

BURL'S CREEK EVENT GROUNDS

MARKET ANALYSIS, SIMCOE COUNTY, ONTARIO PREPARED FOR BURL'S CREEK EVENT GROUND INC.

November 25, 2015

November 25, 2015

Burl's Creek Event Ground Inc.
C/O Mr. Ryan Howes
180 Line 8 S
Oro-Medonte, Ontario
L0L 2X0

Dear Mr. Howes:

RE: Market Analysis, Simcoe County, Ontario

urbanMetrics inc. ("urbanMetrics") is pleased to submit this Market Analysis, prepared on behalf of Burl's Creek Event Ground Inc. ("Burl's Creek"), in support of Official Plan Amendment and Zoning By-law Amendment applications for lands located in the Township of Oro-Medonte and Simcoe County. The analysis and appendices contained herein provide an overview of the key site selection criteria and land requirements for the current/intended use of the subject lands, including large scale cultural events (e.g., music and arts festivals). Based on the various criteria and requirements identified, we have also undertaken a detailed site analysis that evaluates the suitability of comparable event venues throughout the Province of Ontario in terms of their ability to accommodate the specific types of cultural and festival activities planned for the subject site. Similarly, we have evaluated a number of potential alternative locations within Simcoe County; both in terms of each lower-tier municipality's general locational and land characteristics, as well as with respect to a number of specific sites/areas identified through our review.

The primary purpose of this analysis has been to evaluate the suitability of the Burl's Creek lands for their current/intended use, as well as to determine whether any reasonable alternative locations exist in Simcoe County and/or the broader Ontario market area. In particular, this study has been prepared to specifically address the market analysis requirements identified by municipal staff at the Township of Oro-Medonte and Simcoe County, including relevant policies of the 2014 Provincial Policy Statement relating to non-agricultural uses in prime agricultural areas (e.g., Policy 2.3.6.1 (b) 4). In addition to accompanying the Burl's Creek submission for a County/Township Official Plan Amendment and Township Zoning By-law Amendment, this study is also specifically required by the Ontario Ministry of Municipal Affairs and Housing (MMAH).

It has been a pleasure conducting this assignment on behalf of Burl's Creek Event Ground Inc. and we look forward to discussing our results with you in the days ahead.

Yours truly,
urbanMetrics inc.



Peter Thoma, MCIP, CIP, PLE
Partner



Christopher White, PLE
Associate Partner

Table of Contents

1	Introduction.....	1
1.1	Background.....	1
1.2	Purpose	1
1.3	Approach	2
2	Site Context.....	3
2.1	Site Characteristics.....	3
2.2	Site Accessibility	4
2.3	Surrounding Areas.....	4
2.4	Summary	5
3	Site Selection Criteria.....	6
3.1	Regional Site Requirements.....	6
3.2	Local/Site-Specific Requirements.....	7
3.3	Business/Operational Requirements	8
3.4	Summary	9
4	Competitive Site Analysis.....	10
4.1	Comparable Sites	11
4.2	Existing Site Comparison	11
4.3	Summary	14
5	Alternative Site Evaluation	15
5.1	Evaluation by Lower-Tier Municipality	15
5.2	Review of Active Real Estate Listings	21
5.3	Summary	22
6	Summary and Conclusions.....	23
	Appendix A – Existing Event Venue Profiles.....	25
	Appendix B – Other Sites in Simcoe County	29

LIST OF FIGURES

Figure 2-1: Subject Site Location	3
Figure 2-2: Simcoe County Transportation Network.....	4
Figure 4-1: Location of Comparable Festival/Event Venues in Southern Ontario	11
Figure 4-2: Basic Evaluation of Comparable Event Venues in Ontario	12
Figure 4-3: Site Characteristics Weighting.....	12
Figure 4-4: Detailed Evaluation of Comparable Event Venues in Ontario (Including Weighting).....	13
Figure 4-5: Comparable Venue Rankings.....	13
Figure A-1: Festival Venue Fact Sheets	25
Figure B-1: Summary of Signature Sites Identified by Simcoe County Economic Development	29
Figure B-2: Summary of Active Real Estate Listings in Simcoe County.....	29

1 Introduction

1.1 BACKGROUND

Burl's Creek currently owns a total of some 230.6 hectares (569.8 acres) of land located in the Township of Oro-Medonte within Simcoe County. These lands are used for a variety of ongoing and planned cultural events, including a number of prominent music and arts festivals, flea markets, farmers markets, camping, among various other sports and recreational activities.

In particular, the Burl's Creek lands recently served as the host site of the 2015 WayHome Music & Arts Festival ("WayHome") and Boots & Hearts Country Festival ("Boots & Hearts"), which took place in July and August of this year, respectively. Based on information obtained directly from Burl's Creek, these events attracted a total attendance of some 34,000 and 45,000 individuals¹ over approximate three and four-day periods, respectively, including on-site entertainment and accommodations.

Additional background information relating to the current and proposed land use planning policy framework and how it relates to the subject application has been provided in the accompanying Planning Justification Report prepared by Innovative Planning Solutions.

1.2 PURPOSE

This Market Analysis study has been identified by the Township of Oro-Medonte and Simcoe County as one of several supporting documents required in support of the submission of a County and Township Official Plan Amendment and Township Zoning By-law Amendment for the Burl's Creek lands. It is also specifically required by the Ontario Ministry of Municipal Affairs and Housing (MMAH).

Based on our discussions with municipal staff, the primary purpose of this study is to evaluate the suitability of the subject lands for their current/intended use, as well as to provide an assessment as to whether any alternative locations could reasonably support the specific types of cultural and festival activities planned for the site. In particular, this study has been prepared to address relevant policies of the 2014 Provincial Policy Statement relating to non-agricultural uses in prime agricultural areas. Section 2.3.6.1 (b) 4 of the Provincial Policy Statement stipulates that planning authorities may only permit limited non-residential/non-agricultural uses in prime agricultural areas, provided that—among other things—the following has been demonstrated:

- Alternative locations have been evaluated, and
 - i) There are no reasonable alternative locations which avoid prime agricultural areas; and,
 - ii) There are no reasonable alternative locations in prime agricultural areas with lower priority agricultural lands.

As detailed herein, our study includes an overview of the key site selection criteria and land requirements for the intended use of the subject lands, as well as detailed competitive/alternative site analysis at both the provincial and regional levels.

¹ Represents total attendance (paid and complementary) at the events, including guests, artists, staff and volunteers. The total paid attendance at these events has been estimated at some 31,200 and 43,300 persons for WayHome and Boots & Hearts, respectively, including some 29,000 and 38,600 tourist visitors that travelled more than 40 kilometres to the event grounds.

1.3 APPROACH

The following section describes the major work tasks that have been undertaken to carry out this market analysis. The work plan outlined below was developed by urbanMetrics based on direct consultations with planning staff at both the Township of Oro-Medonte and County of Simcoe to determine the general parameters and specific requirements for this study.

- **Site Evaluation**

We have reviewed the site in terms of its physical and location characteristics to assess its suitability for the types of cultural activities/events and festivals already taking place and planned at Burl's Creek. Our evaluation included an assessment of the site's access characteristics, location relative to other urban areas and amenities, physical size and layout, as well as surrounding land uses in this part of Oro-Medonte.

- **Site Selection Criteria**

Based on our discussions with the owners and operators of the subject lands, as well as other research undertaken by urbanMetrics staff, we have identified and reviewed a number of the key site selection criteria that were instrumental when identifying Burl's Creek as a viable location for large scale cultural events, including music and arts festivals. This review included the identification of regional site requirements (e.g., highway access, proximity to urban amenities, minimum population thresholds, etc.), as well as more site-specific characteristics and business/operational requirements (e.g., flat/level land, large open areas, soil characteristics, capacity for overnight accommodation/camping, etc.).

- **Competitive Site Analysis**

As a benchmarking exercise, we have identified and evaluated a number of comparable event grounds across Ontario that host large music and arts festivals, similar to those on the Burl's Creek lands. In combination with the criteria and specific land requirements identified in the previous work step, we have undertaken a detailed site analysis which compares the relative qualities and characteristics of each venue in terms of their ability to accommodate the type of unique multi-day cultural events and festivals planned on the subject site.

- **Alternative Site Evaluation**

In addition to our review of existing comparable event venues in Ontario, we have also evaluated other potential alternative sites within Simcoe County. This evaluation generally focused on: (a) a list of select sites identified by Simcoe County's Economic Development department for businesses seeking locations; (b) available vacant lands within Simcoe County, based on active real estate listings; and, (c) the general locational and land characteristics of each of the lower-tier municipalities within Simcoe County. In particular, we relied on the key criteria identified in the previous work steps, to assess the suitability of these alternative sites/areas.

- **Summary and Conclusions**

Based on the various research and analyses outlined above, we have summarized our key findings and conclusions with respect to the suitability of the Burl's Creek lands for their intended use. We have also provided our professional opinion as to whether any reasonable alternative locations exist within Simcoe County—or elsewhere in Ontario—that could accommodate the specific types of events and activities planned at Burl's Creek.

2 Site Context

In order to evaluate the suitability of the site for the specific types of cultural events and festivals planned for the Burl's Creek lands, we have examined the subject property in terms of its location, size and configuration, accessibility characteristics, as well as its relationship with surrounding land uses. The following subsections provide an overview of our research findings.

2.1 SITE CHARACTERISTICS

The subject site is located on the south side of Highway 11, extending between Line 7 South and Line 9 South in the Township of Oro-Medonte. The subject site occupies a total of some 230.6 hectares (569.8 acres) and is generally bounded by Highway 11 to the north, agricultural land to the south, Line 9 South to the east and Line 7 South to the west. Currently, Burl's Creek is operating as the host site of a variety of major cultural events and festivals of varying scales, including both the WayHome and Boots & Hearts festivals. The figure below illustrates the location of the site in the Township of Oro-Medonte.

Figure 2-1: Subject Site Location



SOURCE: urbanMetrics inc., based on information provided by Innovative Planning Solutions.

There are a range of existing uses and facilities on the site, including a Recreational Event Park with a private road system and camping areas, a motorsports race track, a commercial area at the southwest corner of Line 8 and Highway 11, agricultural uses, forested areas and natural heritage features. The site is generally flat and contains large open areas (i.e. grass fields).

Highway 400 is located approximately 14 kilometres south-west of the site, via Highway 11. Downtown Barrie is approximately 20 kilometres to the southwest, while the major metropolitan area of Toronto is less than 100 kilometres away, accessible by continuing further south on Highway 400.

2.2 SITE ACCESSIBILITY

Situated between a Provincial Highway (Highway 11) and a Secondary Arterial Road (Ridge Road), the subject site is ideally located to facilitate large volumes of visitors. Accessible via Lines 7, 8 and 9 South, Highway 11 provides access to the City of Orillia to the northeast and the City of Barrie to the southwest, as well as a direct connection to Highway 400. Ridge Road provides an alternate connection to the City of Barrie, leading directly to the downtown area. Figure 2-2 illustrates the major street network in the area of Burl's Creek, based on Schedule 5.5.1 of the Simcoe County Official Plan. The figure below also illustrates the subject site's proximity to Lake Simcoe Regional Airport, which is located to the immediate north-west of the Burl's Creek grounds.

Figure 2-2: Simcoe County Transportation Network



SOURCE: urbanMetrics inc., based on Schedule 5.5.1 – County Transportation Systems – Simcoe County Official Plan, 2015.

2.3 SURROUNDING AREAS

Based on our review and assessment of the areas surrounding the Burl's Creek site, the following provides an overview of the major land uses to the immediate north, south, east and west, respectively.

- **To the north** –to the immediate north of Burl's Creek is a section of Highway 11 that contains a variety of existing commercial uses, including gas stations, restaurants and other retail and service type commercial facilities. This portion of Highway 11 is primarily surrounded by a combination of agricultural lands, heavily forested areas, and other natural areas. Lands further north of Highway 11 and centred on Line 7 South include a number of parcels specifically designated for employment purposes, including the airport and other nearby industrial properties.
- **To the south** – the area to the immediate south of Burl's Creek is primarily agricultural lands with some rural residential lands, as well as forested areas. Also located in this area is Oro Station,

which includes a variety of residential uses and supporting retail/service commercial and community type uses (e.g., general store, place of worship).

- **To the east** – the area to the immediate east of Burl’s Creek is primarily comprised by agricultural and other naturally forested lands, plus the north-eastward extension of Highway 11 that includes a number of additional retail/service commercial and employment uses.
- **To the west** – the area to the immediate west of Burl’s Creek includes the Township of Oro-Medonte offices and a place of worship surrounded by agricultural uses and environmental protection lands.

2.4 SUMMARY

As outlined in this section, the subject site benefits from a number of specific locational and land characteristics that make it an ideal location for its intended/current use as a venue for major cultural events and festivals. In particular, the subject site is characterized by the following key attributes:

- Large site area;
- Flat, open areas;
- Direct access to major highway;
- Proximity to 400-series provincial highway system;
- Multiple vehicular and pedestrian access points;
- Proximity to regional airport;
- Proximity to other nearby urban centres and amenities;
- Proximity to major urban population (Greater Golden Horseshoe Region); and,
- Centrally located to access broader Ontario population to the east/west/north.

The following sections provide a more detailed overview of the specific site characteristics that are most important in identifying and selecting an appropriate location for major cultural events, with a particular focus on multi-day, over-night music and arts festivals similar to those already taking place on the Burl’s Creek lands.

3 Site Selection Criteria

This section provides a summary of the basic land requirements and other key site selection criteria typically considered when identifying a potential location for large scale music and arts festivals, including those currently taking place on the subject site (e.g., WayHome, Boots & Hearts). The information contained in this section is based primarily on our discussions with a number of individuals directly involved in the planning, operation and management of these events, consultations with municipal staff, as well as our own professional experience with business site selection.

For simplicity, we have subdivided the identified criteria into three main categories: (i) regional factors considered when selecting the general area of the Province on which to focus; (ii) local/site-specific factors used to narrow the search to a specific site/area; and, (iii) business/operational requirements used to further refine and identify individual sites/areas capable of meeting all the needs of a large music and arts festival, among other cultural events.

3.1 REGIONAL SITE REQUIREMENTS

- **Access to Major Highways** – Recognizing the large number of visitors/attendees at these events, it is critical from a traffic and accessibility perspective that the site be located with direct access to major highways. In particular, it is critical for the site to have direct highway access and at least be located in proximity to a 400-series provincial highway, which offers direct connections among/between the various major population centres in the surrounding market area (i.e., Ontario).
- **Access to Airport** – In addition to road/highway access, it is beneficial for the site to be located near a regional and/or international airport, so as to facilitate the arrival/departure of individuals directly involved with the events (e.g., performers, management, technical crew, etc.).
- **Proximity to Major Urban Area(s)** – In order for large scale music and arts festivals to be successful, they must be located within a reasonable travelling distance of a large urban population. In particular, it is critical for this type of event to be accessible to the core Greater Toronto Area and Hamilton (GTAH) market, which accounts for a significant portion of the Ontario population and is concentrated within a relatively small geographic area.
- **Centrally Located to Access Secondary Markets** – In addition to direct access to the primary GTAH market, it is important for festival sites to provide good access to other secondary urban and rural markets, including those located beyond Southern Ontario. In particular, it is beneficial for the site to be centrally located to the various other major urban population centres in Ontario (e.g., London, Kitchener-Waterloo, Barrie-Orillia, Kingston, Ottawa, etc.), as well to the significant number of other smaller settlement areas and rural residential population that is more broadly dispersed throughout Eastern, Western and Northern Ontario.
- **Proximity to Urban Amenities** – Recognizing that multi-day festivals are typically located beyond urban settlement areas, it is important for the site to be located near urban areas of sufficient size to provide a range of necessary amenities to event visitors/attendees, including accommodations (e.g., hotels/motels), taxi services, food services (e.g., “fast” food and full-service restaurants), among other retail and service-related facilities.
- **Avoid Natural Heritage Restrictions** – A significant portion of the land in the Province of Ontario is protected for its natural heritage features, including plans for the Greenbelt and the Oak Ridges Moraine, as well as various other designated federal, provincial and sub-provincial parks and

conservation areas. To a large extent, these natural areas limit and/or significantly restrict the number of large, non-urban sites available to host music and arts festivals, among other cultural events.

3.2 LOCAL/SITE-SPECIFIC REQUIREMENTS

- **Large Land Area** – One of the most important site characteristics for holding a large multi-day music and arts festival is land area. In particular, these types of events typically require a large site equal to or greater than a minimum threshold of 200 acres (81 hectares), which provides sufficient capacity to accommodate thousands of visitors/attendees, as well as any other related entertainment facilities (e.g., stages/viewing areas, space for art installations, washrooms areas, food vendors, security/emergency areas, etc.). In our opinion, however, this represents a relatively conservative estimate, as many larger events—including those currently being hosted at the Burl’s Creek site—ultimately require significantly larger sites to accommodate upwards of 40,000 visitors. For example, the former site of the Boots & Hearts festival (i.e., Motorsport Park) does not have sufficient usable land area to accommodate the current attendance at this event.
- **Capacity for Overnight Accommodations and Parking** – In addition to accommodating large volumes of people, multi-day festivals are unique in that they have additional land area requirements for overnight camping and parking. In addition to providing opportunities for new/different experiences with overnight events, this also helps to improve safety and reduce the prevalence of intoxicated driving.
- **Flat/Level and Open Land** – Based on the types of entertainment activities involved at music and arts festivals, it is ideal for the lands to be as flat as possible, without any major changes in elevation or terrain. It is also necessary for the lands to be open, so as to reduce the need for major clear-cutting of trees and other vegetation. This type of open and flat land also provides the added benefit of a “blank canvas” scenario, creating as much flexibility as possible for organizing and carrying out the events. Moreover, we note that flat land is also required for a variety of other recreational activities that regularly occur on event grounds, including field/sporting activities, camping, and farmers’/flea markets.
- **Located Outside of Settlement Area** – Recognizing the large number of visitors/attendees at these events, as well as the sheer volume of land required (as described above), multi-day music and arts festivals are typically located at the periphery or well beyond urban settlement areas. This also helps to—at least in part—mitigate and reduce any impacts generated by the events in terms of traffic congestion, noise levels, and other effects inherent to this type of event.
- **Existing Permissions/Precedent for Comparable Events** – Similar to any other type of business, it is advantageous if there are at least some existing permission in place and/or precedent for similar activities on the site. In the case of Burl’s Creek, for example, the site had already been set up as an event facility and had previously hosted numerous concerts and other cultural gatherings in the past.
- **Strong Soil Characteristics** – It is equally important for both single-day and multi-day festivals to be located on lands with strong soil characteristics, so as to reduce the amount of damage caused to the grounds by heavy traffic and other related equipment/facilities (i.e., natural “wear and tear” inherent to these types of events). In particular, quality soil and ground characteristics can help increase the speed at which the grounds “recover” from a major event and can ultimately be prepared for subsequent programming/activities.
- **No Requirement for On-site Shuttling Services** – In addition to the general accessibility of the site from a regional perspective, the physical access characteristics of the site are also important

in terms of how the lands interface with surrounding properties, nearby roadways, and neighbouring urban areas. In particular, it is preferred when the lands do not contain any major physical barriers that would require on-site shuttling services for event attendees.

3.3 BUSINESS/OPERATIONAL REQUIREMENTS

- Private Land Ownership** – Although many large music and arts festivals take place on public lands and/or other temporary event grounds, there are several important benefits associated with owning the site from a business and operating perspective. In particular, direct ownership of the event grounds allows for greater flexibility in scheduling/programming in order to coordinate with other local and potentially competitive or complementary events. Similarly, direct site ownership provides a degree of continuity and stability that otherwise cannot be achieved through temporary or casual agreements with third party property interests. This stability and opportunity to improve on previous event experiences generally results in a more efficient operation overall, and can directly contribute to improved public safety, traffic reduction, among other similar benefits.
- Precedent for Similar Festivals in Regional Market Area** – With respect to the Burl's Creek lands specifically, there is an established precedent for similar large scale music and arts festivals taking place in this part of the Province (e.g., concerts at the former Molson Park in Barrie). These previous events provide a level of certainty that event attendees from the GTA and other parts of the surrounding market area are willing to travel to this location for comparable entertainment activities. Testing a new market area where this precedent has not already been established would introduce at least some amount of additional risk and uncertainty from a business perspective.
- Land Cost and Affordability** – As is the case with many business activities, including the operation of large music and arts festivals, land costs represent a major factor that can significantly influence decisions relating to location and site selection. With respect to multi-day, over-night festivals such as those held at Burl's Creek, the main objective is to achieve an appropriate balance between keeping land costs as low as possible while also maintaining direct access/proximity to a significant urban residential population (i.e., where land costs are typically higher).

In addition to the benefits associated with lower land costs for the event operator, affordability can also play a significant role in the decisions made by patrons of the events. For example, the relative cost of hotels/accommodations, food services, taxis and other nearby amenities are often lower in more rural and/or smaller communities (i.e., relative to major urban centres, such as Toronto and other municipalities in the GTA), thereby providing an added benefit or incentive for event attendees.

- Willingness of Host Municipality/Governments** – Another major factor in identifying potential sites for many businesses is an “open for business” attitude (or lack thereof) from the host municipality and other local authorities. In particular, it is beneficial if local governments are willing to assist and accommodate businesses—where possible—including streamlining government processes (e.g., approvals, etc.), contributing towards marketing/promotions/awareness of businesses, as well as generally maintaining an open relationship and receptive attitude towards local businesses.
- Capacity for Future Growth** – It is important for major event sites to be evaluated for their long-term viability, particularly as it relates to providing the necessary capacity to accommodate future expansion/growth, if needed. Moreover, regardless of whether there is a need for growth, it can also be expensive, time-consuming and risky to relocate a business, so it is often desirable to

establish a certain level of stability and continuity by ensuring that a given site will meet both the current and potential future needs of the event operator.

- **Unique/Differentiated Event Experience** – Given the significant number of major music and arts events/festivals now taking place each year in the Ontario and broader North American market areas, it is increasingly important for events to offer a unique and somehow differentiated experience for attendees. One way to achieve this competitive advantage is to host the event(s) at an interesting or distinct location (e.g., urban vs. rural, previously unknown part of the Province, unique site-specific features or characteristics, etc.).

3.4 SUMMARY

Based on the various requirements and factors outlined above, it is evident that the site selection process for large scale, multi-day music and arts festivals are limited to a large extent by a very specific set of criteria that is unique to this industry. As such, the number of suitable and/or available sites that satisfy all of these criterion at any given time are extremely rare.

The following sections provide a more detailed evaluation as to the merits of a number of existing event venues across the Province of Ontario, as well as possible alternative locations throughout Simcoe County.

4 Competitive Site Analysis

The following section includes a detailed analysis of a number of prominent event venues across Ontario that regularly host major music and arts festivals/events of similar magnitude to those on the Burl's Creek lands (e.g., WayHome, Boots & Hearts). In particular, we have evaluated each of the identified event venues based on a selection of several of the most important site selection criterion introduced in the previous section, in order to identify the most suitable sites for hosting large, multi-day music and arts festivals.

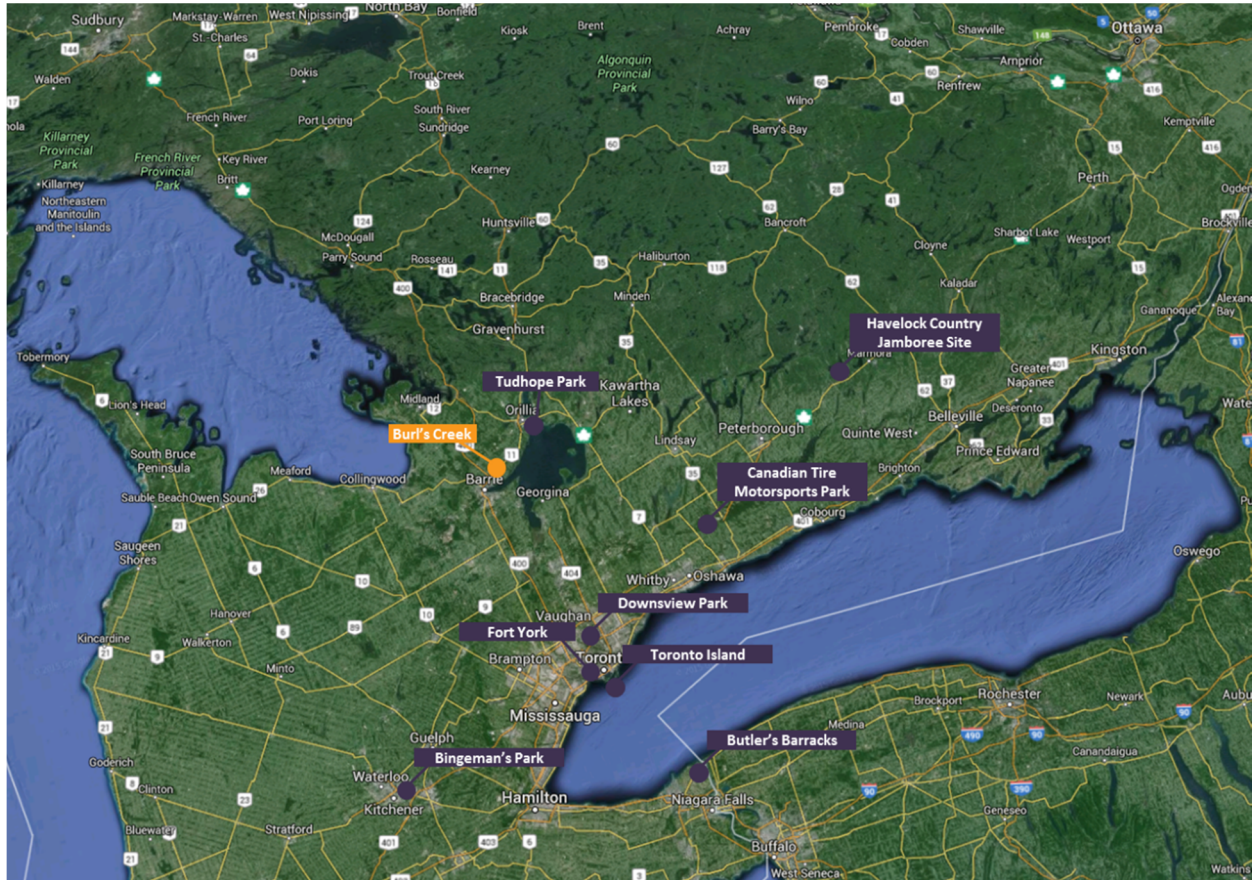
For the purposes of this analysis, we have focused on the following ten (10) criterion, which have generally been defined as follows:

- **Central to GTA Population** – Site located in proximity to the core GTA population (e.g., within approximate two-hour drive, on average), as well as central to both the eastern and western edges of the region.
- **Ontario Wide Audience Access** – Site centrally located within the Province of Ontario to serve equally as a gateway to both the GTA population, secondary urban markets, as well as residents of smaller communities and rural areas throughout Northern Ontario and to the east/west.
- **Site Area Greater than 200 Acres** – Site offering large, open land areas suitable for use as an event venue that is equal to or greater than a minimum threshold of 200 acres (81 hectares).
- **On-Site Accommodation Potential** – Site with an ability to support over-night visitors/attendees versus single-day music and arts festivals (i.e., subject to private/public ownership of the site, total land area, capacity for camping/parking facilities, existing permissions, etc.).
- **Access to 400 Series Highways** – Site with direct access or in direct proximity to a major 400-series provincial highway (e.g., within approximate 10-15 minute drive, if not less).
- **Multiple Access Points** – Site offering more than a single point of access, so as to facilitate the arrival/departure of event attendees, staff, performers, and other individuals directly involved with the events.
- **Proximity to Urban Amenities** – Site located in proximity and/or peripheral to urban settlement areas offering a range of required amenities, including but not necessarily limited to: hotels/accommodations, food services, and taxi services.
- **Long-Term Viability as Event Venue** – Site with sufficient capacity and land availability to accommodate events on an ongoing (annual) basis over the long-term planning horizon (i.e., subject to market conditions and local development interests, etc.).
- **Privately Owned** – Site that is privately owned, offering benefits related to flexible event scheduling and continuity. Excludes event venues located in public parks (e.g., Downsview Park, Fort York, Butler's Barracks, Toronto Islands, etc.).
- **Pre-existing Permissions for Large Cultural Events** – Site with at least some amount of permissions in place and/or precedent for holding similar large scale music and arts festivals.

4.1 COMPARABLE SITES

In addition to Burl's Creek, there are only a handful of venues in Southern Ontario with the proven ability to host large-scale music and arts festivals, both in single and multi-day formats. These venues include a variety of both public and privately owned lands, as identified in Figure 4-1. Detailed profiles of each venue have been provided in the Appendix at the end of this document, including site characteristics relating to location, venue type, ownership, size, accommodations and a sample of past events.

Figure 4-1: Location of Comparable Festival/Event Venues in Southern Ontario



SOURCE: urbanMetrics inc., based on Google Maps.

4.2 EXISTING SITE COMPARISON

Based on the various site selection criterion and land requirements identified in Section 3 of this report—which were developed through an in-depth interview process with the Burl's Creek management team and other independent research into the music and arts festival industry—we have identified ten (10) of the most important site characteristics for supporting a successful and sustainable event of this nature and scale (i.e., comparable to WayHome or Boots & Hearts). These characteristics were identified earlier in this report and have already been defined accordingly.

Figure 4-2 provides a summary of our evaluation as to which of the existing venues satisfy each of the identified criterion. For the purposes of this preliminary analysis, we have evaluated each venue on a simple “pass” or “fail” basis.

As shown, all of the event venues have their own strengths and weaknesses, each satisfying a unique range of criteria. For example, although most sites have at least some existing permissions for large scale cultural/entertainment events and offer a reasonable amount of certainty with respect to their viability as an event venue over the long-term, the number of sites that are both centrally located to the GTAH population and provide access to other market areas throughout the province are relatively limited. Similarly, few sites provide a usable land area greater than 200 acres. By comparison, Burl’s Creek satisfies all of the key criteria identified, confirming that it is indeed one of the most appropriate locations in Ontario for these types of events.

Figure 4-2: Basic Evaluation of Comparable Event Venues in Ontario

Site Characteristics	Burl’s Creek	Canadian Tire Motorsports Park	Havelock Country Jamboree Site	Bingemans Park	Tudhope Park	Butler’s Barracks	Fort York	Toronto Island (Hanlans Point)	Downsview Park
Central to GTA Population	✓	✗	✗	✗	✓	✗	✓	✓	✓
Ontario Wide Audience Access	✓	✗	✗	✗	✓	✗	✗	✗	✗
Site Area Greater than 200 Acres	✓	✓	✓	✗	✗	✗	✗	✗	✗
On-site Accommodation Potential	✓	✓	✓	✓	✓	✗	✗	✗	✗
Access to 400 Series Highway	✓	✓	✗	✓	✗	✗	✓	✗	✓
Multiple Access Points	✓	✓	✓	✗	✗	✗	✓	✗	✗
Proximity to Urban Amenities	✓	✗	✗	✓	✓	✓	✓	✓	✓
Long Term Viability as Event Venue	✓	✓	✓	✓	✓	✓	✓	✓	✗
Privately Owned	✓	✓	✓	✓	✗	✗	✗	✗	✗
Pre-existing Permissions for Large Cultural Events	✓	✓	✓	✓	✓	✓	✓	✓	✓

SOURCE: urbanMetrics inc.

To further evaluate the merits of each of these sites, we have also undertaken a more detailed analysis that involved assigning a weighted score to each characteristic/criterion that reflects their relative importance in the facilitation of a large scale music and arts event/festival. As summarized in Figure 4-3, we have generally assigned a weight of 15 to characteristics of “high” importance, 10 to characteristics of “medium” or average importance and 5 to characteristics of relatively “low” importance, with a total possible score of 100.

Figure 4-3: Site Characteristics Weighting

Weight	Site Characteristics
10	Central to GTA Population
10	Ontario Wide Audience Access
10	Long Term Viability as Event Venue
15	Site Area Greater than 200 Acres
15	On-site Accommodation Potential
10	Privately Owned
5	Proximity to Urban Amenities
10	Access to 400 Series Highway
5	Pre-existing Permissions for Large Cultural Events
10	Multiple Access Points
100	

SOURCE: urbanMetrics inc.

Based on the scoring methodology outlined above, and building on the basic evaluation shown in Figure 4-2, we have assigned each venue a score based on its possession (or not) of each characteristic. It should be noted that each venue received a full score if it possessed that characteristic—regardless of the level of quality—and no marks if the characteristic was not possessed or was not applicable to that particular venue (i.e., on a pass/fail basis, as noted earlier).

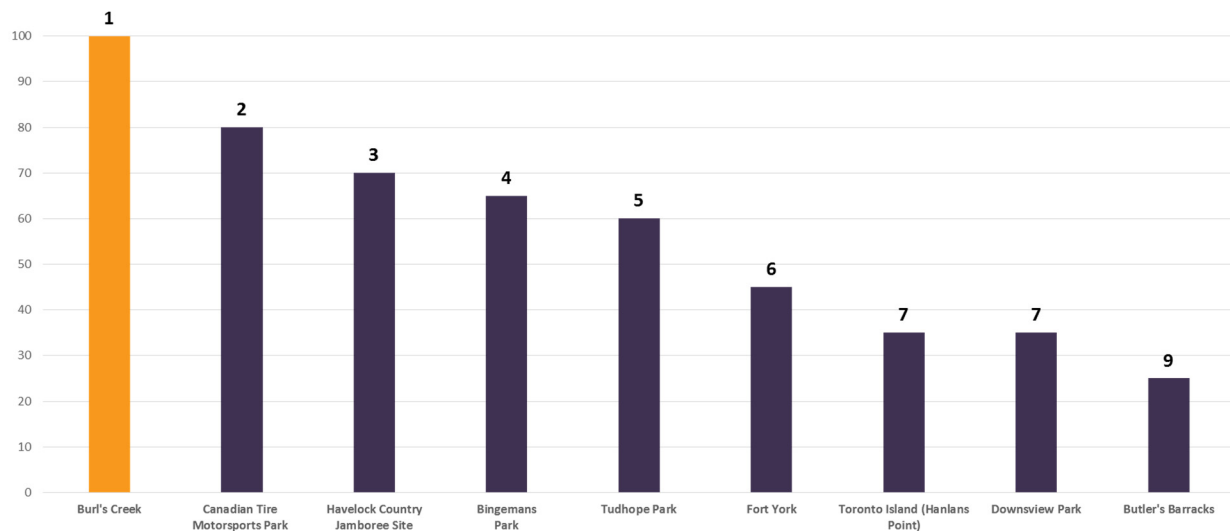
The results of this more detailed evaluation have been summarized in Figure 4-4, whereas Figure 4-5 illustrates the relative ranking of each venue based on our scoring. As shown, Burl’s Creek is again identified as the top venue, with the Canadian Tire Motorsports Park (i.e., the former site of Boots & Hearts) and the Havelock Country Jamboree Site following in second and third place.

Figure 4-4: Detailed Evaluation of Comparable Event Venues in Ontario (Including Weighting)

Site Characteristics	Burl’s Creek	Canadian Tire Motorsports Park	Havelock Country Jamboree Site	Bingemans Park	Tudhope Park	Butler’s Barracks	Fort York	Toronto Island (Hanlans Point)	Downsview Park
Central to GTA Population	10	0	0	0	10	0	10	10	10
Ontario Wide Audience Access	10	0	0	0	10	0	0	0	0
Site Area Greater than 200 Acres	15	15	15	0	0	0	0	0	0
On-site Accommodation Potential	15	15	15	15	0	0	0	0	0
Privately Owned	10	10	0	10	0	0	10	0	10
Proximity to Urban Amenities	5	5	5	5	5	5	5	5	5
Access to 400 Series Highway	10	10	10	10	10	10	10	10	0
Long Term Viability as Event Venue	10	10	10	10	10	10	10	10	10
Pre-existing Permissions for Large Cultural Events	5	5	5	5	5	0	0	0	0
Multiple Access Points	10	10	10	10	10	0	0	0	0
	100	80	70	65	60	25	45	35	35

SOURCE: urbanMetrics inc., based on the results of the basic evaluation provided in Figure 4-2 and the corresponding weighting outlined in Figure 4-3.

Figure 4-5: Comparable Venue Rankings



SOURCE: urbanMetrics inc.

4.3 SUMMARY

Through our evaluation of the various comparable event/festival sites in Ontario—and specifically based on the ten key site characteristics listed earlier in this section—it is our professional opinion that Burl's Creek is the most suitable site for hosting large multi-day, over-night music and arts festivals. The quality of the Burl's Creek site has also been confirmed by the success of recent events held at this location, where some 79,000 guests visited the site over two weekends. Not only were these events successful at attracting guests from across Ontario, but the venue was also able to provide an efficient and safe experience for both guests/attendees and local residents alike.

5 Alternative Site Evaluation

Building on our evaluation of other existing event venues throughout Ontario, and based specifically on the requirements set out by municipal staff at the Township of Oro-Medonte/Simcoe County for this study, the following section provides an assessment of possible alternative sites located within Simcoe County that could potentially support the types of large scale cultural events and festivals currently taking place at the Burl's Creek lands.

For the purposes of this analysis, we have undertaken a high level assessment of each lower-tier municipality in Simcoe County in terms their market capacity to host a comparable event facility. Each local area municipality has been evaluated in the context of the key site selection criteria and other requirements described in Section 3.

5.1 EVALUATION BY LOWER-TIER MUNICIPALITY

The following provides a brief profile of each lower-tier municipality in Simcoe County, summarizing the key characteristics of each area with respect to their ability (or lack thereof) to support the types of multi-day, over-night music and arts festivals currently being hosted at the Burl's Creek site (e.g., WayHome/Boots & Hearts).

As demonstrated herein, there are few, if any, other suitable locations throughout Simcoe County that satisfy all of the same criteria as Burl's Creek and therefore could not reasonably host comparable events of this nature or scale. In particular, we note that most of the other lower-tier municipalities in Simcoe County are either too far removed from Highway 400; do not have a sufficient available supply of flat, open and/or vacant land; or are otherwise comprised of equally sensitive and equally restrictive prime agricultural or natural heritage designations. For reference purposes, we have highlighted some of the specific characteristics of each lower-tier municipalities that preclude them from being considered "viable" alternative locations to Burl's Creek.

- **Oro-Medonte**

The Township of Oro-Medonte is located between the cities of Barrie and Orillia. Highway 400 is located just outside the western boundary in neighbouring Springwater Township; as well as through the northern portion of the Township. Provincial Highway 11 is located in the southern portion of the Township, connecting Orillia and Barrie. The majority of the lands between Old Barrie Road and Lake Simcoe are designated prime agricultural, while the lands between Old Barrie Road and Highway 400 in the north are largely designated natural heritage lands; including the lands in the vicinity of established recreational venues such as Hardwood Hills, Horseshoe Valley, Copeland Forest and Sugar Bush.

As outlined in the previous sections of this report, the Burl's Creek lands are located in this area and already host a number of major music and arts festivals (e.g., WayHome/Boots & Hearts). The Burl's Creek site and Oro-Medonte in general benefit from a number of key locational and site characteristics that make it ideal for the current/intended use of the subject site.

- **Collingwood**

Located on the Nottawasaga Bay, the Town of Collingwood is a destination for both summer and winter recreational activities. Although connected to the City of Barrie by Provincial Highway 26, the Town is located more than 50 kilometres from Highway 400. The majority of the lands outside of the settlement area are designated prime agricultural lands and the majority of greenfield land within the Town has been designated for future residential or employment (industrial) purposes.

- ✘ Majority of lands comprised by urban settlement areas
- ✘ Significant amount of land designated prime agricultural
- ✘ Limited availability of large, open and/or vacant land

- **Wasaga Beach**

Also located on the Nottawasaga Bay, the Town of Wasaga Beach features the longest freshwater beach in the world and is a prominent summer tourist destination. Wasaga Beach is some 30 kilometres from Highway 400 via two-lane county roads. The majority of lands outside of the settlement area fall within the Wasaga Beach Provincial Park or other greenbelt protection areas.

- ✘ Majority of lands comprised by urban settlement areas
- ✘ Significant amount of land protected for natural heritage
- ✘ Limited availability of large, open and/or vacant land

- **Clearview**

Located south of Collingwood and Wasaga Beach, Clearview Township includes the Town of Stayner and the Village of Creemore. Although Provincial Highway 26 passes through the northeast portion of the Township, the majority of lands do not have access to a Provincial Highway and are located more than 30 kilometres from Highway 400 via two-lane county roads. Additionally, the majority of the Township is more than 40 kilometres from the urban amenities located in Barrie. The majority of lands in the Township of Clearview are designated prime agricultural lands. The highest concentration of non-prime agricultural lands are located in the area of Dunedin, which include a significant amount of natural heritage lands.

- ✘ Not directly accessible to major highway
- ✘ Not accessible to Highway 400
- ✘ Significant portion of lands not located in proximity to urban amenities
- ✘ Majority of lands protected for natural heritage and/or designated prime agricultural

- **Springwater**

Located between the Townships of Clearview and Oro-Medonte, Springwater contains a large amount of natural heritage lands located in the Elmvale Clay Plain, including the Minesing Wetlands Conservation Area with an area of some 60 square kilometres (almost 15,000 acres). The balance of the remaining lands are designated prime agricultural. Highway 400 passes through the Township's eastern edge; less than 20 kilometres from most properties in the Township. The majority of the Township is less than 30 kilometres from the urban amenities located in Barrie.

- ✘ Significant amount of lands protected for natural heritage
- ✘ Significant amount of lands designated prime agricultural

- **Tiny**

The Township of Tiny is located on the peninsula that separates Severn Sound and the Nottawasaga Bay. Provincial Highways 93 and 12 pass along the eastern edge of the Township, providing a connection to Highway 400 some 25 kilometres to the east or south. It should be noted however that, due to the large land area, nearly half of the Township is located northwest of these Provincial Highways, adding significant distance to Highway 400. The majority of the Township is more than 50 kilometres from the urban amenities located in Barrie. There is a significant amount of land not designated prime agricultural at the northern end of the peninsula, however, the majority of these lands are protected under the natural heritage designation, including Awenda Provincial Park measuring some 29 square kilometres (almost 7,200 acres).

- ✘ Significant portion of lands not accessible to Highway 400
- ✘ Significant portion of lands not located in proximity to urban amenities
- ✘ Majority of non-agricultural lands protected for natural heritage

- **Penetanguishene**

Located on Georgian Bay's Severn Sound, Penetanguishene is a destination for both summer and winter recreational activities. Located at least 30 kilometres from Highway 400 via Provincial Highway 93, Penetanguishene is more than 50 kilometres from the urban amenities located in Barrie. Outside of the settlement area, the majority of land is designated prime agricultural or natural heritage lands.

- ✘ Not located in proximity to key urban amenities
- ✘ Majority of lands comprised by urban settlement areas
- ✘ Significant portion of lands protected for natural heritage
- ✘ Significant portion of lands designated prime agricultural
- ✘ Limited availability of large, open and/or vacant land

- **Midland**

Also located on Georgian Bay's Severn Sound, adjacent to Penetanguishene, Midland is the economic centre of the southern Georgian Bay area. Less than 20 kilometres from Highway 400, Midland is located some 50 kilometres from the urban amenities located in Barrie. With urban settlement areas comprising the majority of the land, only the northwest portion of the Town contains a small concentration of open lands not designated prime agricultural.

- ✘ Not located in proximity to key urban amenities
- ✘ Majority of lands comprised by urban settlement areas
- ✘ Limited amount of land not designated prime agricultural
- ✘ Limited availability of large, open and/or vacant land

- **Tay**

The Township of Tay is located at the southern end of the Severn Sound. Highway 400 passes through the eastern edge of the township but provides limited access to the urban amenities located in Barrie; approximately 60 kilometres to the south. The majority of the Township is made up of prime agricultural and natural heritage lands.

- ✘ Not located in proximity to urban amenities
- ✘ Significant portion of lands protected for natural heritage
- ✘ Significant portion of lands designated prime agricultural

- **Severn**

The Township of Severn is located in the north end of the County and is a destination for both summer and winter recreational activities with a significant amount of cottage residences. Highway 400 passes through the western edge of the Township while Provincial Highway 11 passes through the eastern edge; some 20 to 30 kilometres apart. The majority of the land in the Township has a natural heritage designation; including a large amount of crown land located in the northern portion of the Township, as well as large areas of the Oro Moraine in the southeast of the Township. The remaining lands are generally designated prime agricultural.

- ✘ Significant portion of lands not directly accessible to major highway
- ✘ Majority of lands protected for natural heritage
- ✘ Significant portion of lands designated prime agricultural

- **Ramara**

The Township of Ramara is located along the eastern shore of Lake Couchiching and the northeastern shoreline of Lake Simcoe. Casino Rama (a major tourist destination) is located in the Township on the First Nations reserve, as well as the Rama Road Economic Employment District (as defined in the Growth Plan for the Greater Golden Horseshoe, 2006). Provincial Highway 12 is located in the southern portion of the Township and connects to Provincial Highway 11 to the west. Highway 400 is accessible through these Provincial Highways; at a distance of more than 30 kilometres from the southwest corner of the Township. Nearby Orillia provides some urban amenities, while Barrie 40 kilometres away provides additional amenities. The majority of the lands in the southern half of the Township are designated prime agricultural lands while the northern half contains a significant amount of natural heritage land, including First Nations lands, crown lands and the Simcoe County Forest Rathburn Tract.

- ✘ Not located in proximity to Highway 400
- ✘ Significant portion of lands protected for natural heritage
- ✘ Significant portion of lands designated prime agricultural

- **Orillia**

The City of Orillia is an urban settlement area located at the southern end of Lake Couchiching. Within its boundaries, there is very little land left that has not been developed for residential or commercial uses.

- ✘ Majority of lands occupied by existing urban residential and commercial uses
- ✘ Limited availability of large, open and/or vacant land

- **Barrie**

Located on the shores of Kempenfelt Bay, the City of Barrie is the largest urban settlement area in the County. Highway 400 travels straight through the centre of the City, providing easy access from the City of Toronto, some 100 kilometres to the south. In the past, the City of Barrie has hosted large open-air concerts such as Edgefest, Vans Warped Tour and Live 8. Taking place at Park Place, these events often suffered transportation challenges due to the venue's location in the centre of an urban settlement area. Park Place has since been redeveloped into a retail/service commercial shopping centre.

- ✘ Majority of lands occupied by existing urban residential and commercial uses
- ✘ Limited availability of large, open and/or vacant land
- ✘ History of event challenges relating to congestion in urban settlement area

- **Innisfil**

Located along the southwestern shore of Lake Simcoe and south of the City of Barrie, the Town of Innisfil has experienced significant residential growth in recent years as the City of Barrie continues to expand to the south. Highway 400 runs through the western portion of the Town with most lands located less than 10 kilometres from the Highway. The majority of the Town is designated prime agricultural lands.

- ✘ Significant portion of lands occupied by existing/planned urban uses
- ✘ Majority of lands designated prime agricultural

- **Essa**

The Township of Essa is located directly west of the Town of Innisfil and includes Canadian Forces Base Borden. Located west of Highway 400, the only current access to the Highway is via two-lane county roads, however County Road 90 in the northern portion of the municipality is currently being expanded to a five-lane road. The majority of the land in the Township is designated prime agricultural, while the Borden Sand Plain natural heritage area encompasses most of the remaining lands.

Also located in this area is the Essa Agriplex, which has recently been developed to host the Barrie Fair and other related recreational events (i.e., since relocating from the Barrie Raceway/Barrie Event Centre site at Highway 400 and Essa Road). Although this is a large, open site capable of supporting major recreational and cultural events, it does not meet the specific criteria identified for the unique type of festival activities currently held at Burl's Creek. For example, the site is only 100 acres in size and already contains a variety of existing infrastructure (e.g., barns and other buildings) that would prohibit a large music and arts festival similar to WayHome and/or Boots & Hearts.

- ✘ Majority of lands currently not directly accessible to major highway
- ✘ Majority of lands designated prime agricultural
- ✘ Significant portion of lands protected for natural heritage
- ✘ Existing recreational sites (e.g., Essa Agriplex) not of sufficient size/format

- **Adjala-Tosorontio**

Located in the southwestern portion of the County, the Township of Adjala-Tosorontio is predominately rural. Provincial Highway 89 connects the northern portion of the Township to Highway 400 while Provincial Highway 9 connects the southern portion of the Township to Highway 400, some 25 kilometres away. The Township contains large amounts of natural heritage lands in the northern half and a mix of prime and non-prime agricultural lands in the southern half. In addition, a significant portion of the lands in the southern portion of the municipality are designated and protected as part of the Oak Ridges Moraine.

- ✘ Significant portion of lands not directly accessible to major highway
- ✘ Significant portion of lands designated prime agricultural
- ✘ Significant portion of lands protected for natural heritage (e.g., Oak Ridges Moraine)

- **New Tecumseth**

The Town of New Tecumseth contains the settlement areas of Alliston and Tottenham. Provincial Highway 89 connects the northern portion of the Town to Highway 400 while Provincial Highway 9 connects the southern portion of the Town to Highway 400, some 15 kilometres away. The majority of lands in the Town are designated prime agricultural or natural heritage areas, including a portion that is identified under the Oak Ridges Moraine. As in neighbouring Adjala-Tosorontio, a portion of the lands along the southern border are designated non-prime agricultural, mostly consisting of the Simcoe County Forest Tottenham Tract.

- ✘ Majority of lands designated prime agricultural
- ✘ Significant portion of lands protected for natural heritage

- **Bradford West Gwillimbury**

Located in southeastern Simcoe County, the Town of Bradford West Gwillimbury contains the Holland Marsh, a flat reclaimed area of organic soil ideal for growing market crops. Highway 400 passes through the Town, providing access to urban amenities located some 35 kilometres to the north in Barrie, the City of Toronto some 45 kilometres to the south, and to some extent a number of other nearby lower-tier municipalities in York Region (e.g., Newmarket, Aurora, Richmond Hill, Vaughan, Markham). The majority of the Town is made up of prime agricultural lands with the remaining lands designated natural heritage areas.

- ✘ Majority of lands designated prime agricultural
- ✘ Significant portion of lands protected for natural heritage

Overall, therefore, we note that—with the exception of the Township of Oro-Medonte and the Burl's Creek site in particular—none of the other lower-tier municipalities in Simcoe County possess the necessary locational or site-specific characteristics required to reasonably support a large scale music and arts festival.

Based on our discussions with Economic Development staff and other supplementary research undertaken by urbanMetrics, no large parcels of clear, flat and/or vacant land could be readily identified in these areas that were not already designated prime agricultural or natural heritage lands (i.e., equivalent to, if not higher priority agricultural or natural heritage lands relative to the Burl's Creek site). For example, in an attempt to further evaluate whether alternative sites exist in Simcoe County, we completed a detailed review of the Economic Development department's real estate and business listings, which profile a number of the 'signature sites' located in each of the lower-tier municipalities that are currently being promoted as viable locations for new businesses. Based on this list of signature sites, which have been summarized in Appendix B, none were deemed suitable for a large cultural events. Similarly, none of the additional vacant and available sites identified on the County of Simcoe's interactive map application were viable or appropriate in terms the core operational requirements needed to host large cultural events.

5.2 REVIEW OF ACTIVE REAL ESTATE LISTINGS

In addition to our review of the various key sites identified by Simcoe County Economic Development, we have also undertaken a high level evaluation of available vacant sites in Southern Ontario based on active MLS (Multiple Listing Service) real estate listings. For the purposes of this analysis, we generally focused on areas of the Province and specific sites capable of meeting the general regional and site-specific requirements identified in Section 3.

Based on our review, only ten (10) sites could be identified that were over 100 acres in size, vacant, and available for sale within Simcoe County. Moreover, as summarized in Appendix B, all of these sites were either already planned for other types of uses (e.g., residential or commercial uses), or were unsuitable due to their size, location, or other relevant characteristics. Similarly, a total of only five (5) vacant sites were identified across all of Southern Ontario that exceeded a land area threshold of 320 acres, which is more consistent with the amount of land available at Burl's Creek. Furthermore, none of these sites satisfied the full range of site criteria and other requirements being considered.

5.3 SUMMARY

Based on the various research presented in this section relating to potential alternative sites in Simcoe County—including direct consultations with Township of Oro-Medonte and Simcoe County planning staff, Simcoe County’s Economic Development Office, as well as additional independent research—we have identified no other locations that possess the key characteristics required for a large scale events/festival venue.

6 Summary and Conclusions

This market analysis has been prepared in support of Burl's Creek's submission for Official Plan Amendments and Zoning By-law Amendment for lands in the Township of Oro-Medonte and Simcoe County.

This study has been identified as one of several technical documents required by the Township of Oro-Medonte and Simcoe County in support of these applications. This study is primarily intended to identify and document the key locational drivers and site-specific requirements of a large scale, multi-day music and arts festival.

This report is also intended to provide a detailed examination of existing and/or possible alternative locations within the County that possess viable market characteristics, while at the same time avoid encroachment into prime agricultural lands.

Based on the research and analysis presented in this study, it is our professional opinion that Burl's Creek satisfies all of the most important criteria for these types of events/festivals and is indeed the most suitable location in Simcoe County for its current/intended use.

Specifically, the following conclusions have been reached in this report.

- **Burl's Creek benefits from a number of specific locational and land characteristics that make it an ideal location for major cultural events and festivals**, including:
 - Large site area;
 - Flat, open areas;
 - Direct access to major highway;
 - Proximity to 400-series provincial highway system;
 - Multiple vehicular and pedestrian access points;
 - Proximity to regional airport;
 - Proximity to other nearby urban centres and amenities;
 - Proximity to major urban population (Greater Golden Horseshoe Region); and,
 - Centrally located to access broader Ontario population to the east/west/north;
- **The site selection process for large scale, multi-day music and arts festivals is limited to a large extent by a very specific set of requirements that is unique to this industry.** These requirements include:
 - *Regional Site Requirements:* access to major highways, access to airport, proximity to major urban area(s), centrally located access to secondary markets, proximity to urban amenities and avoidance of natural heritage restrictions.
 - *Local/Site-Specific Requirements:* large land area, capacity for overnight accommodations and parking, level and open land, outside of settlement area, existing permissions/precedent for comparable events, strong soil characteristics and no requirement for shuttling services.
 - *Business/Operational Requirements:* private land ownership, precedent for similar festivals in regional market area, land cost and affordability, willingness of host municipality/governments, capacity for future growth and a unique/differentiated event experience.

- **The number of suitable and/or available sites that satisfy all of these criterion are relatively rare.** The Burl's Creek lands are notable in that they meet all of the most important locational and site-specific requirements for these types of events.
- Through our evaluation of existing and comparable event venues across Ontario, and based on a number of the key criterion identified above, **Burl's Creek is indeed the most appropriate location for large scale, multi-day music and arts festivals** in this area. In particular, Burl's Creek out-performs a number of prominent event venues that regularly host major entertainment events, including: Fort York (Toronto), Downsview Park (Toronto), Tudhope Park (Orillia) and the site of the Havelock Country Jamboree.
- Through consultations with the Township of Oro-Medonte and Simcoe County planning staff, the Simcoe County Economic Development Office and other independent research and analysis undertaken by urbanMetrics, **no alternative sites in Simcoe County have been identified that possess the necessary locational and site-specific characteristics required to reasonably support a large scale music and arts festival.** In particular, there are currently no large parcels of clear, flat and/or vacant land that also avoid prime agricultural and natural heritage lands (i.e., equivalent to, if not higher priority, agricultural or natural heritage lands relative to the Burl's Creek site).

Therefore, it is our professional opinion that the proposed re-designation and rezoning of the Burl's Creek Events Ground lands in a manner that would enable the continuance of major cultural events is both appropriate and warranted from a market perspective. Based on our research, the subject lands represent the *best* option—not only in Simcoe County, but indeed within the GTA market—for staging large-scale, multi-day, single-site cultural events and festivals.

Appendix A – Existing Event Venue Profiles

Figure A-1: Festival Venue Fact Sheets

Canadian Tire Motorsports Park (Mosport)



--- Approximate Event Area --- Auxiliary Parking

Address
3233 Concession Rd 10

Location
Bowmanville

Venue Type
Motorsports Racing Venue

Ownership
Private

Total Space
± 900 acres

Overnight Accommodation
Yes

Past Events
Strawberry Fields (1970), Canada Jam (1978), Heatwave Festival (1980), Edenfest (1996), Boots & Hearts (2012-14)

Havelock Country Jamboree Site



--- Approximate Area of Past Events

Address
10 County Road 48

Location
Havelock

Venue Type
Private Camping and Open Space

Ownership
Private

Total Space
± 300 acres

Overnight Accommodation
Yes

Past Events
Havelock Country Jamboree

Bingemans Park



--- Approximate Boundary Area of Property

Address

425 Bingemans Centre Drive

Location

Kitchener

Venue Type

Campground and Waterpark

Ownership

Private

Total Space

± 155 acres

Overnight Accommodation

Yes

Past Events

Summer Jam Canada (2010), EverAfter (2015)

Tudhope Park



--- Approximate Boundary Area of Property

Address

500 Atherley Road

Location

Orillia

Venue Type

Public Park

Ownership

Public

Total Space

± 68 acres

Overnight Accommodation

Yes

Past Events

Mariposa Folk Festival

Butler's Barracks



--- Approximate Area of Past Events

Address

51 Queen's Parade

Location

Niagara On The Lake

Venue Type

National Historic Site

Ownership

Public

Total Space

± 100 acres

Overnight Accommodation

No

Past Events

The Tragically Hip, City & Colour, Mumford & Sons

Fort York



--- Approximate Area of Past Events

Address

250 Fort York Blvd

Location

Toronto (Downtown West)

Venue Type

National Historic Site

Ownership

Public

Total Space

± 25 acres

Overnight Accommodation

No

Past Events

Toronto Urban Roots Festival, Field Trip

Toronto Islands (Hanlan's Point)



--- Approximate Area of Past Events

Address

873 Lakeshore Ave

Location

Toronto (Waterfront)

Venue Type

Public Park

Ownership

Public

Total Space

± 60 acres

Overnight Accommodation

No

Past Events

Bestival Toronto, Wakestock

Downsview Park



--- Approximate Area of Past Events

Address

35 Carl Hall Road

Location

Toronto (North York)

Venue Type

Public Park

Ownership

Public

Total Space

± 25 acres

Overnight Accommodation

No

Past Events

Edgefest, Molson Canadian Rocks for Toronto, World Youth Day, SARS Stock, Veld, Riot Fest

SOURCE: urbanMetrics inc., based on Google Earth Pro imagery and urbanMetrics inc. research.

Appendix B – Other Sites in Simcoe County

Figure B-1: Summary of Signature Sites Identified by Simcoe County Economic Development

#	Municipality	Address	Size (Acres)	Current / Intended Use	Notes
1	Alliston	6857 & 7005 Industrial Parkway	Up to 153	Industrial	Employment land in settlement area. Not suitable for festival.
2	Barrie	56-66 Bayfield St	< 5	Commercial	Downtown Barrie with existing buildings on site. Not suitable for festival.
3	Barrie	10 Checkley	< 5	Commercial	7,500 SF Office Building. Not suitable for festival.
4	Barrie	Fairview Rd Site	< 10	Industrial	5 lots near 400 and settlement area. Not suitable for festival.
5	Barrie	25 Morrow Rd	< 5	Industrial	7,700 SF Industrial Warehouse. Not suitable for festival.
6	Barrie	11 Patterson Rd (Units 19 - 21)	< 5	Industrial	4,600 SF Showroom/Office and Industrial Warehouse. Not suitable for festival.
7	Bradford West Gwillimbury	144 Dissette Street	< 10	Industrial	42,000 SF Industrial Warehouse. Not suitable for festival.
8	Clearview	142 Mill Street	< 5	Commercial	Storefront. Not suitable for festival.
9	Essa	5752 30th Sideroad #1 + #2	-	-	No longer available.
10	Midland	288 and 420 Bayshore	< 50	Industrial	Abandoned factory on site. Not suitable for festival.
11	Midland	9742 County Road 93	267	Rural	Not central location and hold provision on zoning. Mostly woodlot. Not suitable for festival.
12	Midland	355 Cranston Cre	< 5	Commercial / Industrial	Building in an industrial park. Not suitable for festival.
13	Midland	264-266 King St	-	Commercial	Downtown storefronts. Not suitable for festival.
14	Midland	9281 Hwy 93	-	Commercial	Retail lease. Not suitable for festival.
15	Midland	9319 Hwy 93	-	Commercial	Retail lease. Not suitable for festival.
16	Orillia	West Orillia Employment Lands	< 50	Industrial	8 lot industrial park. Not suitable for festival.
17	Oro-Medonte	Lake Simcoe Aeropark	212	Industrial	Industrial park with up to 77 lots and 4m SF. Not suitable for festival.
18	Oro-Medonte	Hwy 11 Site	< 50	Industrial	One access point. Not suitable for festival.
19	Oro-Medonte	17 Guest Rd	155	Agricultural	Immediately west of Burl's Creek. One access point. Not suitable for festival.
20	Penatanguishene	163 Robert St	< 25	Industrial	Exiting industrial building. Not suitable for festival.
21	Ramara	Brechin Business Park	-	Industrial	Industrial lots in an industrial park. Not suitable for festival.
22	Severn	12369 County Road 16	< 5	Residential	Existing multiplex. Not suitable for festival.
23	Springwater	Bertram Industrial Parkway	< 25	Industrial	4 lots in an industrial park. Not suitable for festival.
24	Springwater	81 Queen Street W	< 5	Commercial	Not suitable for festival.

SOURCE: urbanMetrics inc, based on sites identified on Simcoe County website, as of October 2015.

Figure B-2: Summary of Active Real Estate Listings in Simcoe County

Municipality	Address	Size (Acres)	Notes
Springwater	2847 Horseshoe Valley Rd	291	Residential adult lifestyle community.
West Grey	79395 124 Grey rd	169	Not close to provincial highway.
Innisfil	3900 Highway 89	100	Mostly woodlot and farm fields.
Bradford	3507 10th Sideroad	105	Existing apple orchard.
Innisfil	20th Sideroad/Killar Road	157	Approved mixed use development approved with commercial and residential units.
Innisfil	1586 Tenth Line	102	Farm at 10th Line and 20 Sideroad. Near settlement area.
Innisfil	1293 Big Bay Point Road	102	Farm just east of 20 Sideroad near settlement area.
Innisfil	1122 Big Bay Point Road	110	Farm just east of 20 Sideroad near settlement area. Currently an equestrian centre.
Ramara	2432 Concession D-E	100	Farm, advertised as possible quarry or recreational use. Many nearby quarries.
Ramara	1466 Canal Road	200	Currently leased to farmer for cash crops. Not near provincial highways.

SOURCE: urbanMetrics inc, based on active real estate listings identified on MLS (Multiple Listing Service), as of October 2015. Represents all vacant sites equal to or greater than 100 acres in size.