

Ministry of Transportation

Highway 26 Transportation Study Business Assessment

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Appendix A. Community Business Impact Survey

1. Introduction

AECOM is currently undertaking a Highway 26 Transportation Study on behalf of the Ministry of Transportation to assess the long term transportation improvement needs for the Georgina Triangle area. As part of this study, AECOM carried out a Business Assessment (BA) to identify the potential effects of the various potential corridor improvement alternatives on businesses within the study area.

The purpose of this BA is to establish an understanding of the general characteristics of the local business community, their current dependence on Highway 26 and the relative potential effects and opportunities presented as part of each of the corridor alternatives. This BA was completed as a desktop study, and is intended to provide supplemental information in support of the evaluation of the alternatives.

Given their proximity to Highway 26, businesses within the following communities were considered as part of the BA:

- Municipality of Meaford
- Thornbury (within the Town of The Blue Mountains)
- Craighleith (within the Town of The Blue Mountains)
- Clarksburg (within the Town of The Blue Mountains)
- Town of Collingwood
- Stayner (within Clearview Township)
- Town of Wasaga Beach

In addition, the potential effects to and/or opportunities for businesses and/or communities situated in the vicinity of each of the corridor alternatives was carried out.

1.1 Background

The Highway 26 corridor currently serves a mixture of local, regional, and long distance vehicle travel given the limited number of alternative routes (particularly between Grey County and Simcoe County). As such, Highway 26 is described in municipal Official Plans (OPs) as a long distance, high speed traffic corridor intended to carry through-traffic. However, future growth anticipated up to the year 2031 is expected to increase travel demands on Highway 26 by approximately 110 % to 190% within Simcoe County, and by approximately 50% within Grey County, the majority of which is anticipated to be related to locally generated work and discretionary trips. Based on the information reviewed as part of the Needs Assessment conducted in support of the Transportation Study, the anticipated growth is further related to short and medium distance trips between communities. By 2031, congestion on Highway 26 through the downtown cores of Stayner, Collingwood and Thornbury will increase, effecting both long distance and local travel. A series of improvement alternatives including Highway 26 widening and various bypass configurations are being evaluated to address future deficiencies.

1.2 Objectives and Methodology

An assessment of the potential effects of the construction of each of the proposed Highway 26 improvement and/or bypass alternatives was carried out as part of this BA, the results of which are intended to support the evaluation of each of the alternatives proposed as part of the Transportation Study. It is understood that the construction of road improvements and/or bypasses can also affect businesses and towns that are currently situated along existing corridors or potentially bypassed routes. The effects of bypasses can be positive or negative in the long or short term and different types of businesses are affected in different ways. Given the number of variables influencing the economic success of a business or town, it is difficult to predict the severity of effects (if any). As such, the following activities were carried out:

- A general overview of the economy of the study area;
- An overview of the existing communities within the study area and located along the Highway 26 corridor;
- A general review of land use planning objectives documented in area municipal OPs;

- A review of existing conditions along the Highway 26 corridor via a site reconnaissance conducted on November 1 and 2, 2010 and a desktop aerial photo review conducted in February 2012;
- A review of case studies and literature related to the economic effect of bypasses; and
- The development of a survey and subsequent distribution to six Ontario municipal Economic Development and/or Planning departments;
- Correspondence and discussion with municipal Economic Development Officers and/or planners; and
- The review of effects from similar projects and the associated changes in the level of economic activity.

The results of the BA for the study area are discussed herein.

2. Study Area Economy

The study area is generally situated within the region commonly referred to as the South Georgian Bay Region (SGBR) and comprises the municipalities of the Town of Collingwood (Collingwood), Town of Wasaga Beach (Wasaga Beach), Clearview Township (Clearview) and the Town of The Blue Mountains. While each of the SGBR communities assessed is distinctly different, businesses in the south portion of the SGBR are generally related to tourism, wine production, fruit cultivation (primarily apple) and cattle farming. The north portion of the SGBR generally consists of tourism and/or adventure tourism-related businesses (i.e., skiing, caving, hiking, cycling, accommodations, retail and/or commercial, real estate, etc.). Tourism in the SGBR is endorsed through the Georgian Triangle Tourist Association (GTТА), an organization that supports tourist-oriented businesses and economic growth in the SGBR. The tourism industry in the region (and beyond) is also supported by the Georgian Bay Destination Development Partnership, an organization represented by a range of members including tourism organizations, municipalities, public organizations and private operators around the Bay. These organizations highlight the tourist attractions, restaurants, shops and events in the SGBR while providing maps and/or guides to its various features and attractions. The GTТА and GBDDP promote tourism through various media, including print and dedicated social media.

An economic analysis was completed on behalf of the municipalities in the SGBR, the results of which are documented in the report entitled, "South Georgian Bay, Regional Economic Development Strategic Plan", completed by Matthew Fischer and Associates and dated June 2011 (hereinafter referred to as the "the ED Plan"). The purpose of the ED Plan was to outline existing economic conditions and develop a strategy for future economic planning in the SGBR. As part of the ED Plan, a review of statistical data (i.e., Census data) related to population and employment was carried out.

The ED Plan notes that the SGBR is supported by a healthy economy, the success of which is enhanced by its strong tourism industry and the region's ability to accommodate four seasons of activities. As such, the SGBR is considered a key contributor to the province's total tourism industry. It is reported in the ED Plan that Simcoe County is ranked 4th in the tourism industry in Ontario (following Toronto, Niagara Falls and Ottawa).

The ED Plan further notes that communities within the SGBR share a common reliance on the tourism industry and appear to be generally interdependent on each other for their economic success. A large number of the region's residents are reported to travel between the communities, as a large percentage appears to live in one community and work in another. Based on the 2006 Census employment data reviewed as part of the ED Plan, Collingwood employs approximately 54% of the residents within the SGBR. As such, 3,775 people commute into Collingwood, the majority of which reside in Clearview Township and the Town of The Blue Mountains.

In summary, the following industries appear to be the main contributors to the SGBR economy

Tourism

Tourism appears to be the driving force of the SGBR. The ED Plan highlights the success of the tourism-related industries through a review of 2001 and 2006 Census employment data, which reports that Accommodation and Food, Arts and Entertainment, Recreation and Real Estate and Retail sectors are realizing the majority of employment growth in the SGBR.

According to the ED Plan, a survey was carried out by the GTТА for prospective visitors to the SGBR. Respondents reportedly indicated that water was the key distinguishing feature of the SGBR and waterfront dining was a sought after experience for tourists.

In 2007, PKF Consulting carried out a tourism-related travel analysis for the study area on behalf of AECOM as part of the Transportation Needs Assessment, the results of which were documented in the report entitled, "Highway 26 Transportation Study, 2007 Tourism-Related Travel to Highway 26 Analysis Area and Visitation Projections to 2030" (hereinafter referred to as the "Tourism Study"). The Tourism Study assessed the current and future tourist visitation

patterns to/from Highway 26 corridor study area to understand the role and importance tourism travel places on the corridor. Based on the findings of the Tourism Study, the following was noted:

- A 14% increase of visitors from 2006 to 2007;
- A 2.7% increase of visitors projected between 2007 and 2013; and
- A 1.0% compound annual growth rate in visitors projected between 2013 and 2030.

The presence of resorts, recreation facilities and residential development projects in the Towns of The Blue Mountains, Collingwood and Wasaga Beach was considered one of the factors influencing travel to the Highway 26 Analysis Area.

Manufacturing

Based on the information reviewed, manufacturing operations within the study area predominantly occur within Collingwood. The ED Plan reported that based on 2001 and 2006 Census employment data, employment in the manufacturing sector in the region has declined, however this trend is generally in line with Canada's overall statistics. However, Collingwood continues to be the largest reported industrial employment centre in the region and is occupied primarily by niche-oriented operations.

Health and Social Services

The regional hospital (i.e., Collingwood General and Marine Hospital) is situated within Collingwood and is the largest area employer, providing approximately 440 jobs¹.

Agriculture

The agriculture industry is a contributor to the strong economy of the study area. As noted previously, agriculture-related businesses dominate the south portion of the study area, the majority of which are located in Clearview. However, an abundance of farmland is also available and/or cultivated in the Town of The Blue Mountains. According to Census employment data reviewed as part of the ED Plan, agriculture in the SGBR reportedly outperformed other regions in the province during the 2001 to 2006 period.

Construction

Construction was identified as another major employer in the SGBR, the range of which appeared to be evenly distributed throughout the communities in the region.

¹ Town of Collingwood Economic Development Office, Community Profile
(<http://www.investcollingwood.com/CProfile/TopEmployers.html>) accessed April 9, 2012

3. Community Profiles

There are a number of communities that provide centres for year-round and seasonal residents, employment and services situated within the Towns of Meaford, The Blue Mountains and Wasaga Beach and Clearview Township. Some development, such as resort residential, is also sparsely situated along local roadways outside of the community centres. The following provides an overview of the main communities within the study area.

3.1 Meaford

The Town of Meaford is located immediately west of the Town of The Blue Mountains. According to 2011 Census data, Meaford comprised a population of 11,100, a 1.4% population increase since the 2006 record of 10,948. Based on 2006 and 2031 employment data reported for Meaford, employment growth in the municipality is anticipated to grow from 3,080 to 3,600, respectively.

The study area does not extend into Meaford, however it is recognized that the existing Highway 26 corridor services the Meaford community and other communities within the Bruce Peninsula and travel demands to/from Meaford have been assessed. This community also comprises the westernmost portion of the SGBR and the Georgian Trail. Highway 26 serves the commercial core of the community, which is generally occupied by a mix of commercial and retail land uses. The community also includes a harbour on Georgian Bay which is operated by the Municipality of Meaford (i.e., Meaford Harbour).

3.2 Town of The Blue Mountains

The Town of The Blue Mountains, which comprises 287 km² in area, is located to the west of the Town of Collingwood, immediately east of Meaford. According to 2011 Census data, the Town of The Blue Mountains consists of a population of 6,453; a 5.5% decrease from the 2006 population of 6,825. The Census employment data for 2006 reports 2,980 jobs within the community. Forecasts prepared as part of the Grey County Growth Management Study predict a 24% growth in employment to 3,690 jobs by 2031.

As per the entire SGBR, the economy of the Town of The Blue Mountains also appears to be heavily reliant on tourism, particularly its expansive ski resort and lifestyle condominium community. The year round recreational features of the Town of The Blue Mountains has led to considerable recreational resort development pressure for the municipality. The Blue Mountains ski resort is considered the largest in Ontario and has undergone increased development since 1999, when Intrawest purchased the facility.

The communities within the Town of The Blue Mountains considered as part of this BA study comprise the three commercial core areas serviced by the Highway 26 corridor. These communities consist of Craigeleith and Thornbury, situated along Highway 26, and Clarksburg, situated immediately south of Thornbury along County Road 13. In March 2011, municipality released the "Town of The Blue Mountains Community Improvement Plan" (hereinafter referred to as the "CIP"). The CIP was developed to provide strategies and a policy framework to guide initiatives for improvements to these commercial core areas. The CIP included public input collected as part of community consultation events, as well as a Strength, Weakness, Opportunity and Threat (SWOT) Analysis which assessed the characteristics and economic activity within each of the commercial core areas. One of the key recommendations identified in the CIP noted that all improvement activities should maintain the character and heritage of the communities and their respective commercial areas.

3.2.1 Thornbury

Thornbury is located immediately south of the shores of Georgian Bay, between the communities of Meaford and Craigeleith. Based on 2011 Census data, the population of Thornbury is 2,253, which represents an increase of 1.6% from 2006.

The main street of the commercial core (i.e., Bruce Street) is traversed by Highway 26 (i.e., Bridge Street and King Street to the east and Arthur Street to the west). Bruce Street spans in a north-south direction, the northern extent

of which leads to Thornbury Harbour, a popular public harbour operated by the Town of Blue Mountains. Highway 26 is recognizably a commercial area in the community; however its character is noted to differ from that of the Bruce Street commercial core. Specifically, from the western town limits easterly to Bruce Street, Highway 26 provides direct access to a variety of local and convenience businesses including, but not limited to, a coffee shop, convenience, drugstore, carwash, gallery and bank. From Bruce Street (i.e., the downtown core) easterly to the eastern limits of the community, land uses generally comprise a mix of local services including the Thornbury municipal offices, restaurant/tavern, new condo and/or townhouse development, auto parts and fuel sales, multi-tenant retail/commercial plaza, medical clinics, gift/decor shops, motel, grocery, hardware and hair salon.



Downtown Thornbury

The Thornbury Cidery is notably present on the north side of Highway 26, immediately south of the Georgian Trail, and located in relation to the apple orchards generally distributed throughout the SGBR. Based on 2007 aerial images reviewed as part of this BA, apple farming appears to be a common cultivar within the agricultural landscape surrounding Thornbury.

The Town of The Blue Mountains CIP identified the commercial core's proximity to Georgian Bay harbour, Beaver River and Mill Pond as a strength for the community, given that it also provides public access to recreational water activities. The commercial core has attractive streetscaping features which provide an attractive pedestrian environment. In addition, the CIP identifies the commercial core as a "healthy commercial area", given a low commercial vacancy rate, business diversity and abundant parking supply.

Highway 26 provides a gateway to the community, and generally supports the commercial function of the downtown area due to the volume of passing motorists. However, Highway 26 is also considered a weakness for the community given the "commercial strip" appearance of many of the adjacent commercial land uses, the presence of several vacant commercial buildings, the high vehicular speeds associated with the highway and lack of a pedestrian-friendly environment. The CIP notes that Highway 26 "accommodates the travel route for a number of visitors to and through the Town and its commercial areas. However, the quality of the streetscape presents a poor image of the community for visitors, and reflects an auto-oriented corridor". Improvements to the condition and appearance of commercial buildings along the Highway 26 corridor, in the vicinity of the commercial core area, is identified as a critical community improvement need, based on input received from members of the public.

The Town of The Blue Mountains OP identifies tourism as the main industry for the community and recognizes the destination-type uses that occupy the commercial core. Thornbury is recognized as "the primary local retail and service centre for the municipality comprising small scale shops, boutiques and other uses related to the travelling public". The OP describes the intent to conserve the historic character of Thornbury's commercial core and retain the 'small town feel' of the community. Policy direction related to the commercial core aims at land uses that do not suit the character of the Bruce Street core (i.e., automobile sales/service, prepared food outlets, motels, services stations, etc.), noting that these developments "will be directed to the Highway 26 corridor/commercial area of Thornbury". According to Schedule A of the OP, designated Commercial land uses are situated along the north and south sides of the corridor. In addition, the commercial designation extends to the north along Bruce Street and leads to the designated Harbor Commercial area of the Thornbury Harbour. The Thornbury Commercial designations represent the primary local retail and service centre for the municipality, as well as some small scale shops, boutiques and other uses related to the traveling public.

Thornbury's commercial uses are also supported by the Business Improvement Area, a committee created to achieve the goal to, "make Thornbury a place where the local community and visitors want to shop, to dine, to relax and to return to; while preserving the original beauty and ambiance of our village". The general characteristic of Thornbury is described as a reflection of the history of the community, given the diverse range of quaint shops and boutiques, restaurants and artisans offered along Bruce Street, as well as architecturally unique buildings located throughout the community.

3.2.2 Clarksburg

Clarksburg is situated immediately south/southwest of Thornbury and is surrounded by a rural/agricultural landscape. The small commercial area is served by Marsh Street (i.e., County Road 13, or Bruce Street in Thornbury) and, in part, by Clark Street (i.e., County Road 33) to the east. While not directly situated along the existing Highway 26 corridor, the community is accessible via County Road 13 and some of the alternatives being considered as part of the Needs Assessment may look to improve the existing County Road 33 to provincial roadway standards or provide a highway bypass in close proximity to Clarksburg.

The CIP describes the buildings within the Clarksburg commercial core as being in close proximity to the existing roadway. These buildings range from poor to fair condition and some are identified for potential demolition. Commercial uses occupying these buildings consist of a limited range of retail and commercial service uses (i.e., hardware, convenience and office). Art supply stores and/or galleries are also present in the community's commercial core, which contributes to the community's character and setting. The CIP notes that 17 active businesses operated out of the commercial core of the community, adding that the area could be expanded through the conversion of some of the residential dwellings present in the core. The CIP notes that opportunities for expansion in Clarksburg are limited due to the lack of municipal services (i.e., water and sewer).



Clarksburg Commercial Core, Marsh Street

According to the Town of The Blue Mountains OP, commercial land uses in Clarksburg are designated Village Commercial, "where commercial and other compatible uses serving the needs of village residents, the travelling or tourist public and surrounding agricultural areas, may locate". In addition, Marsh Street is described as the primary street through Clarksburg that connects to Highway 26 and Thornbury.

3.2.3 Craigleith

Craigleith is situated to the west of Collingwood and to the east of Thornbury, adjacent to Georgian Bay and immediately north of the Village at Blue Mountains resort

Commercial development along Highway 26 within the community comprises sparsely distributed commercial operations including a motel, fireplace gallery, gas station, restaurants and a general store. Based on the 2010 windshield survey conducted by AECOM, residences and/or cottages are the primary land uses that rely on Highway 26 for direct access to their respective property in Craigleith. Access to Craigleith Provincial Park, an Ontario Parks camping and/or recreational destination, is provided via Highway 26 at the west portion of the community. In addition, considerable cottage development is also present along the shores of Georgian Bay, immediately north of the Highway 26 corridor.



Highway 26, Craigleith

According to the CIP, the Highway 26 commercial area of the community is characteristic of an arterial strip and appears to consist of “an older highway-oriented commercial corridor”. In addition, several of the properties were noted to be in poor condition, underutilized and vacant and/or abandoned. The businesses present along the Highway 26 corridor at the time of CIP were not considered to function as a commercial destination.

According to Schedule ‘A’ of the Town of The Blue Mountains OP, land uses surrounding the Highway 26 corridor in Craigleith consist of designated Highway Commercial and Residential Infilling. Section 3 of the OP describes the Craigleith Highway Commercial area as being “intended to serve the needs of the local area residents and the traveling public”. These lands are preserved for operations that require large land areas and those that are not directly related to the resort community. Permitted uses within this designation include, “small scale commercial uses which rely heavily upon vehicular traffic for their economic existence including gas stations, service commercial uses, personal service uses, business and professional offices, veterinary clinics, convenience stores and eating establishments.

3.2.4 Blue Mountain Village

Blue Mountain Village is located immediately south of Craigleith. While not situated immediately on the Highway 26 corridor, the Blue Mountains Village (Blue Mountain ski resort) is accessible to Highway 26 via Grey Roads 19 and 21. Some of the alternatives being considered as part of the Needs Assessment may look to improve the existing Grey Roads 19 and/or 21 to Provincial roadway standards or introduce bypasses of this area.

Blue Mountain Village is a mixed use development that has experienced extensive growth since 1999. This resort community includes fractional ownership properties, the presence of which brings patrons back to the community (and to the SGBR) throughout the year. Population growth throughout the SGBR is noted to be attributed by the growth of the resort, in addition to new condo and single family home development. The Town of The Blue Mountains OP notes that the commercial portion of the Blue Mountain Village is, “intended to serve the needs of the local area residents and the travelling public”. The commercial area of this community is indicated in OP to be developed with a mix of commercial, residential and recreational uses and designed for pedestrian use, and notes that uses permitted within the designated Village area comprise restaurant, accommodation, real estate and recreational uses.

3.3 Town of Collingwood

Collingwood is generally bounded by Georgian Bay to the north, Clearview Township to the south, the Town of Wasaga Beach to the east, and the Town of The Blue Mountains to the west. According to Census data, the 2011 population for Collingwood was 19,241, an 11.3% increase since 2006. Based on population, Collingwood is the largest community within the study area, yet it comprises the smallest geographic area covering 34 km². As such, there is very little undeveloped land within its boundaries.

According to the ED Plan, Collingwood “is the commercial and service centre for the entire region”. Collingwood accounts for approximately half of all business activity and over half of all jobs in the SGBR, many of which are tourist-based, food and accommodation operations. The 2006 Census reported 10,800 jobs in Collingwood. Data for 2011 was unavailable at this time of publishing this report. Forecasts of future employment contained in the Places to Grow: Growth Plan for the Greater Golden Horseshoe (Growth Plan) suggests that Collingwood’s employment will grow to 13,500 jobs by 2031, an increase of 25%.² Collingwood is also home to Collingwood General and Marine Hospital, the regional hospital, which provides health and social to the SGBR. The ED Plan indicates that, as of 2009, there were 1,779 businesses in Collingwood, which is approximately 46% of the total number of business in the SGBR. The study concludes that Collingwood’s retail sales are primarily generated by tourists and/or visitors from outside of the community, serving a retail market that is more than double its population.

Based on the windshield survey completed by AECOM in 2010, indirect access to a golf course and various vacation resorts is provided by Highway 26 via small local roadways in the west portion of Collingwood. Mixed commercial uses that are accessible via Highway 26 (i.e., Balsam Street and 1st Street) generally comprise big box stores, a mixed use strip plaza, a motel and restaurant. Highway 26 also provides the northern extent of the downtown core, which spans south along County Road 124 (Huron Street). Businesses along this portion of Highway 26 consist of compact mixed commercial land uses including coffee shops, restaurants, multi-tenant commercial/office/retail buildings, grocery store and sales offices. The majority of the characteristic specialty shops (i.e., Victorian buildings, charming shops, cafés, antique stores and galleries) are generally located along the north-south local roadways.

To the east of the downtown area, Highway 26 (i.e., Huron Street) is bounded on the north and south sides by recently developed waterfront condominium complex, movie theatre, grocery store and established residential dwellings. Further east along the existing corridor (i.e., Pretty River Parkway), newer large scale auto and recreational vehicle sales facilities are present, beyond



Highway 26/First Street, Collingwood



Huron Street, Collingwood

² *Places to Grow: Growth Plan for the Greater Golden Horseshoe, 2006, Office Consolidation January 2012, Schedule 7: Distribution of Population and Employment for the City of Barrie, City of Orillia and County of Simcoe to 2031.*

which commercial and/or light industrial development and auto sales facilities occur. In addition, the following facilities were distributed along the corridor, between Poplar Side Road and Brock's Beach: gas station, RV sales, auto wrecker, restaurants, motels, go-kart track and rental services.

Georgian College has constructed a new campus (i.e., the South Georgian Bay Campus) on Raglan Street, accessible via Hume Street and/or the existing Highway 26 corridor/ Pretty River Parkway. This new facility is anticipated to be operational by the fall 2013, and accommodate 250 full-time and 3,000 part-time students.

According to Section 4.4.4 of Collingwood's OP, Collingwood's commercial core is, "expected to function as an attractive regional destination for tourists and the traveling public and will function to provide comparison and specialty shopping."

3.4 Township of Clearview

Clearview is situated to the south/southeast of Collingwood, immediately east of Town of The Blue Mountains. Census data indicates that the 2011 population recorded for Clearview has decreased since the population reported in 2006 (i.e., 13,734 versus 14,088, respectively). In addition, Census employment data recorded for the municipality predicts that the 2006 employment (i.e., 4,400) will grow to 5,100 by 2031. According to the ED Plan, the agriculture industry is the key contributor to Clearview's economy. In general, Clearview consists of a predominately agricultural landscape comprising of two small commercial centres (i.e., Stayner and Creemore). According to the information reviewed as part of this BA, these two commercial centres are slowly becoming recognized as tourist attractions within the SGBR. Given that the community of Creemore falls outside the study area, this review has focused on Stayner, given its location along the existing Highway 26 corridor.

3.4.1 Stayner

Stayner is located within the central portion of Clearview, and comprises a population of approximately 3,500 people. The commercial core of Stayner is served by the Highway 26 corridor. According to information provided in the ED Plan, Clearview is currently planning for growth in the community and preparing for development of approximately 2,000 residential units in the Stayner community.

From Sideroad 27 & 28 Nottawasaga southerly to the Highway 26/Airport Road/County Road 91 intersection, commercial facilities located along the existing Highway 26 corridor include auto sales, farm market, an industrial facility (Reinhart Foods Factory), automobile service, restaurant and flooring sales. It is noted that Reinhart Foods Factory is the only manufacturing facility within Stayner. Where Highway 26 runs in an easterly direction, gas stations, automotive service and a multi-tenant commercial building are present in the west, beyond which are compact commercial buildings occupied by mixed retail and/or specialty shops which comprise the commercial core of the community. Businesses occupying the buildings in the commercial core are noted to be situated in close proximity to the existing corridor. Beyond the commercial core, a feed store, church, retirement lodge and highway commercial land uses (i.e., gas station and automotive service facilities) are present along the existing Highway 26 corridor.

The Clearview OP notes that, with respect to economic growth, "new industrial and commercial facilities will be directed to Stayner", (in addition to Creemore and New Lowell). In addition, one of the objectives of the Clearview OP notes Clearview's intent to, "broaden the appeal of major commercial areas, particularly the central business



Highway 26, Stayner

districts in Stayner and Creemore” and “encourage tourism-related development”. Policy direction related to the preservation of character within its commercial cores is also noted as part of Clearview OP:

“...commercial activity be strategically located so as to facilitate improvement to the commercial cores of Clearview’s urban settlement areas, particularly Creemore and Stayner, while maintaining the historical small-town character of established residential neighbourhoods.”

The Clearview OP notes its intention to consider designating the commercial core areas as Heritage Districts as defined in the Ontario Heritage Act.

3.5 Town of Wasaga Beach

Wasaga Beach is located to the east of Collingwood, at the eastern extent of the SGBR. According to the 2011 Census data, Wasaga Beach comprises a population of approximately 17,537 residents. This population represents a 16.7% increase in growth since the 2006 Census, at which time there was a population of 15,029. The Economic Development department for Wasaga Beach issued a media release newsletter on February 9, 2012 which highlighted Wasaga Beach’s 2011 Census population data. The newsletter indicated that approximately 9,000 seasonal residents also reside in Wasaga Beach. The community is also a well-known tourist destination that attracts a reported 2 million tourists annually. According to the EDP Plan, Wasaga Beach is reported to be the fastest growing community in the SGBR, and a key distributor to the SGBR economy. Census employment data recorded for Wasaga Beach in 2006 (i.e., 3,100) is anticipated to grow to approximately 3,500 in 2031.

While not directly situated along the Highway 26 corridor, Wasaga Beach is largely dependent upon access from Highway 26, via Mosley Street. The commercial core of Wasaga Beach is primarily recognized as a summer attraction that is located at the end of County Road 92.

4. Literature Review

As noted above, the unique characteristics of each community within the study area, as well as various other factors, limit the ability to foresee the affects of the introduction of a bypass within the study area. To enhance our understanding of the potential effects on businesses within the study area, AECOM conducted a literature review of existing case studies related to the economic effects of bypass construction, as discussed below.

4.1 Kansas Bypass Study, 2004

A study was released by the Transportation Research Forum in 2004 which assessed the economic effects of the bypasses constructed around nine small towns within the state of Kansas, USA. The results of this study were documented in the report entitled, "*Case Studies of the Economic Impact of Highway Bypasses in Kansas*", completed by Kansas State University and dated October 2003 (hereinafter referred to as the "Kansas study").

Communities included as part of the Kansas study consisted of a population ranging from 723 to 2,600 in the year 2000, and experienced a bypass opening within the 1990s. Fifty-four (54) travel-related business owners and managers situated within the bypass towns were surveyed as part of the Kansas study to determine their perspective on the economic effect of the bypass on their respective businesses.

For the purpose of the Kansas study survey, travel-related businesses consisted of restaurants, convenience stores, auto and truck repair shops and motels. In addition, the travel-related business owner and/or managers were respondents to the survey. Based on the results of the survey, it was noted that the introduction of bypasses appeared to have a greater negative effect on convenience stores and motels, rather than auto and/or truck repair operations;

Regression analysis was also completed as part of the Kansas study to measure the effect of the bypasses on the towns by matching the bypassed town with another, non-bypassed town (i.e., control town). Assuming that local and national economic factors would affect the bypassed towns and the control towns in a similar manner, this method was used to determine if the bypasses had a significant effect on total employment of the bypass towns. The results of the analysis reportedly concluded that the construction of the bypasses did not appear to have a significant effect on the total employment of the bypassed towns. However, based on the results of the survey completed as part of the Kansas study, 67% of the respondents felt that the construction of a bypass had a negative effect on their respective town as a whole.

The Kansas study also included a brief overview of case studies for several communities within the state of Texas, which reported the economic effects documented between the years 1990 and 2001.

Based on the summary information provided in the Kansas study, the following conclusions were noted:

- Communities whose economies were growing prior to the construction of the bypass experienced an improved economy. Cities with a suffering economy were further depressed following construction of the bypass;
- Bypass development reduced traffic through towns by up to 75%, which resulted in a negative effect on businesses which depend on pass-through traffic for patrons and are located within commercial core areas;
- Other factors reportedly contributing to economic change in the community reportedly consisted of national economic trends, increased development of other retail stores, and consolidation of gasoline distributions;
- The economic relationship of the towns assessed in relation to other cities in the respective area, the alignment of the bypass route and local government policies were also noted as factors contributing to economic change; and
- Communities may benefit from a reduction in traffic, noise, emission and safety issues. However, negative effects on businesses that are dependent on through-traffic may be realized. These negative effects may be partially offset by new businesses development along a new bypass route.

4.2 JWEL Bypass Study, 2004

Jacques Whitford Environment Limited (JWEL) reviewed a series of case studies associated with the construction of a bypass in support of an Environmental Assessment for a proposed bypass route situated to the west of the Town of Antigonish, Nova Scotia. The results of this review were documented in the report entitled, “*Economic Impacts of Highway Bypass Development on Communities*”, dated May 2004. The JWEL bypass study consisted of a review of assorted literature related to the economic effects of bypass construction on communities. The majority of the studies were associated with the construction of bypasses in communities within the U.S.; however some were indicated to be related to Canadian experience.

The findings of JWEL Bypass Study include the following:

- A variety of conclusions (i.e., positive and negative) were cited from the literature reviewed;
- The range in magnitude of effects depends on a variety of factors, including the size of the town and its economy;
- Adverse short term effects were generally experienced by drive-through dependant operations (i.e., gas stations and restaurants). However, little or no significant long-term economic effects were reported;
- Non-traffic related employment (i.e., education and health sectors) will lessen the potential short-term negative economic effects;
- Communities with a strong economic base (i.e., the trade centre for a region), endured less negative effects;
- Implementation of a regional economic development strategy or strategic land use plan to take advantage of the improvements contributes to a community’s ability to adjust to bypass development;
- A proactive political and business town council, in addition to increased signage on a new route indicating the variety of shops and services of the bypassed town was proven to lower the short term economic effects based on six of the case studies reviewed; and
- Mitigation measures to reduce negative economic effects and enhance the benefits of a bypass were recommended, including the development of strategies of signage, lighting, interchange landscaping and the provision of tourist information resources.

4.3 Highway Bypass Studies Summary

A summary of economic impact studies of highway bypasses in various small state towns within the USA was prepared by the Wisconsin Department of Transportation in partnership with the Economic Development Research Group. The results of this summary review were provided in the document entitled, “*Summary of Highway Bypass Studies*” (hereinafter referred to as the “Bypass study summary”). Of the conclusions contained in the Bypass study summary, the following are considered applicable to consideration of bypasses in the context of the Highway 26 Transportation Study:

- Gas stations and quick service restaurants that cater to pass-through traffic are most likely to be negatively affected by a bypass;
- Bypassed towns that serve regional markets by providing services (i.e., big box retail, automotive dealerships, hospitals, etc.), are likely to experience little or no economic negative effects;
- Tourist-related businesses (i.e., art galleries and antique stores) attract visitors to a community as a destination themselves. As such, these types of businesses are less likely to be negatively affected;
- Businesses that serve local residents (i.e., drug stores, banks, grocery store) are generally not effected;
- The shift in traffic associated with bypass development may cause existing businesses to close or relocate, however net economic effects on the entire community are generally small, and can be either positive or negative;
- Commercial core areas comprising a strong, existing identity for tourists and local patrons are most likely to be strengthened by the construction of a bypass. This is reportedly related to a reduction in traffic delays through their respective commercial cores; and
- Sufficient signage directing traffic to the bypassed commercial core area is important to its continued success.

5. Survey of Other Municipalities

AECOM also conducted a survey of other municipalities within Ontario to enhance the understanding of the potential effects of bypass construction on businesses within the study area, the results of which are described herein. A copy of the survey is attached in **Appendix A** of this report.

Responses were received from four of the six municipalities contacted. The findings of the survey suggest that the effects of bypass construction on businesses and/or communities in Ontario have not been generally well-documented.

5.1 Survey Description

As part of the survey, a series of questions were posed in a survey provided to six Ontario municipalities. Municipalities were selected based on their likeness to municipalities within the study area and/or historical experience with bypass construction on their respective community. The survey was forwarded to the Economic Development and/or Planning departments servicing each of the selected municipalities.

5.2 Comments and Feedback

Huntsville – Highway 11 Bypass

The original Highway 11 bypass opened in 1958. In general, Town of Huntsville (Huntsville) staff reported that the overall effects to Huntsville were positive. Based on the information received from Huntsville staff, following is noteworthy:

- The bypass serves continued economic growth along the corridor and beyond (northerly);
- Short term effects on the local businesses were reportedly positive given the intensive labour program required to support the construction activities;
- Extensive changes to the downtown community were reportedly realized through the removal of unnecessary traffic (including long haul vehicles) and subsequent evolution of the downtown commercial area to become a regional retail and tourism hub;
- The overall effects on businesses within the Huntsville commercial core have reportedly been positive, given that Huntsville has become a destination and situated in close proximity to Algonquin Park;
- Positive effects to retail, tourism, service and real estate related businesses were reportedly realized following the introduction of the bypass. Trendy shops, fine dining, live theatre, event tourism, outfitters, health care, schools, environmental research and several other additional shopping nodes were noted to flourish in the community;
- Huntsville staff noted that the manufacturing sector has declined significantly, however indicated that this decline was generally related to world economic challenges; and
- No notable increase in travel to the community's tourist areas was reported, however it was noted that the project was able to maintain and grow visitation to the community.

Caledonia – Highway 6 Bypass

The Highway 6 bypass was constructed to the west of the Town of Caledonia (Town) in 1982. Based on feedback received from Haldimand County (County), the bypassed roadway is shorter and more direct than the bypass. As such, travellers were continuing to travel through the commercial core of the town. County staff reported that trucks are currently restricted from travelling through the town. However, the bypass locations of rest stops and/or coffee shops draw truck traffic to the downtown area and avoid use of the bypass. It was further noted by County staff that only three traffic lights are present within the downtown area, and the current geometry of the bypass contributes to the perception that the bypass does not appear to save time. The County is currently undertaking streetscaping initiatives to further deter truck and drive-thru traffic within the downtown core.

County staff also indicated that the bypass is incomplete and still needs to be extended further north in connection with the Hamilton International Airport. One concern noted in association with the future completion of the bypass was the potential effects to businesses within the Caledonia's commercial core. Once completed, vehicles may choose to save time and continue to travel to the City of Hamilton, thereby avoiding the commercial core of Caledonia.

Kenora – Highway 17A Bypass

The Highway 17A bypass of the City of Kenora was introduced in 1990. City of Kenora (City) staff indicated that current staff employed with the City were not familiar with the circumstances in Kenora prior to construction of the bypass. However, City staff indicated that they have recently launched aggressive mitigation and/or marketing strategies given the recent closure of the City's largest employer (a large paper mill operation). As such, City staff reported that their mitigation efforts focused on the City's tourist features, including proximity to water, pristine cottage country and 'lake of 14,000 islands'. In addition, City staff reported that they had upped their tourism effort through rebranding exercises and extending their marketing efforts to western Canada by highlighting the City's attributes and its commitment to becoming "North America's premier boating destination". The City has also partnered with their local First Nation communities.

Lakefield – Highway 28 Bypass

The Highway 28 bypass was constructed to the east of Lakefield in the 1980s. Based on correspondence received from the Township of Smith-Ennismore-Lakefield (Township) Planner/Economic Development Officer (EDO), the survey could not be completed given that staff currently employed with Township were not familiar with the circumstances in Lakefield prior to construction of the bypass. However, the EDO did note that the presence of the bypass did not appear to be currently affecting the overall economic success of the community of Lakefield.

6. Lessons Learned

Road improvements can affect businesses in a positive or negative way. These affects can be temporary in nature or long term. The lessons learned based on the literature review and responses to the business effect survey are described in this section.

6.1 Short-term Effects

In general, improvements to the Highway 26 corridor and/or the construction of a bypass will provide travel time savings for through traffic, improve movement through the SGBR and hence improve access to study area destinations. However, there is potential for negative and/or positive affects to businesses within the study area, the range in magnitude of which depends on a variety of factors, including size of the town and its economy at the time of the proposed improvements.

Construction Activities

During the construction phase of improvements to existing roadways, it is anticipated that some businesses may temporarily lose patrons. These potential negative effects may be realized by businesses dependent on pass-through traffic, particularly in a case where widening improvements are imposed along the existing corridor. However, other businesses may experience increased patron visits by attracting the diverted traffic to their respective business.

It is inferred that local employment opportunities will be generated as a result of the construction activities. In addition, local businesses could also benefit from additional patronage from road construction employees. However, it is understood that these opportunities will be present for the short term and/or for the duration of the construction project.

Highway Commercial Business Activity

Once the bypass is operational, changes in traffic patterns may decrease patron visits for some businesses and services. In general, businesses that primarily rely on pass-through traffic (i.e., gas stations, convenience stores and fast food restaurants) are most likely to be adversely affected by the construction of a bypass.

However, as noted in the case studies reviewed as part of this BA, the presence of businesses that do not depend on through traffic (i.e., such as education and/or health sector-related businesses) may lessen the potential short-term negative economic effect on the local economy (if any). In addition, those businesses that cater to local residents and/or property owners (i.e., mechanics, drug stores, banks, grocery store) are not likely to be affected to the same degree. Tourist destination-oriented communities are considered less likely to be effected by a bypass and may lend to the success of highway commercial and/or highway-dependent businesses.

Given the unique tourist attractions available within most of the communities reviewed, tourist-related businesses within these communities are less likely to be effected by the construction of a bypass.

6.2 Long-term Effects

Retail and/or Commercial Business

As noted above, the highway dependent/highway commercial businesses are more likely to be effected by the construction of a bypass for the short term. However, the construction of a bypass may present an opportunity for relocation of these existing businesses and the development of new businesses in the vicinity of a new alignment. Study area municipal OPs outline several restrictions related to commercial expansion along the existing Highway 26 corridor. The development of a bypass may provide an opportunity to redevelop the existing businesses. However, as indicated as part of the Caledonia experience, new development has tended to concentrate at the interchange of the new and bypassed route. In addition, the Kansas study further noted that new developments associated with a bypass were generally noted to be new to the community, rather than relocated businesses.

These new developments have the potential to deter patrons from similar businesses within the commercial core. For example, large scale and/or big box retail developments may compete with the small scale shops and boutiques operating within or nearby a commercial core.

Community Health and Environment

Bypassed communities can benefit from a reduction in traffic, noise and vehicle emissions. In addition, the existing safety issues associated with the presence of high speed, highway traffic in proximity to the study area's commercial cores can be greatly improved by streetscaping and widened sidewalks. As noted in the literature review, communities benefit from reduced traffic and improved safety for its tourist patrons and/or residents.

Community Economy

Communities with a strong economic base and/or those which serve regional markets were also noted to experience fewer negative economic affects. Based on the overview of communities completed as part of this BA, Collingwood was identified as the trade centre for the entire SGBR. The community provides a wide range of services, including big box retail stores, large automotive dealerships, regional hospital and a new college campus. In addition, Collingwood leads the SGBR in the manufacturing and tourist sector. As such, a bypass of this community is not anticipated to have a significant negative effect on its economy and/or the existing businesses along the Highway 26 corridor.

It should be noted that new and/or relocated highway commercial-type businesses may be attracted to a new bypass route. These developments may lead to spillover effects, such as local job creation and tax revenue increases for a given municipality.

Regional and/or national economic conditions are also key factors considered as part of a business' and/or a community's economy.

Based on the information reviewed, tourist-related businesses (i.e., art galleries and antique stores) attract visitors to a community. These types of businesses are considered to be a destination in themselves and are less likely to be negatively affected, provided that proactive signage strategies are implemented

It was noted in the ED Plan that proximity to water creates an attraction for tourists to the study area. As per the survey completed by the GTTA, prospective visitors to the SGBR reportedly indicated that water was a key feature for the SGBR and waterfront dining was a sought after experience for respondents. The commercial cores of the lakeshore communities of Meaford, Thornbury and Collingwood are situated along, or are in close proximity to, the Highway 26 corridor. The characteristic restaurants, pubs and shops that occupy these waterfront communities would likely maintain or increase their appeal in this regard. Attractive harbours are also situated within these communities, each of which appeals to cottagers, boating tourists or residents of the SGBR. Similar to the Huntsville experience discussed in Section 5.2, bypasses of the Thornbury and Collingwood communities may result in positive economic effects due to reduced traffic within, and/or adjacent to, their commercial core areas. Commercial core areas comprising a strong, existing identity for tourists and local patrons are most likely to be strengthened given a reduction in traffic delays through their respective commercial cores.

In addition, new development can act as a catalyst to extend municipal services to the presently non-serviced communities in the study area (i.e., Clarksburg and portions of Clearview). This presents an opportunity for community expansion and other business development, thereby potentially increasing the economic opportunities.

6.3 Potential Mitigation Measures

The economic effects of bypass development on businesses have the potential to be mitigated through the provision of signage, lighting, interchange landscaping and tourist information centres. As noted as part of the literature review, signage directing traffic to bypassed commercial core areas is important to its success following the construction of a bypass. Such signage can highlight attractions available in their respective communities and guide traffic accordingly. The balance of mitigation efforts can be implemented to maintain attractiveness to community businesses.

A proactive economic development department and/or community council, in addition to increased signage on a new route indicating the variety of shops and services of the bypassed town, was proven to lower the adverse short term economic effects based on six of the case studies reviewed.

In addition, streetscaping, improved sidewalks and parking facilities can create and/or improve the character of bypassed commercial areas, and provide a pedestrian-friendly environment for respective patrons. These opportunities to create an attractive environment to tourists and residents are provided once existing traffic congestion has been diverted by a proposed bypass.

7. Existing Businesses

As part of the desktop review of existing conditions, AECOM determined the number of businesses within each community along the existing Highway 26 corridor that would appear to be dependent on pass-through traffic and have the potential to be affected by the development of a new highway bypass. Based on the findings noted in the literature review, these types of businesses include the following:

- Gas stations and/or repair facilities
- Accommodation facilities
- Convenience stores
- Restaurants.

The results of this analysis are summarized in **Table 1**:

Table 1: Existing Businesses

| | Stayner | Collingwood | Craigleith | Thornbury | Total/ Average |
|--|---------|-------------|------------|-----------|-------------------|
| Number of Pass-Through/Highway Dependent Businesses | 20 | 43 | 6 | 8 | 77 |
| Total Number of Businesses | 94 | 208 | 14 | 44 | 360 |
| Percentage of Highway Dependent Businesses | 21% | 21% | 43% | 18% | 21% |

It should be noted that at the time of the analysis, many of the businesses assumed to be depended on pass-through traffic also appeared to rely on local patrons given their setting and/or other characteristics (i.e., proximity to tourist attractions and/or commercial cores, etc.). As such, the percentage of businesses solely dependent on pass-through traffic, and potentially affected by the construction of a bypass, is anticipated to be considerably less than represented in Table 1 (i.e., 21% in the study area) in the communities of Stayner, Collingwood and Thornbury. However, given the setting and characteristics of the Craigleith commercial area, the results are assumed to be generally accurate.

8. Evaluation of Proposed Alternatives

A Transportation Model was created for the study area to predict traffic volumes along the existing corridors in association with each of the alternatives as part of the Transportation Study. The results of the transportation modelling data were based on travel, population and employment growth forecasts for the study area. These data provide preliminary travel forecasts for the 2031 horizon year at key locations within the study area and were utilized to support the evaluation of the proposed alternatives in association with potential effects on business operations within the study area.

In addition, the evaluation of the proposed alternatives considered the overall existing conditions within each community, as well as lessons learned, as described in Section 6. BA

8.1 Alternative 3-1: Widen Existing Highway 26 Corridor

Description

This proposed alternative consists of the widening of the existing Highway 26 throughout most of the study area, while tying into the new Highway 26 Bypass that is currently under construction between the Town of Collingwood and Wasaga Beach community. Intersection improvements at Highway 26/First Street and at Highway 26/Pretty River Parkway are also included as part of these proposed improvements. In addition, dual left and right turn lanes could be provided along Highway 26, at First Street and at High Street.

Evaluation

While no new development (i.e., a bypass) is proposed as part of this alternative, the existing corridor would be widened as part of the improvements. The commercial cores of the communities of Collingwood, Stayner and Thornbury are traversed by, or located adjacent to, the existing Highway 26 corridor.

Based on the traffic modeling results, the proposed alternative would increase traffic in Collingwood along the improved Highway 26 corridor by 5%. This increase is anticipated to advance the existing congestion within the commercial core, and potentially deter visits from pass-through patrons. In addition, increased congestion may make access to uncontrolled business entrances more difficult for patrons.

Historical commercial buildings servicing the commercial core of Stayner are situated in close proximity to the existing corridor. As noted in the Town of The Blue Mountains OP, consideration to maintaining the historical character of the commercial core where new development is concerned is of particular importance to the community and/or the community. Given the proximity of buildings within the commercial core to the existing Highway 26 corridor, the proposed improvements would likely displace a number of the tourist-related retail operations. In addition, based on the results of traffic modeling completed for the study area, widening the existing Highway 26 corridor through Stayner would increase traffic by 103%. This value would significantly increase congestion within the commercial core.

Some businesses that rely on access to Highway 26 in Thornbury, and in the vicinity of the Bruce Street commercial core, were also noted to be in close proximity to the existing Highway 26 corridor. Traffic modeling results indicate that traffic through Thornbury along the improved Highway 26 corridor would increase by approximately 22%. Similar to Collingwood and Stayner, this increase may deter visits from pass-through patrons and/or visits from tourists.

While widening the existing corridor may create the opportunity to improve the appearance of the Thornbury 'commercial strip', the potential to displace key businesses (i.e., Cidery) is also present. In addition, the increase in traffic further reduces the ability to improve the pedestrian-friendly environment currently sought after as per the Town of The Blue Mountains OP.

In general, overall negative effects on businesses within the balance of the proposed improvement areas are not anticipated as part of this alternative, with the exception of Craigeith, where opportunities for increased commercial

development along Highway 26 within this portion of the study area are restricted by existing recreational and residential land uses and protected natural features. In addition, traffic modeling results indicate that capacity along this portion of the existing corridor would be further improved. As such, negative affects to pass through dependent businesses within this portion of the study area are anticipated in association with this proposed alternative. Based on the results of the existing business tally, Craigeleith comprises the highest percentage of pass-through traffic dependent businesses.

8.2 Alternative 3-2: Widen Highway 26 and Improve Local Roadways

Description

This proposed alternative consists of the widening of portions of the existing Highway 26 corridor, and the new Highway 26 Bypass that is currently under construction between the Collingwood and Wasaga Beach communities. Intersection improvements at Highway 26/First Street and Highway 26/Pretty River Parkway could also be included as part of these proposed improvements.

Improvements to segments of the existing local and/or regional road network would be completed to develop these roadways up to provincial roadway standards. As such, traffic would be redirected around the communities of Stayner, Collingwood and Thornbury. Road improvements to redirect traffic around Stayner consist of improvements to the existing County Road 7 and Nottawasaga Sideroad 27/28. Improvements to the existing Poplar Sideroad, Osler Bluff Road/Grey Road 21 and Grey Road 19 would be completed to act as a bypass of Collingwood, and improvements to Grey Road 33 and Grey Road 33 (West Street) would be completed to bypass Thornbury.

Evaluation

The 'commercial strip' type businesses dependent on pass-through traffic on the Highway 26 corridor (i.e., gas stations), may be the most heavily effected operations given the construction of a bypass. However, according to the results of traffic modelling, vehicle travel along the existing Highway 26 corridor through Thornbury would likely still increase by 2% in 2031. In addition, the many of the businesses located along this portion of the Highway 26 corridor appear to provide services for the local community (i.e., medical offices, grocery store, hair salon, clothing store, etc.). As such, effects to these businesses are anticipated to be temporary in nature.

A portion of the commercial core of Clarksburg is traversed by Regional Road 33 (i.e., Clark Street). However, a potential opportunity to improve the commercial core exists where these improvements are imposed. As noted in the CIP, the streetscape quality of Clark Street (Regional Road 33) and the commercial core (Marsh Street) was recommended for improvement. In addition, it is understood that municipal services do not currently extend to the community. The proposed improvements can create an opportunity to implement these improvements at the time of the construction activities. While improvements to Marsh Street (Regional Road 13) are not included as part of this alternative, it is recognized as the primary service route servicing the community's commercial core. An increase in traffic through the community as a result of the improvements may also expedite streetscaping and building improvement initiatives for Marsh Street, as prescribed by the CIP.

This alternative would bypass Collingwood; however, intersection improvements and widening of the existing corridor within the east portion of Collingwood will connect to the new bypass construction (i.e., between Wasaga Beach and Collingwood). Based on the results of traffic modeling, it is anticipated that vehicle travel through Collingwood along the existing Highway 26 corridor may decrease by approximately 13%, however most of these trips are expected to be local in nature. As per the ED Plan and other relative information reviewed as part of this BA, Collingwood is the commercial and service centre for the SGBR. This is attributed to the wide range of businesses and services available throughout Collingwood (i.e., health care, manufacturing, education, etc.). In addition, Collingwood is centrally located between the many tourist attractions within the EGBR.

The existing Highway 26 corridor provides direct access to Hurontario Street in Collingwood (i.e., the commercial core). However, access to the commercial core would also be enhanced through the proposed improvements to Poplar Side Road and the existing Highway 26 via the New Highway 26 Bypass that is currently being constructed

between the community of Wasaga Beach and the east portion of Collingwood. In addition, reduced traffic would lessen conflicts between traffic and pedestrians, improving safety in the vicinity of the existing Highway 26. The commercial highway-type uses (i.e., gas stations, restaurants, etc.) that are dependent on pass-through traffic may be affected by the proposed introduction of a bypass. However, any negative effects are anticipated to be temporary in nature given the range of businesses, services and attractions available within Collingwood that are anticipated to maintain patron visits to these types of businesses.

Collingwood is identified as a destination given its range of businesses, services, characteristic commercial core, employment, etc. Results from the travel survey undertaken as part of the Transportation Study also demonstrate that Collingwood is a regional centre and destination for trips. As such, similar to Thornbury, it is inferred that the community comprises a strong, existing identity for tourists and local patrons. As per the lessons learned as part of the literature review, tourist-related businesses within these types of communities generally benefit from reduced traffic flow through the commercial core areas, provided that opportunities to take advantage of the reduction are implemented.

Improvements to Grey Road 19 would enhance access to the Village at Blue Mountains and associated commercial core. However, improving Grey Road 19 to a highway environment may significantly detract from the recreational resort community atmosphere that this area currently enjoys.

As discussed above, the businesses dependent on the Highway 26 corridor within Craigleith (i.e., gas station, motel and convenience store) will likely be affected by this alternative. As noted in the CIP, businesses within this portion of the study area currently lack appeal to pass-through traffic. However, the specialty stores are anticipated to be less effected. Opportunities for increased commercial development along Highway 26 within Craigleith are restricted by existing recreational and residential land uses and protected natural features. In addition, the residential and/or cottage properties reliant on direct access to the Highway 26 corridor in this portion of the study area are likely to benefit from the decrease in pass-through traffic (i.e., improved safety, noise reduction, etc.).

As discussed in Section 1.4, the commercial core of Stayner is directly serviced by the existing Highway 26 corridor. Policy direction outlined in Clearview's OP outlines the municipality's intent to preserve the "*historical, small-town character*" within the commercial core of Stayner. It is further noted in the Clearview OP that consideration would be given by the municipality to designate the commercial core area as a designated Heritage District as per the Ontario Heritage Act. A bypass of this community would provide an opportunity for streetscaping (i.e., improved sidewalks, trees, etc.) and enhance safety for its residents and visitors. Based on the information reviewed as part of the BA, Stayner appears to comprise a strong commercial core surrounded by a well established agricultural community.

In the base case condition, the improvements to Nottawasaga Side Road 27/28 that were recently completed by the municipality would begin to attract local traffic to divert around Stayner due to congestion within the community. Through enhanced signage of this alternative and additional upgrades to County Road 7, a further 1%-2% reduction in travel through the urban area is expected. As such, it is inferred that the existing highway commercial businesses dependent on access to/from the Highway 26 corridor are not likely to be adversely effected as a result of the proposed alternative.

Based on the traffic modelling results, an improved capacity along the existing Highway 26 corridor would be realized within Craigleith. Businesses would likely experience reduced traffic and/or patron visits within this portion of the study area as a result of this alternative.

8.3 Alternative 3-3: Widen Highway 26 and Local Roadway Bypasses

Description

As part of this proposed alternative, improvements to the existing Poplar Sideroad/Grey Road 19 and Grey Road 2 would be developed to create a bypass of Collingwood, Village at Blue Mountains and Craigleith. The balance of the improvements are similar to those indicated for Alternative 3-2, from Poplar Sideroad, easterly. Improvements to Grey Road 33 and West Street to direct traffic around Thornbury, however traverse the village of Clarksburg.

Evaluation

Based on the traffic modelling results, it is assumed that the potential negative effects to businesses within Thornbury, Clarksburg and Stayner would be similar to those discussed in association with Alternative 3-2. However, the Village at Blue Mountains would be bypassed to the south as part of this proposed alternative. As discussed in Section 1.2.1, this community is not currently traversed by the existing Highway 26 corridor. Access to this growing community is further provided by Grey Road 19 and/or Osler Bluff Road. In addition, the OP describes the commercial core servicing the Village at Blue Mountains as designed for pedestrian use. As such, businesses within the Village at Blue Mountains community would not likely be negatively affected by the proposed alternative.

It is recognized that the proposed alternative further bypasses the western extent of Collingwood. However, based on the results of the traffic modelling, traffic along the existing Highway 26 corridor in Collingwood is anticipated to decrease by approximately 12% (i.e., 1% less than that calculated for Alternative 3-2). As such, the potential effects on businesses within this portion of the study area are anticipated to be similar to those discussed as part of the evaluation of Alternative 3-1.

The traffic modelling results further indicated an improvement in capacity along the existing Highway 26 corridor within Craigeleith. These businesses in this portion of the study area would likely realize reduced visits from patrons as a result of this alternative.

8.4 Alternative 4-1: Widen Highway 26 and Highway Bypasses

Description

This proposed alternative comprises three sub alternatives (i.e., 4-1, 4-1A and 4-1B) that introduce new provincial highway facilities to bypass the Stayner community, Collingwood and Thornbury. In addition, this alternative consists of the widening of the existing Highway 26 corridor to the east of Stayner, easterly to Sunnidale, and between Collingwood and Thornbury. The new facilities associated with Alternatives 4-1 and 4-1A bypass the community of Stayner to the north; however Alternative 4-1 is aligned further south of Airport Road. Alternative 4-1B bypasses the community of Stayner to the south.

Evaluation

Similar to Alternatives 3-2 and 3-3, the 4-1 alternatives propose to traverse the community of Clarksburg. As such, the potential negative effects discussed in association with these proposed alternatives are anticipated to be similar for the community. However, a new corridor may introduce more restrictive policies which limit new entrances onto the roadway. In this case, a new corridor would be less desirable to businesses.

The results of the traffic modelling predicted a decrease in vehicle travel through the Thornbury commercial area. As such, highway commercial uses that are dependent on the existing Highway 26 corridor within this portion of the study area may be affected. However, these businesses were generally noted to service community members, as well as local residents (i.e., medical offices, grocery store, hair salon, clothing store, etc.). The commercial core of Thornbury is recognized as a tourist destination itself given many attractive features (i.e., Thornbury harbour, proximity to recreational features (water, Georgian Trail), historic buildings and characteristic downtown area comprising unique shops). As such, it is inferred that the community comprises a strong, existing identity for tourists and local patrons. As per the lessons learned as part of the literature review and experiences noted by the Town of Huntsville, tourist-related businesses within these types of communities can benefit from reduced traffic flow through the commercial core areas, improved streetscaping and strategies to take advantage of these opportunities.

Based on traffic modelling results, traffic reduction along the existing Highway 26 corridor within Collingwood would be ranges between approximately 29% and 33% in association with this alternative. As such, it is assumed that some of the commercial highway-type uses (i.e., gas stations, restaurants, etc.) may be slightly affected by the proposed construction of a bypass. However, as noted in Section 5.2, the range of businesses, services and attractions available within Collingwood are anticipated to maintain patron visits to these types of businesses.

The proximity of a highway bypass associated with Alternatives 4-1/4-1A in relation to Collingwood would likely limit effects associated with the expected reduction in pass-through traffic. Many of the existing roadways would provide a connection between the bypass and the commercial core, while minimizing out-of-way travel. Hurontario Street, High Street, County Road 32/Sixth Street and Mountain Road would all provide such connections. This combination of factors may result in a net positive benefit to Collingwood given that vehicle traffic through the commercial area is reduced, allowing new opportunities to enhance this area for pedestrians. However, the pass-through traffic would remain within easy access of the commercial core, enhancing the effectiveness of downtown signage strategies to direct motorists to services and reducing pressure for businesses to relocate out to the highway bypass.

The development of a new highway bypass of Stayner is anticipated to further reduce vehicle travel through the commercial core of Stayner, when compared to base conditions. As discussed in Section 5.4, improvements to the regional road system to the east and north of Stayner are anticipated to produce a similar outcome. As such, the difference between the alternatives which bypass the community of Stayner, and their relative negative effects on businesses along the existing Highway 26 corridor within Stayner are considered negligible.

There is potential for negative effects to businesses along the existing Highway 26 corridor in Craigeith may be realized in association with this alternative through the improved capacity expected based on the results of traffic modeling. In addition, opportunities for increased commercial development along Highway 26 within Craigeith are restricted by existing recreational and residential land uses and protected natural features.

8.5 Alternative 4-2: New Highway 26 Corridor

Description

As part of this proposed alternative, a new Highway 26 corridor would be constructed through the study area, from just east of Collingwood to west of Thornbury. This new corridor would connect to the new Highway 26 By-pass that is currently under construction between Collingwood and Wasaga Beach community, and continue as a northern bypass of the community of Stayner.

Evaluation

The results of the traffic modelling suggest that vehicle travel along the existing Highway 26 corridor through Stayner would be similar to vehicle travel projections discussed in association with Alternative 4-1. As such, the potential negative effects to businesses discussed as part of Alternative 4-1 are anticipated to be similar.

The results of the traffic modelling also indicate the greatest reduction in traffic along the existing Highway 26 corridor within Collingwood (i.e., 33%). Given the general proximity of this proposed bypass to Collingwood itself, and associated distance, negative effects to some pass-through dependent businesses along the existing Highway 26 corridor may be realized. While a new bypass route would provide some connectivity to Hurontario Street and High Street, it would also direct through traffic away from the existing service areas and may result in some pressure for highway-dependent businesses to relocate to be closer to, or adjacent to, the new highway bypass.

It was further anticipated that vehicle travel along the existing Highway 26 corridor through Thornbury would decrease by approximately 50%. As such, this alternative would likely result in the greatest affect to the highway commercial uses that are dependent on the existing Highway 26 corridor within this portion of the study area. As noted in Section 5.4, it is inferred that the community comprises a strong, existing identity for tourists and local patrons. Tourist-related businesses within these types of communities can benefit from reduced traffic flow through the commercial core areas, improved streetscaping and strategies to take advantage of these opportunities.

Businesses along the existing Highway 26 corridor within the community of Craigeith would likely realize the greatest negative effects in association with reduced traffic flow in this portion of the study area as a result of this alternative.

In addition, this alternative is noted to continue to bypass the community of Clarksburg. While this may limit the potential for new commercial development along the existing roads, opportunities to locate new highway service related businesses may arise due to the close proximity of the new corridor.

As discussed in Section 4.1, new and/or relocated highway commercial-type businesses may be lured to a new bypass route. These developments may lead to spillover effects, such as local job creation and tax revenue increases for a municipality.

8.6 Summary Evaluation

A summary of the potential business negative effects and opportunities within the communities of the study area are summarized in Table 2, below.

Table 2: Evaluation of Proposed Alternative Corridors Summary

Most Preferred → Least Preferred

| | Alternative 3-1 | Alternative 3-2 | Alternative 3-3 | Alternative 4-1, 4-1A and 4-1B | Alternative 4-2 |
|----------------------------------|-----------------|-----------------|-----------------|--------------------------------|-----------------|
| Thornbury | | | | | |
| Clarksburg | | | | | |
| Collingwood | | | | | |
| Craigeith | | | | | |
| Village at Blue Mountains | - | | - | - | - |
| Stayner | | | | | |
| SUMMARY | | | | | |

*Note: - denotes an assumed negligible effect on businesses within the community

9. References

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Appendix A

Community Business Impact Survey

Name of Respondent:

Municipality:

Title/Position:

- Question 1. Was congestion the motivation for constructing the bypass?
- Question 2. If so, do you feel the congestion was affecting the delivery of goods and services to your community? The willingness of patrons to visit area businesses?
- Question 3. Was the bypass supported by the community during the planning process?
- Question 4. What were the short term affects on businesses in the community at the time of construction activities and once the bypass was constructed?
- Question 5. Was the removal of any businesses required to accommodate the construction of the bypass?
- Question 6. How has the bypass affected traffic operations in the downtown area? The entire community?
- Question 7. What has been the impact on businesses in the downtown area? The entire community?
- Question 8. Have there been noticeable affects to particular types of businesses?
- Question 9. Have any businesses left the community to relocate in another?
- Question 10. How has land use in the community been affected by the bypass (including the bypass area)?
- Question 11. Has the general character of the community and/or downtown area changed? If so, how?
- Question 12. Have you received complaints from members of the community/businesses since construction of the bypass? If so, what were they?
- Question 13. Was there a noticeable change in travel to the community's tourist area(s)?
- Question 14. Is there any additional information you can provide?