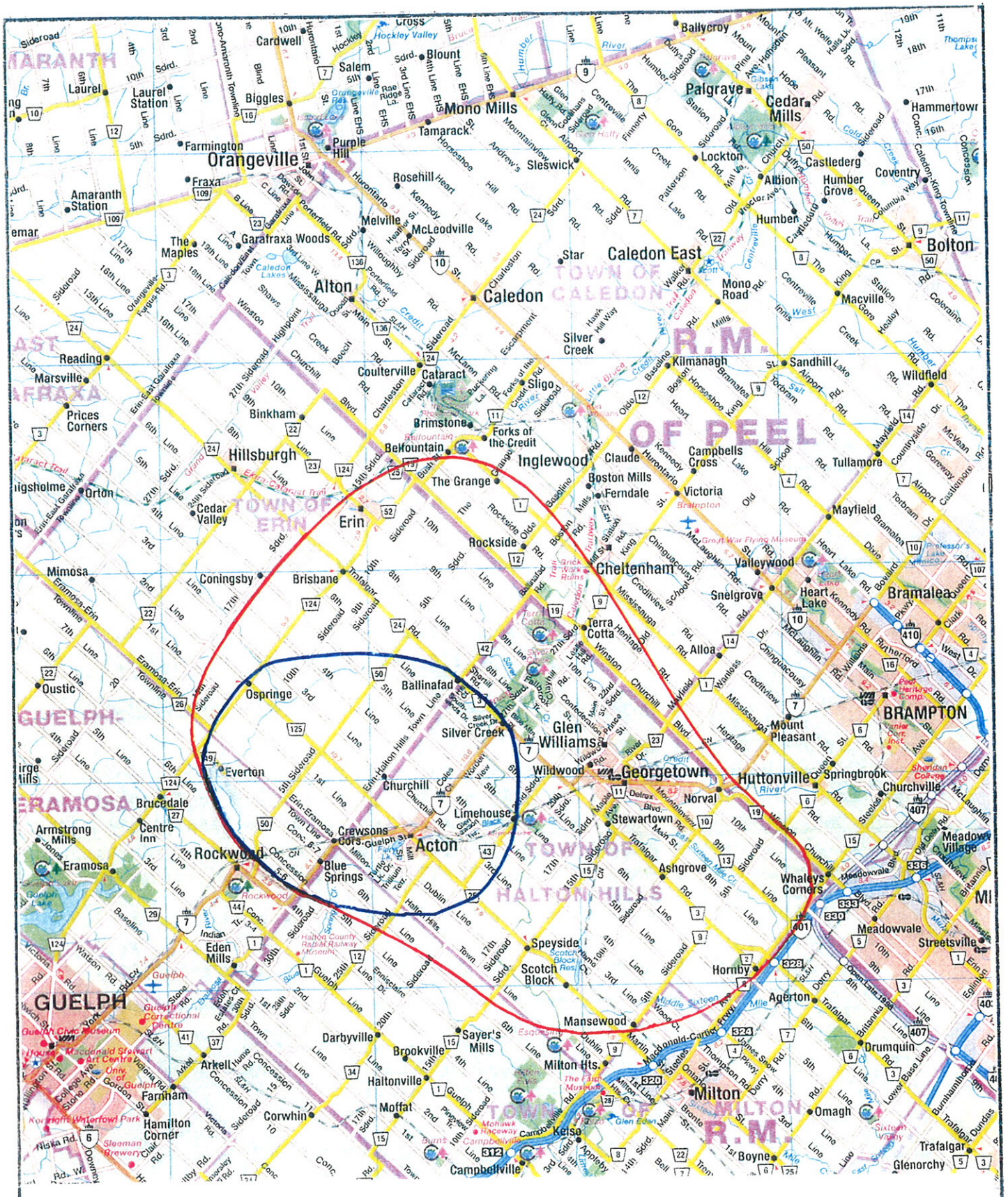
With a ±20,000 population increment to be accommodated in the period 2021 to 2031 in Southwest Georgetown, including the rounding out of Stewarttown and intensification in Southeast Georgetown and elsewhere in Georgetown, the new commercial land requirement by **2031** amounts to an estimated **40** acres (rounded) at 30% coverage.

The 40 acres are sufficient to support up to **400,000** square feet in Southwest Georgetown (on 30 acres) and **140,000** square feet in other designations elsewhere in Georgetown (on 10 acres) for a total of **540,000** square feet.

<u>SW Georgetown Urban Expansion Area:</u>		<u>30% Coverage</u>
One Community Shopping Centre	@ ±190,000 square feet	±15 acres
Two Neighborhood Centres	@ ±120,000 square feet	±9 acres
Three Convenience / Mixed Use Centres	@ ± 90,000 square feet	<u>±6 acres</u>
Subtotal	@ ±400,000 square feet	±30 acres
Other Georgetown:	@ ±140,000 square feet	<u>±10 acres</u>
Total	@ ±540,000 square feet	±40 acres

This recommended breakdown of floor space and land area should be considered with flexibility and not as the only definitive potential distribution of commercial space. When planning at the secondary, tertiary or block plan level, often multiple options are available to achieve the same objectives.

While many anchor stores are not yet represented in Georgetown, a sufficient number are expected to enter the Southwest Georgetown Urban Expansion Area, in conjunction with further planned intensification within Georgetown's built boundary, to fill the recommended longer term allocations of new space. These recommendations will result in a long term equilibrium in which the market is neither over-stored nor under-stored.



ACTON TRADE AREA



GEORGETOWN TRADE AREA



TABLE 1

GEORGETOWN TRADE AREA POPULATION PROJECTIONS UNADJUSTED FOR CENSUS UNDERCOUNT

<u>GEORGETOWN TRADE AREA:</u>	<u>2006</u>	<u>2011</u>	Base Year				<u>2031</u>
			<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	
Primary Zone							
Urban Georgetown							
Population Projection	37,604	39,001	40,793	41,241	44,450	57,354	71,116
Cumulative Growth				448	3,657	16,561	30,323
Average Annual Growth (%)				1.1%	1.5%	3.7%	4.6%
Average Annual Growth (#)				448	610	1,506	1,895
Secondary Zone							
Acton	10,433	10,248	10,067	10,022	10,679	13,277	14,469
Halton Hills Rural / Hamlet Areas	<u>6,876</u>	<u>6,756</u>	<u>6,629</u>	<u>6,597</u>	<u>6,485</u>	<u>6,364</u>	<u>6,297</u>
Subtotal Within Halton Hills	17,309	17,004	16,696	16,619	17,164	19,641	20,766
Erin + Eramosa Twps. + Erin Village	<u>8,726</u>	<u>8,403</u>	<u>8,403</u>	<u>8,403</u>	<u>8,403</u>	<u>8,403</u>	<u>8,403</u>
Subtotal Secondary Zone	26,035	25,407	25,099	25,022	25,567	28,044	29,169
Cumulative Growth				-77	468	2,945	4,070
Average Annual Growth (%)				-0.3%	0.3%	1.1%	1.0%
Average Annual Growth (#)				-77	78	268	254
Trade Area							
Population Projection	63,639	64,408	65,892	66,263	70,017	85,398	100,285
Cumulative Growth				371	4,125	19,506	34,393
Average Annual Growth (%)				0.6%	1.0%	2.7%	3.3%
Average Annual Growth (#)				371	688	1,773	2,150

* Halton Region Traffic Zone Population Projections for areas beyond Halton Hills incorporate assumptions in Appendix A-6.

** Not adjusted for Census under-count for Ontario (per Annual Demographic Statistics, Cat.91-213).

TABLE 2

GEORGETOWN TRADE AREA POPULATION PROJECTIONS ADJUSTED FOR 5.2% HALTON CENSUS UNDERCOUNT

<u>GEORGETOWN TRADE AREA:</u>	<u>2006</u>	<u>2011</u>	<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Primary Zone							
Urban Georgetown							
Adjusted Population Projection @ 3.99% *	39,104						
Adjusted Population Projection @ 5.02% *		41,029	42,914	43,386	46,761	60,336	74,814
Cumulative Growth				471	3,847	17,422	31,900
Average Annual Growth (%)				1.1%	1.5%	3.7%	4.6%
Average Annual Growth (#)				471	641	1,584	1,994
Secondary Zone							
Adjusted Population Projection @ 3.99% *	27,389	26,728	26,404	26,323	26,896	29,502	30,686
Cumulative Growth				-81	492	3,098	4,282
Average Annual Growth (%)				-0.3%	0.3%	1.1%	1.0%
Average Annual Growth (#)				-81	82	282	268
Trade Area							
Adjusted Population Projection @ 3.99% *	66,493	67,757	69,318	69,709	73,658	89,839	105,500
Cumulative Growth				390	4,340	20,520	36,181
Average Annual Growth (%)				0.6%	1.0%	2.7%	3.3%
Average Annual Growth (#)				390	723	1,865	2,261

* HALTON RM CENSUS UNDERCOUN TIN 2011 in Catalogue # 91-214-X = (518660-493045)/493045 = 5.20% 1.0520
 HALTON RM CENSUS UNDERCOUN TIN 2006 in Catalogue # 91-214-X = (456784-439256)/439256 = 3.99% 1.0399

TABLE 3

GEORGETOWN TRADE AREA "NFSR" (GAFO / DRUG) EXPENDITURE POTENTIAL

<u>Trade Area</u>	<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Primary Zone					
Population	42,914	43,386	46,761	60,336	74,814
Per Capita Expenditure (\$) *	<u>\$5,759</u>	<u>\$5,788</u>	<u>\$5,934</u>	<u>\$6,008</u>	<u>\$6,008</u>
Expenditure Potential (\$ m's)	\$247.1	\$251.1	\$277.5	\$362.5	\$449.5
Secondary Zone					
Population	26,404	26,323	26,896	29,502	30,686
Per Capita Expenditure (\$) *	<u>\$5,641</u>	<u>\$5,669</u>	<u>\$5,812</u>	<u>\$5,885</u>	<u>\$5,885</u>
Expenditure Potential (\$ m's)	\$148.9	\$149.2	\$156.3	\$173.6	\$180.6
Trade Area	\$396.1	\$400.3	\$433.8	\$536.2	\$630.1

* Relative to an estimated 2015 Ontario average per capita NFSR (= GAFO / DRUG) expenditure of **\$5,367** per Appendix A-4.
Assume real growth @ 0.5% per annum compounded to the year 2021 and 0.25% to 2026.

TABLE 4

GEORGETOWN TRADE AREA "HI" (HOME IMPROVEMENT) EXPENDITURE POTENTIAL

<u>Trade Area</u>	<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Primary Zone					
Population	42,914	43,386	46,761	60,336	74,814
Per Capita Expenditure (\$) *	<u>\$850</u>	<u>\$854</u>	<u>\$876</u>	<u>\$887</u>	<u>\$887</u>
Expenditure Potential (\$ m's)	\$36.5	\$37.1	\$41.0	\$53.5	\$66.3
Secondary Zone					
Population	26,404	26,323	26,896	29,502	30,686
Per Capita Expenditure (\$) *	<u>\$832</u>	<u>\$836</u>	<u>\$857</u>	<u>\$868</u>	<u>\$868</u>
Expenditure Potential (\$ m's)	\$22.0	\$22.0	\$23.1	\$25.6	\$26.6
Trade Area	\$58.4	\$59.1	\$64.0	\$79.1	\$93.0

* Relative to an estimated 2015 Ontario average per capita "HI" (Home Improvement / Hardware / Specialized Bldg. Material / Garden Ctr.) expenditure of **\$792** per Appendix A-4.
Assume real growth @ 0.5% per annum compounded to the year 2021 and 0.25% to 2026.

TABLE 5

GEORGETOWN TRADE AREA "FSR" (FOOD STORE RETAIL) EXPENDITURE POTENTIAL

<u>Trade Area</u>	<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Primary Zone					
Population	42,914	43,386	46,761	60,336	74,814
Per Capita Expenditure (\$) *	<u>\$2,430</u>	<u>\$2,436</u>	<u>\$2,467</u>	<u>\$2,498</u>	<u>\$2,498</u>
Expenditure Potential (\$ m's)	\$104.3	\$105.7	\$115.3	\$150.7	\$186.9
Secondary Zone					
Population	26,404	26,323	26,896	29,502	30,686
Per Capita Expenditure (\$) *	<u>\$2,416</u>	<u>\$2,422</u>	<u>\$2,452</u>	<u>\$2,483</u>	<u>\$2,483</u>
Expenditure Potential (\$ m's)	\$63.8	\$63.8	\$66.0	\$73.3	\$76.2
Trade Area	\$168.1	\$169.4	\$181.3	\$224.0	\$263.1

* Relative to estimated 2015 Ontario average per capita FSR expenditure of **\$2,381** per Appendix A-4.
Assume real growth @ 0.25% per annum compounded to the year 2026.

TABLE 6

GEORGETOWN TRADE AREA LIQUOR/BEER/WINE EXPENDITURE POTENTIAL

<u>Trade Area</u>	<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Primary Zone					
Population	42,914	43,386	46,761	60,336	74,814
Per Capita Expenditure (\$) *	<u>\$677</u>	<u>\$679</u>	<u>\$687</u>	<u>\$696</u>	<u>\$696</u>
Expenditure Potential (\$ m's)	\$29.1	\$29.4	\$32.1	\$42.0	\$52.1
Secondary Zone					
Population	26,404	26,323	26,896	29,502	30,686
Per Capita Expenditure (\$) *	<u>\$655</u>	<u>\$657</u>	<u>\$665</u>	<u>\$673</u>	<u>\$673</u>
Expenditure Potential (\$ m's)	\$17.3	\$17.3	\$17.9	\$19.9	\$20.7
Trade Area	\$46.3	\$46.7	\$50.0	\$61.8	\$72.7

* Relative to an estimated 2015 Ontario average per capita Liquor/Beer/Wine expenditure of \$604 per Appendix A-4.

** Assume real growth @ 0.25% per annum compounded to the year 2026.

TABLE 7

GEORGETOWN TRADE AREA RESTAURANT EXPENDITURE POTENTIAL

<u>Trade Area</u>	<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Primary Zone					
Population	42,914	43,386	46,761	60,336	74,814
Per Capita Expenditure (\$) *	<u>\$872</u>	<u>\$874</u>	<u>\$885</u>	<u>\$896</u>	<u>\$896</u>
Expenditure Potential (\$ m's)	\$37.4	\$37.9	\$41.4	\$54.1	\$67.1
Secondary Zone					
Population	26,404	26,323	26,896	29,502	30,686
Per Capita Expenditure (\$) *	<u>\$870</u>	<u>\$872</u>	<u>\$883</u>	<u>\$894</u>	<u>\$894</u>
Expenditure Potential (\$ m's)	\$23.0	\$23.0	\$23.8	\$26.4	\$27.4
Trade Area	\$60.4	\$60.9	\$65.1	\$80.5	\$94.5

* Relative to an estimated 2015 Ontario average per capita Restaurant expenditure of \$866 per Appendix A-4.

Assume real growth @ 0.25% per annum compounded to the year 2026.

TABLE 8

GEORGETOWN TRADE AREA DEPARTMENT STORE NFSR (GAFO / DRUG) DEMANDS & RESIDUAL SPACE

<u>Trade Area</u>	Base Year				
	<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Primary Zone (Georgetown)					
Expenditure Potential (\$ m's)	\$247.1	\$251.1	\$277.5	\$362.5	\$449.5
Dep't Store NFSR Share *					
@ 22.0% <i>May 5/10 @ 29.1% vs. May 11/01 @ 26.0%</i>	\$54.4				
@ 22.0% <i>May 5/10 @ 28.5% vs. May 11/01 @ 26.0%</i>		\$55.2	\$61.0	\$79.8	\$98.9
Local Capture *					
@ 53.2% <i>May 5/10 @ 62.6% vs. May 11/01 @ 77.5%</i>	\$28.9				
@ 53.0% <i>May 5/10 @ 63.0% vs. May 11/01 @ 77.5%</i>		\$29.3			
@ 55.5% <i>May 5/10 @ 65.0% vs. May 11/01 @ 77.5%</i>			\$33.9	\$44.3	\$54.9
Secondary Zone					
Expenditure Potential (\$ m's)	\$148.9	\$149.2	\$156.3	\$173.6	\$180.6
Dep't Store NFSR Share *					
@ 21.0% <i>May 5/10 @ 21.8% vs. May 11/01 @ 25.0%</i>	\$31.3				
@ 21.0% <i>May 5/10 @ 21.5% vs. May 11/01 @ 25.0%</i>		\$31.3	\$32.8	\$36.5	\$37.9
Local Capture *					
@ 50.0% <i>May 5/10 @ 59.1% vs. May 11/01 @ 55.0%</i>	\$15.7				
@ 50.0% <i>May 5/10 @ 60.0% vs. May 11/01 @ 55.0%</i>		\$15.7			
@ 50.0% <i>May 5/10 @ 61.0% vs. May 11/01 @ 55.0%</i>			\$16.4	\$18.2	\$19.0
Georgetown Local Share Without Inflow	\$44.6	\$44.9	\$50.3	\$62.5	\$73.8
Plus Inflow **					
@ 10.0% <i>May 5/10 @ 10.0% vs. May 11/01 @ 12.5%</i>	\$5.0				
@ 10.0%		\$5.0	\$5.6	\$5.6	\$5.6
Total Potential Georgetown Local Capture	\$49.5	\$49.9	\$55.9	\$68.1	\$79.4
LESS Existing Competition <i>May 5/10 @ 154,521 ft² vs. May 11/01 @ 154,521 ft²</i>					
Wal-Mart @ 99,013 ft ² GLA					
\$500 / ft ² GLA	\$49.5				
\$504 / ft ² GLA		\$49.9			
\$525 / ft ² GLA			\$52.0		
\$550 / ft ² GLA				\$54.5	
\$575 / ft ² GLA					\$56.9
Residual Potential / Residual Sales Demand	\$0.0	\$0.0	\$3.9	\$13.6	\$22.5
Residual / Warranted ft² GLA:					
@ \$500 per ft ² GLA	0	0	7,803	27,255	45,010
@ \$550 per ft ² GLA	0	0	7,094	24,777	40,918
@ \$600 per ft ² GLA	0	0	6,503	22,713	37,508
LESS 250,000 ft ² "Osmington" dep't store space @ 12.5% effective (half in 2021)			15,625	31,250	31,250
Adjusted Residual / Warranted ft² GLA:					
@ \$500 per ft ² GLA			-7,822	-3,995	13,760
@ \$550 per ft ² GLA			-8,531	-6,473	9,668
@ \$600 per ft ² GLA			-9,122	-8,537	6,258

* Base year shares (excluding "HI") from consumer telephone survey in May 5/10 Study discounted by 15% to reflect draws of Brampton's Credit Ridge Commons' Wal-Mart @ 187,140 ft² and loss of 55,508 ft² of dep't store space in Georgetown since May 5, 2010 market study.

** Assume inflow @ 10.0% until 2021 and declining in percentage terms thereafter.

TABLE 9

GEORGETOWN TRADE AREA NON-DEPARTMENT STORE NFSR (GAFO / DRUG) DEMANDS & RESIDUAL SPACE

Trade Area	Base Year				
	2015	2016	2021	2026	2031
Primary Zone (Georgetown)					
Expenditure Potential (\$ m's)	\$247.1	\$251.1	\$277.5	\$362.5	\$449.5
Non-Dep't Store NFSR Share *					
@ 78.0% <i>May 5/10 @ 70.9% vs. May 11/01 @ 74.0%</i>	\$192.8				
@ 78.0% <i>May 5/10 @ 71.0% vs. May 11/01 @ 74.0%</i>		\$195.9	\$216.4	\$282.8	\$350.6
Local Capture *					
@ 50.0% <i>May 5/10 @ 54.8% vs. May 11/01 @ 40.0%</i>	\$96.4				
@ 50.0% <i>May 5/10 @ 57.5% vs. May 11/01 @ 45.0%</i>		\$97.9			
@ 51.5% <i>May 5/10 @ 60.0% vs. May 11/01 @ 45.0%</i>			\$111.5	\$145.6	\$180.6
Secondary Zone					
Expenditure Potential (\$ m's)	\$148.9	\$149.2	\$156.3	\$173.6	\$180.6
Non-Dep't Store NFSR Share *					
@ 79.0% <i>May 5/10 @ 78.2% vs. May 11/01 @ 75.0%</i>	\$117.7				
@ 79.0% <i>May 5/10 @ 78.5% vs. May 11/01 @ 75.0%</i>		\$117.9	\$123.5	\$137.2	\$142.7
Local Capture *					
@ 35.0% <i>May 5/10 @ 37.7% vs. May 11/01 @ 20.0%</i>	\$41.2				
@ 35.0% <i>May 5/10 @ 38.5% vs. May 11/01 @ 25.0%</i>		\$41.3			
@ 36.5% <i>May 5/10 @ 40.0% vs. May 11/01 @ 25.0%</i>			\$45.1	\$50.1	\$52.1
Georgetown Local Share					
Without Inflow	\$137.6	\$139.2	\$156.5	\$195.7	\$232.6
Plus Inflow **					
@ 10.0% <i>May 5/10 @ 10.0% vs. May 11/01 @ 12.5%</i>	\$15.3				
@ 10.0%		\$15.5	\$17.4	\$17.4	\$17.4
Total Potential Georgetown Local Capture	\$152.9	\$154.7	\$173.9	\$213.1	\$250.0
LESS Existing Competition					
@ 429,720 ft ² GLA <i>May 5/10 @ 387,513 ft² vs. May 11/01 @ 307,008 ft²</i>					
@ \$306 / ft ² GLA	\$131.4	\$133.2			
@ \$317 / ft ² GLA			\$136.3		
@ \$330 / ft ² GLA				\$141.8	\$141.8
LESS Premium Outlet Mall					
@ 35,800 ft ² GLA *** <i>Assume existing 358,000 ft² is 10% "effective" in Georgetown's Trade Area</i>					
@ \$600 / ft ² GLA	\$21.5	\$21.5	\$21.5	\$21.5	\$21.5
Residual Sales Demand	\$0.0	\$0.0	\$16.2	\$49.8	\$86.7
Residual / Warranted ft² GLA:					
@ \$300 per ft ² GLA	0	0	53,847	165,958	289,131
@ \$325 per ft ² GLA	0	0	49,705	153,192	266,890
@ \$350 per ft ² GLA	0	0	46,154	142,250	247,826

* The base year Non-Department Store NFSR Local Capture rates are based on consultant adjustments to the consumer telephone survey results (May 5, 2010 **Appendix C**).

** Assume inflow @ 10.0% until 2021 and declining in percentage terms thereafter.

*** Toronto Premium Outlet = approved @ 385,000 ft² (rounded) which combines 358,000 ft² existing + 27,000 ft² expansion potential.

TABLE 10

GEORGETOWN TRADE AREA NFSR (GAFO / DRUG) COMBINED IMPACTS

(WITH "PREMIUM OUTLET CENTRE EXPANSION" + "NORTH AMERICAN" + "OSMINGTON" & "OTHERS")

Trade Area	Base Year				
	2015	2016	2021	2026	2031
Residual Space Demands (Sq. Ft.):					
@ \$300 per ft ² GLA	0	0	53,847	165,958	289,131
@ \$325 per ft ² GLA	0	0	49,705	153,192	266,890
@ \$350 per ft ² GLA	0	0	46,154	142,250	247,826
Mid-range Residual Demands (2016-2031) (rounded ft²)	0	0	50,000	150,000	265,000
LESS Potential Non-Department Store NFSR Supply (ft²):					
<u>Committed Supply</u>					
GEORGETOWN					
25% NFSR Vacancy Uptake against 85,000 ft ² (= from 5.3% current vacancy to 4.0%)*			21,500	21,500	21,500
HALTON HILLS					
Toronto Premium Outlet Mall					
Assume 10% effective on 27,000 ft ² of zoned outparcel space			2,700	2,700	2,700
Assume 10% effective on 115,000 ft ² of additional proposed space			11,500	11,500	11,500
SW Trafalgar / Steeles					
Assume 10% effective on additional 100,000 ft ²			10,000	10,000	10,000
"North American" Power Ctr.					
Assume 5.25% effective on 188,000 ft ²			10,000	10,000	10,000
Winston Churchill Gateway Site (SW Winston Churchill / Steeles Ave.)					
Assume 10% effective on 250,000 ft ²			25,000	25,000	25,000
BRAMPTON - "Osmington" - NE Mississauga Rd. / Bovaird Dr.:					
Assume 11.5% effective against 385,000 ft ²			44,300	44,300	44,300
Other Zoned Site(s)					
Subtotal Committed			125,000	125,000	125,000
<u>Not Committed Supply</u>					
Unassigned Notional Test Allocation (ft ²)			0	50,000	140,000
Total Potential Supply (ft²)			125,000	175,000	265,000
(Committed + Unassigned Notional Test Allocation)					
Surplus (+) / Shortfall (-) of Supply Over Demand (Sq. Ft.)			75,000	25,000	0
Residual Sales Demand (\$ m's)			\$16.2	\$49.8	\$86.7
Less Potential Non-Department Store NFSR Sales (\$ m's):					
@ Total Potential Supply (ft²)			125,000	175,000	265,000
@ \$300 per ft ²			\$37.5		
@ \$325 per ft ²				\$56.9	
@ \$350 per ft ²					\$92.8
Potential Sales (-) Transfer / (+) Increment (\$ m's)			(\$21.3)	(\$7.1)	(\$6.0)
Resultant Sales Performance of Existing					
Non-Department Store NFSR Space (\$ per ft ²)					
Measured against base year sales of \$328 / ft ² GLA			\$293	\$336	\$338
Resultant Impact on Existing Sales Performance (%)			-10.7%	2.2%	2.9%

* Compare vacant space in May 10/10 @ 35,770 ft² (= 3.8% vacancy rate) vs. May 11/01 @ 41,420 ft² (= 2.3% vacancy rate)

TABLE 11

GEORGETOWN TRADE AREA HAAS / TBA (INCLUDING CANADIAN TIRE) RESIDUAL DEMANDS

HAAS/TBA ANCHOR TENANT CHECK CALCULATION ONLY

(NOTE: HAAS/TBA RESIDUALS ARE ALREADY INCLUDED IN NFSR RESIDUALS)

<u>Trade Area</u>	<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Primary Zone (Georgetown)					
Expenditure Potential (\$ m's)	\$247.1	\$251.1	\$277.5	\$362.5	\$449.5
HAAS / TBA Share of NSR (GAFO + Drug) (\$ m's)					
@ 6.5% <i>May 5/10 @ 6.85% vs. May 11/01 @ 7.3%</i>	\$16.1	\$16.3	\$18.0	\$23.6	\$29.2
HAAS / TBA Local Capture *					
@ 90.0% <i>May 5/10 @ 90.2% vs. May 11/01 @ 90.0%</i>	\$14.5				
@ 90.0%		\$14.7	\$16.2	\$21.2	\$26.3
Secondary Zone					
Expenditure Potential (\$ m's)	\$148.9	\$149.2	\$156.3	\$173.6	\$180.6
HAAS / TBA Share (\$ m's)					
@ 6.5% <i>May 5/10 @ 6.85% vs. May 11/01 @ 7.3%</i>	\$9.7	\$9.7	\$10.2	\$11.3	\$11.7
HAAS / TBA Local Capture *					
@ 78.0% <i>May 5/10 @ 78.1% vs. May 11/01 @ 82.5%</i>	\$7.6				
@ 78.5%		\$7.6	\$8.0	\$8.9	\$9.2
Georgetown Local Share					
Without Inflow	\$22.0	\$22.3	\$24.2	\$30.1	\$35.5
Plus Inflow **					
@ 10.0% <i>May 5/10 @ 10% vs. May 11/01 @ 25%</i>					
@ 10.0%	\$2.4	\$2.5	\$2.7	\$2.7	\$2.7
Total Potential Georgetown Local Capture	\$24.5	\$24.8	\$26.9	\$32.8	\$38.2
Less Existing Competition					
Canadian Tire + Other HAAS / TBA					
@ 89,900 ft ² GLA <i>Formerly 92,640 ft²</i>					
@ \$272 /ft ² GLA	\$24.5				
@ \$276 /ft ² GLA		\$24.8			
@ \$285 /ft ² GLA			\$25.6	\$25.6	\$25.6
Residual Sales Demand	\$0.0	\$0.0	\$1.28	\$7.1	\$12.6
Residual / Warranted ft ² GLA:					
@ \$250 per ft ² GLA	0	0	5,111	28,544	50,321
@ \$275 per ft ² GLA	0	0	4,647	25,949	45,747
@ \$300 per ft ² GLA	0	0	4,259	23,787	41,934

* Base year estimate from consumer telephone survey.

** Assume future inflow @ 10.0% until 2021 and assume declining inflow in percentage terms thereafter.

TABLE 12

GEORGETOWN TRADE AREA HOME IMPROVEMENT DEMANDS & RESIDUAL SPACE

<u>Trade Area</u>	<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Primary Zone (Georgetown)					
Expenditure Potential (\$ m's)	\$36.5	\$37.1	\$41.0	\$53.5	\$66.3
Local Capture *					
@ 35.0% <i>May 5/10 @ 34.5% vs. May 11/01 @ 75%</i>	\$12.8				
@ 35.0% <i>May 5/10 @ 50.0%</i>		\$13.0			
@ 40.0% <i>May 5/10 @ 55.0%</i>			\$16.4	\$21.4	\$26.5
Secondary Zone					
Expenditure Potential (\$ m's)	\$22.0	\$22.0	\$23.1	\$25.6	\$26.6
Local Capture *					
@ 11.0% <i>May 5/10 @ 10.9% vs. May 11/01 @ 62.5%</i>	\$2.4				
@ 11.0% <i>May 5/10 @ 20.0%</i>		\$2.4			
@ 12.5% <i>May 5/10 @ 25.0%</i>			\$2.9	\$3.2	\$3.3
Georgetown Local Share					
Without Inflow	\$15.2	\$15.4	\$19.3	\$24.6	\$29.9
Plus Inflow					
@ 10.0% <i>May 5/10 @ 10.0% vs. May 11/01 @ 10.0%</i>					
@ 10.0% **	\$1.7	\$1.7	\$2.1	\$2.1	\$2.1
Total Potential Georgetown Local Capture	\$16.9	\$17.1	\$21.4	\$26.7	\$32.0
Less Existing Competition					
@ 56,885 ft ² GLA (<i>34,200 ft² = 60% are anchor stores; formerly 53,129 ft²</i>)					
@ \$297 /ft ² GLA	\$16.9				
@ \$301 /ft ² GLA		\$17.1			
@ \$331 /ft ² GLA			\$18.8	\$18.8	\$18.8
Residual Sales Demand	\$0.0	\$0.0	\$2.6	\$7.9	\$13.2
Residual / Warranted ft ² GLA:					
@ \$300 per ft ² GLA	0	0	8,637	26,437	43,984
@ \$350 per ft ² GLA	0	0	7,321	22,662	37,701
@ \$400 per ft ² GLA	0	0	6,477	19,828	32,988
LESS "North American" Power Ctr. (5.0% effective on 150,000 ft ²)			7,500	7,500	7,500
Resultant Adjusted Residual / Warranted ft² GLA:					
@ \$300 per ft ² GLA			1,137	18,937	36,484
@ \$350 per ft ² GLA			-179	15,162	30,201
@ \$400 per ft ² GLA			-1,023	12,328	25,488

* Base year estimate from Consumer Survey for Home Improvement and Building Supply, Hardware, Paint, Wallpaper, Hardware, Electrical and Plumbing Supply, and Garden Centre / Nursery.
Future local capture rates are less pronounced than May 5, 2010 study due to Credit Ridge Commons (Home Depot @ 98,390 ft²)
** Assume future inflow @ 10.0% until 2021 and assume declining inflow in percentage terms thereafter.

Note: The warranted square footages exclude seasonal unenclosed outdoor garden centre space.
The sales for the garden centre space are rolled into the sales of the permanent building.

TABLE 13

GEORGETOWN TRADE AREA SUPERMARKET DEMANDS & RESIDUAL SPACE

<u>Trade Area</u>	<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Primary Zone (Georgetown)					
Expenditure Potential (\$ m's)	\$104.3	\$105.7	\$115.3	\$150.7	\$186.9
Supermarket / Grocery Share					
@ 85.0% <i>May 5/10 @ 87.5% vs. May 11/01 @ 75%</i>	\$88.6				
@ 86.0% <i>May 5/10 @ 88.5%</i>		\$90.9	\$99.2	\$129.6	\$160.7
Local Capture *					
@ 95.0% <i>May 5/10 @ 97.5% vs. May 11/01 @ 90%</i>	\$84.2				
@ 95.0% <i>May 5/10 @ 97.5%</i>		\$86.3	\$94.2	\$123.1	\$152.7
Secondary Zone					
Expenditure Potential (\$ m's)	\$63.8	\$63.8	\$66.0	\$73.3	\$76.2
Supermarket / Grocery Share					
@ 85.0% <i>May 5/10 @ 85.0% vs. May 11/01 @ 75%</i>	\$54.2				
@ 86.0% <i>May 5/10 @ 85.5%</i>		\$54.8	\$56.7	\$63.0	\$65.5
Local Capture *					
@ 55.0% <i>May 5/10 @ 63.7% vs. May 11/01 @ 35%</i>	\$29.8				
@ 55.0% <i>May 5/10 @ 65%</i>		\$30.2	\$31.2	\$34.7	\$36.0
Georgetown Local Share					
Without Inflow	\$114.0	\$116.5	\$125.4	\$157.8	\$188.7
Plus Inflow **					
@ 10.0% <i>May 5/10 @ 12.5% vs. May 11/01 @ 12.5%</i>					
@ 10.0%	\$12.7	\$12.9	\$13.9	\$13.9	\$13.9
Total Potential Georgetown Local Capture	\$126.7	\$129.5	\$139.4	\$171.7	\$202.6
Less Existing Competition *****					
@ 262,165 ft ² GLA <i>May 5/10 @ 260,600 ft² vs. May 11/01 @ 108,500 ft²</i>					
@ \$483 /ft ² GLA	\$126.7				
@ \$494 /ft ² GLA		\$129.5			
@ \$500 /ft ² GLA			\$131.1	\$131.1	\$131.1
Residual Sales Demand	\$0.0	\$0.0	\$8.3	\$40.6	\$71.6
Residual / Warranted ft ² GLA:					
@ \$500 per ft ² GLA	0	0	16,585	81,260	143,127
@ \$550 per ft ² GLA	0	0	15,077	73,873	130,115
@ \$600 per ft ² GLA	0	0	13,821	67,717	119,272

* Base year estimate from consumer telephone survey.

** Assume future inflow @ 10.0% until 2021 and assume declining inflow in percentage terms thereafter.

TABLE 14

GEORGETOWN TRADE AREA SUPERMARKET/GROCERY STORE DIRECTIONAL IMPACTS

	<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Total Potential Georgetown Local Capture	\$126.7	\$129.5	\$139.4	\$171.7	\$202.6
Less Existing Competition:					
Real Canadian Super Store	\$68.7	\$70.2	\$76.0	\$79.8	\$81.1
% Share (Consumer Survey)	54.2%				
Future % Share		54.2%	54.5%	46.5%	40.0%
Sales/ft ² @ 135,565 ft ² GLA <i>May 5/10 @ 105,000 ft²</i>	\$ 507	\$ 518	\$ 560	\$ 589	\$ 598
Impact (%)		2.2%	10.6%	16.3%	18.0%
Food Basics - Halton Hills S.C.	\$16.9	\$17.2	\$18.8	\$19.7	\$20.3
% Share (Consumer Survey)	13.3%				
Future % Share		13.3%	13.5%	11.5%	10.0%
Sales/ft ² @ 36,002 ft ² GLA <i>May 5/10 @ 33,000 ft²</i>	\$ 468	\$ 478	\$ 523	\$ 548	\$ 563
Impact (%)		2.2%	11.7%	17.2%	20.3%
Price Chopper - 325 Guelph St.	\$15.8	\$16.2	\$16.7	\$17.2	\$18.2
% Share (Consumer Survey)	12.5%				
Future % Share		12.5%	12.0%	10.0%	9.0%
Sales/ft ² @ 36,085 ft ² GLA	\$ 439	\$ 448	\$ 463	\$ 476	\$ 505
Impact (%)		2.2%	5.6%	8.4%	15.2%
Metro - Halton Hills Village	\$25.3	\$25.9	\$27.9	\$28.3	\$28.4
% Share (Consumer Survey)	20.0%				
Future % Share		20.0%	20.0%	16.5%	14.0%
Sales/ft ² @ 54,512 ft ² GLA	\$ 465	\$ 475	\$ 511	\$ 520	\$ 520
Impact (%)		2.2%	10.0%	11.8%	12.0%
Supermarket Test Allocation				\$26.6	\$27.4
Future % Share				15.5%	13.5%
Sales/ft ² @ 65,000 ft ² GLA				\$ 409	\$ 421
Supermarket Test Allocation					\$27.4
Future % Share					13.5%
Sales/ft ² @ 65,000 ft ² GLA					\$ 421
Total Georgetown Supermarket Share (%)	100.0%	100.0%	100.0%	100.0%	100.0%
Total Georgetown Supermarket Sales (\$ m's)	\$126.7	\$129.5	\$139.4	\$171.7	\$202.6
Total Georgetown Supermarket Sales/ ft ²					
2015-2021 262,164 ft ² GLA	\$483	\$494	\$532		
2021-2026 327,164 ft ² GLA				\$525	
2026-2031 392,164 ft ² GLA					\$517
Residual Sales Demand	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0

TABLE 15

GEORGETOWN TRADE AREA SPECIALTY FOOD DEMANDS & RESIDUAL SPACE

<u>Trade Area</u>	<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Primary Zone (Georgetown)					
Expenditure Potential (\$ m's)	\$104.3	\$105.7	\$115.3	\$150.7	\$186.9
Specialty Food Share					
@ 15.0% <i>May 5/10 @ 12.5% vs. May 11/01 @ 25%</i>	\$15.6				
@ 14.0% <i>May 5/10 @ 11.5% vs. May 11/01 @ 20%</i>		\$14.8	\$16.1	\$21.1	\$26.2
Local Specialty Food Capture *					
@ 80.0% <i>May 5/10 @ 81.1% vs. May 11/01 @ 75%</i>	\$12.5				
@ 81.5% <i>May 5/10 @ 81.5% vs. May 11/01 @ 85%</i>		\$12.1	\$13.2	\$17.2	\$21.3
Secondary Zone					
Expenditure Potential (\$ m's)	\$63.8	\$63.8	\$66.0	\$73.3	\$76.2
Specialty Food Share					
@ 15.0% <i>May 5/10 @ 15% vs. May 11/01 @ 25%</i>	\$9.6				
@ 14.0% <i>May 5/10 @ 14.5% vs. May 11/01 @ 20%</i>		\$8.9	\$9.2	\$10.3	\$10.7
Local Specialty Food Capture *					
@ 30.0% <i>May 5/10 @ 30.1% vs. May 11/01 @ 55%</i>	\$2.9				
@ 31.5% <i>May 5/10 @ 30.5% vs. May 11/01 @ 65%</i>		\$2.8	\$2.9	\$3.2	\$3.4
Georgetown Local Share					
Without Inflow	\$15.4	\$14.9	\$16.1	\$20.4	\$24.7
Plus Inflow **					
@ 10.0% <i>May 5/10 @ 12.5% vs. May 11/01 @ 12.5%</i>					
@ 10.0% <i>May 5/10 @ 12.5% vs. May 11/01 @ 12.5%</i>	\$1.7	\$1.7	\$1.8	\$1.8	\$1.8
Total Potential Georgetown Local Capture	\$17.1	\$16.5	\$17.9	\$22.2	\$26.5
Less Existing Competition					
@ 63,767 ft ² GLA <i>May 5/10 @ 54,890 ft² vs. May 11/01 @ 54,980 ft²</i>					
@ \$268 /ft ² GLA <i>May 5/10 @ \$226 per ft² vs. May 11/01 @ \$369 per ft²</i>	\$17.1				
@ \$259 /ft ² GLA		\$16.5			
@ \$280 /ft ² GLA			\$17.9		
@ \$300 /ft ² GLA				\$19.1	\$19.1
Residual Sales Demand	\$0.00	\$0.0	\$0.00	\$3.1	\$7.3
Residual / Warranted ft ² GLA:					
@ \$275 per ft ² GLA	0	0	0	11,204	26,679
@ \$300 per ft ² GLA	0	0	0	10,271	24,456
@ \$325 per ft ² GLA	0	0	0	9,481	22,574

* From consumer telephone survey.

** Assume inflow @ 10.0% until 2021 and declining in percentage terms thereafter.

TABLE 16

GEORGETOWN TRADE AREA RESTAURANT DEMANDS & RESIDUAL SPACE

<u>Trade Area</u>	<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Primary Zone (Georgetown)					
Expenditure Potential (\$ m's)	\$37.4	\$37.9	\$41.4	\$54.1	\$67.1
Local Capture *					
@ 85.0% <i>May 5/10 @ 85.0%</i>	\$31.8	\$32.2			
@ 80.0% <i>May 5/10 @ 85.0%</i>			\$33.1	\$43.3	\$53.6
Secondary Zone					
Expenditure Potential (\$ m's)	\$23.0	\$23.0	\$23.8	\$26.4	\$27.4
Local Capture *					
@ 32.5% <i>May 5/10 @ 32.5%</i>	\$7.5	\$7.5			
@ 30.0% <i>May 5/10 @ 32.5%</i>			\$7.1	\$7.9	\$8.2
Georgetown Local Share					
Without Inflow	\$39.3	\$39.7	\$40.2	\$51.2	\$61.9
Plus Inflow					
@ 10.0% <i>May 5/10 @ 12.5%</i>	\$4.4	\$4.4			
@ 10.0% **			\$4.5	\$4.5	\$4.5
Total Potential Georgetown Local Capture	\$43.6	\$44.1	\$44.7	\$55.6	\$66.3
Less Existing Competition					
@ 140,790 ft ² GLA <i>May 5/10 @ 145,905 ft² vs. May 11/01 @ 122,900 ft²</i>					
@ \$310 /ft ² GLA	\$43.6				
@ \$313 /ft ² GLA		\$44.1			
@ \$315 /ft ² GLA			\$44.3	\$44.3	\$44.3
Residual Sales Demand	\$0.0	\$0.0	\$0.4	\$11.3	\$22.0
Residual / Warranted ft ² GLA:					
@ \$300 per ft ² GLA	0	0	1,204	37,665	73,326
@ \$325 per ft ² GLA	0	0	1,111	34,767	67,685
@ \$350 per ft ² GLA	0	0	1,032	32,284	62,851
Per Capita Space Ratio Check Calculation: ***					
Restaurant/Tavern 3.15 ft ² per capita			7,271	32,928	60,291

* Consultant estimate.

** Assume inflow @ 10.0% until 2021 and declining in percentage terms thereafter.

*** Based on Primary Zone population growth and 40% net outflow assumption.

TABLE 17

GEORGETOWN TRADE AREA LIQUOR/BEER/WINE DEMANDS & RESIDUAL SPACE

<u>Trade Area</u>	<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Primary Zone (Georgetown)					
Expenditure Potential (\$ m's)	\$29.1	\$29.4	\$32.1	\$42.0	\$52.1
Local Capture					
@ 70.0% <i>May 5/10 @ 80.0%</i>	\$20.3				
@ 70.0% <i>May 5/10 @ 80.0%</i>		\$20.6	\$22.5	\$29.4	\$36.4
Secondary Zone					
Expenditure Potential (\$ m's)	\$17.3	\$17.3	\$17.9	\$19.9	\$20.7
Local Capture					
@ 15.0% <i>May 5/10 @ 25.0%</i>	\$2.6				
@ 15.0% <i>May 5/10 @ 25.0%</i>		\$2.6	\$2.7	\$3.0	\$3.1
Georgetown Local Share					
Without Inflow	\$22.9	\$23.2	\$25.2	\$32.4	\$39.5
Plus Inflow					
@ 5.0% <i>May 5/10 @ 5.0%</i>	\$1.2				
@ 5.0% <i>May 5/10 @ 5.0%</i>		\$1.2	\$1.3	\$1.3	\$1.3
Total Potential Georgetown Local Capture	\$24.1	\$24.4	\$26.5	\$33.7	\$40.9
Less Existing Competition					
@ 22,050 ft ² GLA <i>May 5/10 @ 25,865 ft² vs. May 11/01 @ 14,980 ft²</i>					
@ \$1,095 /ft ² GLA	\$24.1				
@ \$1,108 /ft ² GLA		\$24.4			
@ \$1,125 /ft ² GLA			\$24.8	\$24.8	\$24.8
Residual Sales Demand	\$0.0	\$0.0	\$1.7	\$8.9	\$16.1
Residual / Warranted ft ² GLA:					
@ \$1,000 per ft ² GLA	0	0	1,696	8,888	16,059
@ \$1,050 per ft ² GLA	0	0	1,615	8,465	15,295
@ \$1,100 per ft ² GLA	0	0	1,542	8,080	14,599
Per Capita Space Ratio Check Calculation: ***					
Liquor/Beer/Wine Space @ 0.50 ft ² per capita			1,924	8,711	15,950

* Consultant estimate.

** Assume inflow @ 5.0% until 2021 and declining in percentage terms thereafter.

*** Based on Primary Zone population growth and 20% net outflow assumption.

TABLE 18

GEORGETOWN TRADE AREA SUMMARY DEMANDS & RESIDUAL SPACE

<u>Trade Area</u>	<u>Sq. Ft.</u> <u>2015</u>	<u>Sq. Ft.</u> <u>2016</u>	<u>Sq. Ft.</u> <u>2021</u>	<u>Sq. Ft.</u> <u>2026</u>	<u>Sq. Ft.</u> <u>2031</u>
Department Store Space					
@ \$500 /ft ² GLA	0	0	-7,822	-3,995	13,760
@ \$550 /ft ² GLA	0	0	-8,531	-6,473	9,668
@ \$600 /ft ² GLA	0	0	-9,122	-8,537	6,258
Non-department Store NFSR Space					
@ \$300 /ft ² GLA	0	0	53,847	165,958	289,131
@ \$325 /ft ² GLA	0	0	49,705	153,192	266,890
@ \$350 /ft ² GLA	0	0	46,154	142,250	247,826
LESS Proposed Non-department Store NFSR Space (Reference TABLE 10)			125,000	125,000	125,000
<i>Adjusted Non-department Store NFSR Space</i>					
@ \$300 /ft ² GLA	0	0	-71,153	40,958	164,131
@ \$325 /ft ² GLA	0	0	-75,295	28,192	141,890
@ \$350 /ft ² GLA	0	0	-78,846	17,250	122,826
Home Improvement Centre Space					
@ \$300 /ft ² GLA	0	0	1,137	18,937	36,484
@ \$350 /ft ² GLA	0	0	-179	15,162	30,201
@ \$400 /ft ² GLA	0	0	-1,023	12,328	25,488
Supermarket Space					
@ \$500 /ft ² GLA	0	0	16,585	81,260	143,127
@ \$550 /ft ² GLA	0	0	15,077	73,873	130,115
@ \$600 /ft ² GLA	0	0	13,821	67,717	119,272
Specialty Food Store Space					
@ \$275 /ft ² GLA	0	0	0	11,204	26,679
@ \$300 /ft ² GLA	0	0	0	10,271	24,456
@ \$325 /ft ² GLA	0	0	0	9,481	22,574
Restaurant Space					
@ \$300 /ft ² GLA	0	0	1,204	37,665	73,326
@ \$325 /ft ² GLA	0	0	1,111	34,767	67,685
@ \$350 /ft ² GLA	0	0	1,032	32,284	62,851
Liquor/Beer/Wine Space					
@ \$1,000 /ft ² GLA	0	0	1,696	8,888	16,059
@ \$1,050 /ft ² GLA	0	0	1,615	8,465	15,295
@ \$1,100 /ft ² GLA	0	0	1,542	8,080	14,599
TOTAL RETAIL & SELECTED COMMERCIAL					
Low Range Sales per ft ² Performance	0	0	-58,353	319,918	473,565
Mid Range Sales per ft ² Performance	0	0	-66,201	164,257	419,309
Upper Range Sales per ft ² Performance	0	0	-72,595	263,602	373,869

TABLE 18, CONTINUED

GEORGETOWN TRADE AREA SUMMARY DEMANDS & RESIDUAL SPACE

PER CAPITA SPACE RATIOS AND WARRANTED SPACE BASED ON CUMULATIVE POPULATION GROWTH

Primary Zone (Georgetown)	Sq. Ft. <u>2015</u>	Sq. Ft. <u>2016</u>	Sq. Ft. <u>2021</u>	Sq. Ft. <u>2026</u>	Sq. Ft. <u>2031</u>
Population Projection	42,914	43,386	46,761	60,336	74,814
Cumulative Population Growth		471	3,847	17,422	31,900

Warranted Space Based on Per Capita Space Ratios

			Sq. Ft. <u>2015</u>	Sq. Ft. <u>2016</u>	Sq. Ft. <u>2021</u>	Sq. Ft. <u>2026</u>	Sq. Ft. <u>2031</u>
Personal + Other Service Space @	2.1	ft ² per capita	0	966	7,887	35,715	65,395
Financial Institution Space @	1.0	ft ² per capita	0	471	3,847	17,422	31,900
Local Office Space @	2.1	ft ² per capita *		990	8,079	36,587	66,990
Total Warranted Space Based on Per Capita Ratios			0	2,427	19,813	89,724	164,284
Assume Average Local Capture @ 75%			0	1,820	14,860	67,293	123,213

* Includes Finance Insurance Real Estate (FIRE) and Services to Business Management (SBM) and Medical Dental

**TOTAL RETAIL & SELECTED COMMERCIAL RESIDUALS PLUS
"OTHER WARRANTED SPACE" BASED ON PER CAPITA SPACE RATIOS**

Low Range Space Estimate	0	1,820	-43,493	387,211	596,778
Mid Range Space Estimate	0	1,820	-51,342	231,550	542,522
Upper Range Space Estimate	0	1,820	-57,736	330,895	497,082

TABLE 19
COMPARISON OF SQUARE FOOTAGE DEMANDS AND POTENTIAL SUPPLY

TOTAL RETAIL & SELECTED COMMERCIAL RESIDUAL DEMANDS & "OTHER WARRANTED SPACE"

	<u>2015</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Low Range Space Estimate	0	1,820	-43,493	387,211	596,778
Mid Range Space Estimate	0	1,820	-51,342	231,550	542,522
Upper Range Space Estimate	0	1,820	-57,736	330,895	497,082
Rounded Mid Range Residual Demands (2016 - 2031)	0	2,000	-50,000	230,000	540,000
Additional Land Requirement (acres)	<u>Acres</u>	<u>Acres</u>	<u>Acres</u>	<u>Acres</u>	<u>Acres</u>
@ 30.0% coverage	0.0	0.2	-3.8	17.6	41.3
		<i>Required</i>	<i>Surplus</i>	<i>Required</i>	<i>Required</i>
@ 25.0% coverage	0.0	0.2	-4.6	21.1	49.6
		<i>Required</i>	<i>Surplus</i>	<i>Required</i>	<i>Required</i>

	<u>Rounded</u>	<u>Rounded</u>	<u>Acres</u>	<u>Acres</u>	Recommended
	<u>% Distributor</u>	<u>ft² Distr'n</u>	<u>25% coverage</u>	<u>30% coverage</u>	<u>30% coverage</u>
One Community Shopping Centre	35%	190,000	17.4	14.5	15
Two Neighbourhood Centres	22%	120,000	11.0	9.2	9
Three Convenience / Mixed Use Centres	17%	90,000	8.3	6.9	6
Other Georgetown	<u>26%</u>	<u>140,000</u>	<u>12.9</u>	<u>10.7</u>	<u>10</u>
Total	100.0%	540,000	49.6	41.3	40.0

TABLE 20

LONGITUDINAL COMPARISON OF POPULATION PROJECTIONS AND RESIDUAL SPACE ESTIMATES

Morgan October 1991

	<u>1991</u>	<u>2001</u>	<u>2006</u>	<u>2011</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
POPULATION (#)								
Primary Zone	18,325	25,800		37,400				
Secondary Zone	<u>28,655</u>	<u>32,400</u>		<u>33,400</u>				
Trade Area	46,980	58,200		70,800				
RESIDUALS (ft²)								
FSR	0	43,000		100,000				
NFSR	0	222,000		360,000				
HI (formerly Wholesale)	na	<u>na</u>		<u>na</u>				
Total		265,000		460,000				

Morgan May 11, 2001

	<u>2001</u>	<u>2006</u>	<u>2011</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
POPULATION (#)							
Primary Zone	32,249	35,952	39,488	43,114	49,012		
Secondary Zone	<u>28,124</u>	<u>31,456</u>	<u>33,917</u>	<u>36,082</u>	<u>35,974</u>		
Trade Area	60,373	67,408	73,405	79,196	84,986		
RESIDUALS (ft²)							
FSR	0	50,634	70,009	89,094	112,263		
NFSR	0	119,282	160,087	200,134	247,156		
HI	<u>0</u>	<u>9,571</u>	<u>13,542</u>	<u>17,409</u>	<u>21,633</u>		
Total Retail	0	179,487	243,638	306,637	381,052		

Morgan May 5, 2010

Existing Georgetown Urban Boundary + Intensification	<u>2006</u>	<u>2011</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Table 2: POPULATION (#)						
Primary Zone	38,291	41,193	44,789	46,457	48,300	50,143
Secondary Zone	<u>28,204</u>	<u>28,050</u>	<u>28,234</u>	<u>29,563</u>	<u>30,814</u>	<u>32,065</u>
Trade Area	66,495	69,243	73,023	76,020	79,114	82,208
Table 20: RESIDUALS (ft²)						
FSR	0	12,976	39,044	54,093	66,163	78,233
NFSR	0	51,498	142,954	177,078	204,291	231,504
HI	<u>0</u>	<u>-15,286</u>	<u>406</u>	<u>3,981</u>	<u>6,863</u>	<u>9,744</u>
Total Retail	0	49,188	182,404	235,152	277,317	319,481

Morgan May 5, 2010

Georgetown Urban Area Expansion + Intensification	<u>2006</u>	<u>2011</u>	<u>2016</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Table 2-1: POPULATION (#)						
Primary Zone	38,291	41,193	44,789	46,457	57,337	68,216
Secondary Zone	<u>28,204</u>	<u>28,050</u>	<u>28,234</u>	<u>29,563</u>	<u>30,814</u>	<u>32,065</u>
Trade Area	66,495	69,243	73,023	76,020	88,151	100,281
Table 20-1: RESIDUALS (ft²)						
FSR	0	14,527	39,044	54,093	107,818	161,543
NFSR	0	51,498	142,954	177,078	291,212	405,345
HI	<u>0</u>	<u>-15,286</u>	<u>406</u>	<u>3,981</u>	<u>17,449</u>	<u>30,916</u>
Total Retail	0	50,739	182,404	235,152	416,478	597,804

TABLE 20, CONTINUED

LONGITUDINAL COMPARISON OF POPULATION PROJECTIONS AND RESIDUAL SPACE ESTIMATES

	Census <u>2006</u>	Census <u>2011</u>	<u>2015</u>	<u>2021</u>	<u>2026</u>	<u>2031</u>
Morgan November 25, 2015						
Georgetown Urban Area Expansion + Intensification						
POPULATION (#)						
Primary Zone	39,104	41,029	42,914	46,761	60,336	74,814
Secondary Zone			<u>26,404</u>	<u>26,896</u>	<u>29,502</u>	<u>30,686</u>
Trade Area			69,318	73,657	89,838	105,500
RESIDUALS (ft²)						
FSR			0	15,077	84,144	154,571
NFSR			0	-83,826	21,719	151,558
Proposed NFSR Space			0	125,000	125,000	125,000
HI			0	-179	<u>15,162</u>	<u>30,201</u>
Total Retail					246,025	461,330

TABLE 21

LONGITUDINAL COMPARISONS OF FOUR (4) FLOORSPACE INVENTORIES OVER 24 YEARS

INVENTORY (ft ²)	<u>October, 1991</u>		<u>May 11, 2001</u>		<u>May 5, 2010</u>		<u>November 25, 2015</u>		Difference 2010-2015
Supermarket / Grocery	115,942	60.9%	108,500	66.4%	291,162	84.1%	262,164	80.4%	-28,998
Specialty Food	<u>74,365</u>	<u>39.1%</u>	<u>54,979</u>	<u>33.6%</u>	<u>54,888</u>	<u>15.9%</u>	<u>63,767</u>	<u>19.6%</u>	<u>8,879</u>
Subtotal FSR	190,307	100%	163,479	100%	346,050	100%	325,931	100%	-20,119
Dep't Store	87,589	9.0%	154,521	13.9%	154,521	10.4%	99,013	6.2%	-55,508
Gen'l Merchandise	34,407	3.5%	14,768	1.3%	12,968	0.9%	14,706	0.9%	1,738
Drug / Cosmetics / Pers. Care	12,624	1.3%	19,275	1.7%	31,858	2.1%	47,402	3.0%	15,544
Apparel & Accessories	22,437	2.3%	47,950	4.3%	106,663	7.2%	128,877	8.0%	22,214
Home Furnishings	125,094	12.9%	51,636	4.6%	76,303	5.1%	56,519	3.5%	-19,784
Other Non-Food Retail	70,361	7.2%	74,736	6.7%	69,721	4.7%	92,319	5.8%	22,598
Canadian Tire	21,925	2.3%	79,400	7.1%	79,300	5.3%	79,300	4.9%	0
Tires/Batteries/Accessories	<u>12,824</u>	<u>1.3%</u>	<u>13,240</u>	<u>1.2%</u>	<u>10,700</u>	<u>0.7%</u>	<u>10,597</u>	<u>0.7%</u>	<u>-103</u>
Subtotal NFSR	387,261	39.8%	455,526	40.9%	542,034	36.5%	528,733	32.9%	-13,301
Home Improvement	58,524	6.0%	59,068	5.3%	53,129	3.6%	56,885	3.5%	3,756
L/B/W	<u>14,222</u>	<u>1.5%</u>	<u>14,983</u>	<u>1.3%</u>	<u>25,863</u>	<u>1.7%</u>	<u>22,051</u>	<u>1.4%</u>	<u>-3,812</u>
Total FSR + NFSR + HI + L/B/W	650,314	66.9%	693,056	62.3%	967,076	65.2%	933,600	58.2%	-33,476
Services:									
Restaurant	106,477	11.0%	122,899	11.0%	145,905	9.8%	140,789	8.8%	-5,116
Bank / Trust	18,285	1.9%	39,826	3.6%	48,346	3.3%	43,106	2.7%	-5,240
Personal Service	22,518	2.3%	25,588	2.3%	62,606	4.2%	69,942	4.4%	7,336
Other Service	83,485	8.6%	120,021	10.8%	142,586	9.6%	241,954	15.1%	99,368
FIRE+SBM+Vet+Travel	41,638	4.3%	42,572	3.8%	55,194	3.7%	55,414	3.5%	220
Medical/Dental/Health Ser.	<u>38,883</u>	<u>4.0%</u>	<u>22,306</u>	<u>2.0%</u>	<u>26,051</u>	<u>1.8%</u>	<u>34,808</u>	<u>2.2%</u>	<u>8,757</u>
Subtotal Services	311,286	32.0%	373,212	33.5%	480,688	32.4%	586,013	36.5%	105,325
Vacant	110,615	11.4%	46,416	4.2%	35,772	2.4%	85,067	5.3%	49,295
TOTAL (millions of ft²)	972,215	100%	1,112,684	100%	1,483,536	100%	1,604,680	100%	121,144

TABLE 21, CONTINUED

LONGITUDINAL COMPARISONS OF FOUR (4) FLOORSPACE INVENTORIES OVER 24 YEARS

	Column 1	Column 2	Column 3	Column 4	Column 5
		Annual	%	2015	Benchmark
INVENTORY (ft²)	Difference	Difference	Increase	Space	Space
	<u>1991-2015</u>	<u>1991-2015</u>	<u>2015/1991</u>	Ratios	Planning
				<u>ft² /Capita</u>	Ratios
					<u>ft² /Capita</u>
FSR SPACE:					
Supermarket / Grocery	146,222	6,093	126.1%	6.1	3.0
Specialty Food	<u>-10,598</u>	<u>-442</u>	<u>-14.3%</u>	<u>1.5</u>	<u>1.3</u>
Subtotal FSR	135,624	5,651	71.3%	7.6	4.3
NFSR SPACE:					
Dep't Store	11,424	476	13.0%	2.3	3.5
Gen'l Merchandise	-19,701	-821	-57.3%	0.3	1.9
Drug / Cosmetics / Pers. Care	34,778	1,449	275.5%	1.1	0.8
Apparel & Accessories	106,440	4,435	474.4%	3.0	2.3
Home Furnishings	-68,575	-2,857	-54.8%	1.3	2.1
Other Non-Food Retail	21,958	915	31.2%	2.2	1.5
Canadian Tire	57,375	2,391	261.7%	1.8	-
Tires/Batteries/Accessories	<u>-2,227</u>	<u>-93</u>	<u>-17.4%</u>	<u>0.2</u>	=
Subtotal NFSR	141,472	5,895	36.5%	12.3	12.1
HI + L/B/W SPACE:					
Home Improvement	-1,639	-68	-2.8%	1.3	2.2
L/B/W	7,829	326	55.0%	0.5	0.4
Total FSR + NFSR + HI + L/B/W	283,286	11,804	43.6%	21.8	19.0
SERVICE SPACE:					
Restaurant	34,312	1,430	32.2%	3.3	3.2
Bank / Trust	24,821	1,034	135.7%	1.0	1.0
Personal Service	47,424	1,976	210.6%	1.6	1.2
Other Service	158,469	6,603	189.8%	5.6	0.9
FIRE+SBM+Vet+Travel	13,776	574	33.1%	1.3	3.5
Medical/Dental/Health Ser.	<u>-4,075</u>	<u>-170</u>	<u>-10.5%</u>	<u>0.8</u>	<u>1.2</u>
Subtotal Service	274,727	11,447	88.3%	13.7	11.0
Total ft² per capita				35.4	30.0
Vacant	-25,548	-1,065	-23.1%		
TOTAL (millions of ft²)	632,465	26,353	65.1%		

Population Increase 1991-2015		
PZ	408%	4-fold increase
SZ	107%	small 7% increase
TA	225%	> 2-fold increase

TABLE 22

LONGITUDINAL COMPARISONS OF FOUR (4) PER CAPITA SPACE RATIOS CALCULATED OVER 24 YEARS

INVENTORY (ft ²)	Divide ft ² by Pop'n		Divide ft ² by Pop'n		Divide ft ² by Pop'n		Divide ft ² by Pop'n		Difference 1991-2015
	October, 1991		May 11, 2001		May 5, 2010		November 25, 2015		
Supermarket / Grocery	115,942	6.3	108,500	3.4	291,162	7.2	262,164	6.1	-0.2
Specialty Food	<u>74,365</u>	<u>4.1</u>	<u>54,979</u>	<u>1.7</u>	<u>54,888</u>	<u>1.4</u>	<u>63,767</u>	<u>1.5</u>	<u>-2.6</u>
Subtotal FSR	190,307	10.4	163,479	5.1	346,050	8.5	325,931	7.6	-2.8
Dep't Store	87,589	4.8	154,521	4.8	154,521	3.8	99,013	2.3	-2.5
Gen'l Merchandise	34,407	1.9	14,768	0.5	12,968	0.3	14,706	0.3	-1.5
Drug / Cosmetics / Pers. Care	12,624	0.7	19,275	0.6	31,858	0.8	47,402	1.1	0.4
Apparel & Accessories	22,437	1.2	47,950	1.5	106,663	2.6	128,877	3.0	1.8
Home Furnishings	125,094	6.8	51,636	1.6	76,303	1.9	56,519	1.3	-5.5
Other Non-Food Retail	70,361	3.8	74,736	2.3	69,721	1.7	92,319	2.2	-1.7
Canadian Tire	21,925	1.2	79,400	2.5	79,300	2.0	79,300	1.8	0.7
Tires/Batteries/Accessories	<u>12,824</u>	<u>0.7</u>	<u>13,240</u>	<u>0.4</u>	<u>10,700</u>	<u>0.3</u>	<u>10,597</u>	<u>0.2</u>	<u>-0.5</u>
Subtotal NFSR	387,261	21.1	455,526	14.1	542,034	13.3	528,733	12.3	-8.8
Subtotal HI (Home Improv't)	58,524	3.2	59,068	1.8	53,129	1.3	56,885	1.3	-1.9
Subtotal L/B/W	14,222	0.8	14,983	0.5	25,863	0.6	22,051	0.5	-0.3
Total FSR + NFSR + HI + L/B/W	650,314	35.5	693,056	21.5	967,076	23.8	933,600	21.8	-13.7
Services:									
Restaurant	106,477	5.8	122,899	3.8	145,905	3.6	140,789	3.3	-2.5
Bank / Trust	18,285	1.0	39,826	1.2	48,346	1.2	43,106	1.0	0.0
Personal Service	22,518	1.2	25,588	0.8	62,606	1.5	69,942	1.6	0.4
Other Service	83,485	4.6	120,021	3.7	142,586	3.5	241,954	5.6	1.1
FIRE+SBM+Vet+Travel	41,638	2.3	42,572	1.3	55,194	1.4	55,414	1.3	-1.0
Medical/Dental/Health Ser.	<u>38,883</u>	<u>2.1</u>	<u>22,306</u>	<u>0.7</u>	<u>26,051</u>	<u>0.6</u>	<u>34,808</u>	<u>0.8</u>	<u>-1.3</u>
Subtotal Services	311,286	17.0	373,212	11.6	480,688	11.8	586,013	13.7	-3.3
Vacant	110,615	6.0	46,416	1.4	35,772	0.9	85,067	2.0	-4.1
TOTAL (millions of ft²)	972,215	53.1	1,112,684	34.5	1,483,536	36.5	1,604,680	37.4	-15.7

APPENDIX A-1

INCOME/EXPENDITURE INDEXING METHODOLOGY (REGRESSION ANALYSIS)

(n)	Av. Per Capita Income of Income Quintile	Per Capita Indexes				
		(x) Income	(y1) FSR	(y2) NFSR	(y3) Restaurant	(y4) L/B/W
1	\$11,020	35.2	95.0	80.7	78.7	61.2
2	\$16,939	54.1	98.8	89.0	67.2	61.5
3	\$24,067	76.9	90.0	88.3	81.5	66.4
4	\$30,527	97.5	100.6	101.9	116.6	119.1
5	\$56,256	179.7	110.8	124.4	129.9	140.5
All Classes	\$31,305	100.0	100	100	100	100

Source: Statistics Canada Survey of Household Spending in 2011 for NFSR & FSR.
= detailed av. household exp. by household income quintile, Ontario 2011

REGRESSION EQUATION

$$y = a + bx$$

where n = number of income classes
 where x = independent variable or Income Index
 where y = dependent variable or Expenditure Index

$$b = \frac{n(\sum xy) - (\sum x)(\sum y)}{n(\sum x^2) - (\sum x)^2} \quad \text{and} \quad a = \frac{\sum y - b(\sum x)}{n}$$

INCOME/EXPENDITURE REGRESSION EQUATIONS

FSR Expenditure Index: $y1 = 89 + .11 (x)$
 NFSR Expenditure Index: $y2 = 61 + .39 (x)$
 Restaurant Expenditure Index: $y1 = 67 + .33 (x)$
 Liquor/Beer/Wine Expenditure Index: $y5 = 35 + .65 (x)$

APPENDIX A-2

2014 ESTIMATES OF ONTARIO RETAIL SALES BY TRADE GROUP

	2014 <u>TOTAL</u>	2014 <u>Per Capita *</u>	%	%	%
NAICS FSR (Food Store Retail)					
44511 Supermarket & Grocery Stores	26,310.7	\$1,923	84.8%	84.8%	
44512 Convenience & Specialty Food Stores	<u>4,710.8</u>	<u>\$344</u>	15.2%	15.2%	
4452 TOTAL FSR	31,021.5				
Per Capita FSR *	=	\$2,268	100.0%	100.0%	
Add back WMC food sales	=	<u>\$135</u>			
Per Capita FSR + WMC *	=	\$2,403			
NFSR (Non-Food Store Retail)					
"GAFO + DRUGS " (Formerly Department Store Type Merchandise)					
4421 Furniture Stores	3,643.8	\$266			
4422 Home Furnishings Stores	2,170.7	\$159			
443 Home electronics + appliance + computer/software	<u>6,091.8</u>	<u>\$445</u>			
Subtotal	11,906.3	\$870	20.29%	17.0%	14.84%
446 Pharmacies and personal care stores	13,300.2	\$972	22.67%	19.0%	16.58%
4481 Clothing stores	8,924.6	\$652			
4482 Shoe Stores	1,279.2	\$94			
4483 Jewellery, clothing accessories, and luggage & leather stores	<u>1,085.2</u>	<u>\$79</u>			
Subtotal	11,289.0	\$825	19.24%	16.1%	14.07%
4529 Department stores (excluding concessions) **	11,240.9	\$822		16.1%	14.01%
452 Other general merchandise stores (incl. Can. Tire + TSC + Costco)	<u>12,483.5</u>	<u>\$913</u>	21.28%	<u>17.9%</u>	<u>15.56%</u>
452 Subtotal	23,724.4	\$1,734		33.9%	29.57%
451 Sporting goods, hobby, music and book stores	4,008.1	\$293		5.7%	5.00%
453 Miscellaneous store retail (90%)	<u>3,587.1</u>	<u>\$262</u>		5.1%	4.47%
Subtotal	7,595.2	\$555	12.95%	10.9%	9.47%
44131 Tires + Batteries + Auto Parts & Accessories (TBA)	<u>2,094.4</u>	<u>\$153</u>	3.57%	<u>3.0%</u>	<u>2.61%</u>
Subtotal	2,094.4	\$153		3.0%	2.61%
"HI"					
444 Building material and garden equipment and supplies dealers	<u>10,310.5</u>	<u>\$754</u>			<u>12.85%</u>
Subtotal	10,310.5	\$754			12.85%
TOTAL NFSR = "GAFO + DRUG"	69,909.5	\$5,111	100.0%	100.0%	
Per Capita (Subtract est'd WMC food sales) **	=	<u>\$135</u>			
Per Capita *		\$4,976			
TOTAL NFSR + HI = "GAFO + DRUG" + "HI"	80,220.0	\$5,865			100.0%
Per Capita (Subtract est'd WMC food sales) **	=	<u>\$135</u>			
Per Capita *		\$5,730			
Dep't. Store Share of NFSR = "GAFO + DRUG"	\$11,240.9/\$69,909.5 =	16.1%			
Dep't. Store Share of NFSR + HI	\$11,240.9/\$80,220.0 =	14.0%			
L/B/W	7,869.1	\$575			

* Per Capita @ 13,678,700 persons (per July - September 2014 estimate from Statistics Canada Quarterly Demographic Statistics, including net undercoverage of non-permanent residents and returning Canadians (July to September, 2011, Cat. # 91-002-X, Table 1).

Source: Retail Trade, Statistics Canada Cat. # 63-005, Table 3-7, December, 2014.

** Morgan estimate.

APPENDIX A-3

GEORGETOWN TRADE AREA -- INCOME AND EXPENDITURE INDEXES

<u>Trade Areas</u>	<u>Study Area Pop'n %</u>	<u>Census Pop'n</u>	<u>Number Households</u>	<u>HH Income (\$)</u>	<u>Total HH Income (\$ m's)</u>	<u>Per Cap HH Income (\$)</u>	<u>Per Cap HH Income Index</u>	<u>FSR Index</u>	<u>NFSR GAFO + Drug & HI Index</u>	<u>L/B/W Index</u>	<u>Restaurant Index</u>
Ontario											
1996 Census		10,753,573	3,924,510	\$54,291	213,065.6	\$19,813	100	100	100	100	100
2001 Census		11,410,046	4,219,410	\$66,836	282,008.5	\$24,716	100	100	100	100	100
2006 Census		12,160,280	4,554,250	\$77,967	355,081.2	\$29,200	100	100	100	100	100
2015 Environics		13,794,782	5,401,658	\$95,214	514,313.5	\$37,283	100	100	100	100	100
Primary Zone - Georgetown											
1996 Census	47.7%	24,585	8,475	\$67,411	571.3	\$23,238	117.3	102.1	111.8	110.7	100.7
2001 Census	54.7%	31,156	10,517	\$84,692	890.7	\$28,589	115.7	101.9	110.7	109.7	100.6
2006 Census	57.3%	36,379	12,261	\$100,370	1,230.6	\$33,828	115.8	101.9	110.8	109.8	100.6
2015 Environics	58.1%	43,207	15,456	\$123,748	1,912.6	\$44,267	118.7	102.1	107.3	112.2	100.7
Secondary Zone											
1996 Census	52.3%	26,958	8,903	\$66,757	595.7	\$22,098	111.5	101.4	107.8	107.0	100.5
2001 Census	45.3%	25,816	8,842	\$85,966	760.1	\$29,444	119.1	102.3	113.0	111.9	100.8
2006 Census	42.7%	27,122	9,426	\$99,979	942.4	\$34,747	119.0	102.3	112.9	111.8	100.8
2015 Environics	41.9%	31,207	11,172	\$117,778	1,315.8	\$42,164	113.1	101.4	105.1	108.5	100.5
GEORGETOWN TRADE AREA											
1996 Census	100%	51,543	17,378	\$67,155	1,167.0	\$22,642	114.3	101.7	109.7	108.7	100.6
2001 Census	100%	56,972	19,359	\$85,274	1,650.8	\$28,976	117.2	102.1	111.7	110.7	100.7
2006 Census	100%	63,501	21,687	\$100,200	2,173.0	\$34,221	117.2	102.1	111.7	110.6	100.7
2015 Environics	100%	74,414	26,628	\$121,243	3,228	\$43,385	116.4	101.8	106.4	110.6	100.6

Regression Equations applied to 2015 income data:

FSR Expenditure Index = 89 + 0.11 (Income Index)
 NFSR +HI Expenditure Index = 61 + 0.39 (Income Index)
 Liquor/Beer/Wine Expenditure Index = 35 + 0.65 (Income Index)
 Restaurant Expenditure Index = 67 + 0.33 (Income Index)

APPENDIX A-4

TRADE AREA FSR, GAFO + DRUG, HI, HAAS/TBA, AND L/B/W EXPENDITURE LEVELS

<u>Trade Areas</u>	2015 Per Cap HH Income (\$)	2015 Income Index	2015 FSR Per Cap Exp.	2015 NFSR + HI Per Cap Exp.	2015 NFSR (GAFO + Drug) Per Cap Exp.	2015 HI Per Cap Exp. *	2015 HAAS/TBA Per Cap Exp. *	2015 L/B/W Per Cap Exp.	2015 Restaurant Per Cap Exp.
Ontario	\$37,283	100.0	\$2,381	\$6,158	\$5,367	\$792	\$161	\$604	\$866
<i>Per cap expenditures = % conversion 2014 \$ to 2015 \$</i>			5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%
GEORGETOWN TRADE AREA	\$43,385	116.4							
Primary Zone (Georgetown)	\$44,267	118.7	\$2,430	\$6,608	\$5,759	\$850	\$172	\$677	\$872
Secondary Zone	\$42,164	113.1	\$2,416	\$6,473	\$5,641	\$832	\$169	\$655	\$870

* Ontario HAAS/TBA shares of NFSR + HI in Ontario @ \$6,158 per capita = 2.6%
 Ontario HI shares of NFSR + HI in Ontario @ \$6,158 per capita = 12.9%
 HI shares = 5 times AAS/TBA shares 15.5%

APPENDIX A-5

GEORGETOWN TRADE AREA POPULATION PROJECTIONS -- RM of Halton Best Planning Estimates 2011-2031

Halton Hills Traffic Zones	Units 2006	Pop'n 2006	Units 2011	Pop'n 2011	Units 2016	Pop'n 2016	Units 2021	Pop'n 2021	With 40% Intensification				
									Units 2026	Pop'n 2026	Units 2031	Pop'n 2031	
Primary Zone - GEORGETOWN													
PERSONS PER UNIT		2.9593		2.9002		2.8226		2.7675		2.723		2.69134	
558	64	189	64	186	64	181	64	177	3,872	10,543	6,651	17,900	
559	146	432	146	423	146	412	146	404	163	444	182	490	
560	114	337	116	336	123	347	127	351	135	368	1,041	2,802	
561	791	2,341	791	2,294	791	2,233	813	2,250	822	2,238	832	2,239	
562	86	255	170	493	555	1,567	1,041	2,881	1,041	2,835	1,041	2,802	
563	603	1,784	775	2,248	903	2,549	1,287	3,562	1,385	3,771	1,480	3,983	
564	1,590	4,705	1,595	4,626	1,735	4,897	1,739	4,813	1,780	4,847	1,805	4,858	
565	117	346	161	467	166	469	176	487	211	575	217	584	
566	0	0	0	0	0	0	0	0	0	0	0	0	
567	1,374	4,066	1,416	4,107	1,594	4,499	1,598	4,423	1,652	4,498	1,668	4,489	
568	347	1,027	349	1,012	355	1,002	359	994	364	991	370	996	
569	1,326	3,924	1,329	3,854	1,346	3,799	1,351	3,739	1,364	3,714	1,372	3,693	
570	54	160	56	162	62	175	67	185	72	196	78	210	
571	177	524	177	513	177	500	178	493	178	485	178	479	
572	39	115	39	113	38	107	42	116	47	128	47	126	
573	244	722	282	818	284	802	300	830	306	833	703	1,892	
574	811	2,400	816	2,367	839	2,368	880	2,435	988	2,690	1,020	2,745	
575	593	1,755	593	1,720	593	1,674	669	1,851	869	2,366	1,021	2,748	
576	910	2,693	919	2,665	923	2,605	951	2,632	954	2,598	955	2,570	
577	585	1,731	647	1,876	727	2,052	827	2,289	971	2,644	1,073	2,888	
578	445	1,317	450	1,305	455	1,284	465	1,287	560	1,525	605	1,628	
579	107	317	111	322	115	325	126	349	134	365	138	371	
580	308	911	382	1,108	383	1,081	383	1,060	391	1,065	391	1,052	
581	539	1,595	539	1,563	539	1,521	540	1,494	545	1,484	550	1,480	
582	879	2,601	993	2,880	1,139	3,215	1,316	3,642	1,623	4,419	2,357	6,343	
583	235	695	258	748	265	748	299	827	316	860	319	859	
584	39	115	90	261	110	310	130	360	131	357	131	353	
585	144	426	144	418	144	406	147	407	149	406	159	428	
586	40	118	40	116	40	113	40	111	40	109	40	108	
Subtotal	12,707	37,604	13,448	39,001	14,611	41,241	16,061	44,450	21,063	57,354	26,424	71,116	
Secondary Zone - GEORGETOWN													
Within Halton Hills													
553	14	41	14	41	10	28	10	28	0	0	0	0	
554	148	438	148	429	155	437	159	440	159	433	159	428	
555	292	864	293	850	294	830	294	814	294	801	294	791	
556	200	592	200	580	200	565	200	554	200	545	200	538	
557	155	459	155	450	155	437	155	429	155	422	155	417	
587	256	758	262	760	265	748	265	733	265	722	265	713	
588	112	331	112	325	112	316	113	313	117	319	120	323	
589	94	278	94	273	94	265	94	260	94	256	94	253	
590	73	216	73	212	73	206	73	202	73	199	73	196	
591	65	192	65	189	65	183	65	180	65	177	65	175	
592	64	189	64	186	64	181	64	177	64	174	64	172	
593	271	802	271	786	271	765	271	750	271	738	271	729	
594	149	441	149	432	149	421	149	412	149	406	149	401	
595	291	861	291	844	291	821	291	805	291	792	291	783	
596	67	198	67	194	67	189	67	185	67	182	67	180	
Acton 597	775	2,293	776	2,251	788	2,224	851	2,355	899	2,448	911	2,452	
Acton 598	414	1,225	414	1,201	414	1,169	477	1,320	1,132	3,082	1,459	3,927	
Acton 599	482	1,426	482	1,398	482	1,360	521	1,442	541	1,473	555	1,494	
Acton 600	719	2,128	719	2,085	719	2,029	731	2,023	874	2,380	948	2,551	
Acton 601	412	1,219	412	1,195	412	1,163	421	1,165	437	1,190	440	1,184	
Acton 602	143	423	144	418	148	418	169	468	174	474	177	476	
Acton 603	315	932	315	914	315	889	347	960	375	1,021	395	1,063	
Acton 604	21	62	22	64	22	62	24	66	24	65	24	65	
Acton 605	245	725	249	722	251	708	318	880	420	1,144	467	1,257	
606	72	213	72	209	72	203	73	202	73	199	73	196	
Subtotal	5,849	17,309	5,863	17,004	5,888	16,619	6,202	17,164	7,213	19,641	7,716	20,766	
Beyond Halton Hills													
Erin Twp. + Erin Village + Eramosa Twp.	2,949	8,726	2,897	8,403	2,977	8,403	3,036	8,403	3,086	8,403	3,122	8,403	
Subtotal Secondary Zone	8,798	26,035	8,760	25,407	8,865	25,022	9,238	25,567	10,299	28,044	10,838	29,169	
TOTAL GEORGETOWN TRADE AREA	21,505	63,639	22,208	64,408	23,476	66,263	25,299	70,017	31,362	85,398	37,262	100,285	

APPENDIX A-6

Scott Morgan - Town of Halton Hills - Demographic Appendix

Geography	Total Households	Total Population	Average Household Income (Current Year \$)	Aggregate Household Income (Current Year \$)
Ontario	5,401,658	13,794,782	95,214	514,314,245,978
Primary Trade Area	15,456	43,207	123,748	1,912,648,004
Secondary Trade Area	11,172	31,207	117,778	1,315,794,061

APPENDIX B-1

RETAIL AND SERVICE COMMERCIAL FLOORSPACE INVENTORIES: GEORGETOWN + ACTON + OTHER TRADE AREA + PROXIMATE BIG BOX CENTRES

Halton Hills Retail and Service Inventory
Updated September 2015

Street No.	Store Name	Type	NAICS Code	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	25-26 Major 25 Promo'l 26 Dep't Store GLA	31-34 Other Gen'l Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Personal Care 20-21 GLA	35-57 Fashion & Access. GLA	58-83 Home Furnishings Computers Electronics GLA	84-113 Sport/Hobby Music/Book Florist Gift/Art Used/Misc. GLA	28-30 Can Tire + TSC 28 Tires 30 Auto P+A 29 GLA	Subtotal Non-Dep't Store NFSR GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	124-126 Bank Trust Cr. Union GLA	137-143 FIRE Legal Acc't/Photo Vet Prof'l Services GLA	151-155 Med/Den & Other Health Services GLA	172-174 Rest. & Fast Food Drinking GLA	184-196 Personal Services GLA	22-24 Liquor (24) Beer (22) Wine (23) GLA	200 Vacant GLA						
ACTON																													
Node 1 - Central Business District																													
<u>N/S of Mill Street west from RR tracks to Main Street</u>																													
151	Four Seasons Dental	Dentist	6212	152	1,000			0							0														
145	Classic Karate	Athletic Instruction	61162	149	1,260			0							0														
137	Station Hotel	Restaurant / Tavern	7224	174	7,800			0							0														
	Mill Street Crossing	Fast Food	7222	173	600			0							0														
129	Smooth Solutions	Beauty Salon	812115	185	1,000			0							0														
129	Trendz Hair Salon	Beauty Salon	812115	185	1,000			0							0														
119	A & K Food Stop	Fast Food	7222	173	450			0							0														
115	Acton's Time Out Sports	Sporting Goods	45111	87	1,620			0						1620	1620														
113	DiMin Wines	Wine Making	453992	104	1,000			0					1000		1000														
93	Acton Medical Pharmacy	Drugstore	44611	17	350			0		350					350														
93	Acton Professional Building	Mixed Medical Offices	6211	151	5,180			0							0														
83	Insurance Office	Insurance	52421	138	360			0							0			360											
77	Blooms Away Flower Shop	Florist	45311	93	1,000			0						1000	1000														
75	Willow Lane Natural Foods	Other Food	445299	13	864		864	864							0														
71	The Holland Shop	Specialty Food	445299	16	600		600	600							0														
67	Law Office	Legal	5411	140	2,088			0							0														
65	Chiropractor's Office	Medical Service	6213	153	2,088			0							0														
45/47	Halton Hills Comm. Support	Social Service	6241	156	4,160			0							0														
43	The Needle Gnome	Craft Supplies	45112	88	3,500			0							3500														
41	Vintner's of Acton	Wine Making	453992	104	1,200			0						1200	1200														
37/39	Country Reflections	Gifts / Balloons	45322	95	1,568			0						1568	1568														
35	Starlight Café	Fast Food	7222	173	1,400			0							0														
31	C.I.B.C.	Bank	52211	124	3,900			0							0			3900											
29	Super Submarines	Fast Food	7222	173	1,820			0							0														
27	Pete's Barber Shop	Personal Service	812114	184	384			0							0														
25	Godfather's Pizza	Fast Food	7222	173	1,920			0							0														
23	Bank of Montreal	Bank	52211	124	4,800			0							0			4800											
21	The Doll Emporium	Hobbies / Crafts	45112	88	2,160			0						2160	2160														
19	Halton Hills Furniture & Appl.	Home Furniture	44211	58	11,000			0					11000		11000														
13/15	Andy's Restaurant & Pizzeria	Restaurant	7221	172	2,100			0							0														
17	TDI Dance Centre	Education	61169	150	1,200			0							0														
11	Blue Springs Spa	Personal Service	81219	190	4,200			0							0														
5	Forever Youngsters	Used Children's Wear	45331	97	900			0						900	900														
3	Acton Jiu Jitsu	Athletic Instruction	61162	149	1,540			0							0														
<u>S/S of Mill Street East of Main Street</u>																													
2	Remax Realty	Real Estate	53121	139	1,480			0							0				1480										
4	Acton Optical	Optician	44671	19	1,080			0		1080					1080														
6	Manny's Roadhouse	Restaurant	7221	172	6,120			0							0														
8	Cash Inn	Other Service	52239	130	300			0							0														
10	Lily Thai	Restaurant	7221	172	1,420			0							0														
14	The Towne Frier	Restaurant	7221	172	1,008			0							0														
16	BIA Office	Gen'l Office Space	n/a	202	200			0							0														
18	Top Nails	Personal Service	812115	185	300			0							0														
<u>S/S of Mill Street East of Main Street</u>																													
20	Fat Cat Tatoo	Personal Service	81219	189	600			0							0														
22	Jug City	Convenience Food	44512	3	1,512		1512	1512							0														
22	Acton Laundromat	Laundry	81231	191	784			0							0														
22	Joe's Great Pizza	Fast Food	7222	173	988			0							0														
28	Leather Town Tavern	Restaurant/Tavern	7224	174	2,250			0							0														
	Super Cuts for All	Personal Service	812114	184	1,200			0							0														
	Scotia Bank	Bank	52211	124	4,304			0							0														
46	Blue Springs Flower Shop	Florist	45311	93	920			0							0														
50	Acton Discount Variety	Convenience Food	44512	3	3,000		3000	3000							0														
54	The Smoke Shop	Convenience Food	44512	3	440		440	440							0														
"	H & R Block	Accounting	5412	141	546			0							0														
"	Silvercreek Spa	Personal Service	81219	190	546			0							0														
"	Profile Hair & Skin Care	Beauty Salon	812115	185	546			0							0														
"	McNabb Graphics	Business Service	56143	145	1,200			0							0														
120	Salvation Army Thrift Store	Used Goods	45331	101	1,000			0						1000	1000														
122	New Variety	Convenience Food	44512	3	700		700	700							0														
130	Lakeview Flooring & Kitchens	Flooring	44221	63	4,600			0					4600		4600														
"	Vacant Space	Vacant	n/a	200	580			0							0														
"	Sunbeach Tanning	Personal Service	81219	189	1,130			0							0														
Subtotal Node 1 - Central Business District					114,766	0	7,116	7,116																					

APPENDIX B-1

RETAIL AND SERVICE COMMERCIAL FLOORSPACE INVENTORIES: GEORGETOWN + ACTON + OTHER TRADE AREA + PROXIMATE BIG BOX CENTRES

Halton Hills Retail and Service Inventory Updated September 2015			NAICS Code	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR GLA	25-26 Major 25 Promo'l 26 Dep't Store GLA	31-34 Other Gen'l Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Personal Care 20-21 GLA	35-57 Fashion & Access. GLA	58-83 Home Furnishings Computers Electronics GLA	84-113 Sport/Hobby Music/Book Florist Gift/Art Used/Misc. GLA	28-30 Can Tire + TSC 28 Tires 30 Auto P+A 29 GLA	Subtotal Non-Dep't Store NFSR GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	124-126 Bank Trust Cr. Union GLA	137-143 FIRE Legal Acc't/Photo Vet Profl Services GLA	151-155 Med/Den & Other Health Services GLA	172-174 Rest. & Fast Food Drinking GLA	184-196 Personal Services GLA	22-24 Liquor (24) Beer (23) Wine (23) GLA	200 Vacant GLA		
Node 2 - Main Street																										
<u>e/s of Main Street north of Mill Street</u>																										
9	Family Barber & Stylists	Personal Service	812114	184	480												0									480
11	Staying Alive Fitness	Fitness Gym	71394	168	2,210												0									
21	Halton Cable Systems	Utility Service	n/a	n/a	n/a												0									
25	Royal City Realty	Real Estate	53121	139	2,200												0									
33	Law Office	Legal	5411	140	1,600												0									
65	Acton Veterinary Clinic	Medical Service	54194	143	3,698												0									
99	Acton Town Milk	Convenience Food	44512	3	1,260		1260	1260									0									
103	Yard & Pool Master	Home Improvement	44411	114	900												0									
243	CarQuest Auto Parts	Auto Parts	44131	29	2,842												0									
<u>w/s of Main Street North of Mill Street</u>																										
	Leather Town Lumber	Building Supply	44411	114	7,200												0									
126	Lakeview Convenience	Convenience Food	44512	3	2,112		2112	2112									0									
<u>Main Mill Mall</u>																										
14-26	Subway	Fast Food	7222	173	1,500												0									
	Giant Tiger	General Merchandise	452999	33	11,500					11500							11500									
	Pizzaville	Fast Food	7222	173	1,000												0									
	Pizza & Coffee Shop	Fast Food	7222	173	1,800												0									
	Dollar Stretcher Daze	General Merchandise	452999	32	2,500					2500							2500									
	Video 99	Video Rental	53223	134	2,500												0									
2	Halton Hills Furniture	Furniture	44211	58	3,344												3344									
<u>w/s of Main Street North of Mill Street</u>																										
14	Think Tank Computers	Computers	44312	73	936												936									
16	Ed's In & Out Conv./Video 99	Conv. Food/Video	44512	3	1,872		1872	1872									0									
20	Relaxco Coin Laundry	Laundry	81231	191	936												0									936
22	Accountant's Office	Accounting	5412	141	936												0									
<u>e/s of Main Street South of Mill Street</u>																										
11	Grillers Pizza & Wings	Fast Food	7222	173	816												0									
<u>Mill Street West of Main Street</u>																										
	Your Place	Fast Food	7222	173	400												0									
	Denny's Insurance	Service	52421	138	2,560												0									
	Vacant	Vacant	n/a	200	720												0									
	Accountant's Office	Accounting	5412	141	900												0									
	Subtotal Node 2 - Main Street				58,722	0	5,244	5,244	0	14,000	0	0	4,280	0	2,842	21,122	8,100	0	11,894	0	5,516	1,416	0	720		
Node 3 - Queen Street (Hwy 7) East																										
	T-D Canada Trust	Bank	52211	124	4,514												0									
	Shoppers Drug Mart	Drugstore	44611	17	14,656												14656									
130	Taste of Mediterranean	Restaurant	7221	172	1,040												0									
256	Liquor Store	Liquor/Beer/Wine	44531	24	4,259												0									
<u>Strip Plaza</u>																										
	Sen Sen Restaurant	Restaurant	7221	172	1,500												0									
294	Rallis Burger	Fast Food	7222	173	900												0									
	Jug City	Convenience Food	44512	3	1,440		1440	1440									0									
318	Tim Horton's	Fast Food	7222	173	2,500												0									
330	The Beer Store	Liquor/Beer/Wine	44531	22	3,209												0									
<u>352 Strip Plaza</u>																										
	Double Happiness	Fast Food	7222	173	1,200												0									
	Ice Dream Art	Other Food	445299	10	1,200		1200	1200									0									
	Domino's Pizza	Fast Food	7222	173	1,200												0									
	Acton Cleaners	Dry Cleaner	81232	192	1,200												0									
	Mac's Milk / M& M Meats	Convenience Food	44512	3	3,480		3480	3480									0									
	Prosperity One Credit Union	Bank	52211	124	4,000												0									
<u>Acton Market Place Plaza</u>																										
f/s	Royal Bank	Bank	52211	124	4,000												0									
f/s	McDonald's	Fast Food	7222	173	3,600												0									
	Sobeys	Supermarket	44511	1	42,700		42700	42700									0									
	Pharma Plus	Drugstore	44611	17	8,300												8300									
	Pet Valu	Pet & Pet Supply	45391	102	1,600												1600									
	KFC	Fast Food	7222	173	1,600												0									
	Optometrist's Office	Medical Service	6213	153	1,600												0									
	Physiotherapy Clinic	Medical Service	6213	153	1,600												0									
	Dentist's Office	Medical Service	6212	152	1,600												0									
	Movie Gallery	Video Rental	53223	134	2,800												0									

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RETAIL AND SERVICE COMMERCIAL FLOORSPACE INVENTORIES: GEORGETOWN + ACTON + OTHER TRADE AREA + PROXIMATE BIG BOX CENTRES

Halton Hills Retail and Service Inventory Updated September 2015			NAICS Code	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR GLA	25-26 Major 25 Dep't Store GLA	31-34 Other Gen'l Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Personal Care 20-21 GLA	35-57 Fashion & Access. GLA	58-83 Home Furnishings Computers Electronics GLA	84-113 Sport/Hobby Music/Book Florist Gift/Art Used/Misc. GLA	28-30 Can Tire + TSC 28 Tires 30 Auto P+A 29 GLA	Subtotal Non-Dep't Store NFSR GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	124-126 Bank Trust Cr. Union GLA	137-143 FIRE Legal Acc't/Photo Vet Profl Services GLA	151-155 Med/Den & Other Health Services GLA	172-174 Rest. & Fast Food Drinking GLA	184-196 Personal Services GLA	22-24 Liquor (24) Beer (22) Wine (23) GLA	200 Vacant GLA			
	Curves Fitness	Fitness Gym	71394	168	1,400			0								0											
	Halton Region Health	Medical Service	6213	153	1,200			0								0				1200							
	Acton Nails & Spa	Personal Service	812115	185	1,200			0								0								1200			
	Herbal Majic	Weight Loss	81219	187	1,200			0								0								1200			
	New Orleans Pizza	Fast Food	7222	173	1,200			0								0					1200						
	First Choice Haircutters	Personal Service	812114	184	1,200			0								0								1200			
f/s	Real Estate Office	Real Estate	53121	139	3,781			0								0				3781							
f/s	Home Hardware	General Hardware	44413	115	8,000			0								0	8000										
329	Doctor's Office	Medical Service	6211	151	720			0								0					720						
	Office Building (2 floors)	Mixed Offices	n/a	202	3,520			0								0											
f/s	No Frills	Supermarket	44511	1	26,263	26263		26263								0											
Strip Plaza																											
b	Pita Pit	Fast Food	7222	173	900			0								0								900			
c	Vacant	Vacant	n/a	200	600			0								0									600		
d	Twice The Deal Pizza	Fast Food	7222	173	900			0								0								900			
Strip Plaza																											
	Mr. Sub	Fast Food	7222	173	1,000			0								0								1000			
	Edward Jones	Brokerage	52393	137	1,000			0								0			1000								
	Halton Police Office	Social Service	6241	156	1,000			0								0											
	Locomotion Fitness	Fitness Gym	71394	168	<u>2,000</u>			0								0											
	Subtotal Node 3				168,268	68,963	6,120	75,083	0	0	22,956	0	0	1,600	0	24,556	8,000	8,000	4,781	6,720	17,540	4,800	7,468	600			
Node 4 - Other Locations																											
Eastern Avenue																											
	The Olde Hyde House	Leather Goods/Furn.	448199	41	30,000			0					30000			30000											
	Tanner's Restaurant	Restaurant	7221	172	1,250			0								0					1250						
Acton Medical Bldg.																											
ib	Dental Office	Dentist	6212	152	1,400			0								0								1400			
ic	Acton Physiotherapy	Other Health	3213	153	2,000			0								0								2000			
id	Urgent Care Clinic	Doctor	6211	151	4,000			0								0								4000			
	Urgent Care Pharmacy	Drugstore	44611	17	1,000			0			1000					1000											
John Street South of Mill Street																											
11	Vacant	Vacant	n/a	200	960			0								0									960		
Willow Street South of Mill Street																											
	Insurance Office	Insurance	52421	138	720			0								0			720								
	Body Movements/Wellness Ctr	Athletic Instruction	61162	149	<u>1,000</u>			0								0											
	Subtotal Node 4 - Other Locations				42,330	0	0	0	0	0	1,000	30,000	0	0	0	31,000	0	0	720	7,400	1,250	0	0	960			
TOTAL ACTON					384,086	68,963	18,480	87,443	0	14,000	25,386	30,000	19,880	16,468	2,842	108,576	16,100	21,004	21,869	22,388	52,182	17,906	7,468	2,860			
					100.0%																						
GEORGETOWN																											
Node 1 - Guelph Street																											
Guelph Street East From Maple Avenue to Mountainview Road																											
116	Mixed Offices (2 floors)	Mixed Offices	n/a	202	6,896			0								0											
Normandy Plaza																											
118	Tan It	Personal Service	81219	189	1,271			0								0								1271			
118	Relax It Spa	Personal Service	81219	190	984			0								0								984			
118	Appleby Systems	Fireplace/HVAC	442298	72	1,763			0					1763			1763											
118	Herbal One Weight Mgmt.	Weight Loss	81219	187	902			0								0								902			
118	B&M Garage Doors	Home Improvement	44411	114	902			0								0	902										
118	Choy's Chinese	Fast Food	7222	173	1,558			0								0					1558						
122	Vacant	Vacant	n/a	200	1,900			0								0									1900		
124/126	Flooring Diva Designs	Carpet/Tile/FI. Cover.	44221	63	4,700			0					4700			4700											
South Side Guelph Street, East of Maple Avenue																											
Guelph Street Plaza																											
130	Halton Camera Exchange	Photography/Film	44313	83	1,040			0					1040			1040											
130	H & R Block	Accounting	5412	141	1,040			0								0			1040								
130	Herbal Magic	Weight Loss	81219	187	1,040			0								0								1040			
130	All Nite Fantasies	Adult Video	53223	134	1,040			0								0											
130	Sally's Viet Thai Takeout	Fast Food	7222	173	1,040			0								0					1040						
130	Raves Hair Salon	Beauty Salon	812115	185	1,040			0								0								1040			

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RETAIL AND SERVICE COMMERCIAL FLOORSPACE INVENTORIES: GEORGETOWN + ACTON + OTHER TRADE AREA + PROXIMATE BIG BOX CENTRES

<u>Halton Hills Retail and Service Inventory</u> Updated September 2015			NAICS Code	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR GLA	25-26 Major 25 Promo'l 26 Dep't Store GLA	31-34 Other Gen'l Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Personal Care 20-21 GLA	35-57 Fashion & Access. GLA	58-83 Home Furnishings Computers Electronics GLA	84-113 Sport/Hobby Music/Book Florist Gift/Art Used/Misc. GLA	28-30 Can Tire + TSC 28 Tires 30 Auto P+A 29 GLA	Subtotal Non-Dep't Store NFSR GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	124-126 Bank Trust Cr. Union GLA	137-143 FIRE Legal Acc't/Photo Vet Profl Services GLA	151-155 Med/Den & Other Health Services GLA	172-174 Rest. & Fast Food Drinking GLA	184-196 Personal Services GLA	22-24 Liquor (24) Beer (22) Wine (23) GLA	200 Vacant GLA			
130	Strictly Fish	Pets / Supplies	45391	102	2,080			0						2080		2080											
131	Quik Pik Convenience	Convenience	44512	3	1,932		1932	1932								0											
132	Altered Native Tatoos	Personal Service	81219	189	1,120			0								0							1120				
134	Royal Pizza	Fast Food	7222	173	1,120			0								0											
136	Wendy's Dazzling Nails	Personal Service	812115	185	1,120			0								0							1120				
136	Reef Gallery Aquariums	Pets / Supplies	45391	102	1,120			0						1120		1120											
136	Furniture Hut	Furniture	44211	58	2,240			0					2240			2240											
136	Dalia Convenience	Convenience	44512	3	1,120		1120	1120								0											
136	Santa Barbara's	Restaurant	7221	172	1,120			0								0							1120				
140	Office Magic	Stationery/Office Supp.	45321	94	1,400			0								1400											
140	Ruffins Pet Centre	Pet & Pet Supply	45391	102	1,400			0						1400		1400											
140	Super Incredible Bulk Food	Specialty Food	445299	15	1,400		1400	1400								0											
140	Vacant	Vacant	n/a	200	1,400			0								0									1400		
142	Georgetown Garden Centre	Garden Centre	44422	123	4,000			0								0	4000										
146	Patrick's Barber Shop	Personal Service	812114	184	1,200			0								0							1200				
148	Eureka Vacworks	Vacuums	44311	81	900			0					900			900											
150	Joseph Hairstyling	Beauty Salon	812115	185	900			0								0							900				
152	Georgetown Restaurant	Restaurant	7221	172	2,300			0								0											
158	Menchie's Frozen Yogurt	Limited Service Rest.	7222	173	2,400			0								0											
158	Vacant - 7 units est'd sq. ft.	Vacant	n/a	200	8,600			0								0									8600		
160	Vacant	Vacant	n/a	200	2,500			0								0									2500		
162	UPS Store	Other Service	56143	145	1,600			0								0											
162	Up Your Bike	Bicycles /Sptg. Goods	45111	84	1,100			0						1100		1100											
164	Compu-Master Repairs	Other Service	811412	180	476			0								0											
164	C.A. Offices	Accounting	5412	141	684			0								0			684								
<u>Guelph Street East From Maple Avenue to Mountainview Road</u>																											
166	Barrager's Cleaner/Money Mart	Dry Cleaner	81232	192	2,024			0								0								2024			
166	Money Mart	Financial Service	52239	130	1,000			0								0											
170	Georgetown Yarn	Crafts	45112	88	2,200			0						2200		2200											
170	Sports Unlimited	Sporting Goods	45111	87	1,500			0						1500		1500											
174	State Farm Insurance	Insurance	52421	138	1,685			0								0											
	Meinake	Automotive Service	n/a	n/a	n/a			0								0											
	Avensu's Tae Kwondo	Athletic Instruction	61162	149	4,000			0								0											
	The Centre for Skills Development	Education	61169	150	2,334			0								0											
	2-4-1 Pizza	Fast Food	7222	173	980			0								0								980			
	Dairy Queen	Fast Food	7222	173	1,800			0								0								1800			
<u>Rexway Plaza</u>																											
210	Your Choice Conv. & Movie	Conv./Video Rental	44512	3	2,592		2592	2592								0											
210	The Stuffed Olive	Restaurant	7221	172	1,440			0								0											
210	J.V's Fish & Chips	Fast Food	7222	173	1,280			0								0											
212	Mr. Submarine	Fast Food	7222	173	1,660			0								0											
214	ICI Paints	Paint/Wallpaper	44412	116	3,686			0								0	3686										
216	Pizza Pizza	Fast Food	7222	173	2,655			0								0											
218-22	Angel's Diner	Fast Food	7222	173	4,860			0								0											
Subtotal Node 1					108,044	0	7,044	7,044	0	0	0	0	10,643	10,800	0	21,443	8,588	0	3,409	0	24,213	11,601	0	14,400			
<u>Node 2 - Mountainview Road S. of Guelph Street</u>																											
<u>Mountainview Road, South of Guelph Street</u>																											
2	Timeless Treasures	Home Decor	442298	67	2,634			0						2634		2634											
4	Georgetown Animal Clinic	Veterinary Hospital	54194	143	2,345			0								0			2345								
6	Fong's Restaurant & Tavern	Lic. Restaurant	7221	172	6,888			0								0								6888			
<u>Mountainview Plaza</u>																											
10	Vacant	Vacant	n/a	200	3,936			0								0										3936	
10	King Submarine & Pizza	Fast Food	7222	173	1,564			0								0								1564			
10	Luca's Hair Studio	Beauty Salon	812115	185	1,938			0								0											
10	Sunrise Nails	Personal Service	812115	185	1,054			0								0											
10	Soft Water Plus	Water Systems	453999	113	1,122			0								0											
10	Odyssey Computers	Computers	44312	73	1,122			0						1122		1122											
10	Goldenstar Insurance	Insurance	52421	138	1,122			0								0											
10	Mac's Milk	Convenience	44512	3	3,168		3168	3168								0											
10	Upper Offices	Mixed Offices	n/a	202	3,488			0								0											
12	Georgetown Bowling Lanes	Recreation/Entertain. (15,	71395	169	15,764			0								0											
<u>Carretal Office Building</u>																											
	Mixed Offices	Mixed Offices	n/a	202	7,200			0								0											
Subtotal Node 2					53,345	0	3,168	3,168	0	0	0	0	3,756	1,122	0	4,878	0	0	3,467	0	8,452	2,992	0	3,936			

Node 3 - Guelphview Centre

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RETAIL AND SERVICE COMMERCIAL FLOORSPACE INVENTORIES: GEORGETOWN + ACTON + OTHER TRADE AREA + PROXIMATE BIG BOX CENTRES

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232	Royal Bank	Bank	52211	124	3,648			0								0		3648							
"	Comfortablr Elegance Hair Loft	Beauty Salon	812115	185	1,080			0								0							1080		
232	Work That Body Fitness	Athletic Instruction	61162	149	5,852			0								0									
"	Domino's Pizza	Restaurant	7221	172	2,204			0								0					2204				
"	Dental Office	Medical Service	6212	152	2,204			0								0				2204					
"	Richard's Fine Chocolates	Confectionery	445292	8	2,204		2204	2204								0									
"	Ares Family Restaurant	Restaurant	7221	172	4,408			0								0					4408				
"	Upper Offices	Mixed Offices	n/a	202	27,244			0								0									
	Subtotal Node 3				48,844	0	2,204	2,204	0	0	0	0	0	0	0	0	0	3,648	0	2,204	6,612	1,080	0	0	
Node 4 - Georgetown Marketplace Mall																									
	Beer Store	Liquor Beer Wine	44531	22	4,522			0								0								4522	
	Liquor Store	Liquor Beer Wine	44531	24	9,341			0								0								9341	
	Vacant		n/a	200	4,300			0								0									4300
	Winners / Home Sense	Family Clothing	44814	38	51,500			0				51500				51500									
	Wal-Mart	Jr. Dept. Store	45211	26	99,013			0	99013							0									
2	Brilliant Gold	Jewellery	44831	56	500			0				500				500									
3	Genius shoe Repair	Other Service	81143	182	415			0								0									
3a	Rogers	Cell Phones	44311	78	415			0					415			415									
4	Realty Office	Real Estate	53121	139	485			0								0			485						
5	Delrex Variety	Convenience	44512	3	1,333		1333	1333								0									
5a	Fido	Cell Phones	44311	78	770			0					770			770									
6a	GNC	Other Food	445299	13	886		886	886								0									
6	Hair In Style	Beauty Salon	812115	185	1,077			0								0								1077	
8	Vanderburgh Flowers & Gifts	Florist / Gifts	45311	93	2,951			0						2951		2951									
10	Maurices	Women's Clothing	44812	36	4,929			0				4929				4929									
12	The Source	Home Electronics	44311	75	2,064			0					2064			2064									
13	Bergsma's Paint & Wallpaper	Paint/Wallpaper	44412	116	2,317			0								0	2317								
14	C.I.B.C.	Bank	52211	124	3,841			0								0		3841							
15	Carter's / Oshkosh	Children's Clothing	44813	37	3,945			0				3945				3945									
18	Family Optical	Optician	44613	19	1,100			0			1100					1100									
19	Stitch It	Other Service	81149	183	480			0								0									
20	Tip Top	Men's Clothing	44811	35	1,620			0				1620				1620									
21a	Le Chateau	Men's Clothing	44811	35	3,791			0				3791				3791									
21b	J.V. Clothing	Other Clothing	44814	38	1,968			0								1968									
21c	Weat 49	Unisex Clothing	44814	38	2,953			0				2953				2953									
21d	Taxwide	Accounting	5412	141	480			0								0			480						
22	Payless Shoes	Family Shoes	44821	52	2,444			0				2444				2444									
23	Pharmasave	Drugstore	44611	17	980			0			980					980									
24	Bank of Montreal	Bank	52211	124	4,908			0								0		4908							
25a	Supreme Hairstyling	Beauty Salon	812115	185	666			0								0								666	
25b	Beauty Supply Outlet	Cosmetics	44612	18	1,281			0			1281					1281									
25c	Indigo Spirit	Books	45121	91	2,043			0						2043		2043									
28	Ardene	Women's Clothing	44812	36	10,129			0				10129				10129									
29	Vacant		n/a	200	355			0								0									355
30	Vacant		n/a	200	437			0								0									437
31	Cellairis	Cell Phones	44311	78	899			0					899			899									
32	Wireless Wave	Home Electronics	44311	75	647			0					647			647									
33	Vivah	Jewellery	44831	56	335			0				335				335									
34	Vacant		n/a	200	823			0								0									823
35	Green Earth Gifts	Gifts	45322	95	1,152			0						1152		1152									
36	Vacant		n/a	200	1,410			0								0									1410
37	Georgetown Photo	Cameras / Film	44313	83	840			0					840			840									
38	Northern Reflections	Ladies Wear	44812	36	1,754			0				1754				1754									
39	Peoples Jewellers	Jewellery	44831	56	1,460			0				1460				1460									
40	Bentley Leather	Lesther Goods	44832	57	1,110			0				1110				1110									
41	Reitmans	Ladies Wear	44812	36	2,870			0				2870				2870									
44	Tanjay	Women's Clothing	44812	36	2,276			0				2276				2276									
45	Market Place Café	Restaurant	7221	172	364			0								0					364				
fc1/fc8	Food Court	Fast Food Restaurants	7222	173	2,600			0								0					2600				
fc5	Lavita Bakery	Bakery	445291	7	2,543		2543	2543								0									
47	Doctor's Office	Doctor	6211	151	2,307			0								0				2307					
48	Vacant		n/a	200	2,500			0								0									2500
49	Flight Centre	Travel Agent	5615	146	583			0								0									
50	International News	News	45121	91	733			0						733		733									
49	Pro Hair Design	Personal Service	812115	185	1,110			0								0							1110		
51	Vacant		n/a	200	952			0								0									952
52	Showcase	General Merchandise	452999	31	1,136			0		1136						1136									
55	Warehouse One	Unisex Clothing	44814	38	3,001			0				3001				3001									
58	Cleo	Women's Clothing	44812	36	3,030			0				3030				303									

APPENDIX B-1

RETAIL AND SERVICE COMMERCIAL FLOORSPACE INVENTORIES: GEORGETOWN + ACTON + OTHER TRADE AREA + PROXIMATE BIG BOX CENTRES

<u>Halton Hills Retail and Service Inventory</u> Updated September 2015							1-2	3-16	25-26		31-34	Drug 17	35-57	58-83	84-113	28-30	Subtotal	114-123	124-126	137-143	151-155	172-174	184-196	22-24	200	
Street No.	Store Name	Type	NAICS Code	Study Code	Total Space GLA	Super-Market & Grocery GLA	Spec. Food GLA	Subtotal FSR GLA	Major 25 Dep't Store GLA	Other Gen'l Merch. GLA	Cosmetic 18 Optician 19 Personal Care 20-21 GLA	Fashion & Access. GLA	Home Furnishings Computers Electronics GLA	Sport/Hobby Music/Book Florist Gift/Art Used/Misc. GLA	Can Tire + TSC 28 Tires 30 Auto P+A 29 GLA	Non-Dep't Store NFSR GLA	Home Ctr. Hardware Bldg. Supply Nursery GLA	Bank Trust Cr. Union GLA	FIRE Legal Acc't/Photo Vet Profl Services GLA	Med/Den & Other Health Services GLA	Rest. & Fast Food Drinking GLA	Personal Services GLA	Liquor (24) Beer (22) Wine (23) GLA	200 Vacant GLA		
60	Vacant	Vacant	n/a	200	1,267			0									0								1267	
62	Bizou	Jewellery	44831	56	808			0				808					808									
63	Walking On A Cloud	Family Shoes	44821	52	2,007			0				2007					2007									
65	Nails In Style	Nail Salon	812115	185	1,168			0									0						1168			
67	Lifestyle	Home Decor	44211	58	1,024			0					1024				1024									
68	Vacant	Vacant	n/a	200	1,315			0									0								1315	
69	Picture & Frame	Art / Frames	45392	103	1,494			0									1494									
70	Sport Chek	Sporting Goods	45111	87	28,508			0									28508									
72	Cell Rox	Cell Phones	44311	78	657			0					657				657									
74	Mark's Work Wearhouse	Family Clothing	44814	38	12,434			0				12434					12434									
74	Mark's Mezzanine	Family Clothing	44814	38	2,735			0				2735					2735									
76	Region Of Peel Office	Gov't. Service	n/a	202	4,517			0									0									
77	Independent Free Press	Newspaperr	n/a	202	3,139			0									0									
f/s	Scotiabank	Bank	52211	124	4,300			0									0		4300							
f/s	Kelsey's	Restaurant	7221	172	5,000			0									0						5000			
306	Baker's Dozen Donuts	Fast Food	7222	173	1,536			0									0						1536			
308	Vacant	Vacant	n/a	200	4,480			0									0								4480	
310	Fire and Ice	Jewellery	44831	56	816			0				816					816									
"	Computers	Computers	44312	73	510			0					510				510									
"	T -A Nails	Personal Service	812115	185	510			0									0						510			
"	Vacant	Vacant	n/a	200	1,190			0									0								1190	
Subtotal Node 4 - Georgetown Marketplace Mall					346,089	0	4,762	4,762	99,013	1,136	3,361	118,415	7,826	36,881	0	167,619	2,317	13,049	965	2,307	9,500	4,531	13,863	19,029		
Node 5 - 66 Sinclair Ave. - Georgetown Professional Arts Building																										
	Pharmacy	Drugstore	44611	17	625			0				625					625									
	Mixed Offices	Mixed Offices	n/a	202	15,652			0									0									
Subtotal Node 5					16,277	0	0	0	0	0	625	0	0	0	0	0	625	0	0	0	0	0	0	0	0	
Node 6 - S/S of Guelph Street - East of Sinclair Ave.																										
<u>The Indoor Mall</u>																										
318	Hydropool Hot Tubs	Home Improvement	44411	114	6,300			0									0	6300								
	Ultimate Hockey Training	Athletic Instruction	61162	149	3,150			0									0									
	Express Employment	Employment	5613	144	5,300			0									0									
	Ross Physiotherapy	Medical Service	6213	153	2,772			0									0				2772					
	Senior Citizens Centre	Social Service	6241	156	n/a			0									0									
f/s	Harvey's /Swiss Chalet	Fast Food	7222	173	5,361			0									0						5361			
<u>Halton Gate Plaza</u>																										
324	Royal Lepage Realty	Real Estate	53121	139	2,000			0									0			2000						
ia	Service Ontario	Gov't. Service	6241	156	3,000			0									0									
ib	Young Dentistry	Dentist	6212	152	2,000			0									0				2000					
	Oxford Learning Centre	Education	61169	150	2,000			0									0									
	9 Round Fitness	Fitness Gym	71394	168	4,320			0									0									
	Mink Hair	Beauty Salon	812115	185	1,080			0									0							1080		
	Nails By Kim	Nail Salon	812115	185	1,080			0									0							1080		
	Friendz Convenience	Convenience	44512	3	2,400		2400	2400									0									
'a	Listen Up Canada	Hearing Aids	6213	153	1,200			0									0				1200					
'b	Cash Money	Cheque Cashing	522291	127	1,200			0									0									
f/s	Tim Horton's	Fast Food	7222	173	3,000			0									0							3000		
328	Mixed Offices	Mixed Offices	n/a	202	5,232			0									0									
330	Bell World	Cell Phones	44311	78	3,200			0									3200									
"	Millers Bakery	Other Food	445291	7	2,400		2400	2400									0									
"	Nikki's Pools & Service	Home Improvement	44411	114	3,200			0									0	3200								
"	Ontario Conserv. of Music	Education	61169	150	800			0									0									
"	Sign Central	Other Service	56143	145	1,600			0									0									
"	Canadian Pellet Products	Miscellaneous	453999	113	1,600			0									1600									
332	Barrager's Cleaners	Dry Cleaner	81232	192	1,600			0									0							1600		
"	BOS Lift Trucks	Industrial	n/a	n/a	n/a			0									0									
"	Bath & Kitchen Studio	Home Improvement	44411	114	1,600			0									0	1600								
"	Super Suds Pet Shop	Other Service	81291	194	800			0									0							800		
334	Carquest Auto Parts	TBA	44131	29	6,000			0									6000									
"	Adam's Georgetown Rent All	Other Service	53231	136	6,000			0									0									
<u>Knolcrest Centre</u>																										
348	Quizno's	Fast Food	7222	173	1,990			0									0							1990		
	House of Ribs	Restaurant	7221	172	620			0									0							620		
	Soccer Plus	Sporting Goods	45111	87	320			0									320									
"	Aztec Computers	Computers	44312	73	730			0									730									
"	McCaslin Horne Insurance	Insurance	52421	138	590			0									0				590					
	Buttle & Tavano Accounting	Accounting	5412	141	1,900			0									0								1900	

APPENDIX B-1

RETAIL AND SERVICE COMMERCIAL FLOORSACE INVENTORIES: GEORGETOWN + ACTON + OTHER TRADE AREA + PROXIMATE BIG BOX CENTRES

Halton Hills Retail and Service Inventory Updated September 2015			NAICS Code	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	25-26 Major 25 Promo'l 26 Dep't Store GLA	31-34 Other Gen'l Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Personal Care 20-21 GLA	35-57 Fashion & Access. GLA	58-83 Home Furnishings Computers Electronics GLA	84-113 Sport/Hobby Music/Book Florist Gift/Art Used/Misc. GLA	28-30 Can Tire + TSC 28 Tires 30 Auto P+A 29 GLA	Subtotal Non-Dep't Store NFSR GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	124-126 Bank Trust Cr. Union GLA	137-143 FIRE Legal Acc't/Photo Vet Profl Services GLA	151-155 Med/Den & Other Health Services GLA	172-174 Rest. & Fast Food Drinking GLA	184-196 Personal Services GLA	22-24 Liquor (24) Beer (22) Wine (23) GLA	200 Vacant GLA		
Rona			44412	114	14,408										0	14408									
"	Krown Rust Control	Auto Service	n/a	n/a											0										
"	Discount Car & Truck Rental	Other Service	53211	131	1,045										0										
"	Coin Car Wash	Auto. Service	n/a	n/a	n/a										0										
"	The Trany Shop	Auto Service	n/a	n/a	n/a										0										
"	Extreme Auto	Auto Service	n/a	n/a	n/a										0										
"	Apple Auto Glass	Auto Service	n/a	n/a	n/a										0										
360	Mac's	Convenience Food	44512	3	2,100		2100	2100							0										
"	Remax Realty	Real Estate	53121	139	3,961										0			3961							
"	Vacant	Vacant	n/a	200	1,040										0									1040	
"	Assured Mortgage Service	Financial Service	52231	129	534										0										
"	Paddon & Yorke Financial	Financial Service	52393	137	410										0			410							
"	Pine Cone Music Lessons	Education	61169	150	855										0										
"	Knolcrest Properties	Other Office	n/a	202	654										0										
"	TLC Dental Hygiene	Medical Service	6213	153	950										0			950							
"	Classic Clips	Personal Service	812114	184	560										0							560			
"	Deep Sea Fish & Chips	Fast Food	7222	173	950										0						950				
"	The Carpet Place	Flooring	44221	63	1,900							1900			1900										
"	The Barbertowne Pub	Restaurant	7221	172	2,100										0						2100				
"	Workplace Training Service	Employment	5613	144	560										0										
"	Executive Suites	Other Office	n/a	202	1,120										0										
"	Yorkshire Bookkeeping	Accounting	5412	141	560										0			560							
Great Lakes Plaza															0										
374	Still Waters Dental	Medical Service	6212	152	2,560										0						2560				
	National Orthotic Centre	Medical Service	6213	153	1,280										0						1280				
	AV Salon & Spa	Beauty Salon	812115	185	1,280										0							1280			
	Hasty Market	Convenience	44512	3	1,280		1280	1280							0										
	Vacant	Vacant	n/a	200	<u>2,560</u>										0									2560	
400	New Strip Plaza														0										
ib	Nuoptik	Optician	6213	153	1,000										0						1000				
lc	Tiny Town Daycare	Daycare	6244	159	4,000										0										
ld	Vacant	Vacant	n/a	200	<u>2,000</u>										0									2000	
le	Upper Offices (vacant)	Vacant	n/a	200	<u>7,000</u>										0									7000	
Subtotal Node 6 - S/S of Guelph Street - East of Sinclair Ave.					143,012	0	8,180	8,180	0	0	0	5,830	1,920	6,000	13,750	25,508	0	9,421	11,762	14,021	6,400	0	12,600		
Node 7 - N/S of Guelph Street - West from McFarlane Drive																									
367	Shoeless Joes	Restaurant	7221	172	3,623										0										
357	Yo Yo Japanese Restaurant	Restaurant	7221	172	1,196										0									3623	
333	Home Hardware Building Ctr.	Building Supply	44411	114	19,800										0		19800								
	Price Chopper	Supermarket	44511	1	36,085		36085	36085							0										
	Canadian Tire	TBA	452991	28	79,297										0										
	Vacant (Petsmart to open 2016)	Vacant	n/a	200	14,167										0									14167	
	Boston Pizza	Restaurant	7221	172	6,118										0									6118	
f/s	A & W	Fast Food	7222	173	2,400										0									2400	
265 - Sinclair Place Strip Plaza																									
	Emerald Isle Furniture	Home Furn.	44211	58	9,200										0										
f/s	Shoppers Drug Mart	Drugstore	44611	17	19,186					19186					0										
249	Johnson & Assoc. Realty	Real Estate	53121	139	4,636										0			4636							
245	Living Lighting	Home Furn.	44211	58	<u>3,588</u>							3588			3588										
Subtotal Node 7					199,296	36,085	0	36,085	0	19,186	0	12,788	0	79,297	111,271	19,800	0	4,636	0	13,337	0	0	14,167		
Node 8 - Halton Hills Shopping Centre																									
235	Brian's Food Basics	Supermarket	44511	1	36,002		36002	36002							0										
"	Boreland's School of Karate	Athletic Instruction	61162	149	8,000										0										
"	Dollarama Discount	Gen'l. Merch.	452999	32	10,970				10970						10970										
"	Pet Valu	Pet & Pet Supply	45391	102	2,400										2400										
"	VPI Employment Office	Employment Service	5613	144	2,088										0										
"	Halton Adult Day Program	Gov't. Service	6241	156	2,020										0										
"	Nice One Nails	Nail Salon	812115	185	3,058										0									3058	
"	Bulk Barn	Bulk Foods	445299	15	5,000		5000	5000							0										
"	The Pita Pit	Fast Food	7222	173	1,080										0									1080	
f/s	Symposium Café	Restaurant	7221	172	2,731										0									2731	
f/s	Toronto Dominion Bank	Bank	52211	124	5,000										0			5000							
Subtotal Node 8					78,349	36,002	5,000	41,002	0	10,970	0	0	2,400	0	13,370	0	5,000	0	0	3,811	3,058	0	0		
Node 9 - n/s of Guelph Street - West of Halton Hills Plaza																									
<u>211 Northview Centre (strip plaza)</u>																									

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RETAIL AND SERVICE COMMERCIAL FLOORSACE INVENTORIES: GEORGETOWN + ACTON + OTHER TRADE AREA + PROXIMATE BIG BOX CENTRES

<u>Halton Hills Retail and Service Inventory</u> Updated September 2015					1-2	3-16		25-26	31-34	Drug 17	35-57	58-83	84-113	28-30	Subtotal	114-123	124-126	137-143	151-155	172-174	184-196	22-24	200			
Street	No.	Store Name	Type	NAICS Code	Study Code	Total Space GLA	Super-Market & Grocery GLA	Spec. Food GLA	Subtotal FSR GLA	Major 25 Promo'l 26 Dep't Store GLA	Other Gen'l Merch. GLA	Cosmetic 18 Optician 19 Personal Care 20-21 GLA	Fashion & Access. GLA	Home Furnishings Computers Electronics GLA	Sport/Hobby Music/Book Florist Gift/Art Used/Misc. GLA	Can Tire + TSC 28 Tires 30 Auto P+A 29 GLA	Non-Dep't Store NFSR GLA	Home Ctr. Hardware Bldg. Supply GLA	Bank Trust Cr. Union GLA	FIRE Legal Acc't/Photo Vet Prof'l Services GLA	Med/Den & Other Health Services GLA	Rest. & Fast Food Drinking GLA	Personal Services GLA	Liquor (24) Beer (22) Wine (23) GLA	200 Vacant GLA	
		Squirts Toys & Learning	Toys	45112	88	1,278			0						1278		1278									
		M & M Meats	Meat	44521	4	1,208		1208	1208																	
		Pro Cuts	Personal Service	812114	184	1,208			0															1208		
		Edward Jones Investments	Brokerage	52393	137	904			0												904					
		The Co-Operators Insurance	Insurance	52421	138	1,208			0												1208					
		State Farm Insurance	Insurance	52421	138	1,512			0												1512					
		Fendley Florists	Florist	45311	93	1,208			0					1208			1208									
		Little Caesars	Fast Food	7222	173	850			0															850		
		Traditional Taste Bakery & Café	Restaurant	7221	172	2,043			0															2043		
		Mixed Offices	Other Office	n/a	202	9,694			0																	
187		Prosperity One Banking	Bank	52211	124	3,450			0																	
181		McDonald's	Fast Food	7222	173	4,938			0										3450						4938	
		Subtotal Node 9				29,501	0	1,208	1,208	0	0	0	0	0	2,486	0	2,486	0	3,450	3,624	0	7,831	1,208	0	0	
Node 10 - Mountainview Road - North of Guelph Street																										
		Tim Horton's	Fast Food	7222	173	3,000			0																	
		Vacant	Vacant	n/a	200	6,435			0																	6435
		Rogers Plus	Video Rental	53223	134	6,696			0																	
		Subway	Fast Food	7222	173	1,720			0																1720	
		Topper's Pizza	Fast Food	7222	173	1,700			0																1700	
		Culligan Water Systems	Miscellaneous Retail	453999	113	1,700			0					1700			1700									
		First Choice Haircutters	Personal Service	812114	184	1,064			0																1064	
		Sun Beach Tanning	Personal Service	81219	189	1,400			0																1400	
		Vacant	Vacant	n/a	200	3,010			0																	3010
49		Napa Auto Parts	TBA	44131	29	4,600			0							4600	4600									
71		Ready To Grill Foods	Meat	44521	4	1,900		1900	1900																	
		Triton Pools	Miscellaneous Retail	44411	107	1,900			0					1900			1900									
		La Vita Bakery Deli Café	Restaurant	7221	172	3,750			0																3750	
		Corks Winery	Wine Making	453992	104	1,900			0					1900			1900									
		Play Junction	Other Service	6244	159	1,900			0																	
99		Mattina's	Restaurant	7221	172	1,325			0																1325	
		Real Canadian Superstore	Supermarket	44511	1	135,565	135,565		135,565																	
		Subtotal Node 10				179,565	135,565	1,900	137,465	0	0	0	0	0	5,500	4,600	10,100	0	0	0	0	11,495	2,464	0	9,445	
Node 11 - n/s of Guelph Street - West of Maple Avenue																										
101		Tax Consultant's Office	Accounting	5412	141	1,200			0											1200						
43		Sideshow Tattoos	Personal Service	81219	189	560			0																560	
43		Sunflower Holistic	Other Service	6213	153	560			0																	
43		Vacant	Vacant	n/a	200	560			0																	560
		Subtotal Node 11				2,880	0	0	0	0	0	0	0	0	0	0	0	0	0	1,200	560	0	560	0	560	
Node 12 - Main Street North																										
7		The George & Dragon	Restaurant	7221	172	3,524			0																3524	
45		Pil Variety	Convenience Food	44512	3	1,155		1155	1155																	
67		Stained Glass Studio	Art / Frames	45392	103	500			0					500			500									
68 / 78		<u>Moore Park Plaza</u>							0																	
		Peekaboo Daycare	Other Service	6244	159	4,000			0																	
		Offspring Kid-Signment	Childrens Wear	44813	37	2,000			0			2000					2000									
		End Zone Sports Exchange	Sporting Goods	45111	87	4,000			0					4000			4000									
		Tirecraft Tire & Auto Service	Auto Service	n/a	n/a	n/a			0																	
		Humane Society Thrift Shop	Used Goods	45331	101	1,620			0					1620			1620									
		Moore Park Convenience	Convenience	44512	3	2,000		2000	2000																	
		Imperial Driving School	Education	61169	150	1,000			0																	
		Peekaboo Daycare	Other Service	6244	159	1,500			0																	
		Laundromat	Laundry	81231	191	1,621			0																1621	
		Brackys Tap & Grill	Restaurant	7221	172	2,940			0																2940	
		Scream'n Eagle Tattoos	Personal Service	81219	189	735			0																735	
		Joe's Great Pizza	Fast Food	7222	173	735			0																735	
		Sunshine Nails	Personal Service	812115	185	735			0																735	
		Riviera Hair Stylist	Beauty Salon	812115	185	735			0																735	
2		Halton Hills Veterinary Hosp.	Medical Service	54194	143	4,548			0											4548						
		Subtotal Node 12				33,348	0	3,155	3,155	0	0	2,000	0	6,120	0	8,120	0	0	4,548	0	7,199	3,826	0	0		
Node 13 - s/s of Guelph Street - East of Main Street																										
24		Bridal Store	Ladies Wear	44812	36	1,769			0				1769				1769									

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RETAIL AND SERVICE COMMERCIAL FLOORSPACE INVENTORIES: GEORGETOWN + ACTON + OTHER TRADE AREA + PROXIMATE BIG BOX CENTRES

Halton Hills Retail and Service Inventory Updated September 2015			NAICS Code	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR GLA	25-26 Major 25 Dep't Store GLA	31-34 Other Gen'l Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Personal Care 20-21 GLA	35-57 Fashion & Access. GLA	58-83 Home Furnishings Computers Electronics GLA	84-113 Sport/Hobby Music/Book Florist Gift/Art Used/Misc. GLA	28-30 Can Tire + TSC 28 Tires 30 Auto P+A 29 GLA	Subtotal Non-Dep't Store NFSR GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	124-126 Bank Trust Cr. Union GLA	137-143 FIRE Legal Acc't/Photo Vet Profl Services GLA	151-155 Med/Den & Other Health Services GLA	172-174 Rest. & Fast Food Drinking GLA	184-196 Personal Services GLA	22-24 Liquor (24) Beer (22) Wine (23) GLA	200 Vacant GLA		
33	Law Office	Legal	5411	140	960			0								0				960						
35	Vacant	Vacant	n/a	200	1,680			0								0									1680	
29	Canada Trust	Bank	52211	124	3,200			0								0		3200								
27	Indoor Daylight	Lighting	442298	71	768			0					768			768										
27a	Kabinet Pro	Home Improvement	44411	114	672			0								0	672									
James Street West of Main Street																										
7	Hampton's Antiques	Antiques	45331	98	1,408			0																		
9	Salon JC	Beauty Salon	812115	185	1,200			0																1200		
Wesleyan Street West of Main Street																										
8	Sprigg's Insurance	Insurance	52421	138	2,368			0												2368						
14	Milliere TV	Homr Furn.	44211	58	1,128			0					1128			1128										
9	Dr. R. Beaton	Medical Service	6211	151	950			0								0				950						
5	Kimby's Apparel	Ladies Wear	44812	36	1,100			0				1100				1100										
5	Upper Offices	Mixed Offices	n/a	202	2,485			0								0										
Mill Street West of Main Street																										
110	Quiet Moments	Books & Gifts	45121	91	680			0						680		680										
114	Architects Office	Other Office	n/a	202	680			0								0										
118	Timepieces	Jewellery	44831	56	408			0				408				408										
120	Mary's Dressmaking	Other Service	81149	183	612			0								0										
122	Hair Creations	Beauty Salon	812115	185	672			0								0							672			
132	Law Office	Legal	5411	140	5,810			0								0			5810							
134	Dr.'s Office	Medical Service	6211	151	1,100			0								0				1100						
142	Halton Hills Dancing School	Education	61169	150	2,470			0								0										
145	Law Office	Legal	5411	140	3,000			0								0				3000						
143	Armstrong Insurance	Insurance	52421	138	1,970			0								0				1970						
119	C.S. Printing	Other Service	56143	145	3,600			0								0										
Mill Street East of Main Street																										
	Ollies Cycle & Ski Shop	Sporting Goods	45111	87	2,100			0						2100		2100										
98	EZ Taxi	Other Service	n/a	202	420			0								0										
96	Vacant	Vacant	n/a	200	1,200			0								0									1200	
80	Salvation Army Thrift Shop	Used Goods	45331	101	3,450			0						3450		3450										
82	Muscle Works	Other Service	71394	168	450			0								0										
74	Mindwalk Design	Other Office	n/a	202	576			0								0										
72	Halton Hills Legal Clinic	Legal	5411	140	1,692			0								0				1692						
83	Downtown Professional Centre																									
	Pharmacy	Drugstore	44611	17	1,150			0			1150					1150										
	Mixed Offices	Mixed Offices	n/a	202	13,896			0								0										
62	Vacant Units (2)	Vacant	n/a	200	3,600			0								0									3600	
62	Halton Hills Child Care	Other Service	6244	159	3,600			0								0										
	Kentner's Catering	Other Service	81299	196	2,800			0								0								2800		
	Subtotal Node 14 - Central Business District				190,660	0	10,542	10,542	0	0	9,150	6,693	3,796	19,910	0	39,549	672	13,475	21,064	2,946	23,988	19,582	0	6,480		
Node 15 - Mountainview Rd. South & Argyll Rd.																										
333	South Georgetown Centre																									
	Shoppers Drug Mart	Drugstore	44611	17	14,000			0			14000					14000										
	South Georgetown Medical Clin	Medical Service	6211	151	2,000			0								0				2000						
	Dental Office	Medical Service	6212	152	2,000			0								0				2000						
	Mountainview Animal Hospital	Medical Service	54194	143	2,000			0								0			2000							
	Factory Outlet Dry Cleaners	Dry Cleaner	81232	192	1,000			0								0							1000			
	Dominion Lending Centre	Financial Service	52231	129	1,500			0								0										
	First Choice Haircutters	Personal Service	812114	184	1,500			0								0							1500			
	EPA Physiotherapy	Medical Service	6213	153	1,500			0								0				1500						
	Pat's Prime Cuts & Deli	Meat	44521	4	1,500		1500	1500								0										
	Water Store	Other Service	453999	113	1,500			0								0										
	All Season Nails	Personal Service	812115	185	1,500			0						1500		1500							1500			
f/s	Seven Eleven	Convenience	44512	3	2,400		2400	2400								0										
Halton Hills Village																										
	Metro	Supermarket	44511	1	54,512	54512		54512								0										
f/s	TD - Canada Trust	Bank	52211	124	4,484			0								0		4484								
f/s	LCBO	Liquor/Beer/Wine	44531	24	8,188			0								0									8188	
f/s	Tim Hortons	Fast Food	7222	173	3,091			0								0						3091				
f/s	Neighbours Convenience	Convenience	44512	3	4,384		4384	4384								0										
	Pizza Nova	Fast Food	7222	173	1,100			0								0							1100			
	Subway	Fast Food	7222	173	1,100			0								0							1100			
	EB Games	Games	45112	88	1,100			0						1100		1100										
	Pet Valu	Pet & Pet Supply	45391	102	1,500			0						1500		1500										
	GT Dragon Chinese Food	Fast Food	7222	173	1,000			0								0							1000			
	Vacant	Vacant	n/a	200	1,400			0								0									1400	
	Bella Tan	Personal Service	81219	189	1,200			0								0							1200			

APPENDIX B-1

RETAIL AND SERVICE COMMERCIAL FLOORSPACE INVENTORIES: GEORGETOWN + ACTON + OTHER TRADE AREA + PROXIMATE BIG BOX CENTRES

Halton Hills Retail and Service Inventory Updated September 2015			NAICS Code	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR GLA	25-26 Major 25 Dep't Store GLA	31-34 Other Gen'l Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Personal Care 20-21 GLA	35-57 Fashion & Access. GLA	58-83 Home Furnishings Computers Electronics GLA	84-113 Sport/Hobby Music/Book Florist Gift/Art Used/Misc. GLA	28-30 Can Tire + TSC 28 Tires 30 Auto P+A 29 GLA	Subtotal Non-Dep't Store NFSR GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	124-126 Bank Trust Cr. Union GLA	137-143 FIRE Legal Acc't/Photo Vet Profl Services GLA	151-155 Med/Den & Other Health Services GLA	172-174 Rest. & Fast Food Drinking GLA	184-196 Personal Services GLA	22-24 Liquor (24) Beer (22) Wine (23) GLA	200 Vacant GLA	
Street No.	Store Name	Type																							
	Salon Concepts	Beauty Salon	812115	185	1,200			0								0								1200	
	Top Hat Cleaners	Dry Cleaner	81232	192	800			0								0								800	
	Dollar Blitz	Gen'l. Merchandise	452999	32	2,600			0		2600						2600									
	Mountainview Dental	Medical Service	6212	152	1,500			0								0					1500				
	Wild Wing	Restaurant	7221	172	2,959			0								0					2959				
	Vacant	Vacant	n/a	200	1,000			0								0								1000	
	Mountainview Chiropractic	Medical Service	6213	153	1,200			0								0					1200				
	Optometrist's Office	Medical Service	6213	153	1,500			0								0					1500				
	U Weight Loss Clinic	Weight Loss	81219	187	1,200			0								0							1200		
	Generations Physiotherapy	Medical Service	6213	153	1,400			0								0					1400				
	Tiny Town Daycare	Other Service	6244	159	5,000			0								0									
	Subtotal Node 15				135,818	54,512	8,284	62,796	0	2,600	14,000	0	0	4,100	0	20,700	0	4,484	2,000	11,100	9,250	8,400	8,188	2,400	

Node 16 - Mountainview Rd. Other Locations

185 Mountainview Road North at John Street

	Mountainview Variety	Convenience Food	44512	3	1,944		1944	1944								0									
	Mountainview Coin Laundry	Laundry	81231	191	972			0								0								972	
	Genhairations Salon	Beauty Salon	812115	185	972			0								0							972		
	Video 99	Video Rental	53223	134	1,944			0								0									

273 Delrex Road at Mountainview Road South

	Daisy Mart	Convenience Food	44512	3	1,216		1216	1216								0									
	Salon Marcel	Beauty Salon	812115	185	1,216			0								0								1216	
	221 Main & Miller Plaza																								
	Quik Pik Convenience	Convenience	44512	3	2,160		2160	2160								0									
	Miller Dental	Dentist	6212	152	1,080			0								0					1080				
	Carafe	Wine Making Supplies	453992	104	1,080			0						1080		1080									
	Royal Lepage Realty	Real Estate	53121	139	1,080			0								0					1080				
	Shiiazi Café Bar	Restaurant	7222	173	1,080			0								0					1080				
	Red Lemon Hair Salon	Beauty Salon	812115	185	1,080			0								0							1080		
	Genesis Walk In Clinic	Doctor	6211	151	1,080			0								0					1080				
	Genesis Pharmacy	Drugstore	44611	17	1,080			0			1080					1080									
	f/s Allison's Farm Market	Fruit & Vegetables	44523	6	3,000		3000	3000								0									
	Subtotal Node 16 - Other Locations				20,984	0	8,320	8,320	0	0	1,080	0	0	1,080	0	2,160	0	0	1,080	2,160	1,080	4,240	0	0	

TOTAL GEORGETOWN

					1,604,680	262,164	63,767	325,931	99,013	14,706	47,402	128,877	56,519	92,319	89,897	429,720	56,885	43,106	55,414	34,808	140,789	69,942	22,051	85,067
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RURAL HALTON HILLS

Node 1 - Hornby - Steeles Avenue & Trafalgar Road Areas

	Pipeline Convenience	Convenience Food	44512	3	2,100		2100	2100								0									
	Shell Service & Convenience	Convenience Food	44512	3	990		990	990								0									
	Coffee Time	Fast Food	7222	173	1,600			0								0					1600				
	Centuries Antiques	Antiques	45331	98	1,800			0						1800		1800									
	Petro Can. & Tim Horton's	Fast Food	7222	173	882			0								0					882				
	Bhar Saddlery	Other DSTM	453999	113	9,000			0						9000		9000									
	Hornby General Store	Convenience Food	44512	3	1,120		1120	1120								0									
	Livno Meat & Deli	Meat	44521	4	2,900		2900	2900								0									
	Vacant	Vacant	n/a	200	1,897			0								0								1897	
	Town & Country Abattoir	Industrial	n/a	n/a	n/a			0								0									
	Halton Homestead Antiques	Antiques	45331	98	495			0						495		495									
	Red Hand Woodcraft	Other DSTM	453999	113	750			0						750		750									
	Subtotal Node 1 - Hornby				23,534	0	7,110	7,110	0	0	0	0	0	12,045	0	12,045	0	0	0	0	2,482	0	0	1,897	

Node 2 - Speyside

	Speyside General Store	Convenience Food	44512	3	1,684		1684	1684								0									
	Subtotal Node 2 - Speyside				1,684	0	1,684	1,684	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	

Node 3 - Norval

	Carpet Palace	Flooring	44221	63	1,600			0					1600			1600									
	Nashville North	Nightclub (37,400 sf)	7224	174	37,400			0								0					37400				
	Adamson Salon & Spa	Beauty Salon	812115	185	2,500			0								0							2500		
	Norval Convenience	Convenience	44512	3	2,800		2800	2800								0									
	Georgetown Terraces	Sales Office	na	202	2,000			0								0									

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RETAIL AND SERVICE COMMERCIAL FLOORSPACE INVENTORIES: GEORGETOWN + ACTON + OTHER TRADE AREA + PROXIMATE BIG BOX CENTRES

Halton Hills Retail and Service Inventory		Updated September 2015		Total		1-2	3-16	25-26	31-34	Drug 17	35-57	58-83	84-113	28-30	Subtotal	114-123	124-126	137-143	151-155	172-174	184-196	22-24	200	
Street No.	Store Name	Type	NAICS Code	Study Code	Space GLA	Super-Market & Grocery GLA	Spec. Food GLA	Subtotal FSR GLA	Major 25 Dep't Store GLA	Other Gen'l Merch. GLA	Cosmetic 19 Optician 19 Personal Care 20-21 GLA	Fashion & Access. GLA	Home Furnishings Computers Electronics GLA	Sport/Hobby Music/Book Florist Gift/Art Used/Misc. GLA	Non-Dep't Store NFSR GLA	Home Ctr. Hardware Bldg. Supply Nursery GLA	Bank Trust Cr. Union GLA	FIRE Legal Acc't/Photo Vet Profl Services GLA	Med/Den & Other Health Services GLA	Rest. & Fast Food Drinking GLA	Personal Services GLA	Liquor (24) Beer (22) Wine (23) GLA	Vacant GLA	
	Norval Plumbing Ctr	Plumbing Supply	44419	119	1,500			0							0	1500								
	Wellness & Addiction Centre	Other Health	6213	153	1,200			0							0				1200					
	Dunlop Insurance	Insurance	52421	138	1,840			0							0			1840						
	Subtotal Node 3 - Norval				50,840	0	2,800	2,800	0	0	0	0	1,600	0	0	1,600	1,500	0	1,840	1,200	37,400	2,500	0	0
Node 4 - Glen Williams																								
	Preston's Meats & Groceries	Grocery	44511	2	2,840	2840		2840							0									
	Copper Kettle Pub	Restaurant	7221	172	1,000			0							0					1000				
	Reeve & Clarke Books	Books	45121	91	400			0						400	400									
	Golden Oven	Other Food	445291	7	960		960	960							0									
	The Boat Harbour	Gifts	45322	95	800			0						800	800									
	Beaumont Mills Antiques	Antiques	45331	98	8,000			0						8000	8000									
	Glen Williams Glass	Art / Frames	45392	103	2,400			0						2400	2400									
	The Gallery Courtyard	Art / Frames	45392	103	1,000			0						1000	1000									
	Subtotal Node 4 - Glen Williams				17,400	2,840	960	3,800	0	0	0	0	12,600	0	12,600	0	0	0	0	1,000	0	0	0	0
Node 5 - Stewarttown																								
	Variety Store	Convenience Food	44512	3	300		300	300							0									
	North Halton Stoves	Home Improvement	442298	72	1,360			0					1360		1360									
	Subtotal Node 5 - Stewarttown				1,660	0	300	300	0	0	0	0	1,360	0	1,360	0	0	0	0	0	0	0	0	0
Node 6 - Terra Cotta																								
	Terra Cotta General Store	Convenience Food	44512	3	1,728		1728	1728							0									
	Forge Studio Gallery	China / Gift	45322	95	1,250			0						1250	1250									
	Terra Cotta Inn	Restaurant/Tea Room	7221	172	8,500			0							0					8500				
	The Brass Thimble	Gifts	45322	95	400			0						400	400									
	Subtotal Node 6 - Terra Cotta				11,878	0	1,728	1,728	0	0	0	0	1,650	0	1,650	0	0	0	0	8,500	0	0	0	0
Node 7 - Ballinafad																								
	Ballinafad Farm Market	Green Grocer	44511	2	1,200	1200		1200							0									
	Ballinafad General Store	Convenience Food	44512	3	1,560		1560	1560							0									
	Subtotal Node 7 - Ballinafad				2,760	1,200	1,560	2,760	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Node 8 - Other Locations																								
	Chudleigh's Apple Farm	Other Food	445299	16	800		800	800							0									
	Subtotal Node 8 - Other Locations				800	0	800	800	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL RURAL HALTON HILLS					110,556	4,040	16,942	20,982	0	0	0	0	2,960	26,295	0	29,255	1,500	0	1,840	1,200	49,382	2,500	0	1,897
Node 9 - Toronto Premium Outlets (Hwy. 401 & Trafalgar Road)																								
100	Guess	Unisex Clothing	44814	38	8,800			0							8800									
106	Bose	Home Electronics	44311	75	2,800			0						2800										
109	The Children's Place	Children's Clothing	44813	37	6,500			0						6500										
115	Corningware, Corelle & More	Housewares	442298	68	3,500			0							3500									
118	Polo Ralph Lauren	Family Clothing	44814	38	12,664			0						12664										
200	Nike	Athletic Clothing	448199	39	12,456			0						12456										
203	Gap	Family Clothing	44814	38	7,549			0						7549										
206	Famous Footware	Family Shoes	44821	52	5,000			0						5000										
209	Bench	Unisex Clothing	44814	38	2,102			0						2102										
212	Lole	Women's Clothing	44812	36	2,500			0						2500										
218	Zumiez	Sportswear	448199	39	3,500			0						3500										
221	Think Kitchen	Kitchenwares	442298	67	1,807			0							1807									
224	Quicksilver	Sportswear	448199	39	5,857			0						5857										
300	Eddie Bauer	Unisex Clothing	44814	38	5,000			0						5000										
301	Aeropostale	Unisex Clothing	44814	38	5,000			0						5000										
302	Bentley	Leather & Luggage	44832	57	3,752			0						3752										
303	Sketchers	Family Shoes	44821	52	3,000			0						3000										
306	Forever 21	Unisex Clothing	44814	38	4,000			0						4000										
309	Columbia Sportswear	Unisex Clothing	44814	38	9,934			0						9934										
400	Mountain Warehouse	Unisex Clothing	44,814	38	4,988			0						4988										
403	Bellisma	Women's Clothing	44812	36	2,179			0						2179										
404	Signature Perfumes	Cosmetics	44612	18	2339			0			2339													
406	Victorinox Swiss Army	General Merchandise	452999	32	2,500			0		2500														
409	Sarar	Men's Clothing	44811	35	2,500			0						2500										
412	Giorgio Armani	Men's Clothing	44811	35	4,500			0						4500										
415	DKNY	Unisex Clothing	44814	38	4,000			0						4000										

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RETAIL AND SERVICE COMMERCIAL FLOORSPACE INVENTORIES: GEORGETOWN + ACTON + OTHER TRADE AREA + PROXIMATE BIG BOX CENTRES

Halton Hills Retail and Service Inventory
Updated September 2015

Street No.	Store Name	Type	NAICS Code	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR GLA	25-26 Major 25 Promo'l 26 Dep't Store GLA	31-34 Other Gen'l Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Personal Care 20-21 GLA	35-57 Fashion & Access. GLA	58-83 Home Furnishings Computers Electronics GLA	84-113 Sport/Hobby Music/Book Florist Gift/Art Used/Misc. GLA	28-30 Can Tire + TSC 28 Tires 30 Auto P+A 29 GLA	Subtotal Non-Dep't Store NFSR GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	124-126 Bank Trust Cr. Union GLA	137-143 FIRE Legal Acc't/Photo Vet Profl Services GLA	151-155 Med/Den & Other Health Services GLA	172-174 Rest. & Fast Food Drinking GLA	184-196 Personal Services GLA	22-24 Liquor (24) Beer (22) Wine (23) GLA	200 Vacant GLA	
417	Ecco	Family Shoes	44821	52	2,500			0				2500				2500									
418	Fossil	Jewellery	44831	56	3,000			0				3000				3000									
421	Hugo Boss	Men's Clothing	44811	35	4,500			0				4500				4500									
424	Calvin Klein	Unisex Clothing	44814	38	8,000			0				8000				8000									
500	Banana Republic	Unisex Clothing	44814	38	7,500			0				7500				7500									
503	Michael Kors	Women's Accessories	44815	55	3,500			0				3500				3500									
506	Danier Leather	Leather Clothing	448199	41	2,238			0				2238				2238									
509	Icebreaker Merino	Family Clothing	44814	38	2,157			0				2157				2157									
512	Levis	Unisex Clothing	44814	38	4,000			0				4000				4000									
515	Aldo	Family Shoes	44821	52	3,000			0				3000				3000									
518	Lucky Brand	Unisex Clothing	44814	38	3,166			0				3166				3166									
519	Samsonite	Leather & Luggage	44832	57	2,149			0				2149				2149									
521	Tory Burch	Women's Accessories	44815	55	3,000			0				3000				3000									
522	Cosmetic ompany	Cosmetics	44612	18	2,000			0			2000					2000									
524	Ports 1961	Women's Clothing	44812	36	3,800			0				3800				3800									
527	Mexx	Family Clothing	44814	38	5,000			0				5000				5000									
600	Hudson Bay Outlet	Dep't Store Cat. Sales Offi	45211	31	25,000			0		25000						25000									
606	Restoration Hardware	Home Furniture	44211	58	12,495			0					12495			12495									
612	Lindt	Other Food	445292	8	1,384		1384	1384																	
700	Burberry	Women's Accessories	44815	55	4,625			0				4625				4625									
703	Kate Spade	Women's Accessories	44815	55	3,600			0				3600				3600									
712	Brooks Brothers	Family Clothing	44814	38	8,400			0				8400				8400									
715	Saucony	Family Shoes	44821	52	1,538			0				1538				1538									
718	Garage	Unisex Clothing	44814	38	4,261			0				4261				4261									
724	Reebok	Athletic Clothing	448199	39	3,000			0				3000				3000									
730	Adidas	Athletic Clothing	448199	39	6,500			0				6500				6500									
733	Tommy Hilfiger	Family Clothing	44814	38	7,907			0				7907				7907									
745	Coach	Women's Accessories	44815	55	9,271			0				9271				9271									
748	J Crew	Unisex Clothing	44814	38	6,000			0				6000				6000									
751	Nine West	Family Shoes	44821	52	2,500			0				2500				2500									
754	Ya Ya & Co.	Women' Clothing	44812	36	4,000			0				4000				4000									
757	Naturalizer	Women's Shoes	44821	50	2,000			0				2000				2000									
760	Royal Doulton	Royal Doulton	45322	95	2,516			0						2516		2516									
763	Hagger	Unisex Clothing	44814	38	3,500			0				3500				3500									
800	Subway	Fast Food	7222	173	660			0								0								660	
803	Umi Sushi	Fast Food	7222	173	660			0								0								660	
806	Famous Wok	Fast Food	7222	173	660			0								0								660	
809	Villa Madina	Fast Food	7222	173	660			0								0								660	
812	Sbarro	Fast Food	7222	173	660			0								0								660	
815	Sunglass Hut	Miscellaneous	453999	113	905			0						905		905									
818	Perfumes 4 U	Cosmetics	44612	18	799			0			799					799									
821	Lids	Other Clothing	448199	48	789			0				789				789									
824	Oakley Vault	Sunglasses	453999	113	2,304			0						2304		2304									
827	Hot Topic	Unisex Clothing	44814	38	2,000			0				2000				2000									
830	American Eagle Outfitters	Unisex Clothing	44814	38	7,500			0				7500				7500									
833	Asics	Family Shoes	44821	52	2,968			0				2968				2968									
836	Jack & Jones	Men's Clothing	44811	35	2,967			0				2967				2967									
839	Puma	Athletic Clothing	448199	39	5,000			0				5000				5000									
842	Broadway Fashion	Women's Clothing	44812	36	3,816			0				3816				3816									
843	La Vie En Rose	Women's Clothing	44812	36	4,000			0				4000				4000									
845	Ardene	Jewellery	44831	56	4,849			0				4849				4849									
849	Rockport	Family Shoes	44821	52	1,722			0				1722				1722									
851	Vince Camuto	Women's Accessories	44814	55	1,723			0				1723				1723									
854	Diesel	Unisex Clothing	44814	38	3,000			0				3000				3000									
856	Ted Baker London	Family Clothing	44814	38	2,500			0				2500				2500									
859	Cosmetic ompany	Cosmetics	44612	18	2,500			0			2500					2500									
860	Cole Haan	Family Clothing	44814	38	3,000			0				3000				3000									
862	True Religion Brand Jeans	Unisex Clothing	44814	38	2,322			0				2322				2322									
865	Watch Station International	Jewellery	44831	56	1,155			0				1155				1155									
866	Second Cup	Fast Food	7222	173	1,150			0								0								1150	
868	The Body Shop	Cosmetics	44612	18	1,150			0			1150					1150									
870	Gateway On The Go	Convenience	44512	3	300		300	300								0									
Subtotal Node 9 - TORONTO PREMIUM OUTLETS					358,453	0	1,684	1,684	0	27,500	8,788	289,704	20,602	5,725	0	352,319	0	0	0	0	0	4,450	0	0	0

Node 10 - Milton Crossroads Centre (James Snow Prkwy. & Hwy> 401)

a	Walmart	Disc. Dept. Store	452991	26	134,226			0	134226																
b	Canadian Tire	Home & Auto Supply	452991	28	93,670			0							93670	93670									
c1.1	First Choice Haircutters	Barber Shop	52211	186	1,078			0								0								1078	
c1.2	Telus Mobility	Cell Phones	44311	78	1,620			0					1620			1620									
c1.3	Subway	Fast Food	7222	173	1,485			0								0								1485	

APPENDIX B-1

RETAIL AND SERVICE COMMERCIAL FLOORSPACE INVENTORIES: GEORGETOWN + ACTON + OTHER TRADE AREA + PROXIMATE BIG BOX CENTRES

Halton Hills Retail and Service Inventory
Updated September 2015

Street No.	Store Name	Type	NAICS Code	Study Code	Total Space GLA	1-2 Super-Market & Grocery GLA	3-16 Spec. Food GLA	Subtotal FSR GLA	25-26 Major 25 Promo'l 26 Dep't Store GLA	31-34 Other Gen'l Merch. GLA	Drug 17 Cosmetic 18 Optician 19 Personal Care 20-21 GLA	35-57 Fashion & Access. GLA	58-83 Home Furnishings Computers Electronics GLA	84-113 Sport/Hobby Music/Book Florist Gift/Art Used/Misc. GLA	28-30 Can Tire + TSC 28 Tires 30 Auto P+A 29 GLA	Subtotal Non-Dep't Store NFSR GLA	114-123 Home Ctr. Hardware Bldg. Supply Nursery GLA	124-126 Bank Trust Cr. Union GLA	137-143 FIRE Legal Acc't/Photo Vet Prof'l Services GLA	151-155 Med/Den & Other Health Services GLA	172-174 Rest. & Fast Food Drinking GLA	184-196 Personal Services GLA	22-24 Liquor (24) Beer (22) Wine (23) GLA	200 Vacant GLA		
c2	Vacant	Vacant	n/a	200	3,100			0																		3100
c2.1	EB Games	Electronic Games	45112	88	1,800			0						1800		1800										
c3	Vacant	Vacant	n/a	200	5,589			0								0										5589
c4	PJ's Pet Express	Pet & Pet Supply	45391	102	4,160			0						4160		4160										
d	Royal Bank	Bank	52211	124	6,000			0								0		6000								
e1	Payless Shoes	Family Shoes	44821	52	3,024			0				3024				3024										
e2	Reitman's	Women's Clothing	44812	36	5,910			0				5910				5910										
e3	Pennington's	Women's Clothing	44812	36	5,006			0				5006				5006										
e4.1	Cleo	Women's Clothing	44812	36	4,400			0				4400				4400										
e4.2	Ricki's	Women's Clothing	44812	36	5,005			0				5005				5005										
e5.1	Dental Office	Dentist	6212	152	1,669			0								0					1669					
e5.2	Cogeco	Other Service	53229	135	2,643			0								0										
e5.3	Optimeyes Optical	Optician	44613	19	1,415			0			1415					1415										
f	Montanas	Restaurant	7221	172	5,158			0								0						5158				
g1	Sleep Better	Mattresses	44211	62	5,000			0					5000			5000										
g2	Mark's Work Wearhouse	Family Clothing	44814	38	15,042			0				15042				15042										
g3	Bonnie Togs	Children's Clothing	44813	37	5,100			0				5100				5100										
g4.1	Tip Top	Men's Clothing	44811	35	5,086			0				5086				5086										
g4.2	Justice	Children's Clothing	44813	37	6,720			0				6720				6720										
g4.3	Bouclair	Home Décor	442298	66	8,161			0					8161			8161										
g5	Absolute Dollar	General Merchandise	452999	32	11,437			0		11437						11437										
g6	Staples	Office Supplies	45321	94	15,100			0								15100										
h1	Popeye's Supplements	Health Supplements	446191	20	1,960			0			1960					1960										
h2	Chorizo	Fast Food	7222	173	1,300			0								0						1300				
h3	Toss Restaurant	Restaurant	7221	172	1,655			0								0						1655				
h4	Pita Pit	Fast Food	7222	173	1,250			0								0						1250				
h5	Great Clips	Barber Shop	812114	184	1,000			0								0							1000			
i1	Massage Addict	Other Health Service	6213	153	2,200			0								0										
i2	Vacant	Vacant	n/a	200	5,000			0								0						2200				
j1	Michael's	Art & Craft Supplies	45112	88	17,880			0								17880										5000
j2	Sport Chek	Sporting Goods	45111	87	20,000			0								20000										
k	Indigo	Books & Stationery	45121	91	18,150			0								18150										
l1	The Shoe Company	Family Shoes	44821	52	4,929			0				4929				4929										
l2	Vacant	Vacant	n/a	200	4,160			0								0										4160
l3	Roots	Unisex Clothing	44814	38	5,150			0				5150				5150										
l4	Mr. Big & Tall	Men's Clothing	44811	35	4,500			0				4500				4500										
l5	Hallmark	Cards	45322	96	3,500			0								3500										
l6	Snuggle Bugz	Children's Clothing	44813	37	4,490			0				4490				4490										
Subtotal Node 10 - MILTON POWER CENTRE					455,728	0	0	0	134,226	11,437	3,375	74,362	14,781	80,590	93,670	278,215	0	6,000	0	3,869	10,848	2,078	0	0	17,849	

Node 11 - Credit Ridge Commons (Mississauga Rd. & Williams Parkway - Brampton)

A	Home Depot	Home Improvement	44411	114	98,390			0								0	98390										
B	Walmart	Disc. Dept. Store	452991	26	187,140			0	187140							0											
C1	Scotia Bank	Bank	52211	124	4,816			0								0		4816									
C2	McDonald's	Fast Food	7222	173	5,212			0								0						5212					
D	TD Canada Trust	Bank	52211	124	5,300			0								0		5300									
G10	Credit Ridge Dental	Dentist	6212	152	913			0								0					913						
H	Royal Bank	Bank	52211	124	6,067			0								0		6067									
O	Bank of Montreal	Bank	52211	124	4,989			0								0		4989									
	Vacant (18 Units)	Vacant	n/a	200	55,626			0								0										55626	
Subtotal Node 11 - CREDIT RIDGE COMMONS					368,453	0	0	0	187,140	0	0	0	0	0	0	0	98,390	21,172	0	913	5,212	0	0	0	55,626		

Node 12 - "OSMINGTON" AREA (NW Mississauga Rd. & Bonaire Drive - Brampton)

(Based on preliminary site plan submitted to the City on August 6, 2015 for the lands north of Bonaire Dr. and west of Mississauga Rd.)

Osmington Proposal Draft Statistics:
Enclosed Retail Mall

GFA GLA
1,200,000 900,000

GEORGETOWN MARKET STUDY

APPENDIX B-2

RETAIL STORE AND SERVICE CLASSIFICATION BY TYPE (NAICS 2002-BASED)

Retail Sector	Store Category	Store Type	NAICS Code	STUDY Code
FOOD STORES				
Supermarkets and Grocery Stores				
		Supermarket	44511	1
		Grocery Store	44511	2
Convenience and Specialty Food Stores				
		Convenience Store	44512	3
		Meat	44521	4
		Fish and Seafood	44522	5
		Fruits and Vegetables	44523	6
		Bakery	445291	7
		Candy and Nut	445292	8
		Herbs and Spices	445299	9
		Milk / Cheese / Ice Cream / Dairy Products	445299	10
		Coffee and Tea	445299	11
		Soft Drinks	445299	12
		Health Food (not supplements)	445299	13
		Delicatessen	445299	14
		Bulk Food	445299	15
		Other Specialty Food	445299	16
PHARMACIES AND PERSONAL CARE STORES				
Pharmacies				
		Pharmacy / Drug Store	44611	17
		Cosmetics / Beauty Supply / Perfume	44612	18
Personal Care Stores				
		Optician	44613	19
		Health Supplements (not food)	446191	20
		Medical Aids and Equipment (e.g. hearing aids, orthopaedic aids, oxygen)	446199	21
BEER, WINE AND LIQUOR STORES				
		Beer	44531	22
		Wine	44531	23
		Liquor	44531	24
GAFO: GENERAL MERCHANDISE STORES				
Department Stores				
		Traditional Department Store	45211	25
		Discount Department Store	45211	26
Warehouse Membership Clubs				
		Warehouse Membership Club	45291	27
Home and Auto Supply Stores				
		Home and Auto Supply (e.g. Canadian Tire, TSC Stores)	452991	28
		Automotive Parts and Accessories	44131	29
		Tires	44132	30
Other General Merchandise Stores				
		Catalogue Sales Showroom (e.g. Sears Catalogue and Sears Dealer stores)	452999	31
		Dollar Store (e.g. Dollarama, Buck or Two)	452999	32
		Variety Store (e.g. Bargain Shop, Giant Tiger, Liquidation World)	452999	33
		General Store (e.g. Co-Op, Country Depot, "farmer's supply" stores)	452999	34

GEORGETOWN MARKET STUDY

APPENDIX B-2

RETAIL STORE AND SERVICE CLASSIFICATION BY TYPE (NAICS 2002-BASED)

Retail Sector	Store Category	Store Type	NAICS Code	STUDY Code
GAFO: APPAREL AND ACCESSORIES STORES				
Clothing Stores				
		Men's Clothing	44811	35
		Women's Clothing	44812	36
		Children's and Infants' Clothing	44813	37
		Family Clothing	44814	38
		Athletic Clothing (not uniforms)	448199	39
		Fur	448191	40
		Leather Apparel	448199	41
		Bridal	448199	42
		Lingerie	448199	43
		Maternity	44812	44
		Outerwear	448199	45
		Swimwear	448199	46
		Uniforms and Work Clothing	448199	47
		Other Clothing	448199	48
Shoe Stores				
		Men's Shoes	44821	49
		Women's Shoes	44821	50
		Children's Shoes	44821	51
		Family Shoes	44821	52
		Athletic Shoes	44821	53
Clothing Accessories and Jewellery Stores				
		Costume Jewellery	44815	54
		Clothing Accessories (e.g. handbags, hosiery, hats, scarves, ties, gloves, umbrellas)	44815	55
		Jewellery	44831	56
		Luggage and Leather Goods	44832	57
GAFO: FURNITURE, HOME FURNISHINGS AND ELECTRONICS STORES				
Furniture Stores				
		Household Furniture	44211	58
		Household Furniture and Appliance	44211	59
		Office Furniture (Non-Wholesale)	44211	60
		Outdoor Furniture	44211	61
		Mattress	44211	62
Home Furnishings Stores				
		Floor Coverings (e.g. carpet, tile, wood, linoleum)	44221	63
		Window Treatments (e.g. drapery, curtain, blinds)	442291	64
		Print and Picture Frame	442292	65
		Bedding / Linen / Bath	442298	66
		China / Glassware / Cutlery / Kitchenware	442298	67
		Housewares	442298	68
		Mirrors	442298	69
		Pottery	442298	70
		Lamps and Lighting Fixtures	442298	71
		Fireplace Accessories	442298	72
Computer and Software Stores				
		Computer Hardware and Software	44312	73
Home Electronics and Appliance Stores				
		Household Appliance	44311	74
		Consumer Electronics (e.g. TV, radio, stereo)	44311	75
		Household Appliance and Electronics	44311	76
		Satellite Receivers	44311	77
		Telephone (including cellular phone)	44311	78
		Personal Care Appliance	44311	79
		Sewing Machines	44311	80
		Vacuum Cleaners	44311	81
		Room Air Conditioners	44311	82
		Camera and Photography Supply	44313	83

GEORGETOWN MARKET STUDY

APPENDIX B-2

RETAIL STORE AND SERVICE CLASSIFICATION BY TYPE (NAICS 2002-BASED)

Retail Sector	Store Category	Store Type	NAICS Code	STUDY Code
GAFO: OTHER RETAILERS				
Sporting Goods, Hobby, Music and Book Stores				
		Bicycles	45111	84
		Fitness Equipment	45111	85
		Bait and Tackle / Firearms	45111	86
		Other Sporting Goods (including uniforms)	45111	87
		Hobby, Toy and Game (including arts and crafts, console game stores)	45112	88
		Sewing, Needlework and Piece Goods (including yarn and fabric)	45113	89
		Musical Instruments and Supplies	45114	90
		Books and News	45121	91
		Pre-Recorded Tapes, Compact Discs and Records	45122	92
Miscellaneous Store Retailers				
		Florist	45311	93
		Office Supply and Stationery (including wholesale office furniture)	45321	94
		Gift, Novelty and Souvenir	45322	95
		Greeting Cards	45322	96
		Used Clothing	45331	97
		Used Furniture / Antiques	45331	98
		Used Appliances	45331	99
		Used Books	45331	100
		Other Used Merchandise (not pawnshops)	45331	101
		Pet and Pet Supply	45391	102
		Art Dealer	45392	103
		Beer and Wine-Making Supply	453992	104
		Art Supply	453999	105
		Auctioneering	453999	106
		Hot Tubs / Whirlpools / Swimming Pools	453999	107
		Coins and Stamps	453999	108
		Autographs, Cards and Collectibles	453999	109
		Party Supply	453999	110
		Tobacco	453999	111
		Tombstones	453999	112
		Other Miscellaneous Retailer (including water systems)	453999	113
BUILDING AND OUTDOOR HOME SUPPLIES STORES				
Home Centres and Hardware Stores				
		Home Improvement Centre	44411	114
		Hardware Store	44413	115
Specialized Building Materials and Garden Stores				
		Paint and Wallpaper	44412	116
		Kitchen Cabinets / Doors and Windows	44419	117
		Electrical Supply	44419	118
		Plumbing	44419	119
		Lumber	44419	120
		Other Building Materials (e.g. brick and tile, fencing, glass, roofing)	44419	121
		Outdoor Power Equipment (e.g. lawnmowers)	44421	122
		Nursery / Garden Centre (including lawn ornaments)	44422	123

GEORGETOWN MARKET STUDY

APPENDIX B-2

RETAIL STORE AND SERVICE CLASSIFICATION BY TYPE (NAICS 2002-BASED)

Retail Sector	Store Category	Store Type	NAICS Code	STUDY Code
SERVICES				
Financial Institutions				
		Bank	52211	124
		Credit Union	52213	125
		Other Depository Institution (e.g. provincial savings and loans)	52219	126
Other Lending Services				
		Consumer Lending (e.g. personal credit and loan companies)	522291	127
		Pawnbroker	522299	128
		Mortgage and Loan Broker	52231	129
		Cheque Cashing Service	52239	130
Consumer Rental Services				
		Car Rental	53211	131
		Electronics and Appliance Rental	53221	132
		Formal Wear and Costume Rental	53222	133
		Video Tape and Disc Rental	53223	134
		Other Consumer Goods Rental (e.g. furniture, sports equipment, party supply)	53229	135
		General Rental Centre	53231	136
Professional Services				
		Investment Advice / Financial Planning	52393	137
		Insurance Agent / Broker	52421	138
		Real Estate Agent / Broker	53121	139
		Legal (e.g. lawyer, notary, paralegal)	5411	140
		Accounting (e.g. accountant, tax preparer, bookkeeper, payroll service)	5412	141
		Photographer	54192	142
		Veterinarian	54194	143
Administrative Services				
		Employment Service	5613	144
		Business Service Centre (e.g. photocopying service, private mail centre)	56143	145
		Travel Service (e.g. travel agent, tour operator, auto club, ticket agent, tourist bureau)	5615	146
Educational Services				
		Business and Secretarial School	61141	147
		Computer Training	61142	148
		Athletic Instruction (e.g. gymnastics club, martial arts club)	61162	149
		Other School (e.g. driver training, tutoring)	61169	150
Health Care Services				
		Physician (including psychiatrist)	6211	151
		Dentist	6212	152
		Other Health Practitioner (e.g. chiropractor, optometrist, psychologist, other therapist)	6213	153
		Out-Patient Care Centre (e.g. family planning, substance abuse, community health)	6214	154
		Medical and Diagnostic Laboratory	6215	155
Social Services				
		Individual and Family Service (e.g. family counselling, big brothers and sisters)	6241	156
		Community Food, Housing, Emergency Relief Service (e.g. food bank, meals on wheels)	6242	157
		Vocational Rehabilitation Service	6243	158
		Child Day-Care Service	6244	159
Arts, Entertainment and Recreation Facilities				
		Movie Theatre / Cinema	51213	160
		Live Theatre	711311	161
		Sports Arena / Stadium	711319	162
		Amusement Arcade	71312	163
		Casino	71321	164
		Lottery Ticket Vendor	713291	165
		Other Gambling Facility (e.g. bingo parlour, off-track betting)	713299	166
		Marina	71393	167
		Fitness and Recreational Sports Centre	71394	168
		Bowling Alley	71395	169
		Billiard Hall	71399	170
		Other Amusement and Recreation Facility (e.g. amusement rides, miniature golf)	71399	171

GEORGETOWN MARKET STUDY

APPENDIX B-2

RETAIL STORE AND SERVICE CLASSIFICATION BY TYPE (NAICS 2002-BASED)

Retail Sector	Store Category	Store Type	NAICS Code	STUDY Code
SERVICES (Continued)				
Food Services				
		Full-Service Restaurant	7221	172
		Limited-Service Eating Place (e.g. fast food, take-out, doughnut shop, cafeteria)	7222	173
		Drinking Places (e.g. bars, pubs, lounges, night clubs, taverns)	7224	174
Automotive Repair and Maintenance				
		Mechanical and Electrical (e.g. general repair, specialty repair of muffler, brake, transmission)	81111	175
		Body, Paint, Interior and Glass	81112	176
		Car Wash	811192	177
		Other Automotive Repair and Maintenance (e.g. lubrication, emission testing, undercoating)	811199	178
Personal Goods Repair and Maintenance				
		Home and Garden Equipment	811411	179
		Appliance (including consumer electronics)	811412	180
		Reupholstery and Furniture Repair (including furniture refinishing)	81142	181
		Footwear and Leather Goods Repair	81143	182
		Other Personal & Household Goods (e.g. garments, bicycles, jewellery, watches, key cutting)	81149	183
Personal and Laundry Services				
		Barber Shop (i.e. men only)	812114	184
		Beauty Salon (i.e. women only; includes nail salons, manicures, pedicures)	812115	185
		Unisex Hair Salon (i.e. men and women)	812116	186
		Weight Loss Centre (e.g. Jenny Craig, Herbal Magic)	81219	187
		Hair Removal / Hair Replacement	81219	188
		Ear Piercing / Tattooing / Tanning Salon	81219	189
		Other Personal Care Service (e.g. bath house, massage parlour)	81219	190
		Coin-Operated Laundry	81231	191
		Dry Cleaning	81232	192
		Linen and Uniform Supply	81233	193
		Pet Care (e.g. animal shelter, boarding kennel, pet grooming)	81291	194
		Photo Finishing Service (e.g. one hour photo finishing services, not camera shops)	81292	195
		All Other Personal Service (e.g. party planning, personal shopping, psychic, shoe shine, es)	81299	196
VACANT SPACE			NA	200
OTHER NON-RETAIL SPACE			NA	201
GENERAL OFFICE SPACE			NA	202
GAFO: OTHER RETAILERS [EXCLUDED]				
Miscellaneous Store Retailers [EXCLUDED]				
		Mobile Homes	45393	NA
AUTOMOTIVE [EXCLUDING AUTOMOTIVE PARTS AND ACCESSORIES STORES AND TIRE DEALERS]				
Vehicle Dealers [EXCLUDING AUTOMOTIVE PARTS AND ACCESSORIES STORES AND TIRE DEALERS]				
		New Cars	44111	NA
		Used Cars	44112	NA
		Recreational Vehicles	44121	NA
		Motorcycles	44122	NA
		Boats	44122	NA
		Other Motor Vehicles (e.g. ATVs, snowmobiles, trailers, aircraft)	44122	NA
Gasoline Stations				
		Gasoline Station with Convenience Store	44711	203
		Gasoline Station without Convenience Store	44719	NA
NON-STORE RETAILERS				
		Electronic Shopping and Mail-Order Houses	45411	NA
		Vending Machine Operators	45421	NA
		Fuel Dealer	45431	NA
		Other Direct Selling Establishments	45439	NA

Based on Statistics Canada, *North American Industry Classification System 2002* (Catalogue #12-501).

APPENDIX B-3

CLASSIC AMERICAN BRANDS AND PREMIUM INTERNATIONAL BRANDS

CLASSIC AMERICAN BRANDS

Polo Ralph Lauren

Banana Republic

J.Crew

Ann Taylor

Nautica

Brooks Brothers

Eddie Bauer

Kenneth Cole

Liz Claiborne

GAP

Tommy Hilfiger

Guess?

Nike

Coach

Calvin Klein

Pottery Barn

Restoration Hardware

Lucky Brand Jeans

Disney

Sketches

Vans

Michael Kors

Under Armour

Tommy Bahama

Perry Ellis

Talbots

Oakley Vault

Anne Klein

DKNY

Cole Haan

Neiman Marcus Last Call

Off 5th Saks Fifth Avenue

Catherine Malandrino

Dana Buchman

Bose

Aeropostale

Pac Sun

Old Navy

St. John

Kipling

Movado

Crate & Barrel

BCBG Max Azria

To The Max

Tahari

Juicy Couture

Jimmy Z

Kate Spade

American Eagle Outfitters

PREMIER INTERNATIONAL BRANDS

Gucci

Giorgio Armani

Burberry

Armani Exchange Escada

Salvatore Ferragamo

Emenegildo Zegna Furla

La Perla

Hugo Boss

Villeroy & Bosch

Yves Delorme

Tumi

Lacoste

Sony