

North Oakville East

Commercial Study

November 12, 2024

Parcel

gladki
planning
associates



OAKVILLE

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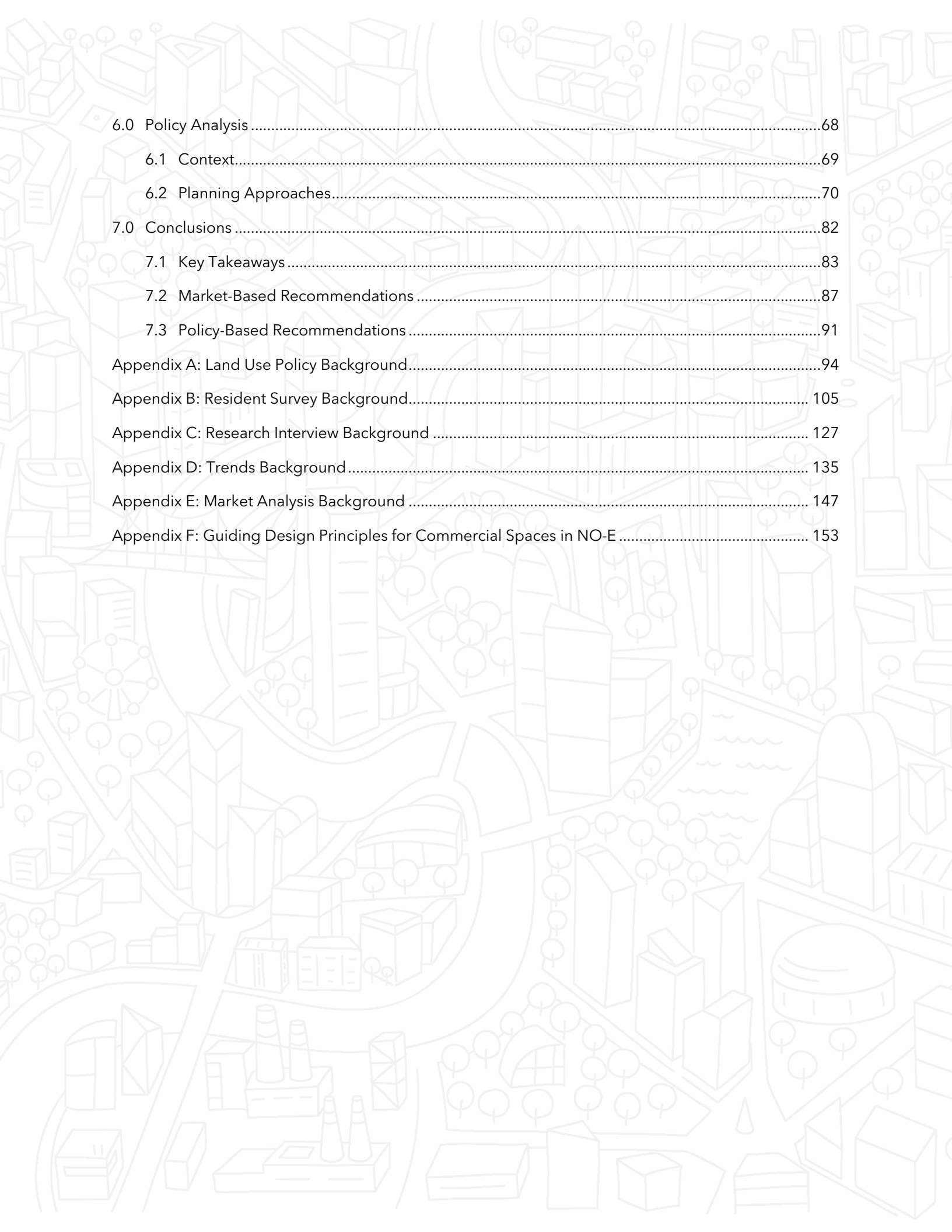


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Acknowledgements

Project Consulting Team

The project consulting team responsible for completing this study included a range of industry-leading professionals offering expertise spanning the full breadth of land economics, land use planning and municipal strategy / policy implementation. Parcel Economics Inc. ("Parcel") has served as the project lead for this study, with additional project support provided by Gladki Planning Associates ("Gladki", "GPA").

Parcel

Project Lead &
Land Economics

gladki
planning
associates

Land Use Planning &
Policy

Town of Oakville Project Team

Our study process has involved extensive collaboration with staff from the Town of Oakville. Consisting of a core working group from the Town's Planning and Development department, these additional personnel provided input, advice and direction throughout the entire study process on matters primarily relating to land use policy, urban design and engagement with local stakeholders.

Other Participants

Our detailed research program and "ground-testing" of study recommendations also involved engaging with a range of stakeholders, including external industry participants active in the development of new residential and non-residential projects in Oakville and beyond. This involved soliciting feedback from a diverse group of developers, landowners and other individuals familiar with the delivery—and management—of retail/service commercial uses in both standalone and mixed-use development environments.

Executive Summary

Background

Context

- The **North Oakville East Secondary Plan (“NO-E”)** envisions and supports mixed-use, complete communities throughout the Plan area, however, there has been limited commercial development in the area to date.
- This has been a function of a variety of factors, many of which are beyond the immediate control of both the Town and the local development community (e.g., prevailing market conditions and the state of the retail industry more broadly, shifting consumer and tenant preferences, heightened construction costs and development financing affecting financial feasibility, etc.).

Purpose

- In response to these challenges, Parcel Economics Inc. (“Parcel”)—in cooperation with project partners Gladki Planning Associates (“GPA”)—has been retained by the Town of Oakville to **provide a more fulsome understanding of the current and future commercial needs of NO-E.**
- To this end, our role for this study has been to provide additional research, analysis and strategic insight from a **market and economic perspective**, as well as in the context of establishing an **appropriate land use policy framework** that has regard for key objectives of the Town.

Scope

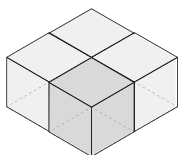
- We have undertaken a detailed research program as part of this study, comprising a number of distinct components:
 - **Review of the subject area** from a commercial market perspective;
 - Review of existing provincial / regional / local **land use policy frameworks**;

- Review of **local market dynamics** and development conditions, including inventorying existing and proposed commercial space inventories;
- Information gathered as part of **stakeholder research interviews**;
- Data collected via an **online survey of local residents** regarding shopping behaviours and preferences;
- Data collected via **customer origins surveys**;
- Consideration of **trends in commercial development and operation**;
- Detailed **market demand assessment** to estimate the amount and type of commercial space warranted to meet the needs of a growing population; and,
- Development of both **market-based recommendations** and **policy-based recommendations** informed by the foregoing.

Key Findings

- As NO-E continues to grow and experience additional development, there will be an **inevitable need for the supply of commercial space to be expanded and diversified** to best serve the needs of existing and new residents.
- Notwithstanding this growth in demand, there are **real and material barriers to entry of the delivery of new commercial space**, which need to be understood and acknowledged in the context of NO-E. These challenges have been validated through our own independent research, as well as anecdotal evidence provided via a research interview processing involving the local development community.
- With respect to four key reporting elements identified for this study, we also note the following for additional reference and context, which have directly informed our recommendations:

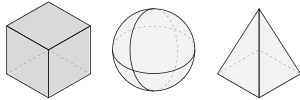
Amount (Floor Area)



- A total of some 1.8 to 2.2 million square feet of new retail / service commercial space could be warranted in NO-E by 2051.
- Accounting for active pipeline developments that are assumed to enter the market over this same forecast horizon, the “net new” space potentially required would be closer to 1.6 to 2.0 million square feet.

Type

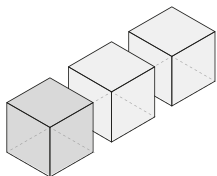
(Store Category)



- To keep pace with a growing residential population while remaining cognizant of broader industry trends, the focus of commercial development in NO-E should be on satisfying the basic day-to-day shopping needs of current and future residents.
- Comprising the total warranted space estimates above, this could involve the following distribution by category: (i) 390,000 to 630,000 square feet of Food Retail; (ii) 460,000 to 640,000 square feet of Non-Food Retail; and (iii) up to 960,000 square feet of Services space.

Location

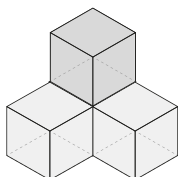
(Geography)



- New growth in NO-E should not compromise other established and/or proposed commercial nodes located throughout the Town and Region, which will likely continue to serve as the primary focuses of commercial activity.
- This may further involve focusing or concentrating commercial space delivery at key locations throughout the secondary plan rather than risk having it “spread too thin”.
- This concept of fostering a “complete” and “balanced” mixed use community as a whole rather than on a building-specific basis can be effective but does present its own unique risks.

Format

(Building Typology)



- Especially in the short to medium term planning horizons, a balanced approach will be necessary involving a mix of different unit sizes and development formats.
- It is unlikely that all of the space required to satisfy future resident needs will be accommodated in mixed use developments, although some of the specific types of retailers and service providers identified as having the most opportunity could—in theory—be captured within these types of projects.
- With a significant transition and evolution from conditions “today” (suburban) to “tomorrow” (urban), allowing a hybrid of

development formats in the interim and/or initiating development in a manner that can be transitioned over time to satisfy longer-term policy objectives may be necessary.

- Layering on solutions that seek to enable and encourage other preferred development formats by removing some existing development barriers can help to simultaneously harness the ambitions of the Town in their underlying policy vision.
-

Recommendations

Market-Based

- **Flexibility** - The continued evolution in the retail industry and other broad macroeconomic shifts necessitate some flexibility to adapt to changing market conditions.
- **Prioritize Objectives** - To achieve a path forward, it will be important for the Town to prioritize a full range of municipal strategic objectives, both specific to retail / service commercial uses but also spanning many other facets of urban development.
- **Patience / Urgency Dilemma** - It will be necessary to evaluate the trade-offs (pros and cons) associated with approaches predicated on: (i) patience and waiting for market conditions to change; or, (ii) adopting a more immediate sense of urgency for delivering new commercial supply at NO-E.
- **Consider Alternatives** - The Town should explore options to encourage the development of retail / service commercial uses and other non-residential functions to satisfy their vision:
 - Temporary / shared spaces
 - Reduced overall space footprints
 - Incentives
 - Integration of other non-residential uses.

See **Section 7.2** for details of Market-Based Recommendations.

Policy-Based

Principle #1

Rethinking the Place of Commercial Uses Within the Urban Structure

- The Town could consider: (i) shifting the focus to narrower roads with somewhat lower traffic volumes and/or at strategic intersections; or, (ii) shifting to more partially internally-oriented clusters on large sites capable of maintaining visibility and a “good face” towards border roadways, while also supporting internal road networks and linkages.
- Under either of these scenarios, consideration and identification of specific locations primed for differing amounts of retail development (including scale and type) will still need to be made for establishing commercial focal points that ensure appropriate geographic distribution and access from surrounding residents.

Principle #2

Allowing Interim Typologies / Building Formats

- The Town should consider new permissions for interim forms of commercial development that do not fully conform to the existing Secondary Plan policies and/or urban design guidelines. This could reprioritize the delivery of retail/service commercial space in the interim in a more traditional low-rise building format, while deferring broader placemaking and urban design outcomes of achieving full integration of commercial uses until later stages of development.

Principle #3

Considering Commercial Use Requirements & Incentives

- The Town could consider a repackaging and/or revisiting of key requirements and incentives to better reflect the current and anticipated future conditions in NO-E. This could include enhanced flexibility between and across landowners, policies that more specifically guide the location and amount of retail space envisioned, reinforcement of retail space requirements, as well as providing opportunities for parking reductions and/or exempting commercial uses from density calculations.

Principle #4

Design & Placemaking for Interim Typologies / Formats

- To support initial phases of commercial development at NO-E, interim urban design principles and/or parking requirements could allow greater flexibility. These could be adapted from existing urban design principles to be more tailored to interim development options.

See **Sections 6.0 & 0** for details of Policy-Based Recommendations.

1.0

Introduction

1.1 Context

Background

The North Oakville East Secondary Plan envisions and supports mixed-use, complete communities throughout the Plan area, however, there has been limited commercial development in the area to date.

A lack of development—combined with residential development patterns, projected growth, and lack of land use designations permitting commercial uses exclusively—has created concern that there may not be enough commercial space to meet the needs of current and future residents as the area continues to develop. This concern is bolstered by the **Town-Wide Employment and Commercial Review (2014)**, which estimated that the Town could have a 25-hectare shortfall of commercial land to 2041 and that the northern area of Oakville is under-served by commercial uses relative to the rest of the town.

That said, much has changed since this type of assessment was last completed, including updates to the Secondary Plan, new population projections and housing targets, as well as ever-changing consumer preferences (e.g., the rise of e-commerce, post-COVID-19 trends, etc.). As such, it has **not been known whether the previously projected commercial shortfall extends to the North Oakville East Secondary Plan** given the time that has elapsed and the changes that have occurred in terms of the new market / economic context in which new developments are now occurring.

Purpose

The purpose of this study has been to provide a more fulsome understanding of the current and future commercial needs of the North Oakville East Secondary Plan Area (“North Oakville East”, “NO-E”).

Drawing on a combination of two parallel work streams involving both **market-based research and analysis** and **observations from a land use policy perspective**, this study has specifically considered how the planning policy framework for commercial development in NO-E could ultimately evolve, having regard for the following key planning objectives:

- Ensuring that there is an appropriate supply of commercial development to support complete community;
- Locating commercial development to enable and encourage access by active transportation and minimize car trips and trip distances;
- Realizing the potential of retail to provide at-grade animation that contributes to placemaking and the creation of comfortable and vibrant public realm.
- Contributing to the creation of community focal points, where groupings of private and public amenities, including retail and service uses, parks, community facilities, and a high-quality public realm, combine to create places of shared experience and community connection.

Scope

In light of these key objectives above, our commercial analysis and related professional advice has explored existing gaps in the market in terms of ideal service levels, as well as strategies to achieve desired commercial outcomes in support of walkable, mixed-use, and complete communities. The following summarizes the key elements of the work plan completed by our team as part of this Commercial Study:

- **Review of the subject area** (NO-E) from a commercial market perspective, including evaluating its physical and access characteristics, visibility and exposure, as well as relationship with surrounding land uses;
- **Review and synthesize existing provincial, regional and local policy** applicable to NO-E in addition to other recent and concurrent studies;
- **Delineation of a relevant Trade Area** for existing and proposed new commercial uses in NO-E that reflects the geography from which retailers and service providers are likely to derive the majority of their sales;
- **Examination of customer origins** to gain a more nuanced understanding of the current commercial function of the local market area relative to other parts of the Town;
- Investigation of the **current and anticipated market profile** of NO-E, including existing and future population and employment as a key determinant in estimating future demand for commercial space;

- Calculation of key performance measures for the community in terms of the area’s **existing and proposed new supply of retail/service commercial space**;
- Consideration of **trends in commercial development** and the extent to which these will influence the appropriateness of establishing new retail/service facilities in the area;
- Providing commentary as to the **impact of the ongoing COVID-19 pandemic**, especially for brick-and-mortar retail spaces and other types of related commercial activity;
- Preparation of a **market demand analysis by major store type** that addresses current and potential future service levels (or “needs”) within NO-E;
- Preparation of **market-based recommendations** relating to the ideal integration of retail/service commercial space in NO-E (i.e., optimum amount, type, size and location of commercial uses);
- **Preparation of policy-based recommendations**, including presentation of options to the Town for securing appropriate commercial uses and associated changes to the existing planning policy framework.

1.2 Study Parameters

Key Geographies

North Oakville East (NO-E) Secondary Plan Area / Trade Area

For the purposes of this assessment, we have delineated a “Trade Area” which represents the primary geographic area from which new retailers and service-provider are expected to generate most of their customer support. As illustrated in Figure 1.1, this area includes the entirety of the NO-E Secondary Plan Area.

The NO-E Secondary Plan Area has served as the primary focus for most of our supporting research program and the targeted analyses that have been summarized herein. This includes details of our inventory of existing commercial space in this part of the Town, which—for the purposes of this analysis—has included existing commercial facilities located throughout the periphery of the delineated Trade Area. That said, we have also considered “inflow” visitation from shoppers originating from beyond this immediate area (e.g., Trade Area employees, visitors from other areas of Oakville, etc.)

Figure 1.1
Map of the Trade Area



Source: Parcel.

Other Benchmark Geographies

Our study has also considered a range of data that is more specific to the entire **Town of Oakville** and **Halton Region**, where applicable. Similarly, our underlying commercial market analysis relies on spending / sales data for the entire **Province of Ontario**, which has been subsequently adjusted to reflect the future expenditure potential of residents within NO-E, both now and into the future.

All of these areas represent important sources of information to our study in terms of: (a) appropriate data availability; and (b) contextualizing the results of our analysis, including benchmarking to averages across much larger geographies. This type of consideration can be especially important for commercial-based market studies, for which consumers are largely agnostic to political boundaries (and/or other sub-municipal policy area delineations, including secondary plans).

Key Reporting Elements

We have identified four key reporting elements that are expected to have the most fundamental impact on the future commercial landscape of NO-E.

As detailed in Figure 1.1, this has involved specific consideration for the **Amount, Type, Location** and **Format** of commercial uses to be developed in this area as it continues to grow and mature as a fledgeling new community. These are intended to frame the primary “takeaways” from our work, as well to establish specific areas of consistency across both the market-based and policy-based recommendations established via the relatively broad range of research and analyses undertaken.

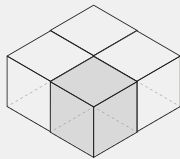
It is also important to note at the outset of this reporting that each of these key reporting elements are:

- Largely inter-related / inter-dependent.
- Subject to constant change as market conditions evolve.
- Some of these elements are reasonably flexible and “fluid” (e.g., it can be relatively easy for store types to change as tenants come and go within existing or potential new commercial spaces in NO-E), whereas others can be much more “sticky” and/or slow to evolve (e.g., factors tied to physical building locations, footprints, and formats).

As such, it is important to consider the results of this type of study with a healthy understanding of the **underlying opportunities, consequences and trade-offs associated with each of these distinct elements**. This includes consideration for which elements are necessary to prioritize to “get it right the first time” rather than potentially adopting a more flexible or responsive approach capable of adapting over time with the dynamics of urban development patterns.

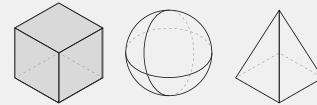
Figure 1.2

Key Study Parameters: Amount, Type, Location & Format



Amount
(Floor Area)

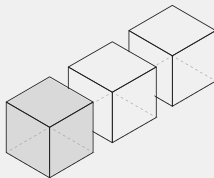
The total quantum of retail / service commercial space required to meet the needs of existing—and future—residents of the community.



Type
(Store Category)

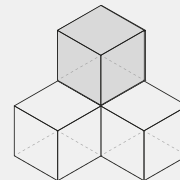
The specific types of retail and service commercial facilities required, based on existing or potential future market “gaps”.

This is directly related to the total amount of retail / service commercial space required, effectively representing the composition of overall space needs by individual store category.



Location
(Geography)

The optimal location for delivery of new retail / service commercial space(s), based on physical / access characteristics, land availability, the amount and type of space warranted, as well as the broader context of the community as a whole (including relationship with other land use types).



Format
(Building Typology)

The preferred building format(s) to accommodate new retail / service commercial uses, including both existing commercial supplies and “new-build” spaces.

Examples range from single-storey, standalone commercial uses to more intensification-focused, mixed-use development formats.

Source: Parcel

1.3 Assumptions

When completing this type of early-stage market assessment, it is important to identify the key assumptions and limitations inherent to our approach. Consistent with other similar analyses for high-level master planning and/or secondary planning efforts, we note that the demand forecasts and other economic research presented herein should not necessarily be taken as conclusive nor definitive evidence of the market opportunity available to—nor the financial feasibility of developing—individual commercial units or spaces at NO-E.

Rather, **our research is intended to provide a more general and preliminary understanding of the likely opportunities available within the community over the longer-term planning horizon**, based on the assumptions provided. To this end, the following provides a summary of the key assumptions that must be understood as limitations to the analysis undertaken as part of this assignment.

Analytical Structure & Approach

- The findings presented in this report do not account for the unique financial expectations, strategic positioning and/or other potential individual preferences of new commercial businesses at NO-E, nor the current and future owners of commercial / development properties in the area. As such, although this research may indicate a positive preliminary finding as it relates to commercial viability and development opportunity, it does not necessarily assert that these observations will ultimately be consistent with the perspectives (and/or parallel analyses) of individual commercial business / prospective tenants or developers.
- Although we have considered the general financial performance of commercial real estate in and around NO-E as an indicator of future demand—including forecast sales per square foot levels of existing and new commercial establishments—we have not been tasked with preparing a financial feasibility assessment for this project that directly considers: (a) the economics of new building construction; nor, (b) the economics of operating these spaces on a go-forward basis.
- Further to above, we note that the recommendations and direction in this report have been provided in the context of broader objectives at NO-E and other relevant areas of the Town that seek to achieve an appropriate balance between yielding both economic and social value for the community overall. As such, our assessment has not focused exclusively on maximizing profitability and/or optimizing returns on investment, but rather balancing out a more complete range of municipal strategic objectives and priorities.

Other Assumptions

- It is assumed that a reasonable degree of economic stability will prevail in the Province of Ontario, and specifically in the context of the Town of Oakville, over the course of the development planning horizon identified in this study.
- It is important to recognize that the lingering effects of the COVID-19 pandemic will continue to result in uncertainty as it relates to current and potential future market conditions; particularly within the commercial sector. To the extent possible, reasonable assumptions and conservatism has been applied to reflect this uncertainty.
- The statistical inputs relied upon in our analysis are considered sufficiently accurate for the purposes of this analysis. These statistical sources—including available Statistics Canada Census data, municipal information and third-party real estate information—have ultimately informed a number of the key underlying assumptions and inputs utilized in our analysis relating to the performance of commercial real estate in North Oakville East.
- References to the Canadian dollar in this report generally reflect its 2022 value, including the range of supporting statistical inputs and research that have informed our baseline market assumptions. Additional adjustments have also been made to reflect real growth in expenditures for future periods, where applicable.
- It is important to highlight that this document reflects the Provincial Planning framework and policy as they existed prior to the 2024 Provincial Planning Statement coming into effect.

In the event that material changes occur that could influence the foregoing assumptions, the various analytical assumptions, key research findings and other strategic recommendations contained in this report should be reviewed or updated, accordingly.

2.0

NO-E Context

2.1 Location

The following provides an overview of the locational context of NO-E, with a particular focus on factors that will most influence the market demand and viability of retail/service commercial space in the area.

- **North Oakville** is a developing area of the Town, nestled just north of Dundas Street, south of 407, east of Tremaine Road and west of Ninth Line. Separate and distinct from other areas of the Town, North Oakville is recognized as a Special Study Area in the Town's Official Plan with the intent that over the next twenty years the area will develop with a fulsome range of residential, employment, commercial, institutional and natural and open space uses.
- **North Oakville East ("NO-E")** includes the portion of North Oakville located east of Sixteen Mile Creek, south of Highway 407 and the Town boundary, west of Ninth Line (Regional Road 13) and north of Dundas Street. The area is comprised by the Glenorchy and Joshua Meadows communities and a portion of the Sixteen Hollow community.

Figure 2.1

Map of North Oakville East in the Context of North Oakville



Source: Parcel.

2.2 Surrounding Land Uses

NO-E is a distinct community and secondary plan area that encompasses the northeast limit of the Town. However, future retail/service commercial uses will inevitably support people outside these neighbourhood boundaries, including other surrounding residential populations and visitors. To this end, the following highlights some of the key features of the lands immediately surrounding NO-E.

North

Directly north of NO-E, beyond Highway 407 and the Town boundary, are lands Agricultural Area and Natural Heritage System by the Town of Milton. Lands further north are designated Urban Area in the Town of Milton and currently encompass **large greenfield areas**.

East

Immediately east of Ninth Line—and the Town boundary—is Highway 403. Lands designated Business Employment in the City of Mississauga comprise the majority of lands at the western extent of the City of Mississauga and are primarily comprised of various **employment and industrial uses**.

South

Areas to the immediate south of NO-E are comprised by **retail/service commercial uses and residential uses**. Significant retail concentrations are located at Trafalgar Road and Dundas Street (Smart Centres Oakville) and Dundas Street and Neyagawa Boulevard (RioCentre), both of which will influence the demand and type of retail/service commercial needs in NO-E.

West

Approaching the western boundary of NO-E includes the only freestanding retail plaza in NO-E (Dundas Market Square). The town's Sixteen Mile Sprots Complex and future Community Centre (under construction as of the date of this report) are located on the west side of Neyagawa Boulevard, just north of Dundas Street West. To the west of the Sixteen Mile Creek are some detached dwellings and townhomes now under development and the Oakville Trafalgar Memorial Hospital ("OTMH"). This residential development is associated with **North Oakville East Secondary Plan Area**, whereas OTMH is being developed in the **North Oakville West Secondary Plan Area** that extends west of the Trade Area to Tremaine Road.

2.3 Policy Context

The vision for NO-E is described in the Secondary Plan as an urban community that is complete and pedestrian-oriented, containing a mix of uses with a wide range of housing options.

It will be well-connected to local and regional transit networks. Commercial uses are envisioned to be located within three **Urban Core Areas** and within **Neighbourhood Centre Areas**, contributing to a mixed-use built environment.

This vision is supported by the provincial planning framework (PPS and The Growth Plan) which encourages the creation of walkable complete communities that are well served by transit.

See **Appendix A** for details of current Policy Context in NO-E.

2.4 Other Characteristics

Access & Transportation

Access characteristics to / from—and within—NO-E are evolving as the residential and non-residential components of the area develop.

Located at the north end of Oakville, the future growth of NO-E is envisioned to combine roads and transportation corridors that enable **efficient travel by vehicular and non-vehicular traffic**. These characteristics are expected to support and ease travel by local residents in the community, while also enabling people from across the town to visit.

- The area abuts Dundas Street, a six-lane *Major Arterial* roadway that connects the area west (towards Mississauga) and east (towards Burlington).
- Cost-effective, frequent and reliable transit service requires concentrated development. As a developing greenfield area, NO-E currently lacks concentrated nodes of population and employment to support transit infrastructure. Currently, Oakville Transit currently delivers Ride On-Demand service, additional transit service may be introduced over time. Future bus stops and stations would be accessible throughout the community so that residents can conveniently and efficiently navigate between differing uses, neighbourhoods and to other areas of the Town.
- Creating a pedestrian-oriented environment is a core component of the vision for NO-E. A focus of the plan is to **develop a multi-modal transportation network that encourages people to cycle and walk** rather than rely exclusively on vehicles. The integration of bicycle friendly and pedestrian oriented streetscapes will be advanced as development in the area increases. It is anticipated to support and create a more active and vibrant streetscape.

Visibility and Exposure

Existing

As noted above, access to—and navigation throughout—NO-E is currently driven by heightened traffic volumes and vehicular access along Dundas Street. Dundas Street current functions as a throughfare and significant transportation network that connects Mississauga to the east with Burlington to the west. Recognizing the lack of existing retail/service space, combined with the nature of this roadway, dwell times are limited and there is little benefit of this traffic volume to the NO-E community.

Furthermore, the area also benefits from heightened traffic along Trafalgar Road (which runs North-South through NO-E) and William Halton Parkway (which runs east-west at the north end of NO-E. Like Dundas Street, these roads have attracted more notable development to date because of enhanced customer exposure and access along these roadways.

Similarly, the areas surrounding NO-E are of minimal benefit to retail/service commercial uses in NO-E. Adjoining communities and development areas (including North Oakville West) are largely undeveloped, thereby limiting support and exposure to uses in NO-E.

Future

Guided by policy direction in the NO-E Secondary Plan, future development plans and population growth are anticipated to steer the vision for NO-E. At its core, NO-E is **anticipated to transition from a low-density, greenfield community to an animated, mixed-use environment**. Development on Urban Core lands, and other strategic areas of the community, are expected to include non-residential uses at grade. The intent is that these uses will collectively establish a walkable and main street environment for future residents and visitors, providing increased exposure and access to amenities and services.

It will also enhance the local streetscape and animate the sidewalk environment to improve the pedestrian experience while simultaneously reducing automobile dependence.

3.0

Market Profile

Key Findings

Population & Income

- As of 2023, some 25,200 persons resided in the Trade Area. The population is anticipated to grow to some 65,600 persons by 2031 and some 142,100 persons by 2051.
- Owing to rapid and significant development in North Oakville East, population growth in the Trade Area is anticipated to represent a significant 55% of growth in Oakville to 2051.
- The average per capita income of the Trade Area was below the Town and Region at \$47,215, but approximately 5% above the provincial average.

Other Demographics

- Relative to the Town, the Trade Area currently contains a higher proportion of 30- to 49-year-olds and a lower proportion of seniors (60+).
- This coincides with a smaller share of single-person families and couples without children in the Trade Area, likely related to the low-density format of housing in the area today.

3.1 Population

Historical

- Approximately **25,200 residents live in NO-E as of 2023**, some 11% of the Town's current population.
- As a developing area of the Town, the population of NO-E has grown at a significant 7.8% average annual growth rate since 2021, well above the average annual growth rate experienced across Oakville (some 2.7%).

Forecast

- To estimate the future population of NO-E, Parcel has relied on Halton Region's Joint Best Planning Estimates ("JBPE"), which forecast future population, occupied dwelling units and employment across the Town to 2051. The JBPE's are a tool used to identify where and when development in the Region is expected to take place and are useful to the Town in developing complete communities and in determining the timely provision of infrastructure.
- Based on these estimates, Figure 3.1 details that the population of the Trade Area is forecast to grow to a significant 142,100 **persons by 2051** largely due to heightened growth to 2041.
- Population growth in the Trade Area is anticipated to account for approximately 55% of all growth across the Town to 2051.

Figure 3.1

Trade Area Population

	<u>Historical¹</u>	<u>Current²</u>	<u>Forecast³</u>		
	2021	2023	2031	2041	2051
North Oakville East	21,800	25,200	65,600	110,400	142,100
Average Annual Growth		1,700	5,050	4,480	3,170
Average Annual Growth Rate		7.8%	20.0%	6.8%	2.9%
Town of Oakville	220,100	231,900	295,900	378,500	444,000
Average Annual Growth		5,900	8,000	8,260	6,550
Average Annual Growth Rate		2.7%	3.4%	2.8%	1.7%

Source: Parcel. Rounded to the nearest 100 residents.

¹ Statistics Canada Census data, adjusted for net undercount.

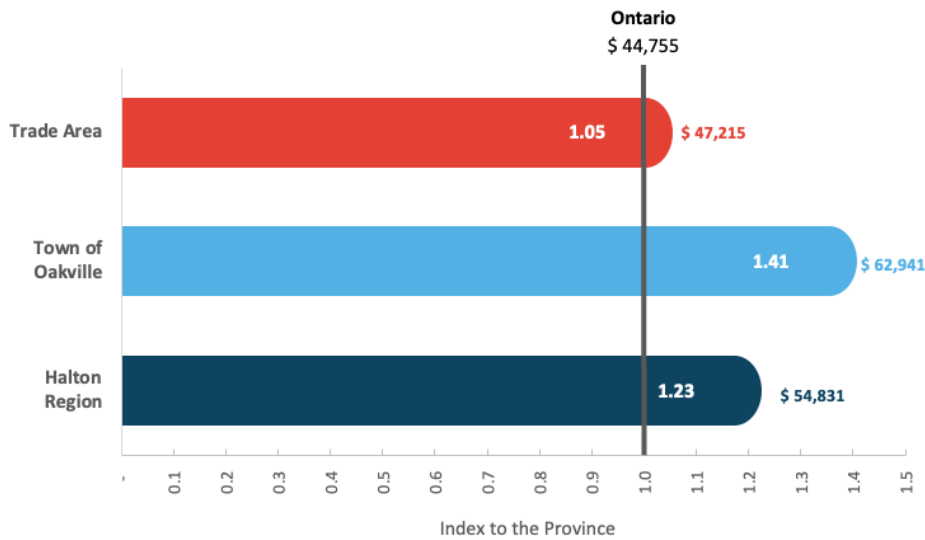
² Statistics Canada Census data (adjusted for net undercount), CMHC completions data, the Town of Oakville Development Charges Background Study.

³ Halton Region Joint Best Planning Estimates. These estimates include the most current information available at the time of this analysis. If these forecasts are refined and/or updated over the forecast period, adjustments should be translated to this analysis.

3.2 Income

- As of the 2021 Census, the average per capita income in the Trade Area—an important input in our retail/service commercial demand assessment to follow—was **below the Town and Region**.
- However, at \$47,215 it was 5% **above the average per capita income of the province**.
- Existing and future retail/service commercial businesses will rely, at least in part, on capturing spending from Town residents who have a greater ability to spend across all store categories.
- With new development and population growth anticipated in the Trade Area, we also expect the average per capita income in the Trade Area will grow in-line with trends experienced across the Town and Region.

Figure 3.2
2020 Per Capita Income in NO-E



Source: Parcel based on 2021 Census data. The current per capita income in the Trade Area is based on information for relevant Census Tracts as data for applicable dissemination areas is not available.

3.3 Other Demographics

NO-E is a developing and growing area of the Town. In understanding potential driving factors of future retail / service commercial facilities needed in this area, we have reviewed a range of other demographic factors beyond population and income alone.

Note: Demographic Change

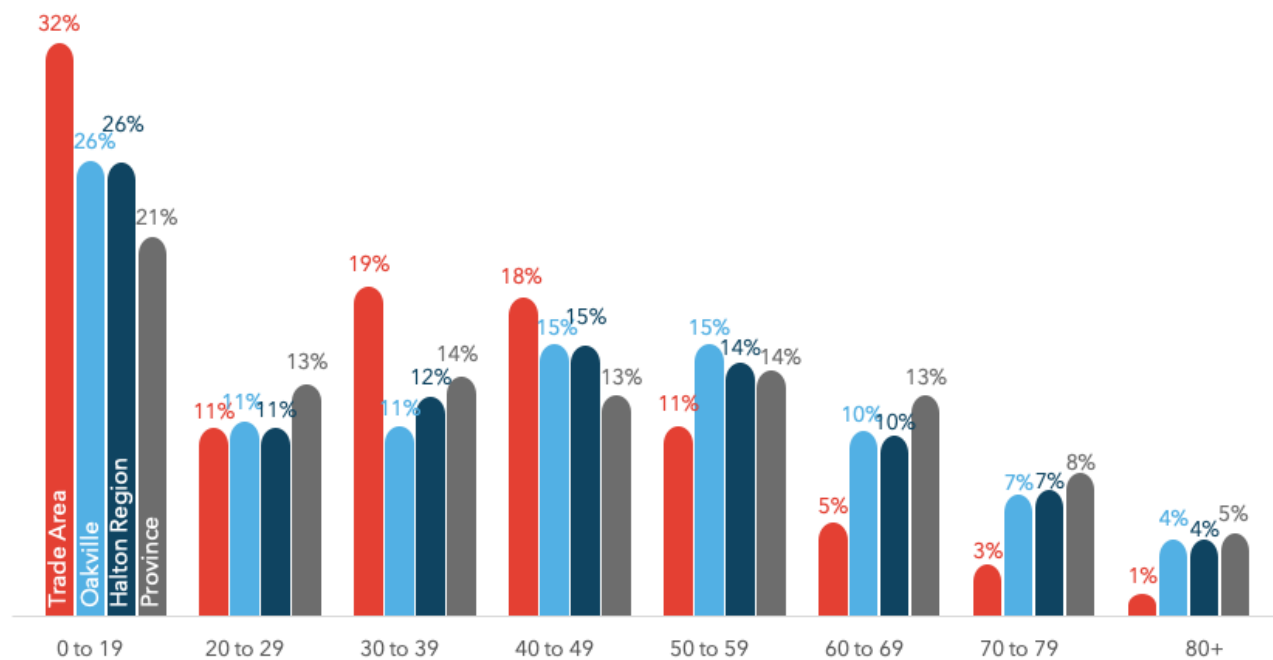
We note that the following overview reflects the current composition of residents in NO-E (as of the most recent Census for 2021). Given significant growth and development anticipated over the forecast period, it is **likely these demographic factors will change**.

Specifically, the introduction of higher density and more mixed-use development (as seen on Dundas Street West) could generate an uptick in older and single persons (demographic groups who often favour these types of dwelling units).

Age

- NO-E contains a higher proportion of people under the age of 19. This coincides with a higher **concentration of residents between the ages of 30 to 49** and suggesting the presence of young families in the Trade Area.
- By contrast, the Trade Area contains a much **lower proportion of people over the age of 60** relative to all other geographies.

Figure 3.3
Age Composition



Source: Parcel based on 2021 Census data.

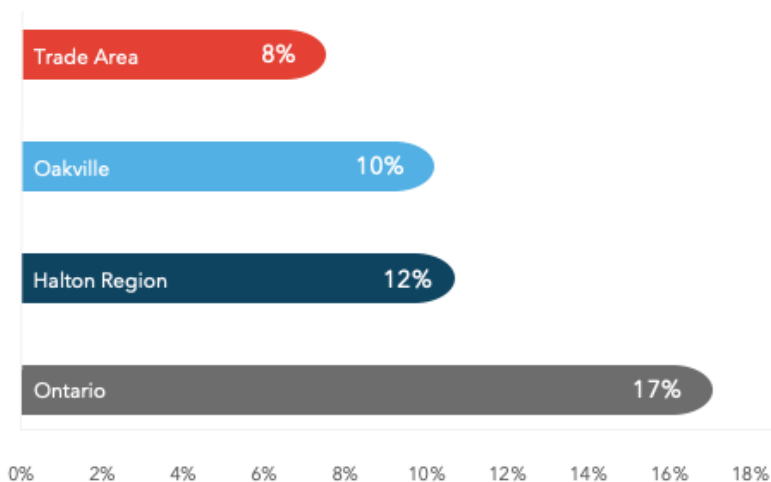
Family Profile

Single-Person Households

- The Trade Area contains a smaller proportion of single-person households than the Town and Region, which is favourable to future spending patterns in the area.
- The relative lack of single-persons households may **increase the average household income—and spending power—of the Trade Area** as single-persons typically have lower households incomes (by virtue of living alone).

Figure 3.4

Share of Single-Person Households

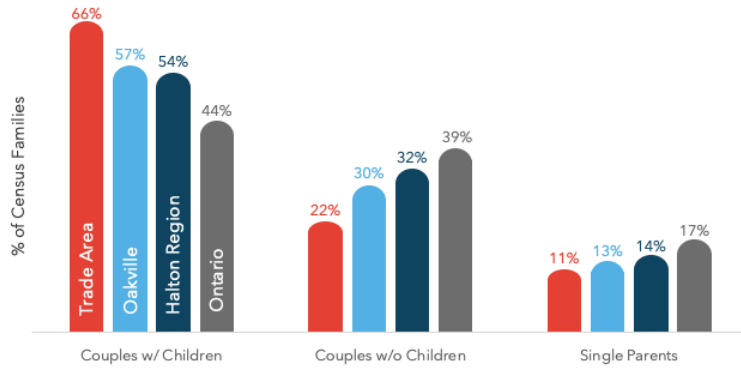


Source: Parcel based on 2021 Census data.

Family Characteristics

- The Trade Area contains a higher share of couples with children and a smaller proportion of single parents than the Town and Region.
- Recognizing the Trade Area's existing age profile, it **appears there is a heightened concentration of young families in NO-E**. Combined with the existing age profile, the Trade Area appears to contain a significant share of young families.
- Relative to the Town and Region, the Trade Area also contains a small share of single parents and couples without children. Recognizing the younger age profile of the Trade Area, these trends suggest there is likely a minimal amount of retirees and empty nester families in the area today.

Figure 3.5
Census Family Characteristics



Source: Parcel based on 2021 Census data. The current per capita income in the Trade Area is based on information for relevant Census Tracts as data for applicable dissemination areas is not available.

4.0

Market Context

Key Findings

- There is currently some **1.1 million square feet of retail/service commercial space** operating in the local market, albeit most is not located directly within NO-E.
- Vacancy rates are extremely low, but potentially as a function of factors beyond typical indicators of demand.
- The composition of space deviates from typical patterns, with a general over-representation of Non-Food retail space and an undersupply of Services.
- Proposed commercial developments include 21 distinct and active applications comprising **some 185,600 square feet (17,200 square metres) of new retail/service commercial space**.
- Customer origins data highlight nuances across existing nodes across the Town and the need to provide opportunities for a broader range of retail/service offerings in NO-E.
- Local resident surveys validate gaps in the market and specifically a preference for shops and services capable of better supporting **day-to-day shopping needs**.
- Stakeholder research identified several central issues expressed by the development community, largely focused on the format of retail/service commercial space to locate at NO-E.
- The retail sector has faced a range of material changes in recent years with varying levels of impact to future commercial space planning at NO-E.

4.1 Commercial Supply

Existing Commercial Space

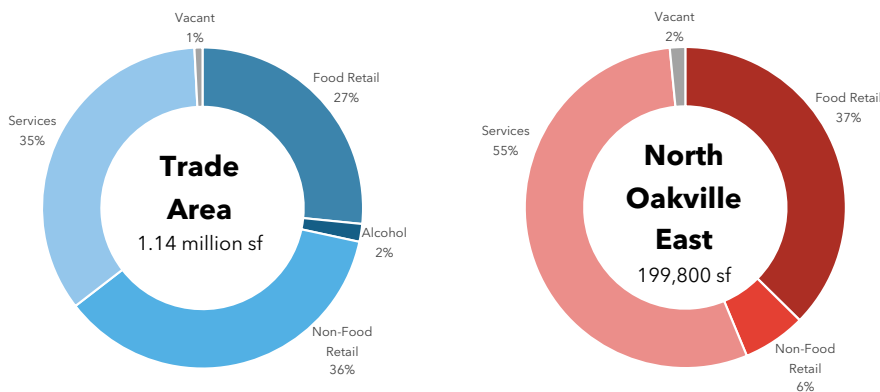
Note: Inclusion of Existing Space at Periphery of the Trade Area

Due to a lack of retail / service space currently operating in NO-E and recognizing that the distribution of commercial activity is not explicitly tied to hard physical boundaries, Parcel has included a range of commercial spaces located at the periphery of the Trade Area in our existing supply estimates.

Total Supply

- The Trade Area currently includes some **1.1 million square feet** of retail/service commercial space. Figure 4.1 illustrates the breakdown of space by store category.
- Approximately 18%, or 199,800 square feet, of this space is located within the NO-E boundary, confirming most of the space operating in the market today is serving residents of other parts of the Town.

Figure 4.1
Existing Supply of Retail / Service Space by Location & Category



Source: Parcel.

Vacancy Rates

- The share of Vacant space, which currently consumes only 1% of space in the Trade Area, is quite low given that a healthy vacancy typically ranges from 4 - 6% depending on the context and location.
- While a low vacancy rate is a common and possible indicator of heightened demand, in the case of NO-E it could also simply reflect the changing and growing nature of the community. Namely, it is important to note that new or expanded commercial supply continues to lag behind residential development.

Composition

- For many Southern Ontario communities, Service space often comprises approximately 50% of total retail/service commercial space. By contrast, only 35% of space in the Trade Area is Service-based space.
- Accordingly, the Trade Area contains a more significant concentration of Non-Food space due to the prominence of big-box stores and other regional-serving uses concentrated along the south side of Dundas Street.
- These factors, and proximity to existing regional serving nodes, will be important as the retail/service commercial space internal to NO-E ultimately develops.

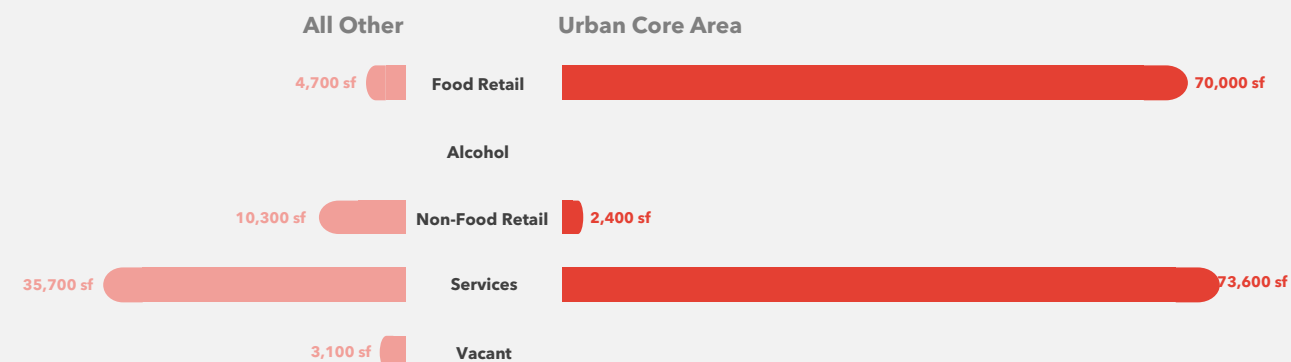
Within North Oakville East

Currently, NO-E does not comprise a significant cluster of retail/service commercial relative to commercial uses present elsewhere in the Trade Area (i.e., including space at the periphery of this geography).

Furthermore, Figure 4.2 shows that the majority of existing space located on lands designated *Urban Core Area*, in Dundas Market Square at 479-519 Dundas Street West. The remaining space is distributed throughout the area—including within newer mixed-use developments—and is generally comprised by a range of limited office and commercial services.

Figure 4.2

Composition of Space in North Oakville East



Source: Parcel.

Proposed Commercial Space

In addition to the nearly 200,000 square feet of retail/service commercial space located in NO-E today, there is a range of active development applications that proposed to introduce various quantities and varieties of new commercial space. This includes **21 applications (19 of which are under active and 2 that are recently built)** that collectively include some **191,900 square feet (17,800 square metres) of new retail/service commercial space.**

Figure 4.3 plots their location. It also details the size (or quantum) of space proposed, the majority of which is proposed to be located at grade of one or multiple mixed-use buildings.

Two of the proposals identified—210 & 374 Burnhamthorpe Road East and a proposal at Trafalgar Road on the north side of Dundas Street West—have yet to specify the potential quantum of retail space to be integrated. To estimate the total amount of potential retail space in the development pipeline, Parcel has therefore estimated the potential retail gross floor area (GFA) that could be developed at these locations based on applying an assumed coverage factor consistent with other developments in the area.

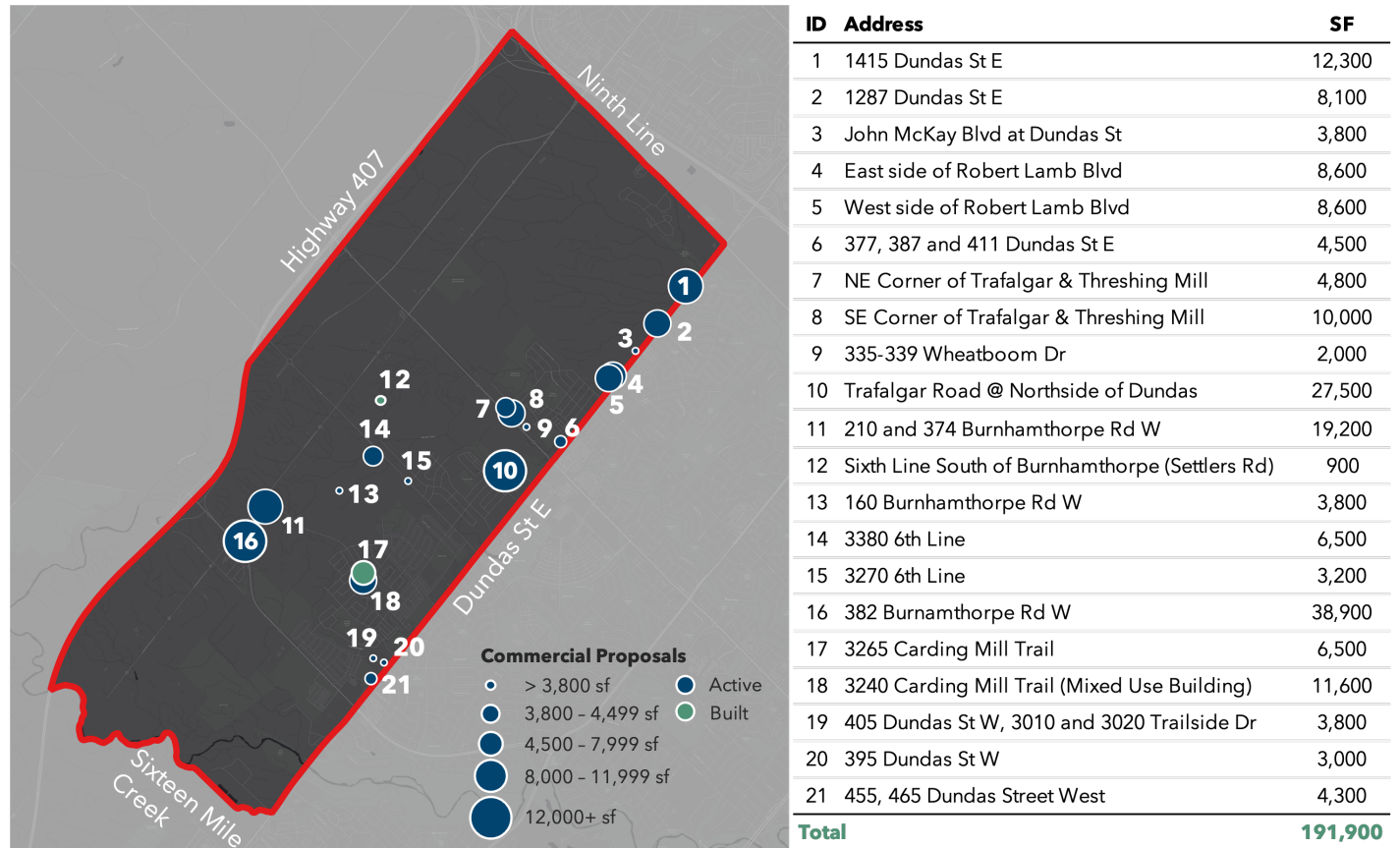
Amount of Retail/Service Commercial Space per Project

Based on the commercial proposal information summarized above and below, we note that the amount of commercial space currently being proposed within new development projects is quite limited, at **less than 9,000 square feet (830 square metres) per site**. This is unsurprising, based on the range of market challenges and broader macroeconomic conditions influencing the amount of space that can be viably delivered to market, among other factors explored in more detail throughout the balance of this reporting.

That said, this represents a notable disconnect with the amount of retail/service commercial space required to meet the future needs of the growing NO-E population, which have been modelled separately as part of our community-specific warranted space estimates. It will be important to reconcile these supply / demand factors in establishing a realistic policy framework that balances this need with prevailing market realities.

Figure 4.3

Active Development Applications with Commercial Space Proposed



Source: Parcel based on Town of Oakville Development Application information.

4.2 Visitation & Customer Origins

To gain a more nuanced understanding of the existing draw and commercial function of existing businesses in the Town—and how this could change through future

growth in NO-E—we have evaluated visitation patterns to selected commercial nodes.

Parcel has utilized this data to better understand visitation patterns across differentiated retail nodes in Oakville with the goal of better understanding the travel behaviours and preferences of people visiting existing establishments in Oakville. Perhaps more importantly, this exercise has been undertaken to capture the true drawing power and customer support for commercial establishments in Oakville, and to better understand how future commercial uses in NO-E could extend or be differentiated from existing uses. This is particularly important recognizing that NO-E is currently devoid of a critical mass of retail/service commercial space and furthermore is still in the process of integrating retail as the area develops.

Note: Customer Origins Source Data

This research has involved partnering with a third-party data provider to determine the travel behaviours and estimated geographic origins of residents, employees and other individuals that visited selected commercial nodes in Oakville over a full one-year period. For the purposes of this analysis, data collected is based on full year 2021 visitation patterns, as the last full-year of data available.

The analytics data employed for this analysis are based on the traffic volume of an average day in the defined study period, or average annual daily traffic (AADT) estimate, and are then adjusted to represent real-world count data. Location based services from smartphones and global positioning points are collected and normalized through various algorithms to estimate AADT, which are comparable to real-world count data.

Based on this process, our analysis below is reported in percentage terms. Estimated trip counts have been interpreted to access the home location of visitors to existing retail locations in Oakville at a macro-level.

Proxy Commercial Nodes

For the purposes of this analysis, we have analyzed customer origins for three commercial locations in NO-E which we—in agreement with Town staff—felt represent reasonable, commercial development proxies for potential future visitors to retail in NO-E. As shown in Figure 4.4, the three locations surveyed include:

- The **Fortinos Plaza** (Neyagawa Boulevard & Dundas Street), an existing commercial plaza in NO-E;
- The **Walmart Plaza** (Trafalgar Road & Dundas Street), a regional-serving plaza on the southern boundary of NO-E; and
- **Downtown Oakville**, an upscale shopping district in southern Oakville.

These retail locations were chosen to assess how the amount, location, type and format of retail at differing locations impacts capture patterns. To understand the current shopping behaviours of NO-E residents, these nodes were also chosen to assess how compositional differences may correlate to the draw of NO-E residents.

Figure 4.4
Surveyed Retail Locations in Oakville



Source: Parcel.

Customer Origins Summary (Geography)

Error! Reference source not found. details the capture patterns of each node. This includes trips made by **“locals”** including people who reside: (i) in the Trade Area; or, (ii) in the remainder of Oakville. It also includes trips made by **“visitors”** including people residing across the following areas: (i) the balance of Halton Region; (ii) elsewhere in Ontario; and, (iii) outside Ontario.

This figure also shows the percentage breakdown associated with **total visits** and **unique visitors** by each proxy commercial node based on the grouped common evening locations noted above. The total visits estimates deliberately include repeat visitation to highlight the tendency of locals to visit a given node more frequently in addition to the more limited visitation of people who come from further afield (e.g., tourists, seasonal residents, or other types of visitors that are less likely to visit these locations regularly). Unique visitors have also been examined as an indicator of total customer volumes and to identify differences in the overall drawing power of commercial nodes with different formats and functions.

Fortinos and Walmart Nodes

- NO-E residents represent 3% of unique visitors but 13% of overall visitation. Similarly, the remainder of Oakville accounts for 17% of visitors but 56% of visitation. This dynamic is similarly present at the Walmart Node, where NO-E residents represent 3% of visitors and some 8% of visitation. The remainder of Oakville accounts for 17% of visitors but 61% of visitation to the Walmart node.
- The remainder of Ontario (outside of Oakville) account for a significant 77% of visitors to Fortinos, but only 30% of visits. This dynamic is similar in reviewed visitation to the Walmart node. Residents living outside of Oakville account for 80% of unique visitors but only 30% of total visitation.
- These trends suggest that while both the Walmart and Fortinos nodes attract people from across Ontario, they **primarily serve local Oakville residents**. As retail plazas with ample parking and a range of food and non-food stores these locations clearly support the daily or more regular shopping needs of residents rather than serving as a distinct amenity.

Downtown Oakville

- NO-E residents represent only 2% of visitors and a less significant 1% of total visits to the Downtown. The rest of Oakville accounts for 19% of visitors but 59% of visits to the Downtown.
- Those living outside of Oakville, and across other portions of Halton Region and beyond, account for a significant 80% of visitors and some 40% of visits.
- Compared to the Fortinos and Walmart nodes, Downtown Oakville **clearly serves as a destination, with a greater range of unique amenities**. The heightened concentration of unique shops and services in the Downtown likely perpetuates this dynamic, appealing more specifically to visitors of the community rather than catering to the daily or weekly needs of locals.

Figure 4.5

Summary of Customer Origins (Geographic Location)

	Fortinos Node		Walmart Node		Downtown Oakville	
	Vists	Visitors	Vists	Visitors	Vists	Visitors
Trade Area (NOE)	13%	3%	8%	3%	1%	2%
Rest of Oakville	56%	17%	61%	17%	59%	19%
Sub-Total (Local)	69%	20%	70%	20%	60%	20%
Rest of Halton Region	11%	22%	9%	23%	11%	19%
Rest of Ontario	19%	55%	22%	57%	29%	60%
Outside Ontario	0%	3%	0%	0%	0%	1%
Sub-Total (Inflow)	31%	80%	30%	80%	40%	80%
Total	100%	100%	100%	100%	100%	100%

Source: Parcel based on mobile analytics data.

Customer Origins Summary (Total Volume)

Relying on the same mobile analytics data, Parcel has also examined the volume of visitation to each commercial node to better understand their respective drawing power (see Figure 4.6) At a high-level, Parcel identified that there was significant variation in total visitation to each node, specifically:

- A **greater volume and diversity of retail draws greater visitation.** In particular, the AADT estimate for the Fortinos node was some 3,400 whereas the AADT estimate for Downtown Oakville was over 14,100 visits.
- While Downtown Oakville had a comparatively small share of its visits associated with residents from Oakville, it had larger volumes overall. This means that on a given day, more discrete visits are still made by Oakville residents to the Downtown than to the Fortinos or Walmart node.
- A similar dynamic prevails in examining the Fortinos and Walmart nodes. While a similar share of visits to each can be attributed to NO-E residents, there is a heightened volume of trips made to the Walmart node. In fact, for every NO-E visit to the Fortinos node, two visits to the Walmart node were observed.
- **Smaller scale retail areas that are less diverse clearly reduces the draw of commercial areas.** Areas with more fulsome and diverse retail offerings (in this case Walmart and the Downtown) draw traffic from a broader range and at greater scale when compared to more local-serving offerings.

North Oakville East Context

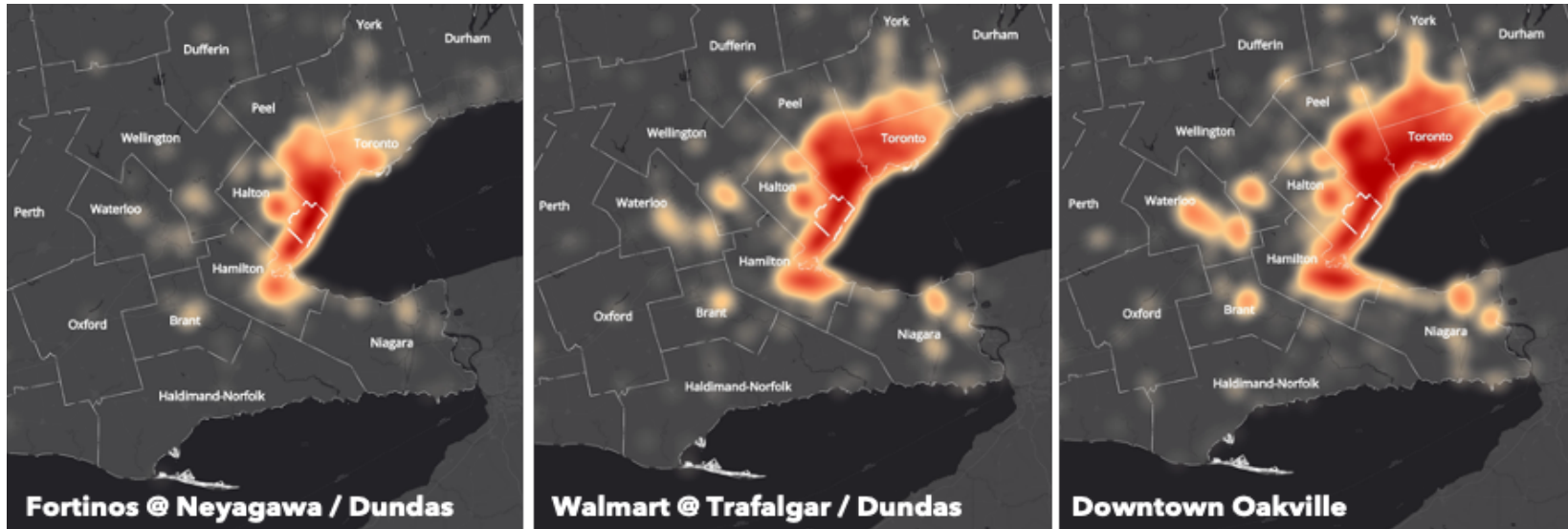
These visitation trends are key to understanding potential future visitation and support for retail/service commercial establishments in NO-E longer-term.

While future retail uses in NO-E are anticipated to have the same underlying locational and access characteristics as the Fortinos and Walmart nodes (i.e., exposure to major arterials, same transportation infrastructure, etc.), they are being encouraged to be in smaller formats as part of more dense mixed-use developments.

As highlighted above, smaller formats and spaces included as part of mixed-use developments generally attract a distinct range of shops and services, rather than the fulsome range of food and non-food offerings that transcend the typical retail hierarchy. Recognizing that the primary function of new retail/services in NO-E is to serve existing and future residents of the area, it will be **important to provide opportunities for the integration and provision of a broader range of retail/services in the area** that will still support and attract people to the area while simultaneously supporting the daily needs of NO-E residents.

Figure 4.6

Origin of Trips to Existing Retail Nodes in Oakville



Total Average Daily Visits

	Fortinos Node	Walmart Node	Downtown Oakville
Trade Area (NOE)	439	885	193
Rest of Oakville	1,911	6,477	8,327
Sub-Total (Local)	2,350	7,362	8,520
Rest of Halton Region	377	910	1,566
Rest of Ontario	662	2,311	4,046
Outside Ontario	15	3	19
Sub-Total (Inflow)	1,054	3,224	5,631
Total	3,404	10,586	14,151

Source: Parcel based on mobile analytics data.

4.3 Resident Shopping Patterns

Parcel—in collaboration with the Town of Oakville—prepared a survey to better understand the current expenditure patterns of residents and to establish a more thorough profile of individuals shopping preferences.

The survey was launched on September 30th, 2023 and ran until October 21st, 2023. It was hosted and promoted through the Town’s website and received **679 survey responses** over this period. Consistent with the core focus of this study, 38% of respondents were individuals who currently reside in NO-E. Less than 2% of completions were by individuals residing outside of the Town of Oakville. The remaining 60% included individuals residing across other portions of Oakville.

The survey was intended and designed to better understand the current shopping patterns and behaviours of residents. It was also pertinent in informing the current and future retail/service commercial needs of the NO-E area, including those sought by individuals living in the area. The survey nonetheless also garnered insights from individuals living in other areas of Oakville and beyond, providing insight into how and in what quantity visitors engage—and ultimately depend on—retail/services in NO-E.

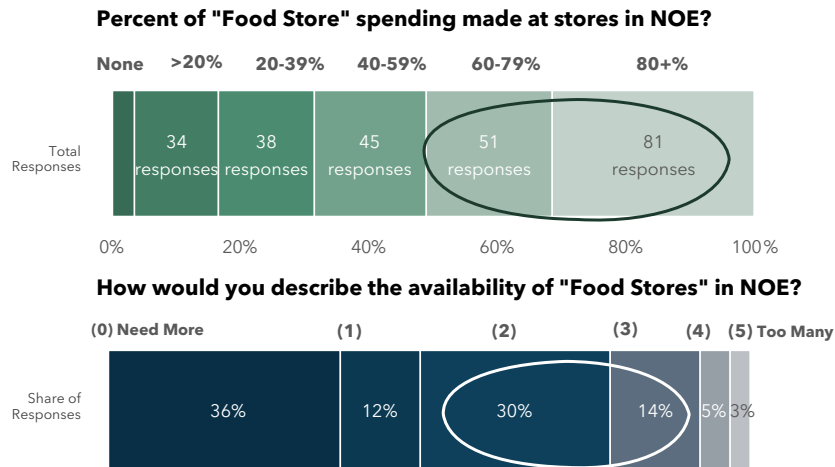
Below we have highlighted the key findings gleaned from this survey exercise. Consistent with our market analysis in Section 5.0 below, NO-E in this context includes stores located on the periphery of the area (i.e., south of Dundas Street).

Current Shopping Patterns

- Approximately 51% of NO-E residents reported that over 60% of their food store spending currently occurs in NO-E.
- With an evident concentration of residents already spending on food stores in NO-E, respondents were largely neutral about the need for more food stores in the area. Some 44% of NO-E residents responded “neutral” about the current supply of food stores, suggesting there was neither too many nor too few food stores in the area today.

Figure 4.7

Shopping Behaviour of NO-E Residents (Food Stores)

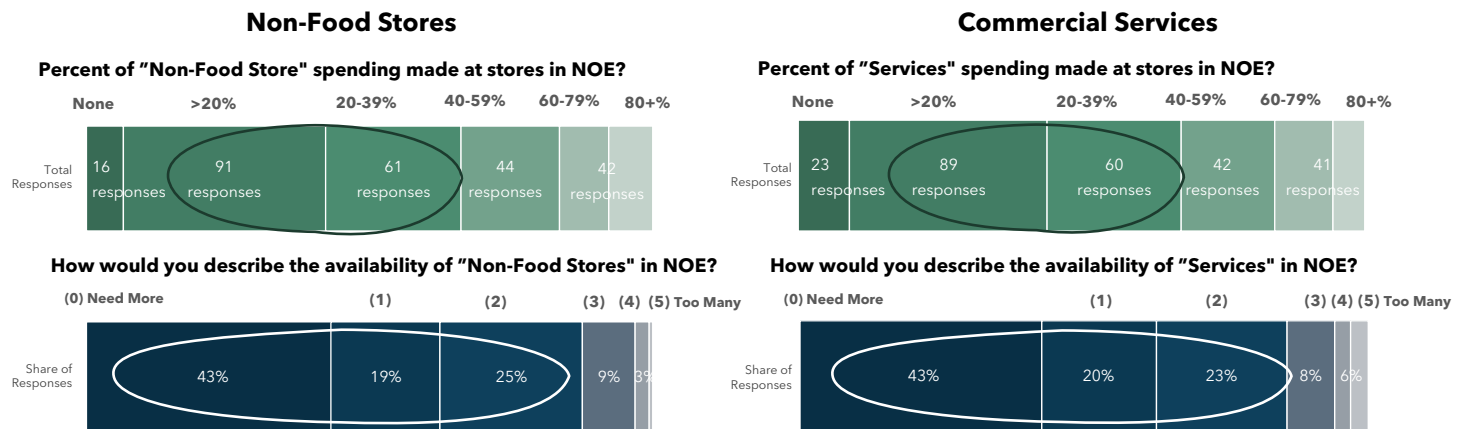


Source: Parcel.

- By comparison, Figure 4.8 shows that some 66% of NO-E residents reported currently making less than 40% of their Non-Food store purchases in NO-E. To this end, a notable 43% of NO-E residents indicated that they feel the area "needs more" non-food store offerings.
- A lack of resident spending and a need for more stores was also identified when residents were asked about the current provision of commercial services. Nearly 80% of NO-E residents reported that less than 40% of their Services spending is made in NO-E. An amounting 43% of these respondents indicated that the area "needs more" services.

Figure 4.8

Shopping Behaviour of NO-E Residents (Non-Food & Services)

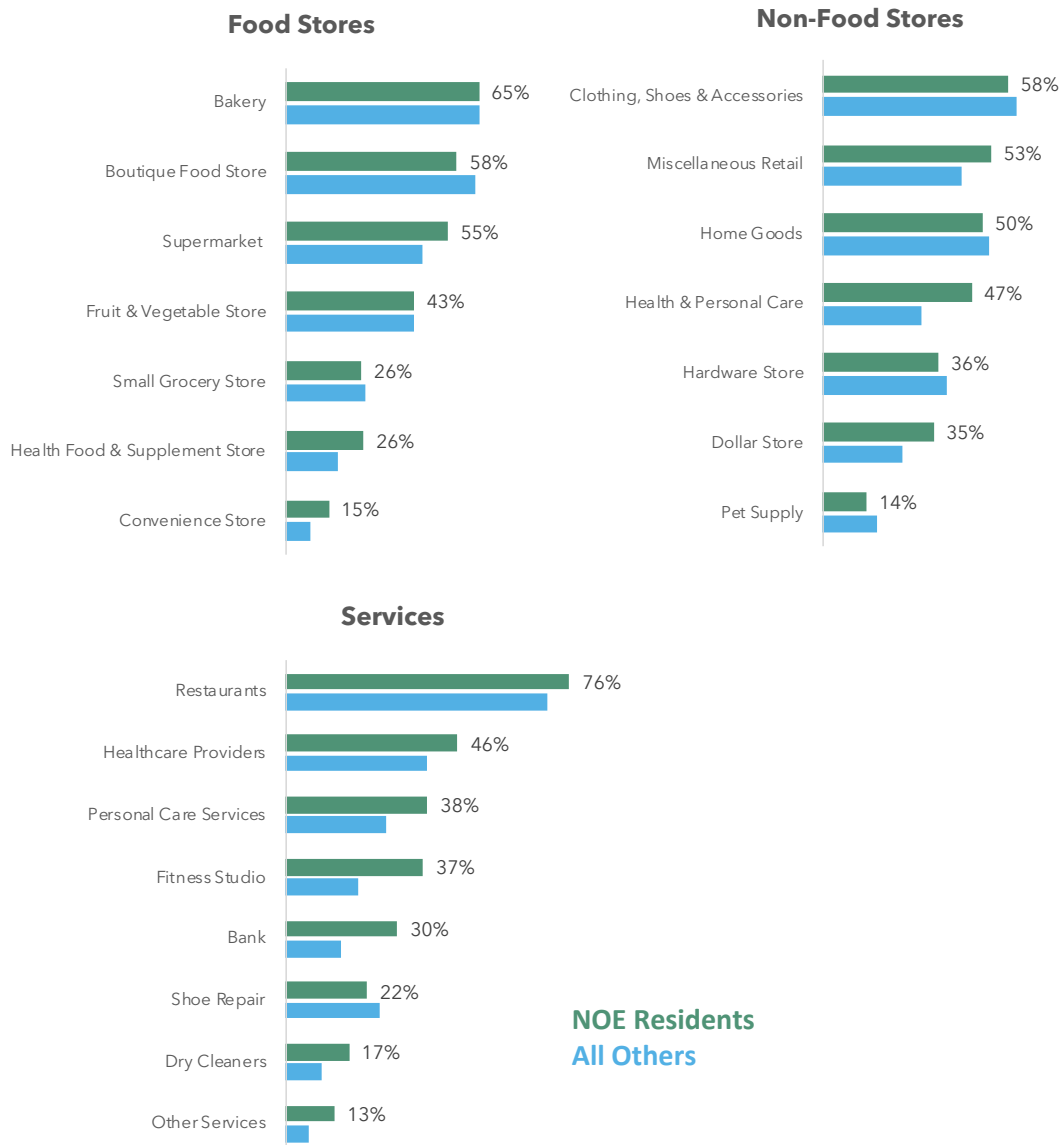


Source: Parcel.

Shop & Service Preferences

- Food Stores:** A desire for bakery’s and boutique food stores (e.g., butcher, cheese shop etc.) was evident among the responses by NO-E residents and those living elsewhere. Relative to individuals living outside of NO-E, local residents also showed preference for more supermarkets, health food stores and convenience stores.
- Non-Food Stores:** Respondents indicated desire for clothing stores, miscellaneous stores and home good stores when asked about the type of non-food stores they would like to see in NO-E. Relative to other respondents, those living in NO-E currently also showed preference for more health and personal care stores.
- Commercial Services:** Restaurants—or food services—were the most sought-after by all respondents. Service preferences from NO-E residents otherwise highlighted demand for more health and personal care services and fitness studios. Demand for commercial services in NO-E among those living outside of the local area generally followed the same pattern but seemed comparatively less engaged (i.e., reduced volume in responses).

Figure 4.9
Desired Shops and Services in NO-E



Source: Parcel.

Consistent with the lack of substantial retail/service commercial offerings in NO-E today, local residents showed preference for shops and services that would support their daily or weekly shopping needs.

More specifically, the figures above identify demand and desire for a fulsome range of shops and services, including larger supermarkets, health and personal care stores and other smaller ad-hoc service facilities.

By contrast, responses from individuals who currently reside elsewhere in Oakville and beyond showed preference more in favour of stores and services that typically have larger footprints and more regional draws. To this end, these individuals also showed less interest in the provision or type of services to be integrated in NO-E. As visitors to the area who have more direct access to local-serving retail/service commercial uses elsewhere in Oakville, it is **possible these individuals see potential new retail/service commercial space in NO-E as an opportunity to address broader retail gaps in the Town, rather than more strictly the direct or local-serving needs of the community itself.**

Frequency & Purpose of Visit

- Notwithstanding the existing lack of retail / services in the area today, some 88% of NO-E residents indicated that they currently visit shops and services in the Trade Area at least once a week. A significant 72% reported visiting more than once a week.
- Shopping was identified as the primary reason that people visit establishments in NO-E. Existing service commercial uses (e.g., dining, personal services etc.) represented a comparatively small share of why people visit. This may be due to a lack of service offerings currently in the area, particularly given previous findings which highlighted residents desire for more “restaurants” and “health care services” in the area.
- Other prominent commercial areas of Oakville reviewed as part of this exercise (e.g., Dorval Crossing, Downtown Oakville & Oakville Place) seemingly attract individuals for a broader range of reasons. While shopping is consistently a dominant reason, each location also draws individuals for dining, social reasons and personal services.
- **In pursuit of developing a successful retail program in NO-E, the integration of a range of shopping, recreation and dining activities should be prioritized.**

Figure 4.10

Frequency & Purpose of Visits to Shops & Services in NO-E

	All Other Residents	NOE Residents
Daily	6%	12%
2-5 times a week	34%	60%
Once a week	21%	16%
<i>Weekly Sub-Total</i>	<i>62%</i>	<i>88%</i>
1-3 times a month	18%	7%
Less than once a month	14%	3%
Never	6%	2%
Grand Total	100%	100%

	All Other Residents	NOE Residents
Shopping	76%	84%
Dining	4%	5%
Personal services	3%	3%
Social & recreation	6%	5%
Other	8%	3%
Work	2%	0%
Grand Total	20%	11%

Source: Parcel.

See **Appendix B** for complete details of Resident Survey results.

4.4 Research Interviews

Parcel conducted informal, virtual research interviews with relevant stakeholders throughout September and October 2023.

This included a range of **local developers, landowners** and **industry groups**. The following themes were gleaned from these discussions.

Summary of Key Themes

Theme #1:

Mixed Use Suitability

There was a shared sentiment that mixed use projects with commercial uses at grade can be **appropriate in many—but not all—development contexts**. By comparison to NO-E, many interviewees saw this type of development as more favourable to relatively dense / urban environments offering immediate access to transit and/or established population bases as a key source of guaranteed customer support and therefore tenant interest to occupy space.

Theme #2:

Tenant Influence

A common source of feedback related to the **needs and interests of tenants as a limiting factor to mixed use development**, rather than the underlying preferences of the development community and/or customers themselves. Namely, many tenants are seen as being tied to a specific blueprint, store designs and/or other relatively templated store parameters that ultimately limit leasing interest (e.g., parking requirements, access / visibility considerations, signage, etc.).

Theme #3:

Urban Design Requirements

There was widespread acknowledgement that land use policy / urban design objectives in NO-E—while well intentioned and potentially appropriate in the fullness of time (i.e., once additional growth has occurred and the area has had a chance to mature)—are **currently unrealistic and unachievable from a practical / real-world perspective.**

There was also regular suggestion that urban design expectations are too onerous and effectively given too much importance relative to other identified municipal strategic objectives.

Theme #4:

Financial Feasibility Challenges

Interviewees noted that mixed-use developments are **increasingly challenged from a fundamental financial feasibility perspective**, due to a range of changing macroeconomic conditions (including those specific to both the retail industry and to new real estate developments of all kinds).

In the context of NO-E specifically, this ultimately pointed to a need for financial incentives and/or other supports to enable this type of development, if desired.

Theme #5:

Interim Use Opportunities

As a function of many of the factors identified above, many interviewees highlighted the importance of development timelines and suggested that the lands in NO-E could **ultimately evolve into a more urban, mixed-use environment, in due course.** Many emphasized the need for urgency in allowing other forms of development in the interim rather than simply wait for market conditions to become more favourable over the longer-term planning horizon captured under Official Plan policy.

Parallel Engagement: Oakville Business Improvement Areas (BIAs)

In addition to the primary research interviews completed by Parcel with relevant stakeholders itemized above, Town staff also conducted interviews with existing BIAs in Oakville, including: the **Bronte BIA**, the **Kerr Village BIA**, and the **Downtown BIA**.

A few themes emerged from this process that are immediately relevant to this study:

- Rising costs are part of the new normal in the commercial sector.
- Dependency on parking was a common theme. Respondents from the various BIAs seemed more advanced in their understanding about the need to shift current parking behaviours. New development in NO-E should similarly consider how development can benefit and thrive in the absence of typical parking ratios.
- New developments and increased population helps attract new businesses and services. The same relationship is true in NO-E, with continued development serving as an attractant for a broader range of retail/service commercial businesses.
- Collaboration is key in establishing the right retail mix. Similar commitment between Town staff and NO-E landowners is paramount.
- The local population is aging and increasing demand for services in Oakville. This demand is replacing the opportunity for—and prominence of—retail businesses and indirectly changing the vibrancy of existing streetscapes. Understanding potential demand from an aging population and its broader implications on design is an important consideration in the build-out of NO-E.
- Activating commercial areas requires the right mix of uses, design, programming, and open space.
- Businesses are relocating from Downtown to less urban areas—in this case Kerr Village—due to more affordable rent per square foot. Attractive design, good location and a growing local population in NO-E may serve as a competitive advantage in the acquisition of new businesses.
- COVID-19 lead to unprecedented challenges for the commercial sector, but also enabled businesses to show resilience and adaptability. Creative retailing, marketing and an ability to withstand change will be key to successfully attracting and sustaining new tenants to NO-E, particularly in the context of mixed-use development.

Commonalities & Differences

Stakeholder research identified several central issues expressed by the development community in NO-E, particularly as it relates to the format of retail/service commercial space to be delivered in this area.

Identified issues—which are broadly a function of shifting macroeconomic conditions, tenant and consumer preferences, as well as other external factors extending beyond the immediate control of the municipality—are largely at odds with the Town’s land use framework and vision detailed in the North Oakville East Secondary Plan. Many of these differences—both real and perceived—relate to the “format” of commercial space that is to be integrated in the area, and perhaps more importantly over what timeframes (i.e., “when”).

Mutual objectives present an opportunity for the public and private sector to work collaboratively to establish a shared understanding of how best to deliver commercial space in NO-E.

Despite the aforementioned challenges, other areas of overlap and consensus were also observed, which—in many cases—have the potential to outweigh the more specific concerns of interviewees and/or the Town individually. This includes a mutual desire for additional growth and development in NO-E, the delivery of housing to meet heightened demand, the advancement of local infrastructure delivery, as well as the provision of a reasonable complement of retail/service commercial space to meet the basic needs of existing and prospective residents of the growing community.

These areas of commonality can potentially be leveraged to help establish creative solutions for the delivery of new retail/service commercial spaces in NO-E, both now and into the future.

See **Appendix C** for complete details of Research Interview feedback.

4.5 Trends & Best Practices

From substantial growth in online shopping activity, continued shifts in merchandise / service offerings, and other ongoing responses to the COVID-19 pandemic, the retail sector has faced a range of material changes in recent years.

Consistent with many of the observations and feedback provided via the research interview process outlined above, the following highlights just a few selected trends that will undoubtedly influence the ultimate commercial strategy for NO-E, with varying levels of impact on the physical, “bricks-and-mortar” space likely to be accommodated in this location longer-term.

Given that **not all of the trends identified will be felt equally at NO-E**, the selected factors that we believe are most relevant to the Town and this specific secondary plan area have been reflected in: (i) the underlying statistical assumptions and key inputs considered in our market demand assessment ([See Section 5.0](#)); and, (ii) as part of our more targeted recommendations for NO-E ([See Sections 6.0 and 7.0](#)).

Trend #1: Blurring of Merchandise Categories

The COVID-19 pandemic and other factors have reinforced the position of many retailers as effective “one-stop shop” locations for a broad range of merchandise offerings. There has also been increased overlap between what have historically been distinct store categories (e.g., Shoppers Drug Mart deviating from their core offering and now offering food products via a more recent affiliation with Loblaws) and other broadening of retail goods / service offerings within single commercial businesses to make ends meet financially.

This has resulted in increased competition among/between retail nodes within a given community.

Trend #2:
Segmentation of Commercial
Hierarchy

There have been clear “winners” and “losers” through recent changes in the retail sector, with the most successful typically being high-end regional/super-regional shopping centres, local-serving / grocery-anchored type corridors and districts or trendy / destination-based “main street” commercial environments.

Trend #3:
E-Commerce

Although often over-stated and misrepresented in the context of commercial development planning—especially for new development communities like NO-E—there has been a discernable and undeniable growth in e-commerce activity as of late, amplified through the COVID-19 pandemic. With significant variation across different store categories (e.g., electronics stores vs. food stores), this has in many cases limited the pool of eligible retailers now opting to locate in secondary or tertiary markets (i.e., instead choosing to reduce their physical space footprints to very few selected locations or key areas).

Trend #4:
Typology & Unit Size
Differentiation

Factors relating to affordability, the economics of new real estate construction and consumer preferences have all resulted in changes to the types and sizes of commercial units now being integrated in new development projects (if any). With a general shift towards smaller units and less overall space, this has brought material challenges to mixed use developments, such as those envisioned at NO-E.

Trend #5:
Shifting Tenant Formats &
Requirements

In response to the foregoing, the type and composition of tenants occupying space in both existing and new commercial developments has also continued to shift. This has involved an emphasis on more experience-based and “showroom” style retail offerings, a growth in cultural / entertainment / recreation type facilities (both civic and privately operated), as well as nuances among chains vs. independents and urban vs. suburban development contexts.

Trend #6:**Influence of COVID-19**

While the longer-term impacts of the COVID-19 pandemic are yet to be fully understood—both as a function of ongoing changes and data availability—many of the changes observed have been a function of pre-existing conditions that were simply accelerated and/or amplified.

See **Appendix D** for complete details of Trends & Best Practices.

5.0

Market Analysis

Key Findings

- Forecast demand could support approximately 114,000 to 183,000 square feet of new **Food Retail** space at NO-E by 2031, increasing to between some 390,000 and 630,000 square feet by 2051.
- Forecast demand could support approximately 133,000 to 186,000 square feet of new **Non-Food Retail** space at NO-E by 2031, increasing to between some 460,000 and 640,000 square feet by 2051.
- By 2031 it is estimated that Trade Area residents could support an additional 3320,000 square feet of **Services** commercial space, increasing to up to 960,000 square feet by 2051.
- In total, this represents a potential need of between 1.8 million and 2.2 million square feet of additional retail/service commercial space at NO-E by 2051.
- Approximately 191,900 square feet of this space could be accommodated by existing applications in the development pipeline. Subject to future changes to existing applications or the addition of additional applications proposing to include retail/service commercial space, existing applications would only account for 11% of this space at most.
- If all the existing applications fruition as currently anticipated, there would still be demand for between **1.6 million and 2.0 million square feet of additional retail / service commercial space by 2051.**

5.1 Demand Assessment

Food Retail

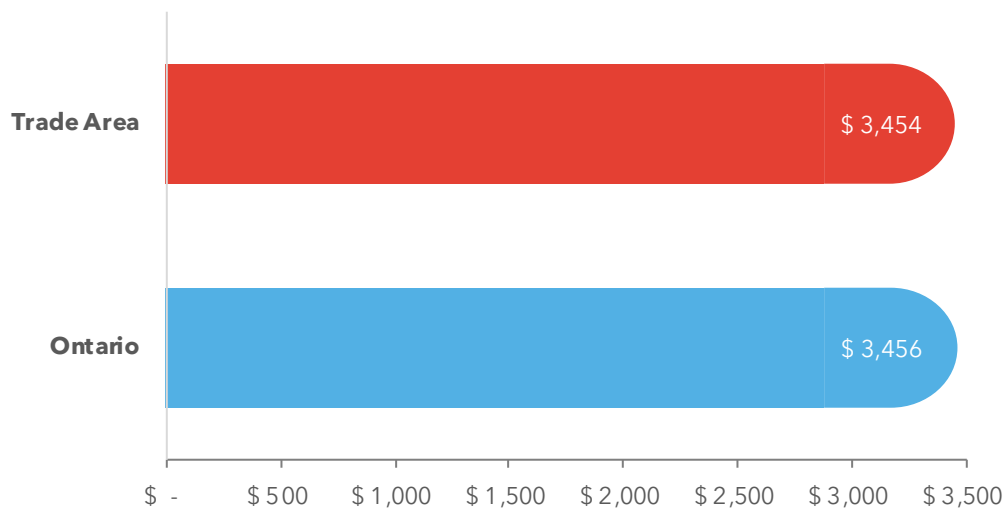
The average Ontarian spends approximately \$2,800 annually on food at supermarkets, convenience and specialty food stores. An additional \$660 per year is spent on beer, wine and liquor by the average Ontarian.

Annual spending on food is relatively inelastic, meaning that spending does not necessarily rise significantly with income. As a basic necessity without many substitutes, demand remains relatively constant regardless of the income capacities of individuals. Additional income translates more directly to enhanced spending at adjacent or alternative food options, such as food services (e.g., restaurants).

Recognizing Trade Area residents' per capita income relationship to the provincial average (as illustrated previously in Figure 3.2) and based on a regression analysis of Ontario household spending by income quintile, we have adjusted Trade Area residents' food retail spending per person as shown in Figure 5.1.

Figure 5.1

Food Retail Spending Per Capita (Including BWL)



Source: Parcel, based on Figure 3.2, Statistics Canada Retail Trade (20-10-0008-01) and Household Spending by Household Income Quintile (11-10-0223-01) data. **Includes an adjustment for e-commerce spending at 3.0% of food retail spending.**

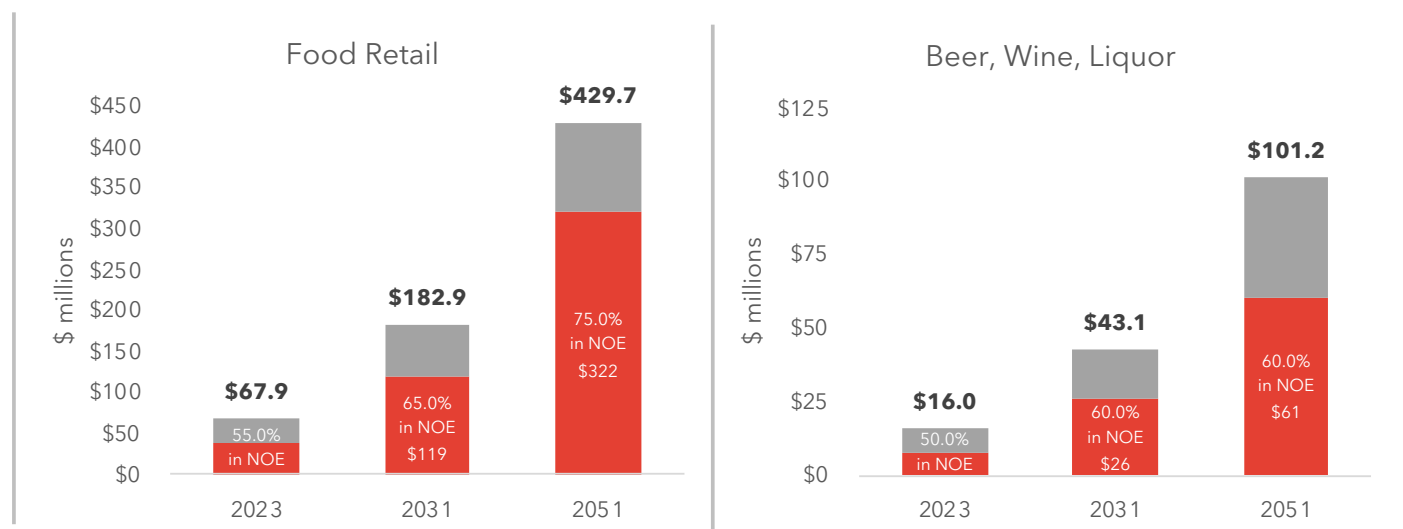
Based on the trends in food spending identified in Figure 5.1 and the current 2023 population for the Trade Area from Figure 3.1, it is estimated that in 2023 Trade Area residents spent some **\$83.8 million** dollars on food retail stores, including beer, wine and liquor stores. Approximately **\$45.3 million** (54%) of which was spent at food and beer, wine, liquor stores in the Trade Area (including periphery store locations).

More specifically:

- **\$57.3 million** (68%) of this spending is attributed to spending at supermarket and grocery stores, while some **\$10.5 million** (13%) of food retail spending was associated with spending at convenience and speciality stores.
- The remaining **\$16.0 million** (19%) of food retail spending was tied to spending at beer, wine & liquor stores.

Figure 5.2

Forecast Food Retail Expenditures



Source: Parcel based on population forecasts in Figure 3.1, food retail spending in Figure 5.1, and estimations of current and future capture and inflow rates.

Recognizing the number of food stores located on the periphery of the Trade Area in addition to a more limited number of food stores in NO-E, it is estimated that existing supermarkets and smaller specialty food / convenience stores currently achieve an average sales performance of some \$600 per square foot. Existing beer, wine and liquor stores are estimated to currently achieving an average sales per square foot performance of some \$1,200.

Going forward, if future food stores—in addition to beer, wine and liquor stores in the Trade Area—are estimated to attain approximately 15% of their sales are from residents outside of the Trade Area (i.e., “inflow” from elsewhere in Oakville and beyond), we estimate that between **114,000 and 183,000 square feet** of additional store space could likely be supported in the Trade Area by 2031, increasing to between **387,000 and 628,000 square feet** by 2051.

A significant concentration of this additional space is tied to supermarkets and smaller specialty food / convenience store space, including between 96,000 and 160,000 square feet of space by 2031 increasing to between some 335,000 to 559,000 square feet by 2051.

Figure 5.3

Forecast Demand for Additional Food Retail Space



Source: Parcel, based on Figure 5.2 and average food store sales of between \$600 and \$1,000 per square foot and average beer, wine, liquor store sales of between \$900 and \$1,000 per square foot.

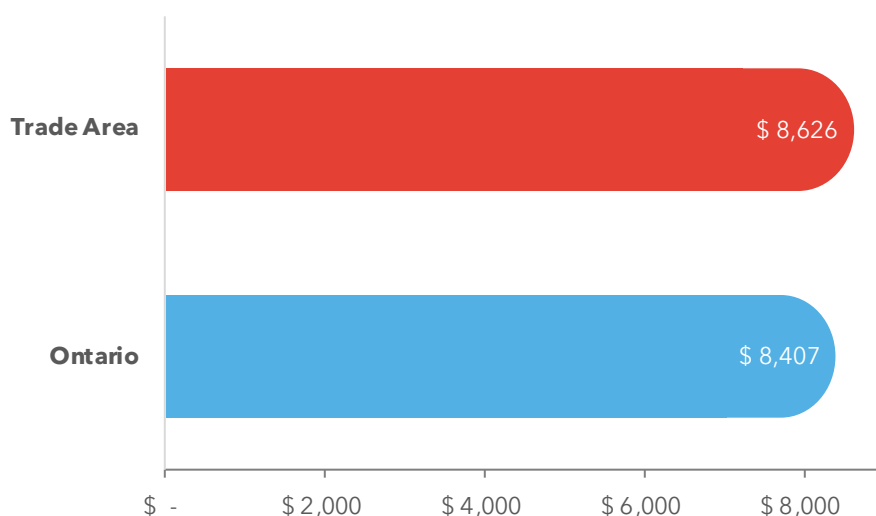
Non-Food Retail

The average Ontarian spends some \$8,400 annually on non-food retail, including items such as sporting goods, clothing, home goods, electronics and health stores (e.g., pharmacies, supplement stores etc.).

Unlike food store spending, spending on these types of non-food store goods are much more elastic, rising considerably with income. Current and future non-food retailers in NO-E will benefit from the higher spending capacities of people living in the Trade Area, Oakville and across Halton Region, helping support business longevity, sustainability and business development.

Figure 5.4

Non-Food Retail Spending



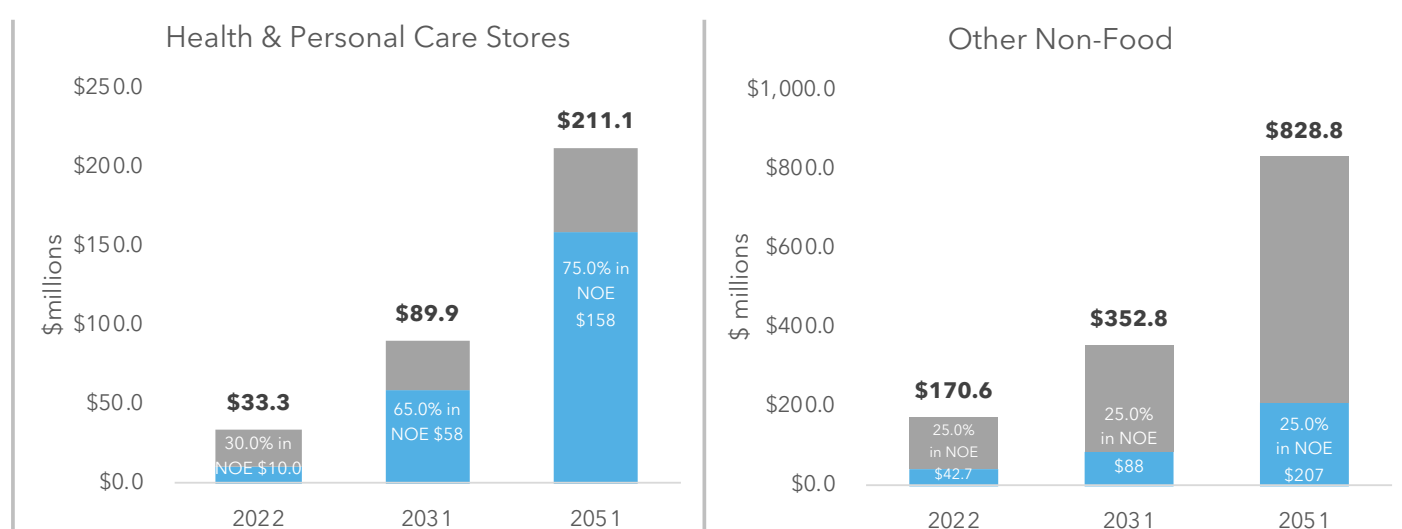
Source: Parcel, based on Figure 3.2, Statistics Canada Retail Trade (20-10-0008-01) and Household Spending by Household Income Quintile (11-10-0223-01) data. **Includes an adjustment for e-commerce spending by store type from between 5% - 22%.**

Based on the non-food retail spending in Figure 5.4 and the 2023 population in Figure 3.1, we estimate that in 2023 Trade Area residents spent some **\$203.9 million** on non-food items in retail stores (e.g., clothing, electronics, sporting goods, health stores etc.). Approximately **\$52.7 million** (30%) of which was spent at non-food stores in the Trade Area. More specifically:

- \$33.3 million at health and personal care stores, \$10.0 million (30%) of which was in the Trade Area.
- \$170.6 million at other non-food stores, \$42.7 million (25%) of which was in the Trade Area.

Figure 5.5 forecasts the expected growth in non-food retail expenditures in the Trade Area to 2051. These estimates are primarily tied to population growth and a reasonable increase in the amount of population that could be captured by non-food stores in the Trade Area today and in the future.

Figure 5.5
Forecast Non-Food Retail Expenditures



Source: Parcel based on population forecasts in Figure 3.1, non-food retail spending in Figure 5.1, and estimations of current and future capture and inflow rates.

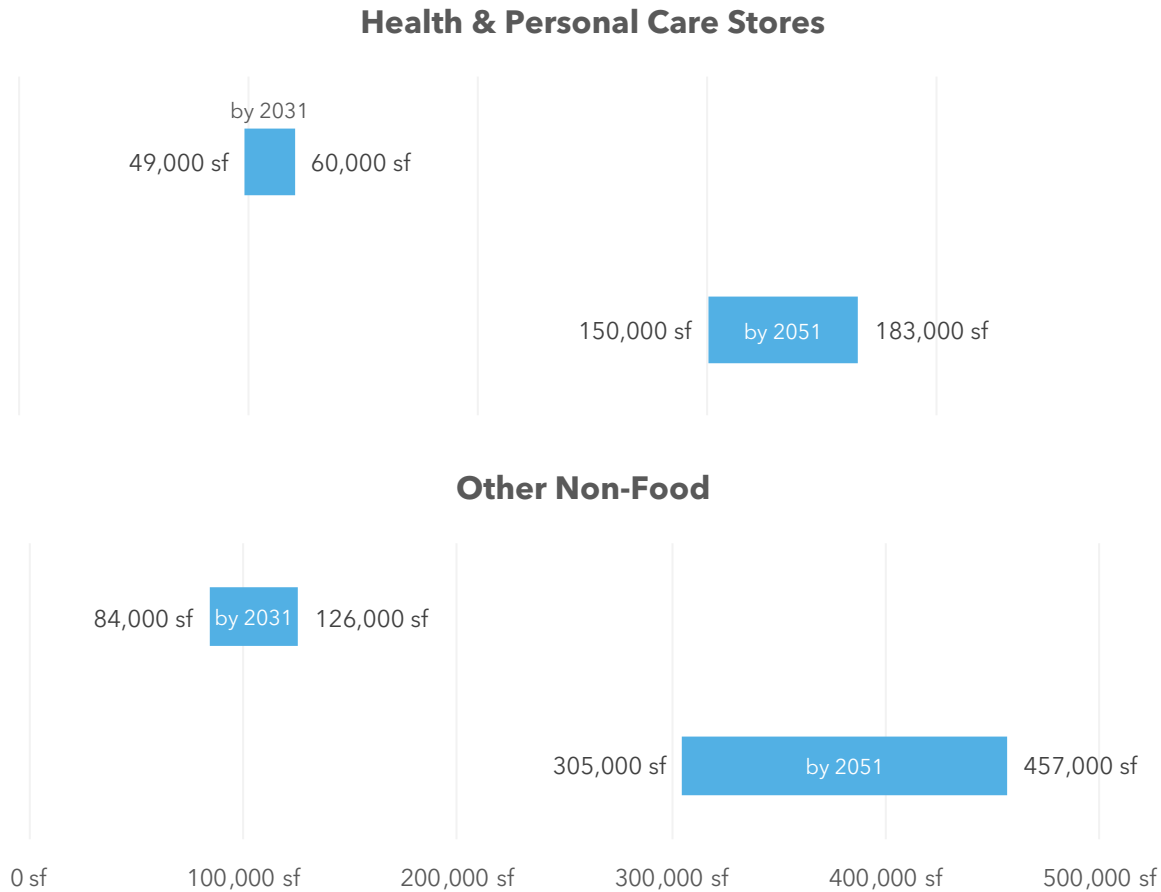
Estimating that approximately 10% of non-food store sales are from residents outside the Trade Area (i.e., “inflow” from elsewhere in Oakville and beyond) we estimate that between **133,000 and 455,000 square feet** of additional non-food store space could likely be supported in the Trade Area by 2031, increasing to between **186,000 and 640,000 square feet** by 2051.

By 2051, this includes:

- Between 150,000 and 183,000 square feet health and personal care retail space.
- Between 305,000 and 457,000 square feet of other non-food retail space.

Figure 5.6

Additional Non-Food Retail Space



Source: Parcel, based on Figure 5.4 and average non-food store sales ranging between \$400 PSF for other non-food to a maximum of \$1,200 PSF for beer, wine and liquor stores.

Services

Our extensive experience inventorying commercial space in communities across Southern Ontario has yielded a typical amount of service commercial space that can be estimated or expressed on a per capita basis. This 'per capita' approach has been used to estimate the future amount of additional service commercial space warranted in the Trade Area.

Recognizing that our inventory in Section 4.1 considers retail/service commercial space on the periphery of the Trade Area, forecast demand for additional service space in NO-E has been based on additional population growth

only. This means that future space estimates reflect net new space required in NO-E (i.e., the Trade Area) notwithstanding existing space in—or on the periphery of—the Trade Area.

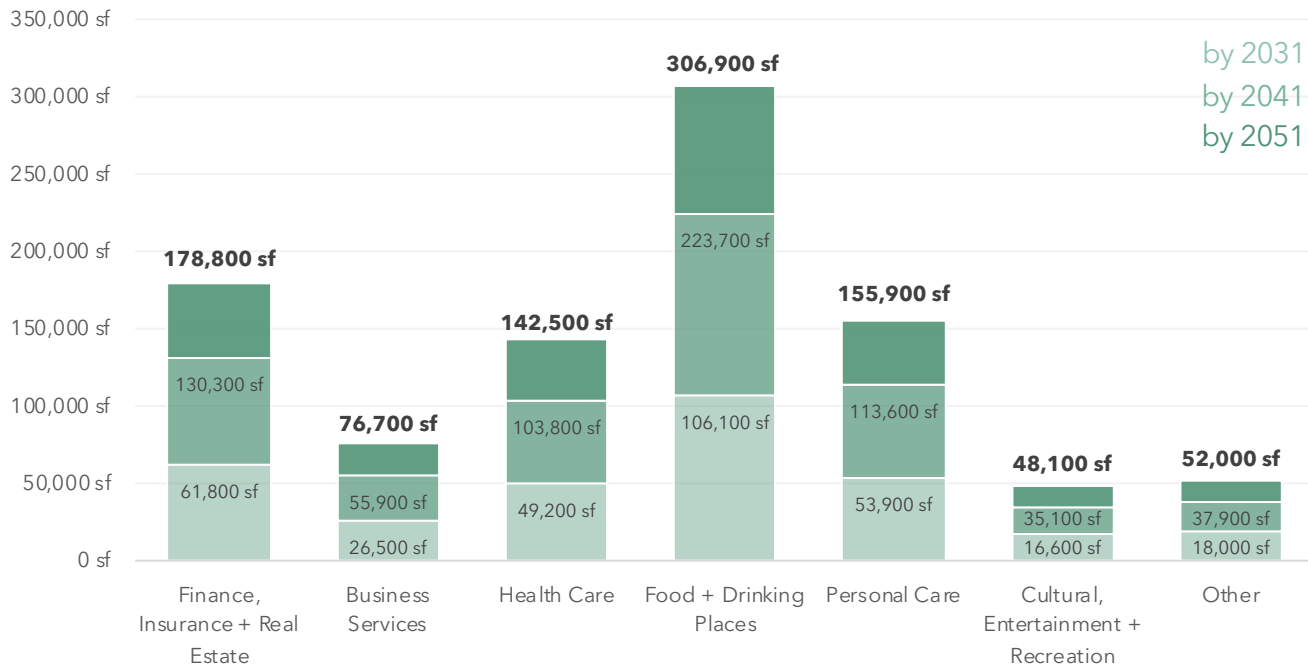
Significant population growth anticipated in the Trade Area over the short and longer-term is anticipated to generate demand for a full range of service categories. While our per capita space analysis does not recognize the current supply of existing space but rather depends on substantive growth projections, it can be further understood given the lack of space in the Trade Area today.

By 2031 it is estimated that Trade Area residents could support an **additional 332,000 square feet** of service commercial space, increasing to **up to 961,000 square feet** by 2051.

Figure 5.7 illustrates the more detailed results of our per capita analysis, including when and what type of service space is warranted to 2051.

Figure 5.7

Additional Service Commercial Space



Source: Parcel.

Business Services include: Professional + Scientific Services; Selected Office Administrative Services; Selected Educational Services. Other includes: Consumer Goods Rental; Personal + Household Goods Repair + Maintenance; Selected Civic + Social Organizations; Transportation.

Summary

Aggregating the distinct analyses by store category above, we estimate the current and future Trade Area residents could support between **579,000 and 701,000 square feet of additional retail/service commercial space in the Trade Area by 2031**. Approximately 191,900 square feet of this space could be accommodated by existing applications in the development pipeline. Subject to future changes to existing applications in the pipeline or the addition of additional applications proposing to include retail/service commercial space, existing applications have the potential to account for between 27% and 33% of the space warranted by Trade Area residents.

By 2051, Trade Area residents could support between **1.8 million and 2.2 million square feet of additional retail/service commercial space in the Trade Area by 2051**. Existing development applications could consume between 9% and 11% of this space. If all the existing applications fruition as currently anticipated this would reduce the 2051 net new space required to between 1.6 million square feet and 2.0 million square feet.

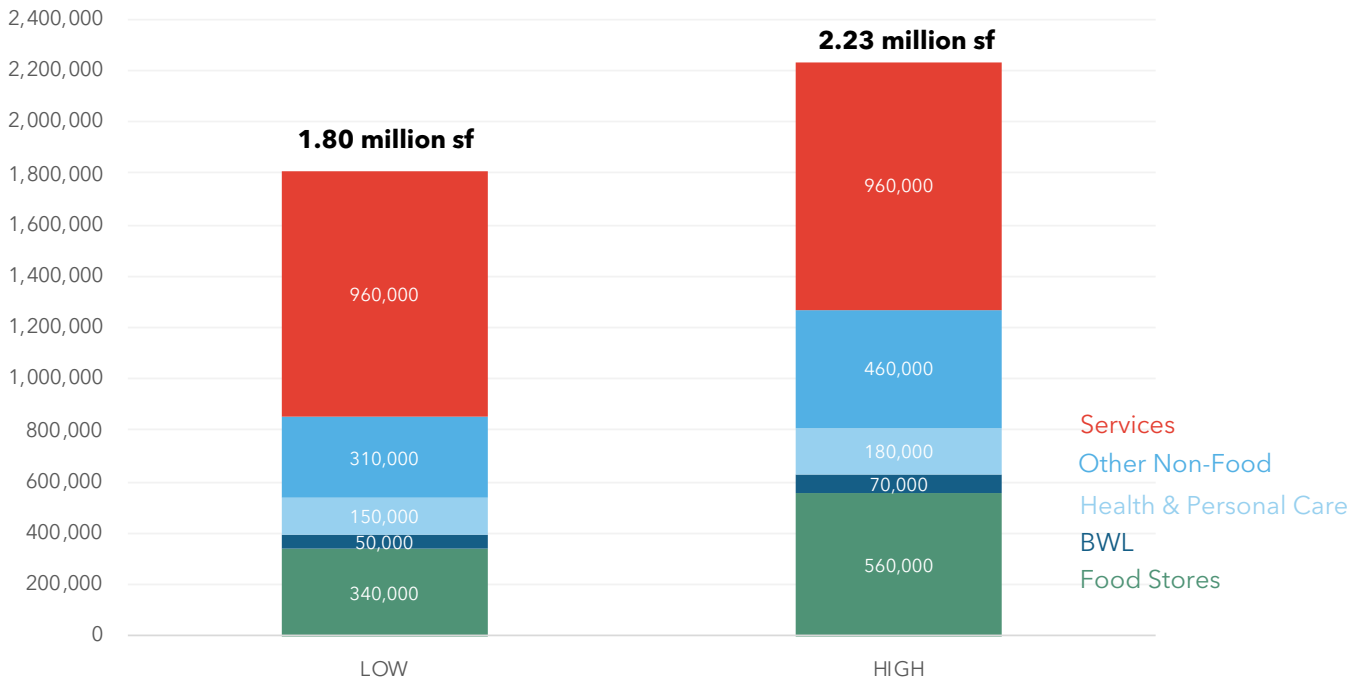
Based on forecast population growth of 116,900 persons to 2051, this equates to some 15 to 19 square feet of retail / service commercial space on a per capita basis. While this may be below what has historically been considered a healthy service level, it is generally in-line with more recent trends in declining square feet per capita service levels. This trend has been driven by many factors, including a rise in e-commerce, a reduction in tenant's in-store inventory and amounting space needs and rising lease rates, which is prompting some tenants to make more efficient use of space than they may had previously. In the case of NO-E, it also reflects the role of the Secondary Plan Area in the context of the Town more broadly. Many large-format stores (e.g., Walmart, Home Depot etc.) are already present in other parts of Oakville and may not necessarily need a second store in this area specifically. These types of "destination" retail facilities (e.g., larger format commercial uses like movie theatres / home improvement stores, etc.) may not represent the essential "day-to-day" uses that will be in highest demand at NO-E - especially relative to other existing retail destinations in Oakville absorbing much of the future demand instead. If anywhere within NO-E, these types of uses would likely be situated within the more prominent arterial-focused intersections, and specifically to the north along Burnhamthorpe Road bordering the employment / transition areas.

To put this in perspective, existing residents in NO-E—some 25,200 persons—are served by 199,800 square feet currently. This equates to nearly 8 square feet per capita. Population growth and resulting estimates for new retail/service commercial space will help ensure that future residents—and the community more generally—are better served than existing residents of the area.

Note About Non-Residential Space Estimates

Development application information referenced above is based on the most current concept plans and draft documents for various applications available through the Town of Oakville. Each application referenced has also been reviewed in consultation with Town staff and are considered the most representative and accurate references. The exact amount and type of non-residential space to be integrated in—including but not limited to those proposals involving retail/service commercial uses—will undoubtedly evolve over time, and ultimately refined at a later date / as part of future stages of the municipal approvals process.

Figure 5.8
Total Demand Warranted in the Trade Area, 2031 & 2051



Source: Parcel.

5.2 Location & Areas of Focus

In conjunction with our evaluation of the *amount* and *type* of retail/service commercial space that may be warranted in NO-E over the longer-term planning horizon, it is also important to consider the **appropriate locations** where this space could be delivered to market throughout the community. To this end, the following provides a brief overview as to the specific locations where policy is directing commercial activities, as well as consideration as to where these commercial activities are potentially best suited in light of current and evolving market conditions.

Existing Context: Policy-Based Direction

As detailed further in Section 6.2 (Planning Approaches), commercial uses in NO-E are currently envisioned to be focused in the specific areas and related land use designations itemized below. These comprise a mix of “main street” commercial environments centered along major arterial corridors (e.g., Trafalgar and Dundas), more localized and smaller pockets of convenience-based retail/service activity situated internal to neighbourhoods, as well as supportive commercial uses in predominantly employment-based areas.

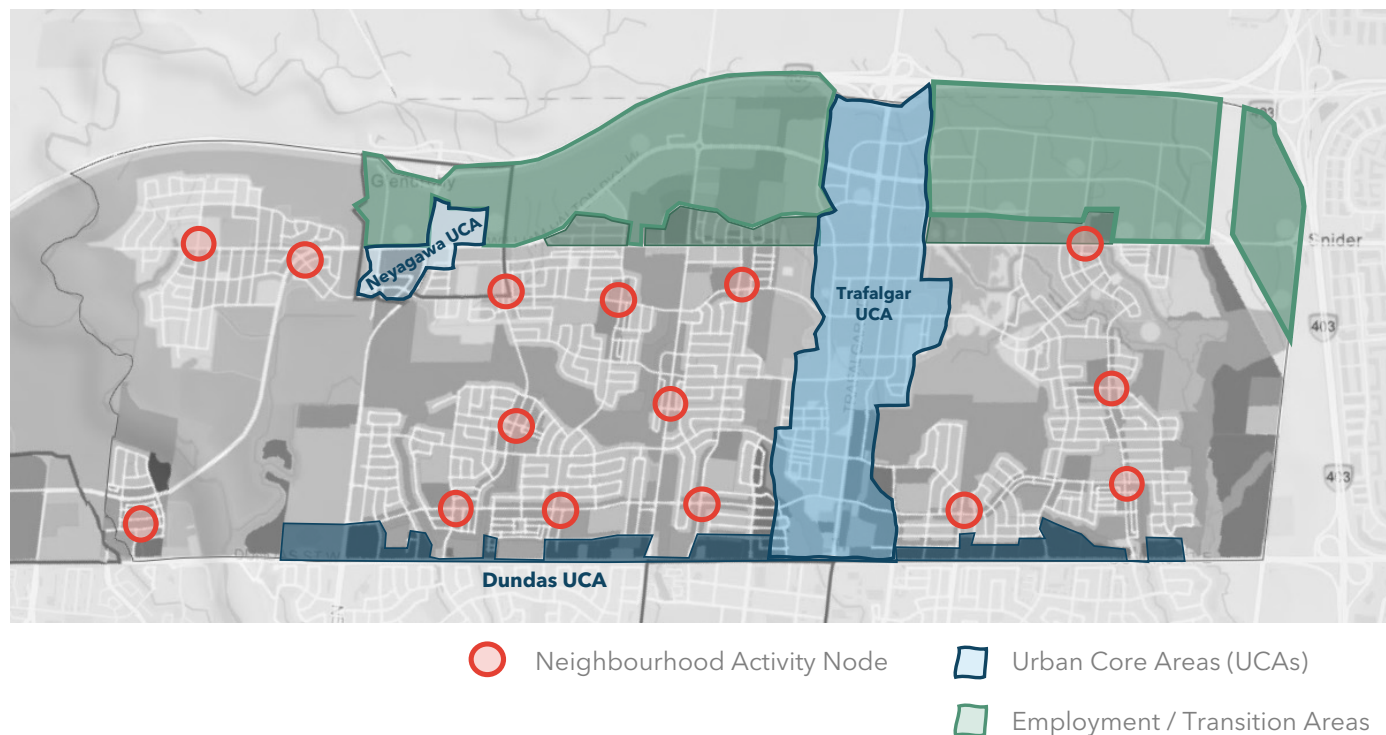
We also note—as illustrated in Figure 5.9—that the existing Secondary Plan envisions a relatively extensive, “blanketed” retail coverage across North Oakville East, integrating a range of opportunities for the delivery of commercial space.

- **Urban Core Areas**
 - Trafalgar Urban Core Area
 - Dundas Urban Core Area
 - Neyagawa Urban Core Area
- **Neighbourhood Activity Nodes** (comprising part of broader Neighbourhood Centre Areas)
- **Transitional & Employment Areas**

See **Section 6.2** for details of current Policy Context in NO-E.

Figure 5.9

Location of Planned Commercial Uses in NO-E (Existing Secondary Plan Context)



Source: Parcel, based on Town of Oakville base map, designations and land use categories.

Future Context: Market-Based Direction

Based on the various market-based research and analysis undertaken as part of this assessment, it is our opinion that retail/service **commercial activity in NO-E will be most successful if it is concentrated at a smaller subset of strategic locations rather than dispersed throughout the entire community**, to the extent originally envisioned in the Secondary Plan. This will require the current policy context to be revisited from a locational perspective with particular attention given to existing and stringent requirements for commercial space delivery at selected locations. It may also involve the potential replacement of these policies with alternative requirements, that aim to “encourage” or “enable” additional growth in retail/service activity elsewhere.

Overall, this would involve adopting more of a **focus on “quality over quantity” with respect to commercial functions in NO-E**. As discussed further herein, this could also be supported through parallel approaches, such as: (a) supplementing traditional commercial space footprints with other forms of commercial activity (e.g., temporary /

shared spaces, etc.); and/or, (b) potentially re-evaluating opportunities for other grade-related spaces in the context of new mixed-use developments and reallocating spaces to other residential / non-commercial uses.

Urban Core Areas

Trafalgar UCA

It is our opinion that the Trafalgar Urban Core Area represents among the more prominent and meaningful opportunities for retail/service commercial space in NOE. There is likely the greatest opportunity for the NO-E community to leverage access to an ideal combination of transportation infrastructure (e.g., major arterial corridors, planned transit infrastructure), customer support from both existing and planned new residents of the community (i.e., to the north and south of Dundas Street, respectively), as well as its ability to capture “inflow” visitation from a broader area that could extend across other parts of the municipality (e.g., direct connections to other major growth areas to the south). Similarly, we note that the existing concentration of commercial uses at the Uptown Core node—to the immediate south of Dundas Street—provides an appropriate baseline from which additional “net new” commercial activity can be built as the NO-E community continues to grow¹. Specifically, there is likely an opportunity to leverage the existing critical mass of established commercial activities at this location, and extend the commercial focus further north into NO-E. The Trafalgar Road corridor also benefits from the continued momentum and development investment planned in this area, which could ultimately continue to support higher densities and thereby reinforce the importance of this as a key gateway to the community (See **Intersection of Interest #1** in Figure 5.10).

That said, commercial activity will **likely need to be concentrated at key intersections** rather than maintained as a consistent, contiguous “ribbon” of retail/service space along the entirety of the corridor. As a major, multi-lane arterial roadway, it is unlikely that the full length of Trafalgar Road will be capable of supporting a “main street” pedestrian environment continuously animated by commercial uses, as originally envisioned for this area in the subject Secondary Plan. Instead, opportunities for relying on the high visibility and direct access / frontage to the primary arterial corridor afforded along Trafalgar Road should be leveraged, while exploring opportunities for additional commercial activity to permeate further into individual development blocks and/or nodes, as applicable. For example, this could include additional focus around the intersection of Trafalgar Road and Burnhamthorpe Road further north and somewhat removed from the existing development closer to Dundas Street (See **Intersection of Interest #4** in Figure 5.10).

¹ We note that the Town of Oakville is in the process of initiating a study to review and update the land use vision for the Uptown Core node, including considerations as to how the existing commercial uses at this location could evolve through redevelopment longer-term. Where possible, the commercial strategy for this area should be considered in unison with that of NO-E.

Dundas UCA

Similar to above, the results of our market demand assessment confirms that there could be sufficient customer support available to warrant additional commercial or “non-residential” space delivery along portions of the Dundas Urban Core Area. That said, expectations should be tempered with respect to extending a consistent ribbon—or even intermittent nodes at key intersections—of street-fronting commercial along the entirety of this roadway. This approach or expectation could prove challenging due to the nature of this corridor as a major thoroughfare for vehicles accessing points further east and west. It is also simply too long a distance to maintain this amount of commercial space delivery in a consistent, contiguous manner.

Where applicable, areas with existing concentrations of commercial activity along Dundas Street should again be leveraged to help satisfy the shopping needs of existing and new residents of NO-E, particularly as new commercial uses are introduced elsewhere in NO-E over the longer-term planning horizon. Selected areas throughout this corridor could potentially accommodate a mix of grade-related commercial activity spanning a variety of retail/service store types (i.e., small to mid-sized footprints). Of particular note, the area around Dundas Street and Neyagawa Boulevard likely serves as an ideal location for concentrated commercial uses, given the presence of: (a) existing retail/service activity (i.e., the Fortino’s plaza); and (b) other non-residential / institutional uses, such as the Sixteen Mile Sports Complex and Oakville Public Library’s Sixteen Mile Branch, which could provide additional sources of customer support and “traffic” (See **Intersection of Interest #2** in Figure 5.10).

Neyagawa UCA

The Neyagawa Urban Growth Area also represents a potential area of focus for new retail/service commercial activity in NO-E, especially in that it is further removed from other existing and/or potential new proposals for commercial development, including the foregoing Urban Growth Areas. As the NO-E community continues to build out longer-term, there will be a need for another standalone commercial node in this vicinity, containing a range of basic retail/service uses (e.g., food store / pharmacy-anchored node with other supporting convenience-based shops and services) (See **Intersection of Interest #3** in Figure 5.10).

Neighbourhood Activity Nodes

In addition to the various other locations envisioned to accommodate commercial space, a total of 15 Neighbourhood Activity Nodes are identified in the existing NO-E Secondary Plan, which require at least one corner of identified intersections to include commercial space (i.e., via mixed-use development and/or standalone non-residential buildings).

From a market and economic perspective, it is unlikely that all of the Neighbourhood Activity Nodes currently identified across NO-E will develop with these types of commercial uses – again as a function of both: (a) market conditions and potential limited interest among tenants to occupy space in these locations offering limited visibility

and access to higher volumes of potential customer traffic; and, (b) strained financial feasibility conditions where new development densities are likely to be most limited internal to the NO-E neighbourhood. From a purely market and economic perspective, it is our opinion that the number of Neighbourhood Activity Nodes that require retail/service commercial space should be reduced and potentially re-focused on a select few **“primary”** internal nodes that are located furthest from other existing or proposed commercial activity. Remaining Neighbourhood Activity Nodes could continue to be encouraged as more **“secondary”** areas of focus, but without the explicit requirement for commercial space, which could otherwise risk inhibiting development of any kind (i.e., including housing).

Competing Priorities: Reconciling Market vs. Planning Objectives

The market-based direction above suggests that there should be consideration in the geographic extent of commercial space delivery requirements—namely the distribution and amount of Neighbourhood Activity Nodes. While we recognize that this recommendation could inherently involve accepting trade-offs with other important planning ideals and objectives (e.g., improved access for local residents and walkability, etc.), we nonetheless believe this direction is appropriate given the combination of market realities that now prevail and are likely to persist in the coming years (e.g., reduced need for commercial space in response to changing consumer behaviours and macroeconomic factors such as online shopping, challenging feasibility conditions for new development of all types – especially non-residential space / commercial uses, etc.).

Moreover, it is our opinion that the potential externalities or trade-offs that could amount from this approach may be more limited in practice rather than in theory. This is because concepts such as walkability and convenient access to commercial space in this type of suburban “blank slate” development context tend to be more predicated on perception and pre-defined planning goals than actual resident behaviour. For example, it is possible—even likely—that future residents of NO-E will continue to rely heavily on automobile travel for shopping trips in the foreseeable future, regardless of land use policy directions and/or until such time as additional transit infrastructure is provided that enables a more fundamental shift in travel patterns.

It will be necessary for the Town to manage these trade-offs and prioritize preferred outcomes, accordingly, when establishing new and/or revised land use policies for NO-E.

Transitional / Employment Areas

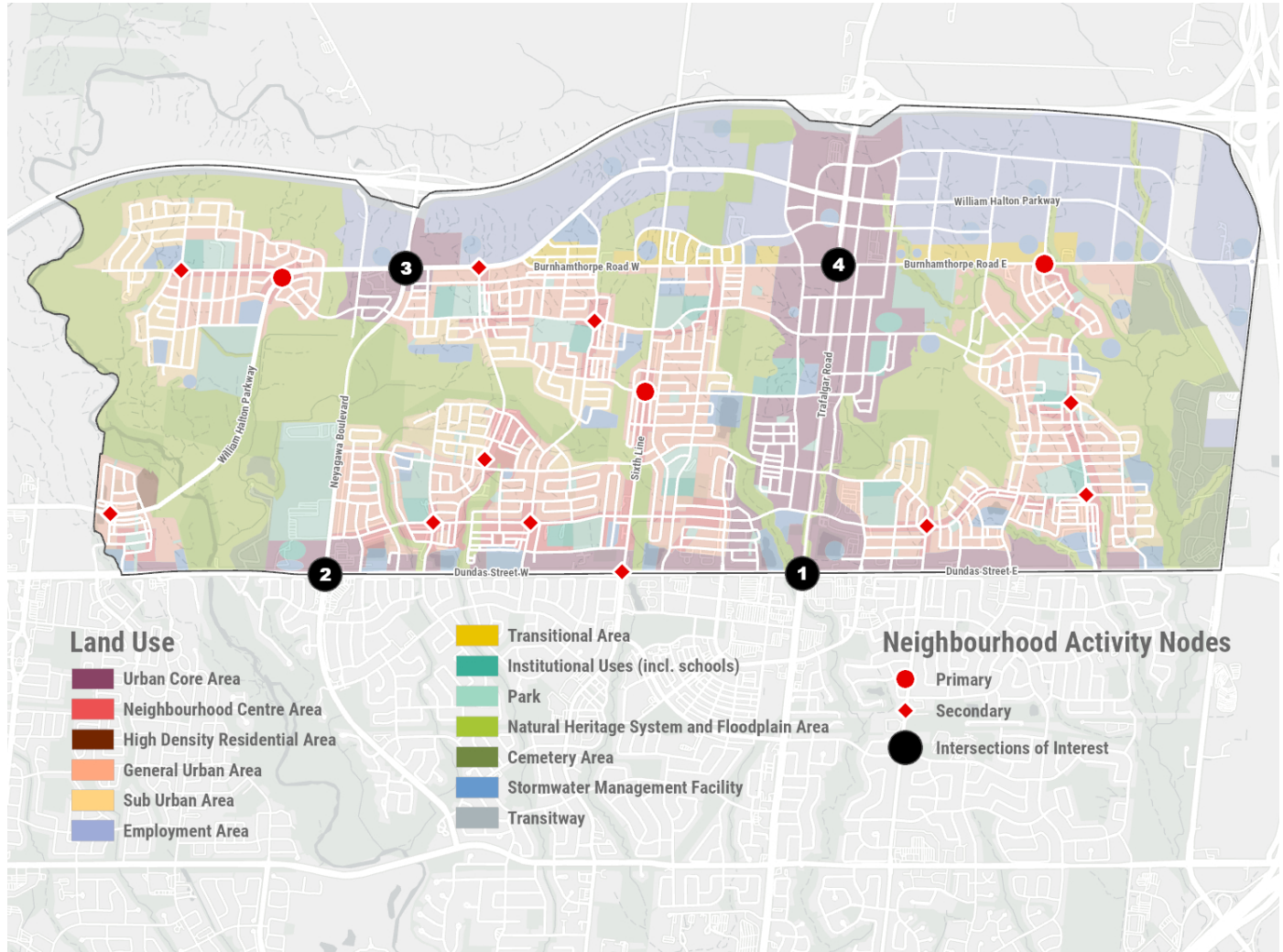
With respect to the balance of the NO-E community, we note that the designed “Transitional” and “Employment” Areas situated along the northern edge of the community and to the immediate south of the Highway 407 corridor have been earmarked for future employment-based development. From a commercial market perspective, these areas are similar in terms of their overall locational characteristics, as well as their relationship with existing / proposed shopping areas elsewhere in NO-E (and the Town). As such, we have generally treated them as being equivalent in terms of their capacity to accommodate future commercial uses as the area continues to build out.

Given the configuration and geographic location of these lands, it is our opinion that future commercial activity is most likely to concentrate in either more highway-serving formats (e.g., gas station / rest stations and supporting quick-service restaurant uses) or along the transition areas identified along Burnhamthorpe Road, where visibility and access to pass-by traffic among local residents are highest. This area may also serve as an appropriate location for some secondary commercial activity on an east-west corridor that is separate and distinct from the Dundas Urban Core Area.

Overall, commercial uses are unlikely to materially advance the supply of retail/service space available to local residents in NO-E, but could nonetheless help to alleviate some local demand indirectly. As such, we do not believe that this needs to be an area of focus for commercial space planning and any new uses would generally be best intended to play more of an employment area-serving function and/or highway-oriented function; both of which would primarily cater to non-residents (i.e., pass-by traffic, local employees and/or other types of visitors to the area). Furthermore, recognizing that that latest direction from the Province (i.e., per the proposed Provincial Planning Statement 2023) currently contemplates reducing or eliminating retail permissions in employment areas, we also feel that advancing the supply of retail/service space across employment areas in NO-E should not be a priority in the short-term. Instead, it is important that commercial uses be directed to many of the key nodes identified above, accordingly (e.g., key intersections / Urban Core Areas, etc.).

Figure 5.10

Location of Commercial Uses in NO-E (Proposed Directions)



Source: Parcel and Town of Oakville base mapping, designations and land use categories. This map is intended to show the “emerging evolution” of NOE, integrating the latest zoning / subdivision approvals, proposed or anticipated road layouts and the NOE Master Plan. As proposals evolve, it is important to keep in mind that this concept may also be adjusted.

5.3 Unit & Space Typologies

Providing opportunities for a range of different commercial unit types and sizes will continue to be important as part of the future growth and development in NO-E. Whereas other existing commercial centres throughout the Town can continue to be relied upon to satisfy more community-wide and/or regional shopping elements of the

commercial hierarchy (e.g., traditional indoor shopping centres, larger format anchors and national retail chains, main street downtown pedestrian environments with higher levels of “inflow” visitation, etc.), future retail/service commercial uses at NO-E are more likely to be comprised of smaller to mid-sized units and tenant types that are more local-serving in nature.

This could include, but would not necessarily be limited to, some combination of the following:

- **Selected mid/large-sized anchor spaces** at strategic locations capable of generating co-location benefits and driving growth in “cross-shopping” among and between retailers, including direct benefit to operators of smaller units nearby (e.g., supermarkets or health and personal care / pharmacy type anchors);
- A collection of **smaller and mid-sized units** capable of accommodating smaller chains and independent shops / services that satisfy the day-to-day needs of local residents (e.g., restaurants / food-service and drinking establishments, healthcare and other related professional offices, personal care services, etc.);
- Ancillary **temporary or shared spaces** capable of supporting additional and more informal retail-based programming (e.g., seasonal or semi-regular markets, pop-up shops, etc.), which could be accommodated in parks / open spaces, at institutional facilities (e.g., libraries / community centres / schools) and/or in common areas of new mixed use developments.

Note About Unit Typologies

Additional functional details with respect to commercial unit design, preferred locations and other factors identified above are likely to be refined and further explored throughout the design process for the site and individual buildings. Many of these building design aspects are too detailed for consideration at this early stage in the planning process and are therefore subject to change as individual concepts evolve.

6.0

Policy Analysis

6.1 Context

The foregoing market assessment and stakeholder feedback established have revealed constraints that could impede successful mixed-use commercial development in NO-E.

These constraints include, but are not necessarily limited to, the following:

- There may not be enough space warranted to substantiate the full spectrum / hierarchy of commercial uses identified in the original secondary plan.
- The Urban Core Areas permit the highest densities for commercial / retail space and are planned to have a “main street” character located on arterial roads. The size of arterial roads and the volume and speed of vehicular traffic on them create an uncomfortable pedestrian environment, which calls into question the appropriateness of these locations as the commercial focal points of the community.
- There is not strong buy-in from landowners and developers for a pedestrian-oriented commercial structure.
- Landowners and developers have limited interest in developing mixed-use buildings with a commercial component, based on current economic conditions and the locational context of North Oakville East.
- For many stakeholders, single-storey, standalone building typologies with surface parking continue to be preferred for retail / service commercial uses at this time due to prevailing market conditions (e.g., construction costs, tenant preferences, perceived level of demand for mixed-use commercial and retail space in NO-E, etc.).
- Given the current economic landscape and planning policy framework in NO-E, landowners are unlikely to develop commercial and retail uses within the Neighbourhood Centre Area designation at a scale and format that would provide for the convenience retail needs of the community. Additionally, the Town has not played its role in locating civic uses in Neighbourhood Activity Nodes of the Neighbourhood Centre Area designation.

6.2 Planning Approaches

Given the constraints identified, the Town may wish to rethink the approach taken for commercial uses in the North Oakville East Secondary Plan.

The following considers alternative planning approaches that respond to these constraints, organized along the following themes:

- **Principle #1:** Rethinking the Place of Commercial Uses Within the Urban Structure
- **Principle #2:** Allowing Interim Typologies and Formats
- **Principle #3:** Considering Commercial Use Requirements and Incentives
- **Principle #4:** Design and Placemaking for Interim Typologies / Formats

Policy Analysis: Presentation of Options

Following these principles, the balance of this section presents several recommendations and policy options that are designed to enable future growth in NO-E in a manner that satisfies the underlying planning objectives identified for this study.

For each principle, the discussion has been organized to include: (i) a general discussion about the **key challenges** being addressed; (ii) a summary of **existing Secondary Plan policies** related to the principle; and, (iii) an overview of **potential planning solutions**.

Principle #1 – Rethinking the Place of Commercial Uses Within the Urban Structure

Key Challenge

Commercial uses are envisioned as an important contributor in creating an urban structure and are used in place-making, creating a “main street” environment along Arterials and serving as one of the defining features of Neighbourhood Activity Nodes in NO-E.

However, the width and the volume of traffic along the arterials present a challenge to creating a “main street” pedestrian environment. Commercial uses developed in Neighbourhood Activity Nodes have also been relatively minor, resulting in only a limited number of live-work units to date Secondary Plan-wide.

Current Policies

The Secondary Plan envisions a linear, “main street” built form format in the Trafalgar and Dundas Urban Core Areas (7.5.14, 7.5.15), with commercial uses clustered in a few areas (7.5.14.f, 7.6.4.5, 7.6.4.7, 7.6.8.3, 7.6.5.1).

The Trafalgar Urban Core Area (TUC) is intended to be the focal point for North Oakville East and is planned to accommodate a mixed-use and some single use commercial development in a “main street” format (7.5.14). While the plan promotes a linear pattern of development lining Trafalgar Road, it acknowledges retail and service commercial may be clustered in a few areas given the current pace of intensification in North Oakville East. Additionally, the Secondary Plan identifies the intersection at Burnhamthorpe Road and Trafalgar Road as an area where commercial and retail uses could be clustered in a single use format to meet the needs of residents (7.5.14.c.g).

In the Dundas Urban Core Area (DUC), commercial and retail development is restricted to intersections with north/south streets, promoting a cluster development pattern (7.5.15.c). In these areas, the Secondary Plan encourages commercial development to occur in a “main street”, mixed-use format (7.5.15.c).

A cluster development pattern is also encouraged in the Neyagawa Urban Core Area (NUC) (7.5.16).

In the Neighbourhood Centre Area (NC), limited commercial uses are permitted, including convenience retail, personal service, restaurants and business activity. The Secondary Plan requires a minimum of one mixed use or non-residential building at the intersection of each Neighbourhood Activity Node, within the NC (7.6.7.1).

Potential Solutions

Hierarchy of Commercial Areas of Focus

Within the broader framework of Urban Core Areas and Neighbourhood Activity Centres established by the Secondary Plan, Section 5.2 of this study outlines a hierarchy of Areas of Focus for commercial development and identifies general locations within the Secondary Plan area for each category. Each is defined by its locational characteristics, scale of offering, nature of their co-locational benefits and anticipated catchment. The Areas of Focus are:

- **Key Intersections** - Feature the largest agglomeration of commercial uses, including large-sized anchor spaces such as supermarkets, to serve the North Oakville East community. They will be located in prominent locations in proximity to the intersection of major roads which provide high exposure and good access.
- **Primary Neighbourhood Activity Centres** - Feature significant concentrations of commercial uses, secondary to those located at Key Intersections, with an offering that includes more service-oriented and local-serving uses. They are located within neighbourhood areas to improve local access and foster walkability, realizing complete community principles at the neighbourhood scale.
- **Secondary Neighbourhood Activity Centres** - Feature smaller groupings of commercial uses located primarily within the interior of neighbourhoods. They provide access to a range of convenience retail, locally-oriented services and community-oriented businesses, serving as local focal points of community at a walkable scale.

This approach is a **departure from the existing Secondary Plan** in a number of ways:

- The proposed Areas of Focus differentiate between Primary and Secondary Neighbourhood Activity Centres; and
- The proposed Areas of Focus provide a further level of policy direction on the location for concentrations of commercial uses within the Urban Core Areas at Key Intersections.

The Town should consider **incorporating this hierarchy of commercial development** and their locations into the Secondary Plan. The recommended locations are intended to ensure good geographical distribution, foster integration with surrounding uses to promote short travel distances and good accessibility from the surrounding mixed use and residential areas, and enable access by transit to the more significant concentrations of commercial uses. The Town is encouraged to strengthen these “areas of focus” as community focal points by **co-locating community services and amenities with commercial uses** within a high-quality public realm. The Town should work to align its Parks, Recreation and Library Master Plan with these Areas of Focus to identify suitable sites for integrating community assets such as libraries, recreational facilities and parks within planned developments.

Different Configurations

The existing Secondary Plan focuses on creating ‘main street’ oriented retail. This approach is sound in that it uses retail to animate streets and contribute to the creation of streets as enjoyable and walkable public places. However, as discussed elsewhere in this study, development interest has been weak in this kind of development and the major arterial roads present challenges to the development of positive pedestrian environments which would benefit from at-grade animation by commercial uses. The Town should consider whether other configurations for the incorporation of retail into the built environment could be more successful in attracting commercial development while still meeting Secondary Plan objectives. Some alternative configurations include:

Option A: *Shifting from a Main Street Concept to a Partially Internally-Oriented Cluster Concept*

- This approach would focus clusters of commercial uses on larger sites at Key Intersections.
- These clusters would present a good face towards bordering roadways, but also be large enough to maintain internal road networks and linkages.
- This approach would likely be more conducive to the development of interim typologies and formats that would meet the immediate needs of the community for commercial uses, while allowing for comprehensive redevelopment of sites along a more urban mixed-use format at a later point.
- While this approach is most pertinent to the development of commercial uses at Key Intersections, it may also have applicability in Primary Neighbourhood Activity Centres.

Option B: *Maintaining but Refocusing the Main Street Concept*

- The Town could consider shifting the focus of commercial/retail development to narrower roads with lower volumes of traffic.

- Rather than clustering commercial uses along the arterial in a 'main street' fashion, commercial uses could extend along a perpendicular or parallel street, particularly in the areas surrounding Primary Neighbourhood Activity Centres.
- Collector or local streets are more appropriate places to encourage a pedestrian-oriented 'main street' format. Narrower rights-of-way and lower volume and speed of vehicular traffic are more conducive to fostering an environment comfortable for pedestrians. They also penetrate more deeply into the interior of neighbourhoods, thereby improving accessibility by walking for nearby residents.
- The arterials will be designed to be complete streets.

Principle #2 - Allowing Interim Typologies / Building Formats

Key Challenge

Landowners have expressed that the current policies in the Secondary Plan have impacted their ability to develop their lands to meet the market demand for standalone commercial space. In keeping with the planning goals for this study to both secure commercial uses within NO-E and create a complete and compact community, the challenge is to consider how interim uses for sites could be permitted to meet current needs for commercial/retail space while upholding the long-term goals for the area.

Current Policies

The Secondary Plan includes an interim uses and phased development policy (7.5.13). This policy contains principles to which all development within NO-E should conform. These principles can be summarized as follows:

- All buildings should be viewed as if permanent, except for small structures, to ensure that future phases of intensification are not inhibited.
- Development should be designed to be pedestrian and transit friendly.
- Highest density of development should be concentrated on Trafalgar Road.

- There needs to be an appropriate relationship between different built forms. This will be outlined in Urban Design Guidelines.
- Urban Core Areas will be connected to the street and open space network.
- The Town's local character will be conveyed through urban design.

Design alternatives for large retail stores that contribute to a vibrant and active street life will be considered. (7.5.13.b)

Additionally, the Town currently requires an intensification plan to be provided in the Trafalgar Urban Core Area and Neyagawa Urban Core Area when minimum standards will not be achieved within the initial development proposal (7.6.4.8.i & 7.6.6.3.c). Intensification plans should include:

- the provision of local roads and small blocks;
- the means to achieve a pedestrian and transit friendly streetscape;
- building orientation within the block and the relationship to the street for initial and future development;
- the siting and orientation of the parking for initial and future development;
- the ability to achieve both short- and long-term intensification.

As part of the intensification plan process, the Secondary Plan permits the Town to consider a reduction in density within the Trafalgar Urban Core Area (7.6.4.8.i). Within this area, low-rise commercial buildings of a minimum height of 5 m are permitted as part of a comprehensive development (7.6.4.8.d.iv).

While mixed-use development is encouraged within the Urban Core Area, the Secondary Plan does permit single use buildings widely in the Urban Core Areas (7.6).

Potential Solutions

- Plan for interim forms of commercial development that do not fully conform to the ultimate vision for North Oakville East exists in current Secondary Plan policies and urban design and open space guidelines. These policies could be more explicitly targeted at commercial uses and apply throughout the Secondary Plan area. This would allow Town staff the discretion in evaluating development proposals to effectively prioritize the amount and access to retail/service commercial space in the short-term and defer broader placemaking and urban design outcomes of achieving the full integration of commercial uses until later stages of development.

- In essence, this would permit stand-alone retail stores with surface parking as an interim use. These uses could only be permitted in strategic and accessible locations.
- Consideration would need to be paid to urban design elements—especially the positioning of buildings and the relationship of their primary unit entrances to surrounding roads and outdoor pedestrian spaces, the location and orientation of surface parking, minimum building heights, other design features and maximum store size—that landowners have identified as barriers to the provision of commercial retail and service uses.
- A focused set of urban design guidelines could also be assembled to address the permitted scope of interim uses, including those that allow for greater flexibility, while also promoting appropriate site and building design, vehicular and pedestrian access, interface with surrounding uses, pedestrian circulation, etc.
- To ensure these developments contribute to the long-term vision for NO-E, the Town could also reinforce their existing policy for intensification plans by including this policy within a new interim use and phased development policy. An intensification plan for an interim use would need to demonstrate how the development could be intensified in the future so as not to preclude the achievement of the vision set out in the Secondary Plan.
- The criteria listed in the current intensification plan policy are sufficient at present but could be reviewed in light of expanded permissions for interim uses.

Principle #3 – Considering Commercial Use Requirements & Incentives

Key Challenge

The Town has struggled to secure commercial and retail space in a mixed-use format in North Oakville East. Existing Secondary Plan policies widely permit these uses and, in some cases, provide direction on the amount (GFA) that is desirable. However, they do not contain a mechanism (site and quantity specific policies) that require their delivery. As it is unclear how GFA requirements will be distributed or secured over individual parcels, the Town is limited in their ability to ensure that commercial uses are available in the long-term.

Current Policies

In the Secondary Plan, Gross Floor Area (GFA) requirements are the only policy that provides direction on the location and quantity of commercial/retail space, except concerning Neighbourhood Activity Nodes, as described below.

In the Trafalgar Urban Core Area, commercial buildings are required to not exceed a maximum of 93,000 square metres of gross leasable floor area in the designation, with a minimum of 55,000 square metres of gross leasable floor area located in Urban Core Area 2 (7.6.4.2.iv).

In the Dundas Urban Core Area commercial buildings are required to not exceed a total of 32,000 square metres of gross leasable floor area in the designation, with no single user or retail store exceeding 7,000 square metres (7.6.5.2.c).

In the Neyagawa Urban Core commercial buildings are required to not exceed a total of 31,000 square metres of gross leasable floor area in the designation, with no single user or retail store exceeding 7,000 square metres (7.6.6.2.c).

In the Neighbourhood Centre Areas there are no GFA requirements for commercial development. However, there is a requirement that a minimum of one mixed use or non-residential building is located at the intersection of each Neighbourhood Activity Node (7.6.7.1.c).

Potential Solutions

The adoption of the alternatives discussed above under Principle 1 would require a rethink of the current approach to establishing minimums and maximums for commercial use GFA in different parts of the Secondary Plan area. More broadly, regardless of which alternative is selected, or if the current approach to locating commercial uses within the urban structure is maintained, the Town should consider establishing requirements and incentives for commercial development. Commercial uses are a critical component of a complete community and should be secured at a pace to support residential development, as it proceeds.

Traditionally, commercial uses were included in the development of new communities by designating parcels of land exclusively for these uses. However, the segregation of uses runs contrary to the planning objectives for NO-E, which aims to foster an urban mixed-use environment. Commercial uses are concentrated and located to provide structure and community focus but are not separated from other compatible uses. Given the variable profitability of different uses, **relying on permissions alone can result in the absence or under provision of commercial uses**

in mixed use areas. The alternative would be to establish a commercial use requirement. This could take a number of forms:

- A minimum GFA of commercial uses established for a sub-area, with each mixed-use development proposal required to demonstrate how it contributes to the minimum;
- A minimum GFA of commercial uses established on a parcel-by-parcel basis and secured through a zoning by-law; or
- A minimum percentage of commercial use GFA to be included in mixed use developments within particular sub-areas.

In all instances, flexibility could be provided in meeting minimum GFA obligations by allowing requirements to be transferred from parcel-to-parcel, as long as the broader intent of the Secondary Plan is realized, including achieving a contiguous focus of commercial uses in either linear or nodal form, realizing the benefits of co-location, and improving access by walking, cycling and transit. Transfers could be realized through zoning by-law amendments for the parcels concerned, with a hold on development on the parcel from which the requirement was shifted until the commercial GFA requirement is realized on the parcel to which the requirement was transferred.

Further policy approaches aimed at ensuring a balance of uses include:

- A policy could be added to the Secondary Plan that a balance between residential uses and the retail and service uses that serve related populations shall be maintained. The Town would undertake periodic commercial uses assessments to evaluate this balance and could elect to put a hold on further residential development, if the assessment indicates a deficit of retail and service commercial uses relative to the needs of the community.
- A policy could be added to the Secondary Plan that promotes the formation of landowners' groups to coordinate the provision of retail and service uses in the same way as used to provide other critical communal elements such as infrastructure and parks.
- A policy could be added to the Secondary Plan that directs the existing landowners' groups to coordinate the provision of retail and service uses in the same way as used to provide other critical communal elements such as infrastructure and parks.

Less effective at realizing an appropriate quantity of commercial uses but related to their inclusion in mixed use developments are policies that establish:

- Ground floor commercial use requirements in key areas within the Urban Core Areas and Neighbourhood Core Areas.

- Limitations on residential uses on ground floors within selected areas.
- Requirements for active, non-residential uses at the ground floor along the frontages of designated streets.

On the incentive side and potentially complementing requirements, requirements could include:

- Exempting commercial retail and service uses from the calculation of maximum FSI.
- Reducing minimum parking standards, particularly in areas such as Primary and Secondary Neighbourhood Activity Centres, where a large portion of the customer base is anticipated to be generated by foot traffic. Reductions in parking requirements could be accompanied by the provision of short-term street parking in the vicinity to foster a more urban condition, while providing parking supply.

Principle #4 – Design & Placemaking for Interim Typologies / Formats

Key Challenge

Design and parking policies are creating barriers for building commercial retail and service uses. The Secondary Plan provides minimal direction on design alternatives or interim use policies for single use and large retail sites. In advancing policy to support interim uses, the Town will need to find a balance between promoting the development of interim uses and having them contribute to the creation of an attractive built environment.

Current Policies

The Secondary Plan indicates that all development applications will be evaluated against the Urban Design and Open Space Guidelines (2009) (7.5.3). Some general design directions and streetscape design directions are included in the Secondary Plan (7.5.4, 7.5.5). Development applications are required to adhere to these guidelines. The directions relevant to commercial development include:

- All development should be designed to be compact and pedestrian friendly.
- A hierarchy of uses should be established to form mixed-use areas with community or retail focal points.

- Development will be based on a modified grid system and should be designed to support the viability of transit service within North Oakville East.
- The natural heritage system is a central feature of the Planning Area and development should reflect this.
- Neighbourhood Activity Nodes will serve as central 'meeting places' for residents.
- Building densities and land uses should support the use of transit and active transportation facilities outlined in Schedule D 'Active Transportation Plan' and the Livable Oakville Plan.
- Public frontages should promote pedestrian circulation and contribute to the character of the streetscape.

The only policy outlining design alternatives for large retail or single uses is 7.5.13.b. The policy is brief and indicates that large retail stores may locate in the interior of commercial or mixed-use development blocks with surrounding smaller stores oriented towards the street, or that the frontage of a large retail store facing the street could be lined with smaller entrances or smaller stores. No further interim urban design principles are included.

The Secondary Plan also requires that the location of parking within commercial or mixed-use developments be at the rear or the side of the building. There should be no or minimal parking in front of a main building (7.5.7.b). The Secondary Plan does provide some flexibility for this policy and in sub-area 2 of the Trafalgar Urban Core, within the Dundas Urban Core Area at Neyagawa and within the Neyagawa Urban Core, allowing design alternatives proposed in 7.5.13.b to be accommodated (7.5.7.b). These additional requirements are designed to promote accessibility by active transportation, create vibrant community focal points and contribute to a sense of place. A lack of specific policies may inhibit the Town from achieving a complete, vibrant and walkable community in the long-term.

North Oakville Urban Design and Open Space Guidelines (2009) address the issue of interim uses and provide urban design guidelines for the development of large format retail (3.4.2.2) and surface parking (3.12.2). Similarly, the Livable by Design (2019) contents provide further urban design direction and considerations at a Town-wide level regarding commercial uses at grade and in the context of mixed-use developments.

Potential Solutions

Interim urban design principles and parking requirements could allow greater flexibility for the initial phases of commercial development in North Oakville East, while not compromising on components that are integral to the achievement of a pedestrian-friendly and vibrant place in the long-term.

Existing design principles (7.5.4, 7.5.5) could be adapted to include specifications for interim commercial development. Potential design principles include:

- Direct pedestrian and active transportation access
- Landscaping and public art
- Creation of a strong street edge with building frontage and patron entrances on arterial, collector or local streets
- Establishment of a block pattern to support future intensification
- Maintain retail entrances directly on public sidewalk
- Introduce public spaces near key commercial development that encourage socialization, rest and gathering

Included in the Appendix F is a more specific summary of key design principles—prepared directly by Town staff—for consideration as part of the advancement of land use directions in NO-E. These principles are intended to build upon pre-existing urban design guidelines referenced throughout this document and in light of the key market / land use policy-based recommendations resulting from this study.

7.0

Conclusions

7.1 Key Takeaways

1

Established “Need”

The NO-E community exhibits several underlying characteristics that highlight the need for improved delivery and access to a more complete range of retail / service commercial facilities. As this area continues to grow and experience additional development, there will be an **inevitable need for the supply of commercial space to be expanded and diversified** to better serve the needs of existing and new residents.

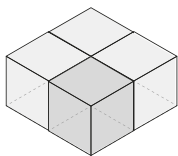
2

Validation of Patterns

Notwithstanding the foregoing, there are **real and material barriers to entry which limit delivery of new commercial space**. This includes challenges specific to mixed use development, but also all other types of real estate development. Our independent research, previous professional experience and feedback from the development community largely validate recent patterns in this regard, which tend to favour residential development as the “highest and best use”.

3

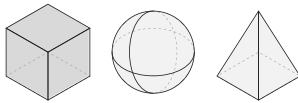
Amount (Floor Area)



A total of some 1.8 million and 2.2 million square feet of new space could be warranted in NO-E by 2051. Accounting for a range of applications in the development pipeline that are expected to include the delivery of additional retail/service commercial space over this same horizon, the “net new” space required is estimated at closer to **1.6 million and 2.0 million square feet**.

4

Type (Store Category)



Our research highlights a number of obvious “gaps” in the local market at NO-E, mainly as a function of the limited amount of space operating in the area today.

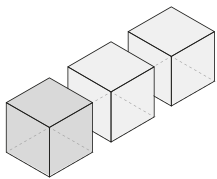
To keep pace with a growing residential population while also remaining cognizant of broader retail industry and development trends, the Town should focus on ensuring new space satisfies the **basic day-to-day shopping needs** of current and future residents, rather than pursuing a more fundamental or ambitious shift in patterns at this location.

Comprising the total space warranted above, this could include the following by 2051:

- 390,000 to 630,000 square feet of **Food Retail**;
- 460,000 to 640,000 square feet of **Non-Food Retail**; and,
- Up to 960,000 square feet of **Services** space.

5

Location (Geography)



Consistent with above, it will be important to ensure that new growth in NO-E does not compromise other established and/or proposed commercial nodes located throughout the Town and Region. These other established and potentially more prominent commercial districts will likely—and indeed should—continue to serve as the primary focus of commercial activity in the community more broadly.

In the context of NO-E specifically, and recognizing the total quantum of space identified as necessary to help meet future demand, this may also involve **focusing or concentrating commercial space delivery at key locations** throughout the secondary plan area.

This concept of fostering a “complete” and balanced mixed use community in its entirety rather than in each and every building can be effective in establishing a critical mass of space, while combatting some of the challenges of new mixed-use developments if some direction or parameters are provided.

However, focusing on key locations rather than each building does present its own unique risks (e.g., used as an excuse to provide little to no commercial space in projects taken in isolation, overburdening the “last to market” that may be obligated to deliver more than their fair share of total space requirements, etc.).

Some level of control, guidance or other coordination from the Town will be necessary to successfully focus commercial space delivery at key locations in an appropriate manner.

The amount of space warranted above (some 1.8 million and 2.2 million square feet) will necessitate a **mix of different unit sizes and development formats** in NO-E. While it is unlikely that all of this space can be accommodated exclusively within mixed-use development formats, which tend to have more nominal—and even “tokenistic”—amounts of commercial space, many of the specific types of retailers and service providers identified as having the most opportunity for growth in NO-E could—in theory—be captured in these mixed-use development formats.

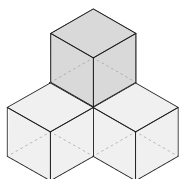
In light of current market conditions and the relatively significant transition envisioned for NO-E from “today” (suburban) to “tomorrow” (urban), the key may be to allow a hybrid of development formats in the interim and/or focusing efforts on initiating development in a manner that can be transitioned over time to satisfy existing policy objectives longer-term.

This type of approach may be necessary to acquire much-needed commercial space in NO-E in the short-term and to bridge the gaps between the specific typologies that are likely to be most appropriate at various points over the forecast horizon (e.g., as a function of evolving resident / consumer preferences, shifting transportation habits and modal splits, evolving retail tenant preferences, ever-changing developer expectations as a function of prevailing market / economic conditions, etc.).

So as not to lose sight of the broader vision for NO-E to achieve a complete, walkable

Format (Building Typology)

6



community as it continues to develop, it may also be possible to harness the ambition of the Town by encouraging / enabling preferred development formats through the removal of some existing development barriers (i.e., incentivize, where possible, and make it as easy as possible for the development community to deliver the types of mixed-use commercial formats directed by the Town). One such example is to encourage commercial development via a Community Improvement Plan (CIP), which would require the maintenance of retail space for a pre-determined amount of time in exchange for relevant municipal fee waivers / deferrals.

7.2 Market-Based Recommendations



Flexibility

The retail industry continues to evolve substantially, including acceleration and amplification caused directly by the COVID-19 pandemic. These and other broad macroeconomic shifts necessitate some **flexibility to adapt to changing market conditions** over the longer-term planning horizon. At the same time, there is an immediate need for the delivery of new retail / service commercial space which ought to be achieved over more realistic timelines and development horizons than are typically captured under Official Plan policy.

B

Prioritize Objectives

While there may be general consensus around the amount, type and potential location of commercial space to be accommodated at NO-E over time, there is a material disconnect between the perceptions and preferences of local landowners relative to the Town in regard to development format. To achieve a path forward, the “devil will be in the details” and it will be important for the Town to **prioritize a full range of municipal strategic objectives** spanning many different facets of urban development (i.e., not only specific to retail, but also responding to the housing crisis, weighing the importance of urban design, considering the role of other non-residential / civic uses in place of or as an accompaniment to retail, balancing economic vs. social outcomes, etc.).

C

Patience / Urgency Dilemma

NO-E faces clear challenges to mixed use development and other types of standalone retail/service commercial formats, based on prevailing market conditions and the economics of new development. The Town should understand and clearly identify these external factors as posing a material risk to the ability of the community to achieve the amount and type of space required by residents.

To this end, it may also be necessary to **evaluate the trade-offs (pros and cons)** associated with approaches more predicated on; (i) patience / waiting for market conditions to change; or, (ii) adopting a more immediate sense of urgency for delivering new commercial supply.

These two paths—or some combination thereof—will significantly impact the nature of new commercial development in the community over different timeframes. In our opinion, it is reasonable to consider a “now” and “later” approach, which would first focus on **establishing the basics** from a commercial market standpoint, which can then serve as a foundation for future change and evolution to achieve the more “complete community” vision set out for NO-E longer term.

To this end, it is important to accept that even the best master planned communities take time to mature and are inherently difficult to establish commercial vibrancy “from scratch”.

In tandem with other potential approaches outlined above, the Town should also explore options to encourage the development of retail / service commercial spaces and other non-residential functions to satisfy their vision in ways that may be slightly different than originally intended. This could include more immediate consideration of alternative uses and activation strategies such as:

- **Temporary / shared spaces** that are less space intensive and/or that can be accommodated without physical or permanent new space requirements (e.g., pop-ups, festivals, seasonal markets and other programming).
- **Reduced overall space footprints** and/or smaller units, which could



Consider Alternatives

reduce the burden on financial feasibility. This can also have the spin-off benefit of improving access and affordability to prospective tenants, which can promote a more complete and diverse supply of new businesses.

- **Incentives** that are targeted specifically at new commercial developments (e.g., financial supports, policy amendments and/or process-related improvements), or direct subsidies to tenants occupying space at NO-E to help fill the gap in feasible commercial rental rates.
- The integration of **other non-residential uses** (e.g., community uses, local-serving office uses, etc.) that can fulfill similar animating functions as retail, as well as presenting obvious co-location benefits where retail does exist. This would require additional “hands-on” involvement by the Town to strategically direct civic and other institutional uses to key locations to replace and/or supplement where retail / service commercial uses had originally been envisioned as part of the secondary plan.

7.3 Policy-Based Recommendations

In response to limited uptake in the development of Neighbourhood Activity Nodes and challenges around creating a “main street” retail environment along major arterials, the Town should adjust their existing approach to consider the following alternatives:

- **Prioritizing retail development at specific locations**, that vary in scale due to their location, nature of their co-locational benefits and potential catchment areas. This will help develop reasonable retail distribution across NOE while acknowledging varying opportunities across the Secondary Plan;
- Shifting away from the Main Street concept to more **partially internally-oriented clusters on large sites**. These sites will be capable of maintaining visibility and a “good face” towards border roadways, while also supporting internal road networks and linkages. It also creates locations more conducive to interim typologies that can more immediately meet the community’s commercial needs; or,
- Refocus the Main Street Concept to **extend commercial uses along streets that run parallel or perpendicular to Major Arterial roads**, allowing retail to

E

Principle #1

Rethinking the Place of Commercial Uses Within the Urban Structure

penetrate more deeply into the interior of neighbourhoods.

Under any of these scenarios, consideration will still need to be made for establishing commercial focal points that ensure appropriate geographic distribution and access from surrounding residents.

F

Principle #2

Allowing Interim Typologies / Building Formats

The Town should consider **new permissions for interim forms of commercial development** that do not fully conform to the existing Secondary Plan policies and/or urban design guidelines. This could reprioritize the delivery of retail/service commercial space in the interim in a more low-rise building format, while deferring broader placemaking and urban design outcomes of achieving full integration of commercial uses until later stages of development..

G

Principle #3

Considering Commercial Use Requirements & Incentives

The Town could consider **establishing requirements and incentives for commercial development** to ensure the current and future needs of NO-E residents are met.

Flexibility could be one approach applied to ensure minimum GFA requirements are achieved, while providing landowners with the opportunity for choice as long as the broader intent of the Secondary Plan is realized.

Policies that aim to ensure a **balance of uses and an appropriate amount of commercial could be considered.** This could include limitations on ground floor residential uses or retail requirements at key intersections of neighbourhood centres, as well as the

encouragement of new spaces to satisfy the day-to-day shopping needs of current/future residents.

Incentives are another way the Town could achieve retail development. This could include reductions to parking requirements, as well as providing opportunities for exempting commercial uses from density calculations. Equivalently, dedicated directions could be established via a Community Improvement Plan (CIP), which considers requirements for the maintenance of commercial space for a pre-determined amount of time in exchange for municipal fee waivers / deferrals.



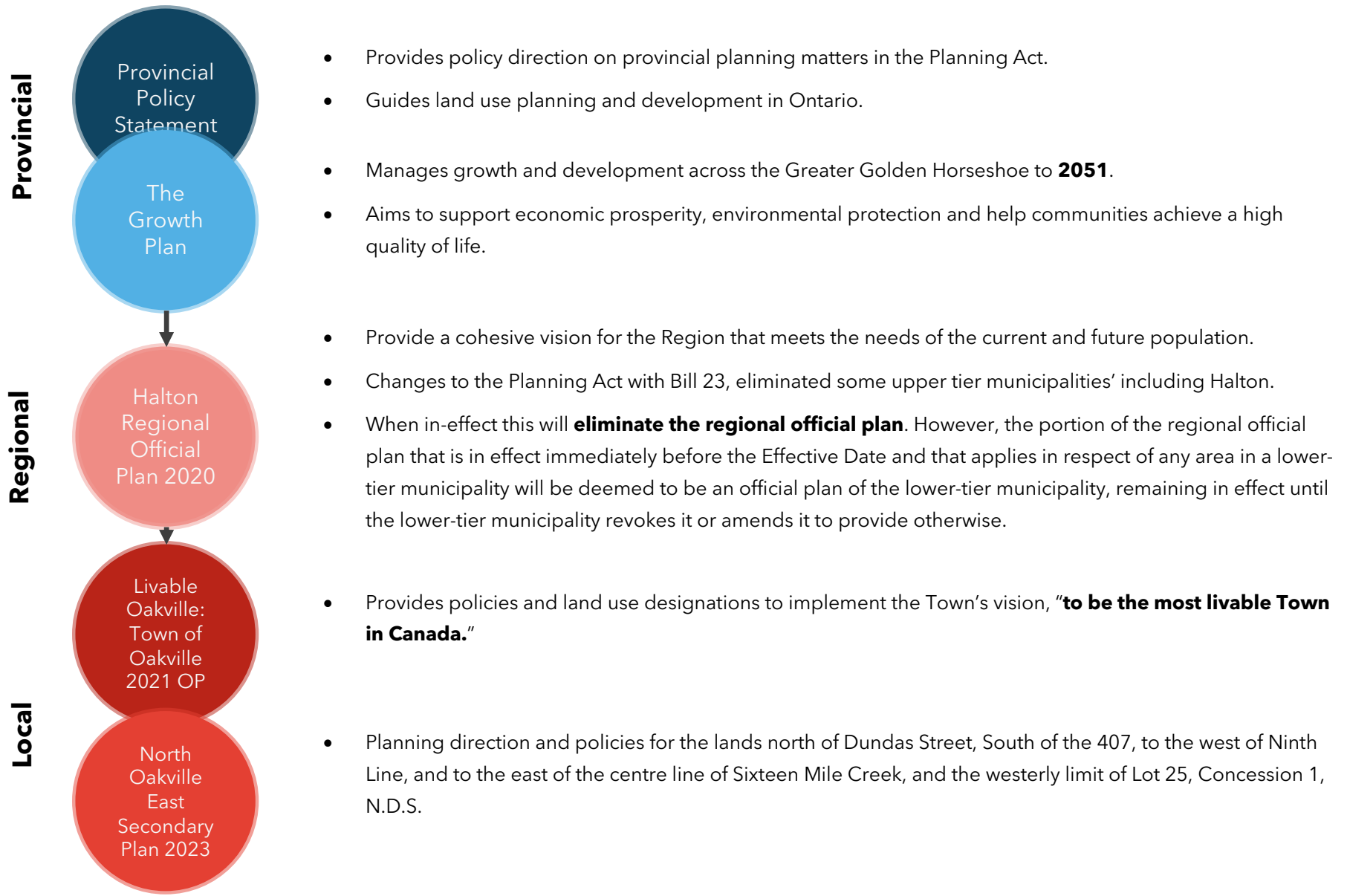
Principle #4

Design & Placemaking for Interim Typologies / Formats

To support initial phases of commercial development at NO-E, **interim urban design principles and/or parking requirements** could allow greater flexibility. These could be adapted from existing design principles to be more tailored to interim development options.



Appendix A:
Land Use Policy Background



Provincial Policy



The Provincial Policy Statement 2020

Overview

- The PPS promotes an appropriate mix of uses, including commercial uses, in order to achieve efficient and resilient land use and development patterns.
- Additionally, the PPS supports the idea of a mix of uses in order to encourage complete communities to sustain healthy, liveable and safe communities.

Key Policy Directions

- Ensuring sufficient lands and accommodating a mix of uses for employment, including both industrial and commercial to meet long-term needs (1.1.1.b, 1.1.2, 1.3.a)
- Plan for areas where growth or development will be directed, including the identification of nodes and corridors linking these nodes (1.2.4.b., 1.8.1)
- Encouraging compact and mixed-use development to support liveable and resilient communities, as well as promote economic development and competitiveness (1.3.d).
- Establish land use patterns within settlement areas based on densities and a mix of land uses which support active transportation and use of transit, as well as minimizing the length and number of vehicle trips (1.1.3.2, 1.6.7.4).
- Enhancing the vibrancy and vitality of downtowns and main streets with well-defined built form with a mix of uses (1.7.1).
- Locating commercial uses in proximity of public transportation and residential uses to create more complete communities, and reduce reliance on vehicles (1.8.1).

A Place to Grow: Growth Plan for the Greater Golden Horseshoe 2020

Overview

- Supporting the achievement of complete communities that are designed to support healthy and active living and meet people's needs for daily living throughout an entire lifetime.
- Providing flexibility to capitalize on new economic and employment opportunities as they emerge, while providing certainty for traditional industries, including resource-based sectors.
- Improving the integration of land use planning with planning and investment in infrastructure and public service facilities, including integrated service delivery through community hubs, by all levels of government.
- Providing different approaches to manage growth that recognize the diversity of communities in the GGH.

Key Policy Directions

Complete community development is prioritized, and growth is allocated to settlement areas that can support its achievement. Including:

- Settlement areas with delineated built-up areas, strategic growth areas, areas where higher order transit is planned for or exists, and areas with existing or planned public service facilities (2.2.1.2).

Additionally:

- Complete communities will have a diverse mix of land uses, including residential and employment uses, and convenient access to local stores, services, and public service facilities (2.2.1.4, 2.2.5.15).
- In regard to growth in designated greenfield areas, new development should support the achievement of complete communities, support active transportation, and integrate and sustain viable transit services (2.2.7).
- The Growth Plan projects that in **2051** the Region of Halton will have a total population of **1,100,000 persons** and some **500,000 jobs**.
- Upper tier municipalities will establish a hierarchy of areas within settlement areas and provide direction to achieve complete communities with a compact built form (2.2.1.3).

Regional Policy



Halton Region Official Plan 2022

Overview

By 2051, the Town of Oakville is projected to be home to 349,990 people and provide 181,120 jobs. The ROP includes goals and objectives to guide land use in Halton Region, with key policies focused in four key areas:

- **Planning Vision;**
- **Healthy Communities;**
- **Land Stewardship;** and
- **Implementation.**

Key Policy Directions

- The primary goal of the *Urban Area* and *Regional Structure* in the ROP is to **manage growth in a manner that fosters complete communities** (72., 72.1.5, 79).
- The Regional *Urban Structure* in the ROP strongly promotes a significant proportion of population and certain types of employment growth within strategic growth areas through mixed use intensification (78.1).
- The ROP encourages regional nodes, as identified on Map 1h, to provide a range and mix of transit-supportive uses including retail and office (82, 82.7).
- **Regional Nodes** include: Trafalgar Urban Core, Dundas Urban Core, and Neyagawa Urban Core - all of which are located within the study area (82.1 and Map 1h).
- A mix of uses, including commercial, is encouraged along and within *Regional Intensification* corridors within *Regional nodes*. There are two *Regional Intensification* corridors within the study area, one along Trafalgar Road and another along Dundas Street (82.3, Map 1h).
- A mix of land uses is also promoted in the ROP for greenfield sites (77). Development occurring within greenfield areas should support active transportation, advance healthy communities, and provide a diversity of uses including residential and employment uses to support vibrant neighbourhoods (77.2.4).

Local Policy



Liveable Oakville: Town of Oakville Official Plan 2021 Consolidation

Overview

- The Official plan promotes sustainability, providing choice, and preserving and creating livable communities.
- A town-wide Official Plan review is underway in order to conform to the 2051 population and employment forecasts.
- The Livable Oakville Plan applies across the entirety of the Town of Oakville with the exception of the North Oakville East and West Secondary Plan areas. Therefore—excepting Section 3 and Schedule A1—the Liveable Oakville Plan is not applicable.

Key Policy Directions

While not directly applicable, **Liveable Oakville** details policies on mixed-use communities and commercial development. “Liveable” is promoted through policies that promote:

- Protecting and enhancing the distinct character of Oakville, directing a majority of growth to areas that allow high density, can support transit and pedestrian oriented development, and offering a diverse range of employment opportunities for residents (2.2.1).
- choice and the availability and accessibility of a wide range of housing, jobs, and community resources (2.2.2).
- Balancing population and employment (14.1). Additionally, Greenfield areas are intended to be developed in a way that contributes to creating complete communities, including a mix of land uses (which includes residential and employment uses, at transit-supportive densities) (4.5).

Livable and complete communities are encouraged through:

- **Mixed-use designations**, where residential, commercial, and office uses are integrated in a compact urban form at higher development densities (12.0).
- The intent is to support a diversity of residential, commercial and office uses to be integrated in buildings (12.1.1) and the creation of animated streets by providing retail

and service commercial uses on the ground floor of mixed-use buildings, fronting onto the street and other pedestrian environments.

- Identified Nodes and Corridors, and Oakville’s Growth Areas are key areas of mixed-use intensification in the Urban Structure (3.6, 12.1.2, 26.5).

North Oakville East Secondary Plan 2023

Overview

The Secondary Plan allows for higher density of development outside of the open space and natural heritage systems in North Oakville. The intent of the Secondary Plan is to establish a planning framework that promotes future urban development while reflecting the Town of Oakville’s small town and rural heritage.

Key Policy Directions

- The Secondary Plan supports a distribution of land uses so that residents do not need to rely on automobiles to meet their daily recreational, shopping and commuter needs (7.2.3.5).
- The general development objective is to promote integrated residential, commercial, and mixed-use areas in order to support live/work relationships (7.2.3).
- Urban Core areas reflect the most urban part of the North Oakville East Area. The Urban Core will allow for the highest densities of development and the highest order of activities including a full range of residential, retail and service commercial, entertainment, cultural, business and institutional uses.
 - Mixed use development is encouraged.
 - Urban Core lands are intended to become true mixed-use urban areas that serve as focal points for the planning area rather than isolated single use complexes (7.3.2, 7.5.4.b).
 - As the urban core transitions to a more urban form, large retail stores, which are permitted within the Urban Core Areas, however are often not conducive to a vibrant and active street life, may be located in the interior of commercial or mixed-use development blocks with smaller stores and buildings oriented to surrounding Arterial, Avenue or Connector Roads to create a strong street presence (7.5.13).

There are 3 **Urban Core Areas** within the North Oakville East Secondary Plan. As detailed, commercial development is also permitted in the **Neighbourhood Centre Areas**.

Trafalgar Urban Core Zone (TUC) (7.1)	Dundas Urban Core Zone (DUC) (7.2)	Neyagawa Urban Core Zone (NUC) (7.3)	Neighbourhood Centre Zone (NC) (7.5)
Urban Core Area	Urban Core Area	Urban Core Area	Neighbourhood Zone Area
<p>Ensuring a magnitude and mix of uses to promote service, employment, residential and community activity focal points (7.5.14)</p> <p>Planning for Trafalgar Road to have strong street-related built edge, wide sidewalks, enhanced tree plantings and other design features as the community “main street” (7.5.14.b)</p> <p>Promoting the intersection of Trafalgar Road/Dundas Street and Trafalgar Road/Burnhamthorpe Road as mixed use nodes with a commercial focus to anchor the Trafalgar Urban Core Area (7.5.14.c)</p> <p>Planning for retail and service commercial development in a “main street” format, with consideration that areas of retail and service commercial development may be clustered in a few areas (7.5.14.f)</p>	<p>Promoting a band of mixed-use development at high and medium densities (7.5.15)</p> <p>Restricting retail and service commercial development to locations at the intersections with north/south streets (7.5.15.a)</p> <p>Promoting the highest densities at the intersections of Minor Arterials, Avenues and Connectors with Dundas Street (7.5.15.b)</p> <p>Encouraging a “main street” format where retail and service commercial uses are located. Retail and service commercial uses may be in stand-alone stores or in the ground floor of mixed-use buildings (7.5.15.c).</p>	<p>Planning for mixed-uses to accommodate a range of commercial, residential and institutional uses for the western portion of the secondary plan area (7.5.16)</p> <p>Encouraging a hierarchy of density, where the densities will be lower than the Trafalgar and Dundas Urban Core Areas (7.5.16)</p> <p>Promoting retail and service commercial development in either stand-alone stores or ground floors of mixed-use buildings. (7.5.16.a)</p> <p>Supporting a pleasant, pedestrian shopping environment with retail and service commercial uses oriented towards the street. (7.5.16.a)</p>	<p>Accommodating a range of medium density residential, mixed-use, and limited commercial and civic uses to create a central neighbourhood activity node (7.6.7.1.a)</p> <p>Permitting medium density residential, mixed-use, small scale convenience retail, personal service, restaurants, business activity, public, and institutional uses. Both single use and mixed-use building will be permitted (7.6.7.1.b)</p> <p>Supporting convenience commercial facilities or similar uses in these areas. (7.6.7.1.c)</p>

Zoning Bylaw 2009-189

Overview

A comprehensive bylaw that applies to all properties in North Oakville, implementing the community vision and policies for future growth / development (in North Oakville East & West Secondary Plans).

Trafalgar Urban Core Zone (TUC) (7.1)	Dundas Urban Core Zone (DUC) (7.2)	Neyagawa Urban Core Zone (NUC) (7.3)	Neighbourhood Centre Zone (NC) (7.5)
Urban Core Area	Urban Core Area	Urban Core Area	Neighbourhood Zone Area
All commercial, service-related uses are permitted excepting Vehicle Dealership and Vehicle Repair Facility; Gas Bar; Drive Through Facility; Ancillary Retail/Service Commercial.	All commercial, service-related uses are permitted excepting Nightclubs, Vehicle Dealership and Vehicle Repair Facility; Gas Bar; Drive Through Facility; Ancillary Retail/Service Commercial.	All commercial, service-related uses are permitted excepting Nightclubs, Vehicle Dealership and Vehicle Repair Facility; Gas Bar; Drive Through Facility; Ancillary Retail/Service Commercial.	Commercial, service-related uses permitted in this zone include retail store; service commercial; general office use or medical office or financial institution; commercial/residential; commercial fitness centre; convenience store; restaurant; café; and service establishment.
Mixed-use building; Apartment; Office building; Hotel; Institutional building; Parking garage; and Commercial/ residential building (7.1.2).	Mixed-use building; Apartment; Office building; Hotel; Institutional building; Parking garage; and Commercial/residential building (7.2.2).	Mixed-use building; Apartment; Office building; Hotel; Institutional building; Parking garage; Commercial/residential building (7.3.2).	Mixed-use building, office building, institutional building, parking garage, commercial building, commercial/residential building, apartment, triplex, townhouse dwelling unit street access private garage/lane access/back to back.
Minimum of 3 storeys Maximum of 15 storeys (7.1.4).	Minimum of 2 storeys Maximum of 8 storeys (7.2.4).	Minimum of 3 storeys Maximum of 8 storeys. (7.3.4).	Minimum of 2 storeys Maximum height 5 storeys.

Zone 2: Minimum of 50% of the first storey shall be utilized for commercial or institutional uses (7.1.7.2).

Zone 5: Retail and service commercial uses, convenience stores and restaurants shall be permitted in commercial buildings with a minimum overall height of 5 metres (7.1.7.5).

Zone 6: Commercial buildings with a minimum overall height of 5 metres shall be permitted (7.1.7.6).

Zone 7: notwithstanding the limit on the leasable floor area of retail commercial uses in the TUC Zone established in Section 7.1.1 ii., an additional 55,000 square metres of leasable floor area of retail commercial uses shall be permitted (7.1.7.7).

Zone 1: Commercial buildings with a minimum overall height of 5 metres shall be permitted (7.2.7.1)

Zone 2: Uses and buildings in the General Urban Area (GU) Zone will also be permitted, regulations of the GU Zone shall apply to those uses and buildings (7.2.7.2).

Zone 3: Minimum height for all buildings, other than accessory buildings and structures shall be three storeys (7.2.7.3).

Zone 7: Uses and buildings in the GU Zone will also be permitted, regulations of the GU Zone shall apply to those uses and buildings. However, notwithstanding the permissions in (Section 7.6.2) of the GU Zone, single-detached and semi-detached building types shall not be permitted (7.2.7.7).

Zone 1: Uses and buildings in the GU Zone will also be permitted and the regulations of the GU Zone shall apply to those uses and buildings (7.3.7.1).

Zone 2: Commercial buildings with a minimum overall height of 5 metres shall be permitted (7.3.7.2).

Zone 4: Minimum height for all buildings other than accessory buildings and structures shall be 2 storeys (7.3.7.4).

Liveable by Design - Urban Design Directions for Oakville (Part A) 2019

Overview

- The Town of Oakville's Urban Design Guidelines provides a design direction for development that is compatible with its surroundings, maintains and enhances character, and promotes a human approach. The guidelines are applicable across the entirety of the Town of Oakville.
- The guidelines provide direction on complete streets and focus on vehicle lanes that accommodate all types of vehicles, active transportation lanes, convenient parking, highly visible pedestrian crossings, and spaces for public life (2.1).
- The guidelines promote a built form that is visually attractive, continuous along street walls, balanced, and facilitates street activity including active transportation (3.0).

Key Policy Directions

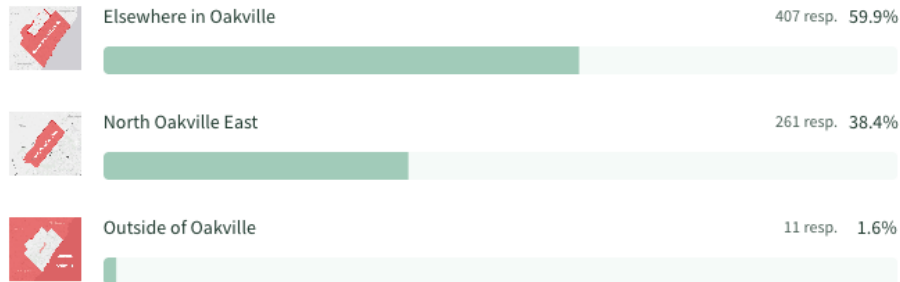
- Ground floor commercial uses facing a public street or space, must incorporate:
 - Minimum first storey floor to ceiling height of 4.5m
 - A minimum of 75% glazing on façade(s) to achieve visual interest and access to natural lighting
 - Architectural treatments on all non-transparent surfaces (3.1.4.a-c)
- Design principal entrances to commercial units that are oriented towards and highly visible from the public realm and located at the same level/plane with the sidewalk. Secondary entrances may be oriented to private amenity areas (3.1.8).
- In mixed-use and commercial areas, as it relates to structured parking facilities, design the liner building/leasable spaces at ground level with a minimum depth of 7.0m and floor to ceiling height of 4.5m (4.3.3).
- Wherever feasible on abutting mixed-use and/or commercial properties, provide linkages between surface parking areas to permit pedestrian and vehicular movement between the sites (4.3.16).



Appendix B:
Resident Survey Background

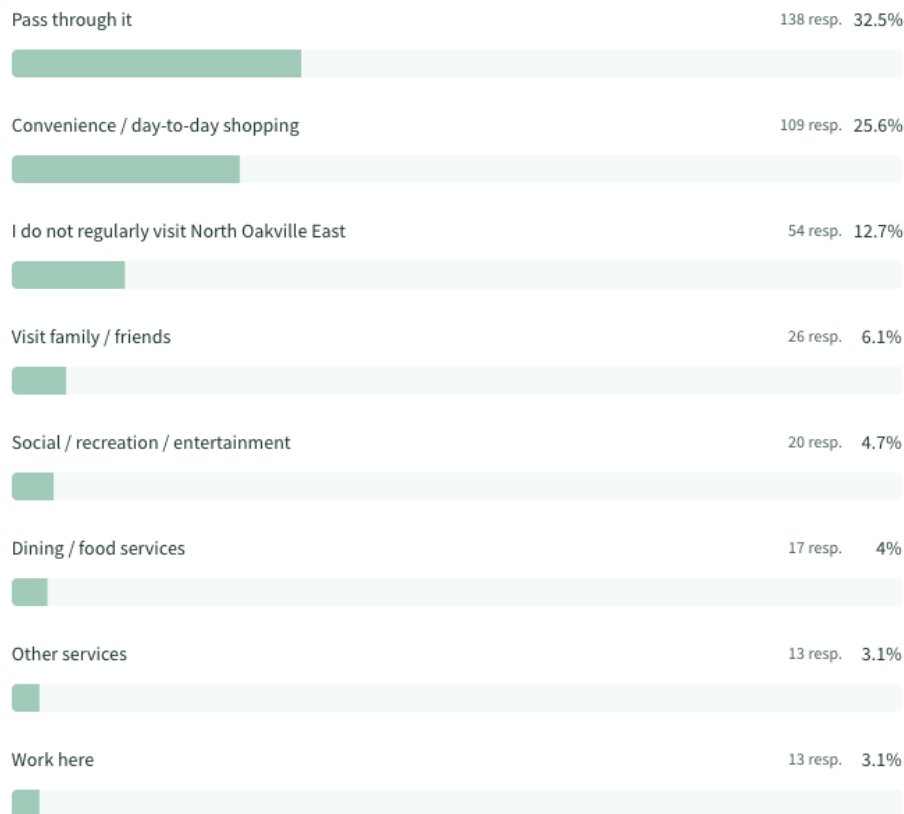
In which of the following areas do you currently live?

679 out of 679 answered



What is the nature of your **relationship with North Oakville East?**

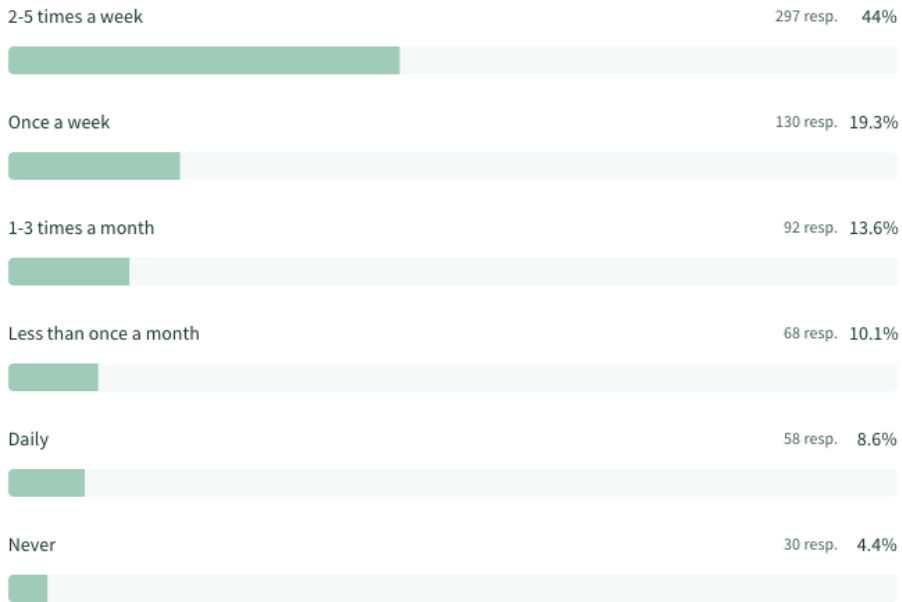
425 out of 679 answered





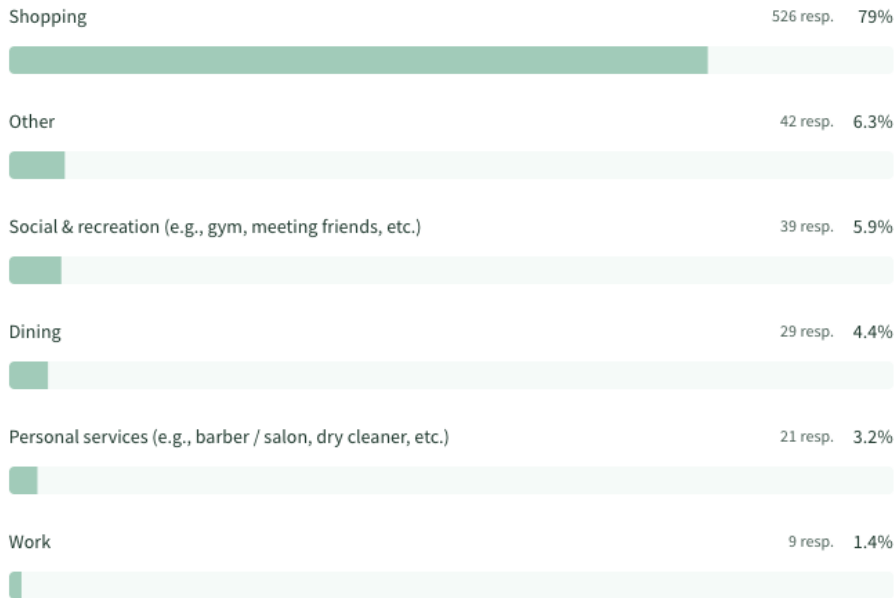
Under normal circumstances, **how often do you visit** shops and services in *North Oakville East*?

675 out of 679 answered



When visiting *North Oakville East*, what is the **primary purpose of your visit?**

666 out of 679 answered



How do you typically travel to *North Oakville East*?

675 out of 679 answered



Under normal circumstances, how often do you visit shops and services in the following commercial areas **outside of North Oakville East**?

441 out of 679 answered

	Dorval Crossing (Dorval Dr @ QEW)	Downtown Oakville (Lakeshore Rd E - Oakville Harbour to Allan St)	Oakville Place (Trafalgar Rd @ QEW)
Daily	34.2%	50%	28.9%
2-5 times a week	59.5%	31.3%	31.3%
Once a week	62.8%	30.4%	32.5%
1-3 times a month	51.2%	38.6%	49.1%
Less than once ...	41.3%	60.8%	66.7%
Never	40.6%	72.9%	24.1%

When visiting these other commercial areas **outside of North Oakville East**, what are the main reason(s) for your visits?

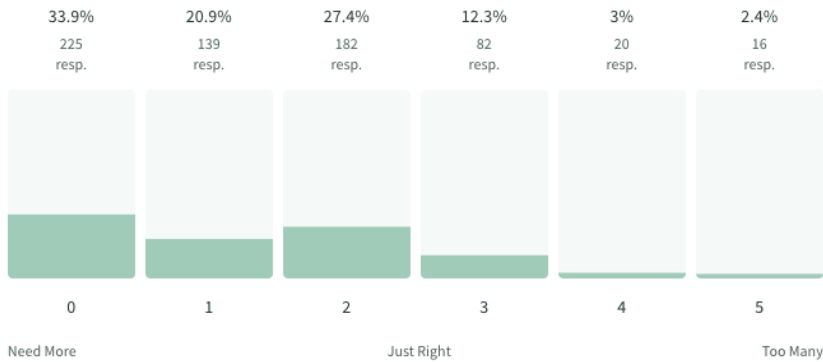
616 out of 679 answered

	Dorval Crossing (Dorval Dr @ QEW)	Downtown Oakville (Lakeshore Rd E - Oakville Harbour to Allan St)	Oakville Place (Trafalgar Rd @ QEW)
Shopping	78.2%	33.9%	80%
Dining	22.8%	85.9%	23.1%
Personal services (e.g.,...	45.1%	44%	26.6%
Social & recreation (e.g.,...	20.6%	78.3%	25.2%
Other	50%	53.2%	25.8%

How would you describe the availability of **Services** in *North Oakville East* today?

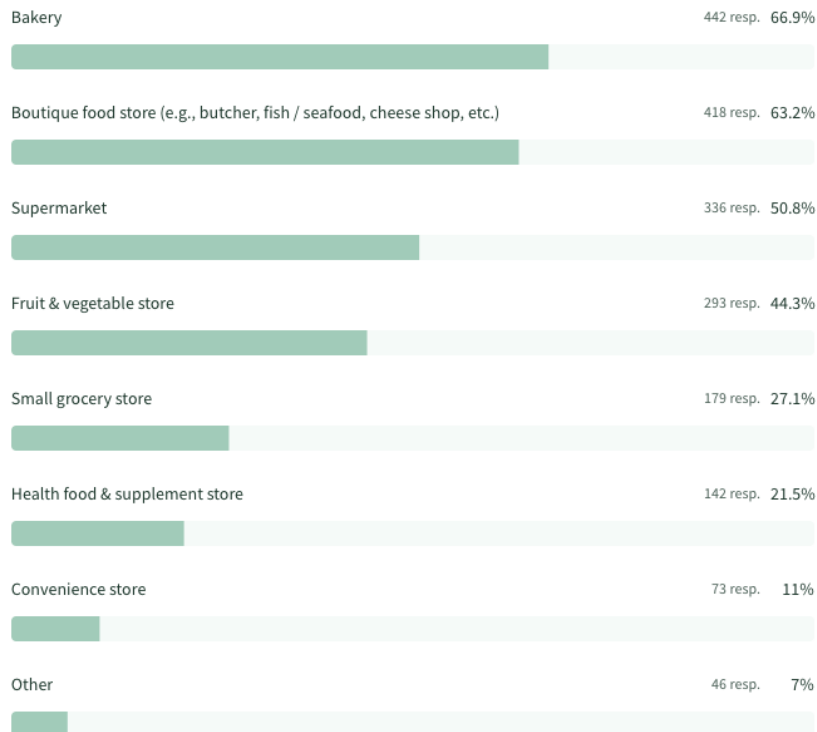
664 out of 679 answered

1.4 Average rating



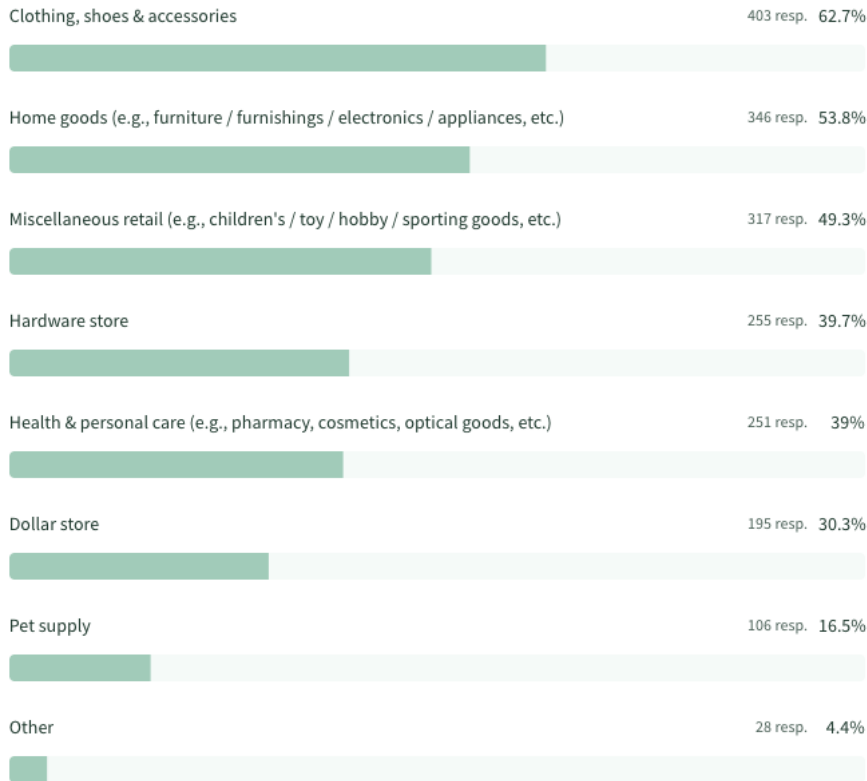
What specific types of **Food Stores** would you shop at if they were more available in *North Oakville East*?

661 out of 679 answered



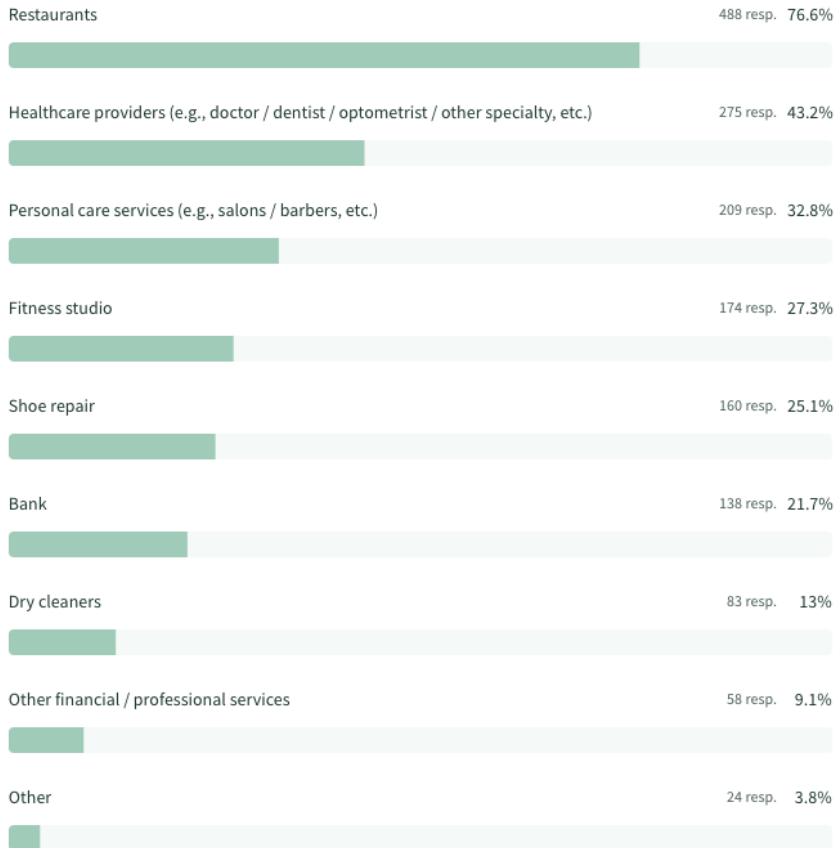
What specific types of **Non-Food Stores** would you shop at if they were more available in *North Oakville East*?

643 out of 679 answered



What specific types of **Services** would you shop at if they were more available in *North Oakville East*?

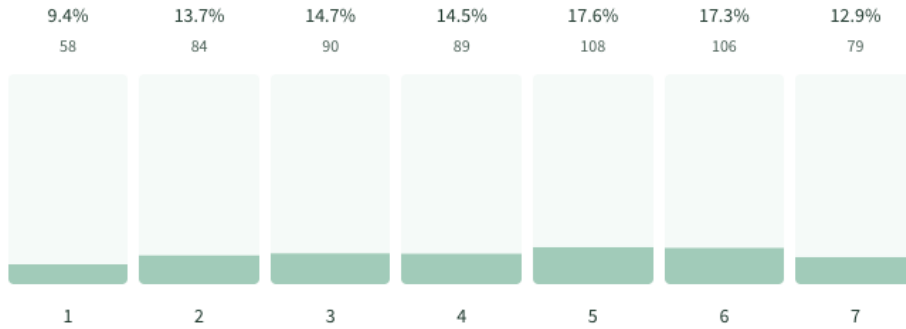
637 out of 679 answered



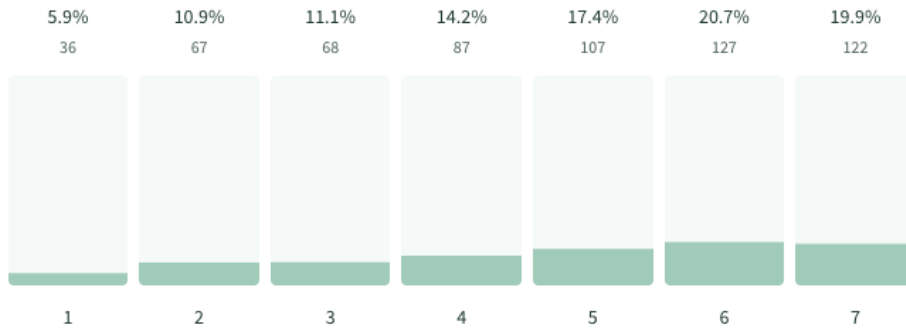
In your opinion, how important are the following **factors in planning** for retail/service commercial space in *North Oakville East*?

614 out of 679 answered

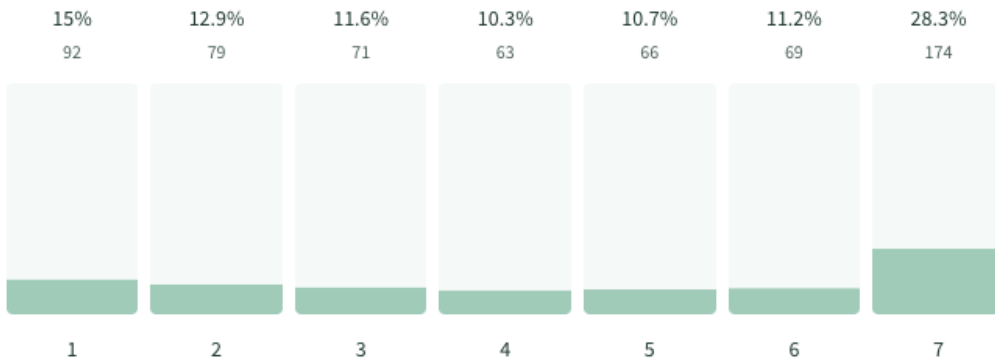
Provide opportunities for employment



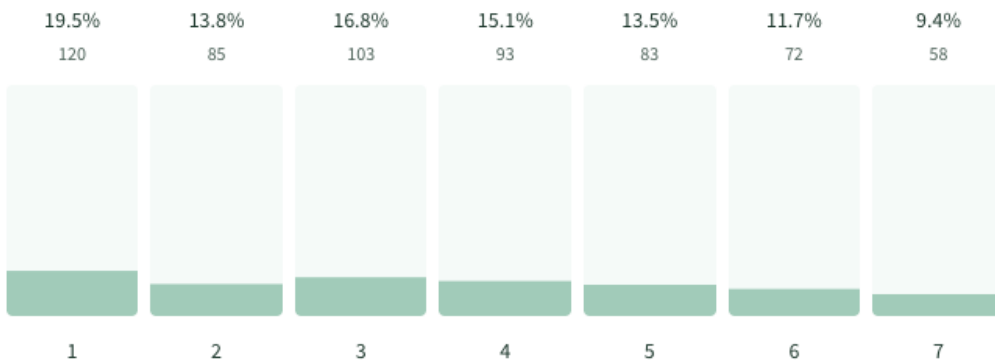
Support opportunities for entrepreneurship



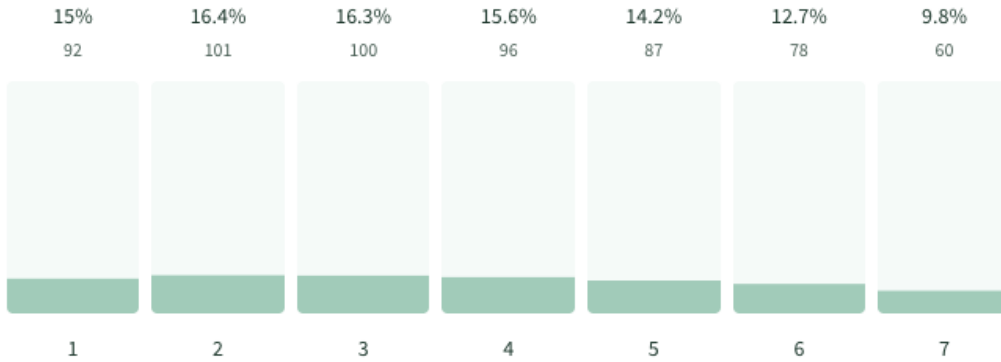
Access to major chains



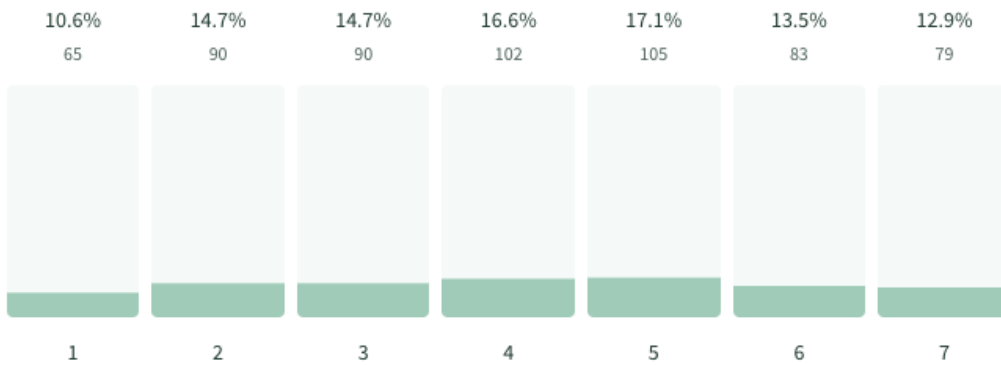
Access to independent shops / services ("mom and pop" shops)



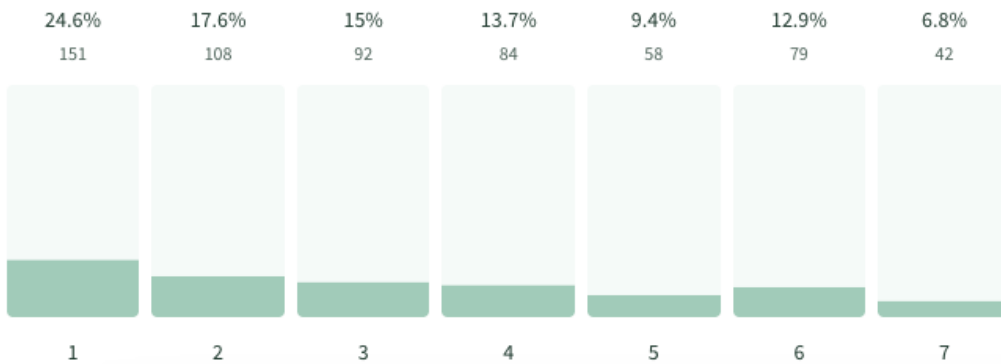
Support social gathering and community-building



Physical attributes / design (e.g., accessibility, safety, etc.)

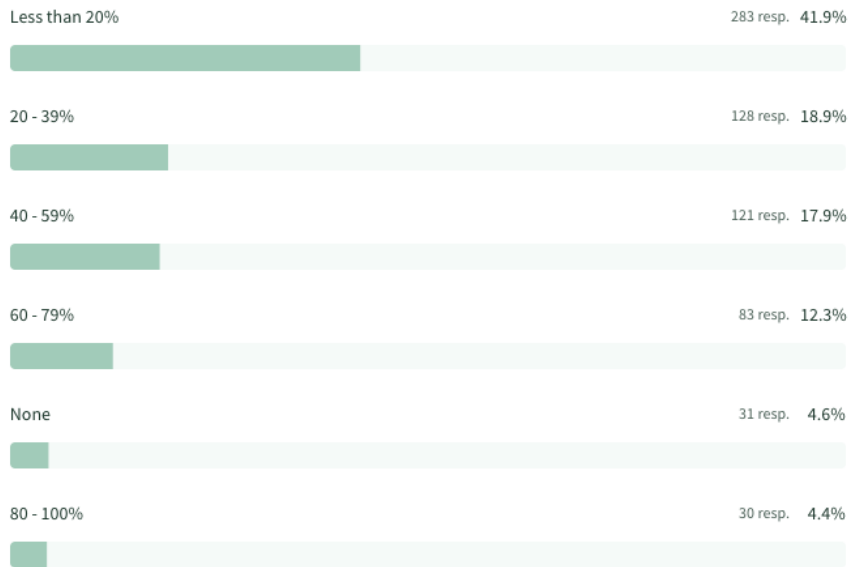


Location (e.g., near transit, parks, schools, major intersections, etc.)



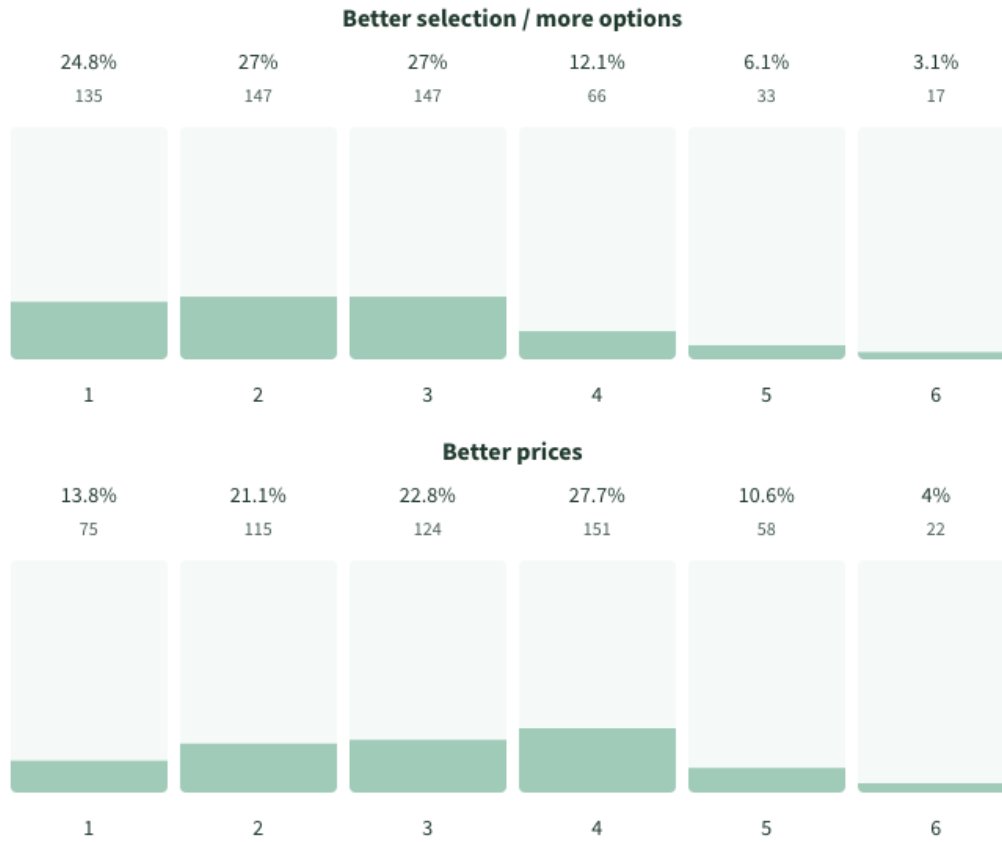
Approximately what percentage of your monthly purchases are made **online**?

676 out of 679 answered

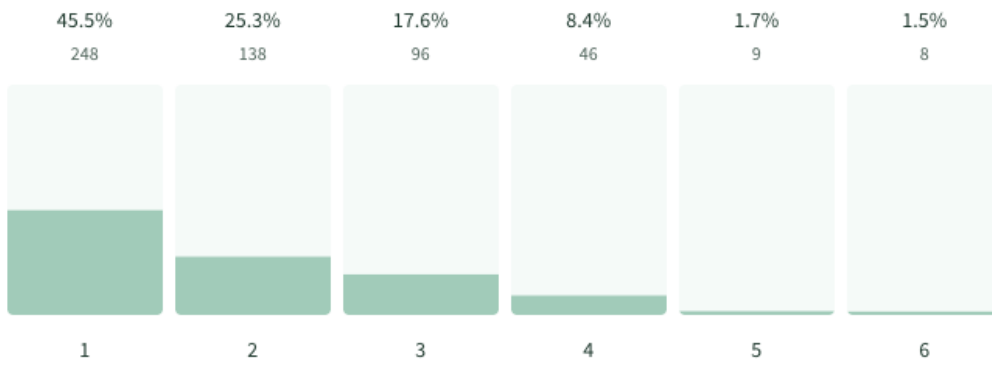


Why do you shop **online**?

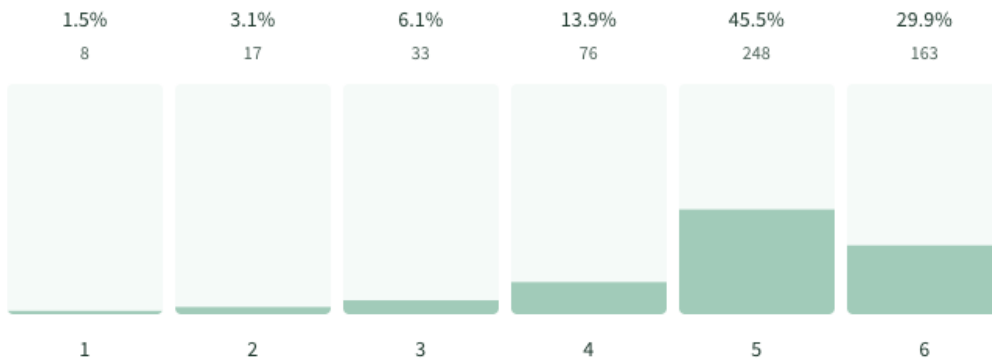
545 out of 679 answered



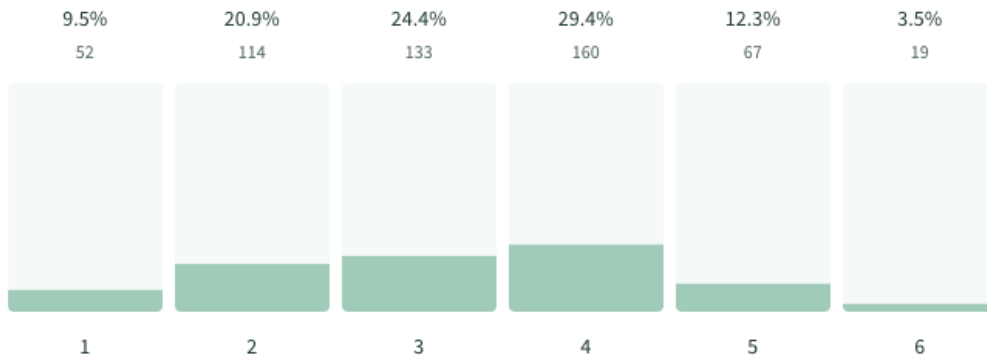
More convenient



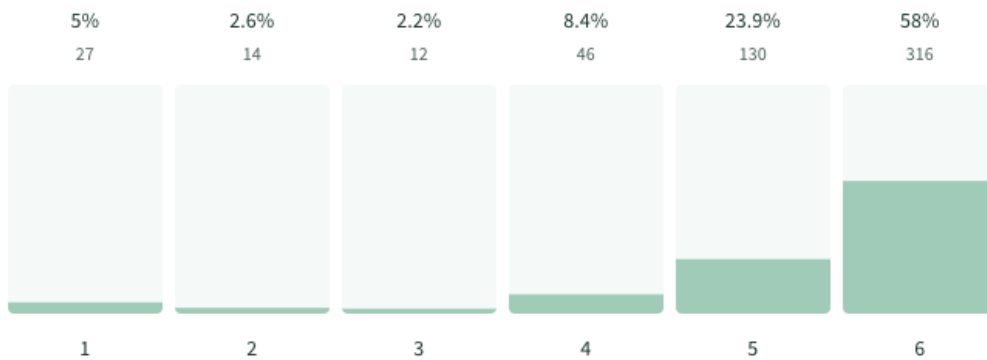
Safety



Shop at my own pace / no sales pressure

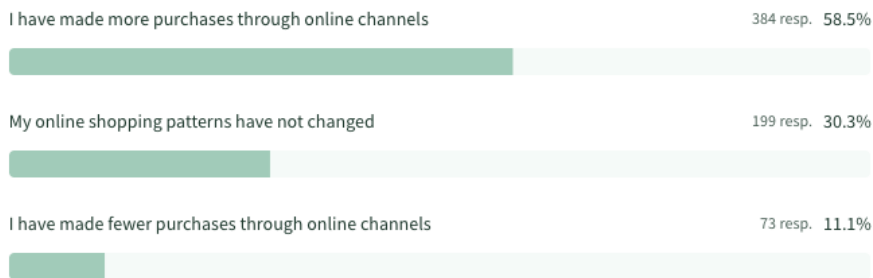


Other



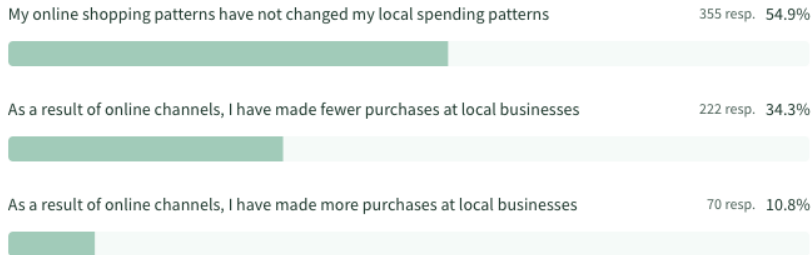
Compared to before **COVID-19**, how would you characterize your total online spending habits?

656 out of 679 answered



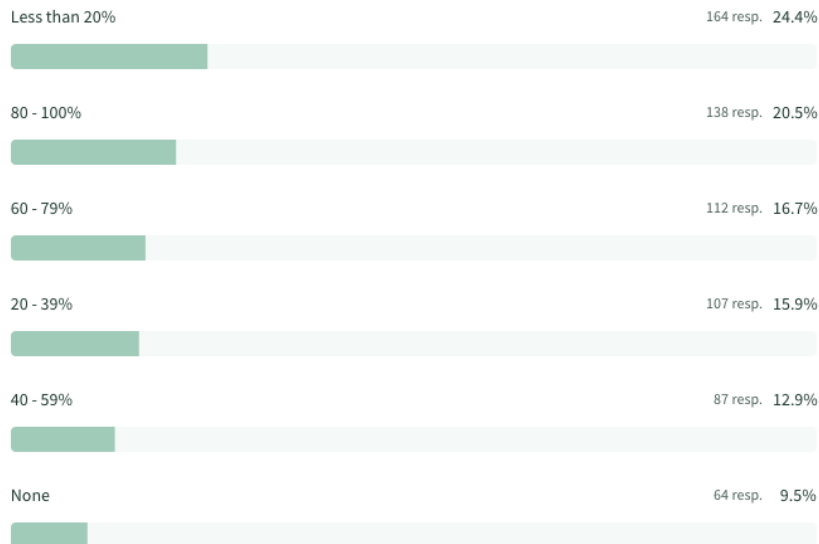
Compared to before **COVID-19**, how has online shopping impacted your spending habits in *North Oakville East*?

647 out of 679 answered



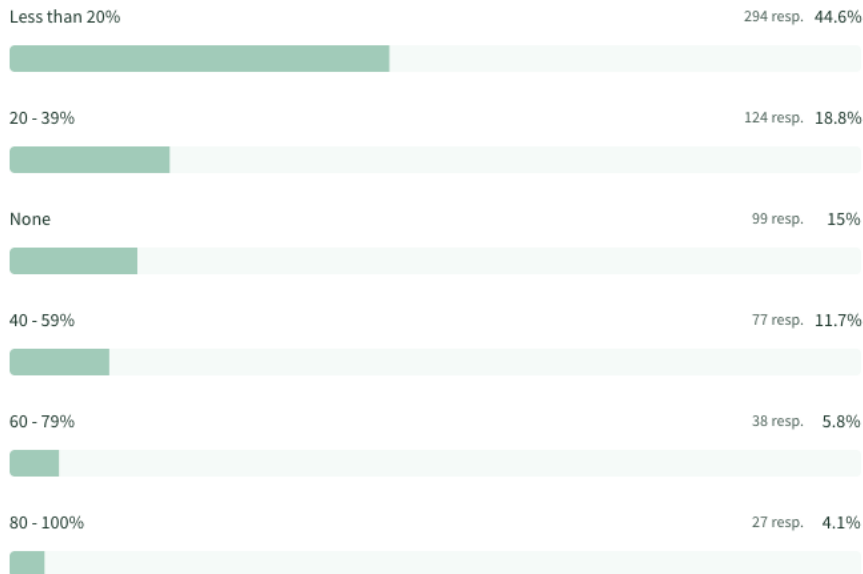
Approximately what percentage of your **Food Store** spending is made at stores in *North Oakville East*?

672 out of 679 answered



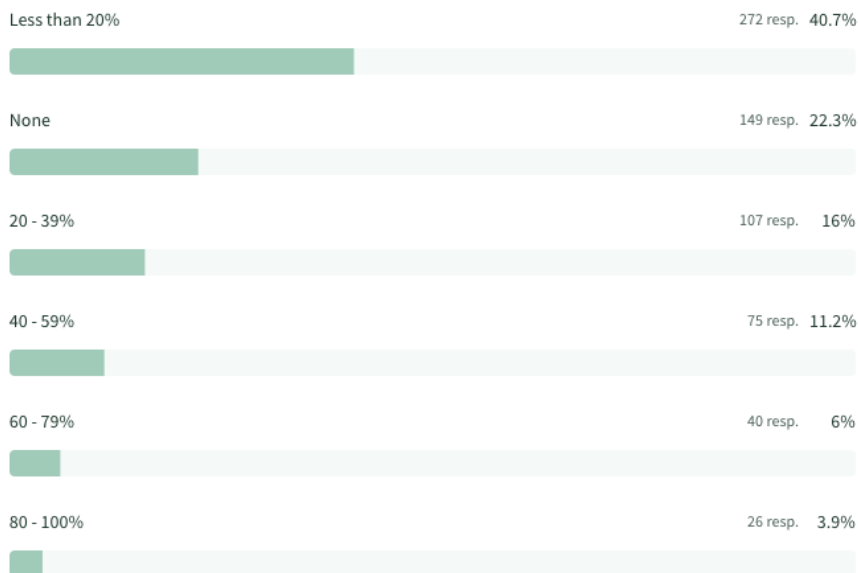
Approximately what percentage of your **Non-Food Store** spending is made at stores in *North Oakville East*?

659 out of 679 answered



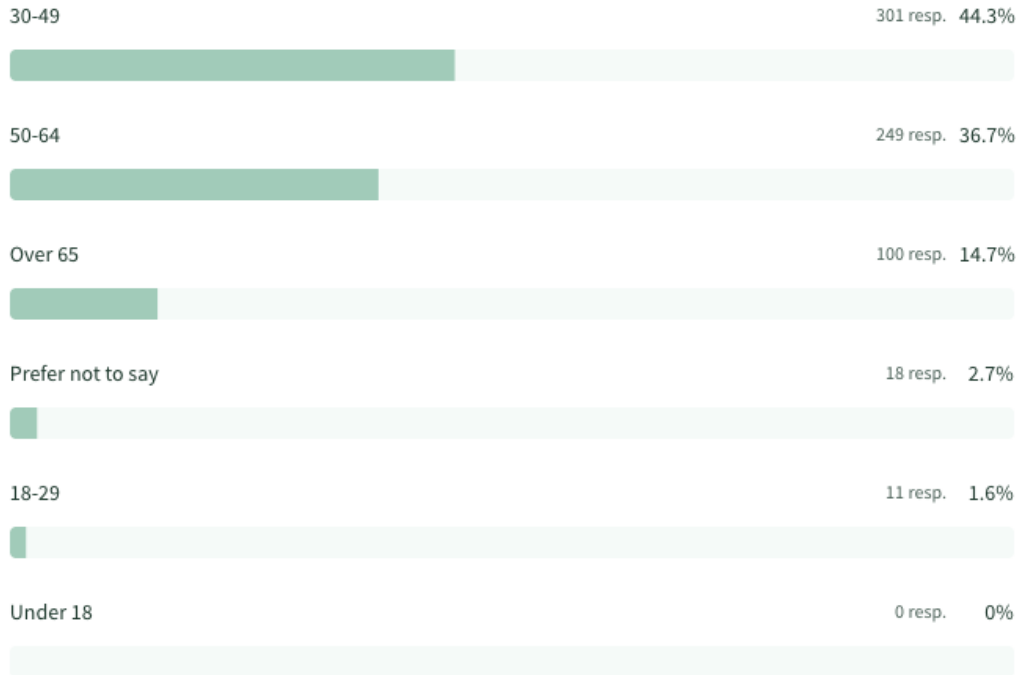
Approximately what percentage of your **Services** spending is made at stores in *North Oakville East*?

669 out of 679 answered



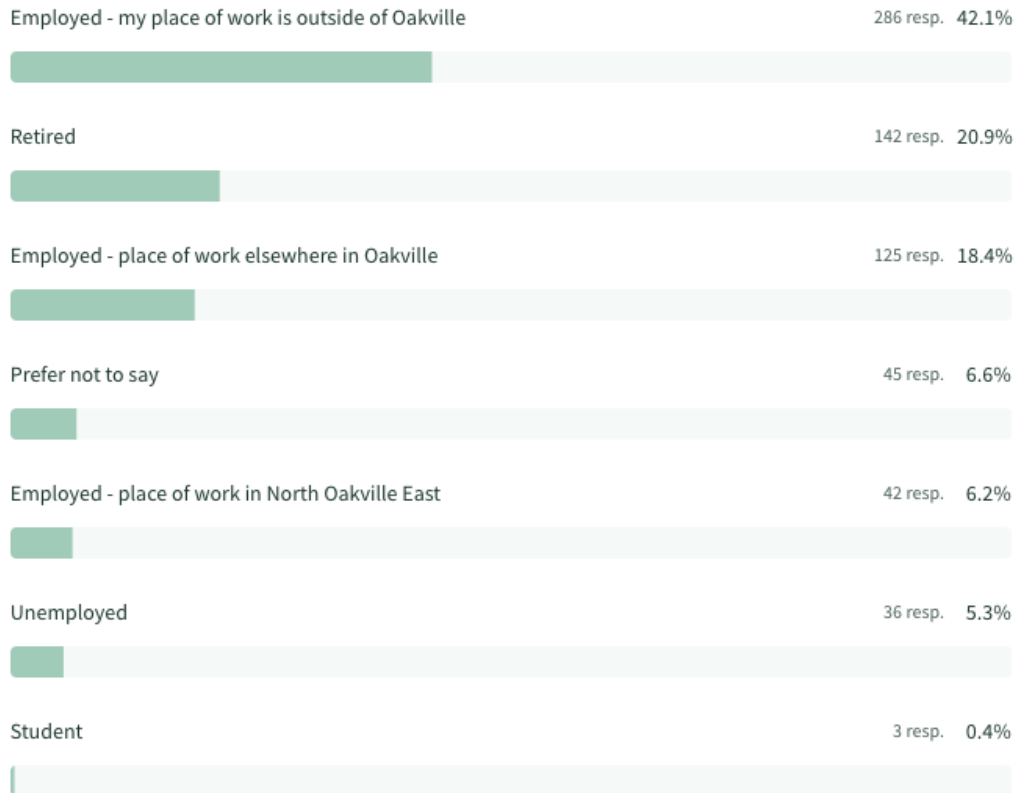
What is your age?

679 out of 679 answered



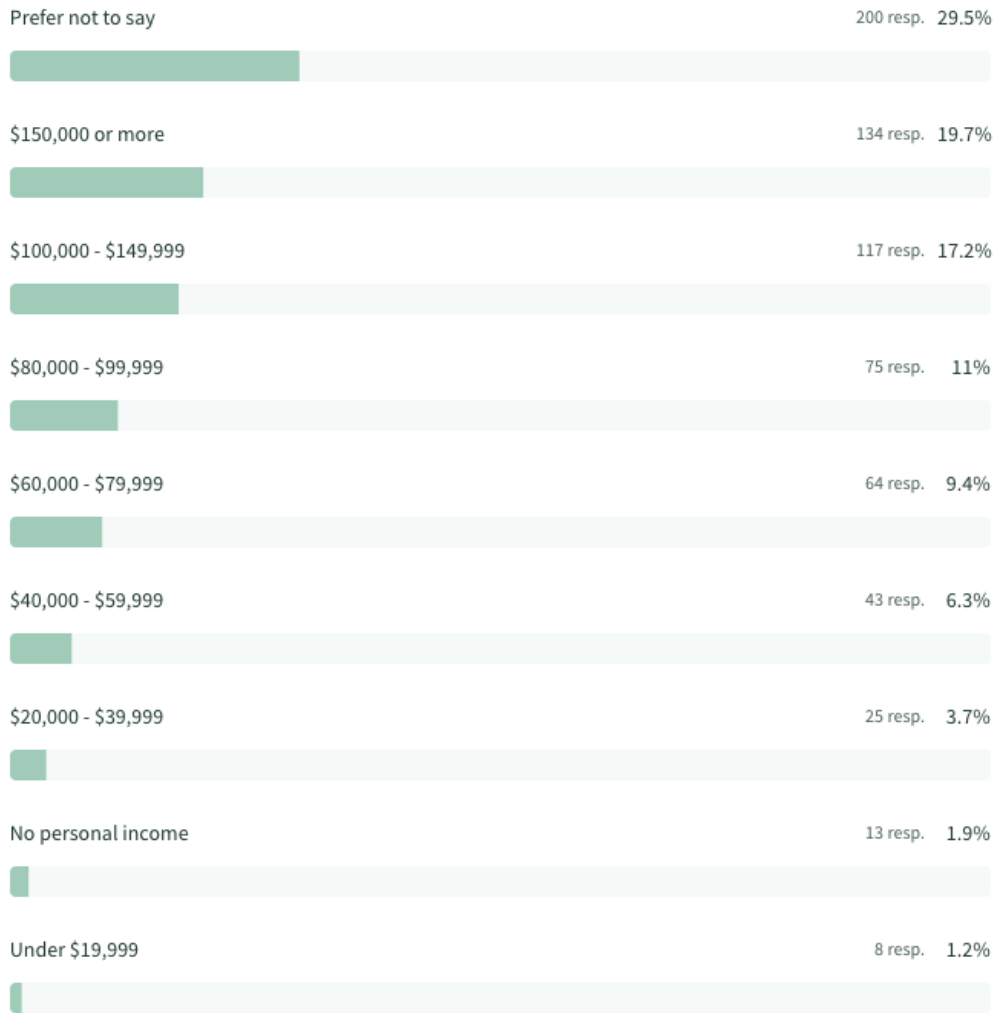
What is your current employment status?

679 out of 679 answered



Which category best describes your total personal income?

679 out of 679 answered





Appendix C:

Research Interview Background

Theme #1:

Mixed-Use Does Not Work Everywhere

- Many noted that the viability of mixed-use in North Oakville is limited by the existing road network. Dundas Street and Trafalgar Road are major arterial roads that funnel high traffic volumes across the Town. Interviewees noted that these roads are not conducive to pedestrian traffic and that the desire for pedestrian-oriented design in an area that is not walkable does not make sense.
- There was general agreement that the present lack of transit makes mixed-use development hard to justify and even more difficult to tenant. Transit is critical to support retail at grade of mixed-use development as it enhances pass-by traffic and customer exposure. This was emphasized as particularly important recognizing that mixed-use developments typically have less associated parking.
- To this end, many voiced that the existing *Neighbourhood Activity Nodes* are challenging from a tenancing perspective. These lands are disadvantaged by their internal locations away from major arterial roadways. They—to an even greater extent than lands designated *Urban Core*—lack the exposure and access characteristics necessary to attract and sustain tenants in the mixed-use formats desired.
- Landowners noted that some of their sites are physically constrained. It was noted that appropriate and well-designed mixed-use buildings with retail at grade cannot be integrated on certain sites because of their physical limitations.
- Many agreed that mixed-use development formats limit—in some cases eliminates—the opportunity for big-box stores as it restricts the form and function of retail space that can be integrated on a site. There were concerns that the vision for mixed-use development across NO-E would limit that type and diversity of retail tenants in the area.

Introducing larger space at grade of new developments was also seen as a risk. From a development standpoint, it was flagged that large units can be the most difficult to tenant and are undeniably more expensive to carry as a vacant unit.

- There was general agreement that viability is pertinent in determining if mixed-use development is appropriate. One interviewee noted that **balance is necessary**, suggesting that Erin Mills and Eglinton had a healthy mix of mixed-use development in some but not all buildings.

Theme #2:

Tenants Preferences Influence Built Form

- Retail tenants are not that flexible and are often tied to a particular development blueprint or specific design parameters of their own (i.e., parking expectations, floor area, building characteristics etc.). An inability to meet these requirements and expectations often turns tenants away.

It was noted by multiple interviewees that the specifications associated with mixed-use developments rarely align with the type of retail space sought by major tenants and is a key reason many landowners are hesitant to introduce retail at grade in NO-E.

- Several interviewees noted that the size and shape of their properties in NO-E are limited. Interviewees suggested it is increasingly difficult to balance the realities of what tenants demand while conforming to Town policy.
- Per the above, developers and **landowners feel caught in the middle**. They do not dictate the expectations of the Town or the tenant but are left to deal with the outcomes.
- It was also noted that surface retail dominating the periphery of NO-E makes it even more difficult to attract tenants to mixed-use nodes in NO-E. Tenant preferences and requirements are more conducive to the established retail areas on the south side of Dundas, making it difficult for new developments to compete.
- There was consensus that the current parking requirements for NO-E negatively impact the appeal of retail space. Tenants often depend and rely on certain parking parameters as a condition of development. Interviewees feel that this relationship is not understood.
- There is often disagreement between what a tenant wants and what is proposed by a developer or landowner. One landowner noted that tenanting can often be about finding an appropriate “give and take” between both parties (i.e., concessions on another property, specific rates, lease terms etc.). That said, it was recognized that not all landowners have the capacity to make these trades, which may eliminate the potential value of this strategy.

Theme #3:

Impact of Urban Design Expectations on the Function / Amount / Type of Retail in NO-E

- Existing urban design guidelines are trumping approved Official Plan Policy. Many noted that while standalone retail is permitted on their lands as of right, the design intentions of the Town are precluding it from being advanced. There was consensus that existing design expectations are inhibiting development timelines and creating unnecessary roadblocks. Indirectly, broader development plans in NO-E are being delayed which is also delaying housing development, pushing proposals to the Ontario Land Tribunal and driving up costs.
- Prescriptive urban design expectations are given too much importance. They are prescribing specific building forms, densities and heights, irrespective of other development factors.
- Most agreed that the intent of the policies is good and **could come to fruition overtime**. However, in advance of more substantial residential development, transit and a more fulsome build-out of NO-E, they are not realistic.
- There would be immense value in developing a pragmatic policy framework that can adapt to market changes and growth impacts going forward.
- Interviewees were largely of the opinion that the Town needs to make structural changes to existing policy if any retail space is going to get built. To this end, many believe that mixed-use can and should be seen as two uses on one site or two uses within one building.
- Provisions included in the existing Zoning Bylaw were noted as too specific. It was suggested these details are more applicable to the site plan process when thorough details and delivery are more pertinent. Interviewees noted that the specifications in the existing Zoning Bylaw are guaranteeing failure and increasing development costs which could easily be avoided.
- Many noted that they feel Town staff are not enabling retail development to happen. Development concepts with commercial blocks are not being considered because they do not align with the Town's development vision and so nothing is advancing.

- There were mixed opinions on what the Town should be doing to support development in NO-E. That said, there was agreement that there are no fruitful, meaningful discussions being had between landowners and Town staff currently.
- The Town's vision for what they want NO-E to be is disconnected from the market realities of today.

Open, Honest Discussion Between Town and Landowners

There needs to be more advanced and open-ended conversation between existing landowners and Town staff. There is no expectation that either party should fully understand the other. However, an agreement to listen is paramount in creating a way forward and in ensuring that neither party is operating with their blinders on.

At a high-level there is a mutual understanding that NO-E needs more retail space. It is the **format of retail space that creates the most disagreement**. Candid conversation between involved parties would enable existing and forthcoming development opportunities to be explored, while simultaneously advancing and introducing much-needed retail space in NO-E.

Theme #4:

Mixed-Use Development Feasibility

- Interviewees noted that mixed-use developments are increasingly not feasible. The ability for a residential project to carry a commercial component is decreasing because of external factors like inflation, rising construction costs etc. To this end, many interviewees suggested that they **are ready to develop** but existing requirements for mixed-use formats precludes them from starting.
- There was consensus among most interviewees that it is not feasible to introduce underground parking in NO-E.
- If the Town is committed to mixed-use development, there are **financial incentives** they could use to support and advance development or increase the feasibility of retail at grade, including: reductions in servicing requirements, simplification of design requirements or the increasing of residential density allotments so developers can recoup losses from retail at grade.
- There was consensus that the viability of retail space on a property is dependent on the valuation of other uses on a property.
- Many noted that it is easier to take a hit on retail when sites are bigger. This is atypical of lands in NO-E, further impeding the financial viability of retail development.
- Those interviewed were skeptical that they would be able to lease space in mixed-use buildings. One of the main concerns is that retail in mixed-use developments is often consumed by service-uses that generally require smaller units and less floor area. NO-E can only sustain so much space for service-oriented uses. Beyond its saturation point, leasing is anticipated to be an issue.
- An interviewee suggested that it is not the type or format of commercial that is wrong. Rather, the problem is how the commercial is expected to develop. The existing framework is seen to be too aggressive given the status of development in NO-E.

Theme #5:

Opportunities for Interim Uses

- It was voiced that NO-E is a low-density community that is being treated like something else. Many viewed that the existing housing densities and the lack of transit infrastructure would only support standalone retail development.

Interviewees suggested these sites **could evolve into mixed-use developments as the market materializes** but that flexibility and an opportunity for transition are more important in the meantime.

- Others highlighted the importance of timing. Standalone retail can be built immediately and respond directly to community needs. Retail at grade of mixed-use development will be stalled for years, as it will depend on the complete build out of mid-and-high-rise development concepts that have yet to begin.
- The Town's vision for retail will only be achieved if there is time for it to evolve.
- There is consensus that **more urgency** is needed. Many interviewees noted that they are embarrassed by the lack of retail in NO-E today, it is something that could be addressed if there was interim flexibility in building form. One interviewee noted that the lack of retail in NO-E is negatively impacting the Town. It was suggested that current residents are likely leaving Oakville to shop, creating both economic and job losses.
- Demand and development of commercial uses in mixed-use buildings will be tied to the residential build-out of NO-E. Residential development is key to providing regular foot traffic, consumer support and a significant local population base who can more regularly visit retail in mixed-use buildings.


The importance of having a local population in walking distance of new retail development is heightened recognizing substantial retail development on the south side of Dundas Street. It was similarly noted that there needs to be a local market for tenants (especially the big ones) to come.

- The lands designated *Urban Core* on Dundas Street are significant in size which enhances opportunity to introduce a range of uses and formats on each block rather than within each building.
- Most of the interviewees believe that NO-E needs land dedicated for sizeable retail development. It was noted that the Town should revisit central locations for commercial destinations as the existing designations do not permit anything of substance. A few suggested that it may be valuable for intersection locations to have more flexible policies than other sites to satisfy this demand.

- The Town needs to introduce central or accepted locations for sizeable commercial destinations. All the current designations are limited, providing no land for straight residential development or retail development that would permit anything of substance. It was suggested that the Town should consider allowing intersection locations to be developed through more flexible policies, particularly policies that do not stipulate that mixed-use development must be integrated vertically.
- There was general frustration across interviewees. Many suggested that they felt that there is a lack of political will to make stuff happen. No party can agree so nothing is changing.
- It was also voiced that the Town is attached to having a vision, even if the vision changes. One individual cited that the Town was previously attached to live-work units, but have since decided that they will not support it. There was also consensus that there is a lack of explanation regarding how or why retail must develop per the existing policy framework, making it difficult for landowners to justify and comply.

The Town is Locked to a Vision

Many interviewees indicated that the Town's vision for what NO-E *should be* in the fulness of time is precluding it from developing and evolving. External and internal challenges faced by landowners and developers combined with the Town's apprehensions to consider development concepts that stray from their current policy regime are perceived to be stalling development and limiting the integration of substantive, viable retail space.



Appendix D:
Trends Background

Trend #1:

Blurring of Merchandise Categories

Including those establishments able to capitalize on recent changes in shopping preferences resulting from the COVID-19 pandemic, a notable subset of chain retailers have effectively reinforced their position as convenient, “one-stop shops” for a full range of retail merchandise. At the same time, smaller, main-street and often independent retailers are also finding creative ways to tackle affordability and expand their offerings to meet the demands of premium rental rates and other operating costs.

- Traditional large format, “big-box” general merchandise retailers such as Wal-Mart, Costco, Real Canadian Superstore and Canadian Tire have all leveraged an opportunity to serve as a singular source for a full range of typical consumer-grade products, both in the context of physical store locations and their online presence.
- Similarly, retailers such as Shoppers Drug Mart—now affiliated with Loblaw Companies Ltd.—and establishments like London Drugs in Western Canada have now started to offer goods such as groceries, electronics, home furnishings / electronics, which deviate significantly from their original core offering of drugstore products (pharmacy, cosmetics, etc.).
- In an effort to provide a unique offering to local consumers, as well as make ends meet financially, many smaller and mid-sized urban commercial tenants have explored opportunities to broaden their product offerings, including “store-within-a-store” formats and other discernable merchandise mixing that deviate from typical norms. This trend also applies to service providers too (e.g., spaces being operated as cafes by day and bars / drinking establishments by night).

As a function of all of the above—which is a very consistent experience across the Town, Region and beyond—retailers of all sizes and statures (chains and independents) have created significant overlap between what were historically distinct store categories. Unfortunately, this has **resulted in retail nodes frequently competing for the same or similar customers, and also for the same individual store tenants**. Furthermore, the volume and scale at which larger general merchandisers—including “online-only” platforms like Amazon—are able to purchase goods provides a distinct advantage in cost savings. It is important to note that these **cost savings are rarely matched by retailers operating within more narrowly defined segments and/or at smaller scales, including at the community- or secondary plan-specific levels of geography** (e.g., NO-E, as is the subject of this study).

Trend #2:

Segmentation of Commercial Hierarchy

Within the rapidly growing Greater Toronto Area, the retail sector has grown increasingly segmented, reinforcing an urban and suburban divide, as well as yielding a distinct parcelling of retail “winners” and “losers”. As highlighted in our corresponding inventory of existing commercial space in the Trade Area, as well as related experience profiling other commercial nodes elsewhere in the region, the separation between various levels of the broader retail/service hierarchy have never been more distinct. The most successful formats as of late include:

- Major **regional and super-regional shopping centres** (e.g., traditional enclosed shopping centres and/or large format, open-air plazas) which have been able to withstand the challenges posed throughout the retail sector in recent years and anchored by a wide selection of national and international retailers. These typically include higher-end, luxury shopping destinations focused on fashion and design, as well as some lower-performing community-scaled shopping centres that are now seeking to reposition their properties as new high density mixed use communities.
- **Local-serving, grocery anchored corridors and districts** able to find success in meeting the day-to-day needs of local residents and employees (e.g., local-serving, community-based retail clusters typically located in either established, stable residential neighbourhoods and/or master planned new communities contemplating significant intensification and redevelopment).
- Traditional **street-facing, fine-grained commercial strips or “main streets”** that often have less clearly defined commercial and community functions. These areas typically include vibrant, animated and trendy shopping and/or entertainment districts or more fledgeling new commercial nodes competing to establish a unique identity and—in effect—a unique customer base. They are not focused exclusively on retail, but rather a broader experience capable of attracting visitation from a much larger geographic area.

Trend #3:

E-Commerce

Among the most profound shifts in shopping patterns over the last decade has been the growth of e-commerce (online shopping) activities, which has caused a fundamental change in the way that retail/service commercial providers do business. The convenience of shopping from home, the ability to easily comparison shop for products / prices and in many cases to be offered same-day delivery has obvious appeal to consumers.

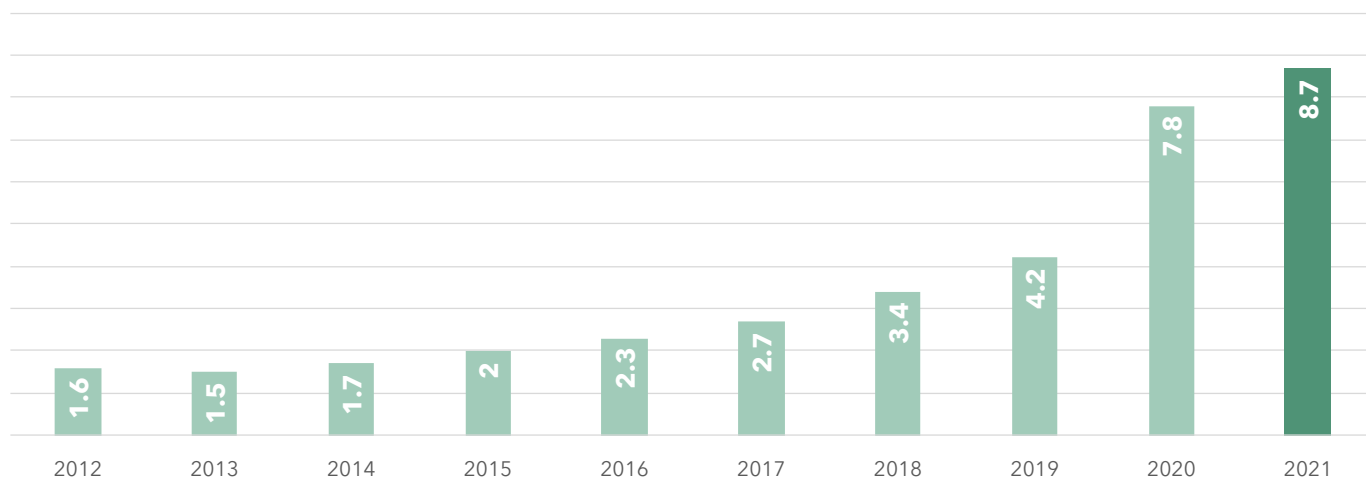
That said, it is important to recognize the following key factors at the outset of this discussion:

- Although there is a general view and characterization in the media that this form of convenience shopping has come directly at the expense of traditional brick and mortar retailers (i.e., as households redirect an increasing proportion of their overall retail spending to these channels), the effects are: (a) largely overstated; and (b) have not been felt equally across all store categories.
- For better or worse, the true impacts of online shopping are not currently well understood, based on a general lack of available (and reliable) data to properly evaluate the magnitude of these types of shopping activities. There is a significant “grey” area when it comes to capturing expenditures at omni-channel retailers with both physical and online presences (e.g., how these sales are reported to Statistics Canada, inconsistent treatment of online orders picked up in-store / delivered directly to a residence via a nearby store, etc.).
- It remains to be seen whether the impact of COVID-19 will ultimately represent a more permanent shift in shopping patterns or—at least in part—simply borne out of necessity vs. actual consumer preferences. In-person shopping, dining and other service-provisions continues to be both a necessary occurrence, as well as a desirable leisure-based activity for many.

Figure D highlights the recent growth in e-commerce activity, based on available Statistics Canada data for “Retail Trade”. This represents the main source data relied upon in a range of traditional retail market analyses, including that outlined in this study as part of our warranted space / “demand” analysis. Unsurprisingly, the total percentage of sales being redirected to e-commerce has been steadily increasing. That said, excluding “online-only” retail formats such as Amazon, the overall share is not as pronounced as many think, albeit also likely skewed by the underlying quality of this dataset and uncertainty in how these sales are being reported.

Figure D.7.1

Growth in E-Commerce - Percentage of Total Sales (2012 - 2021)



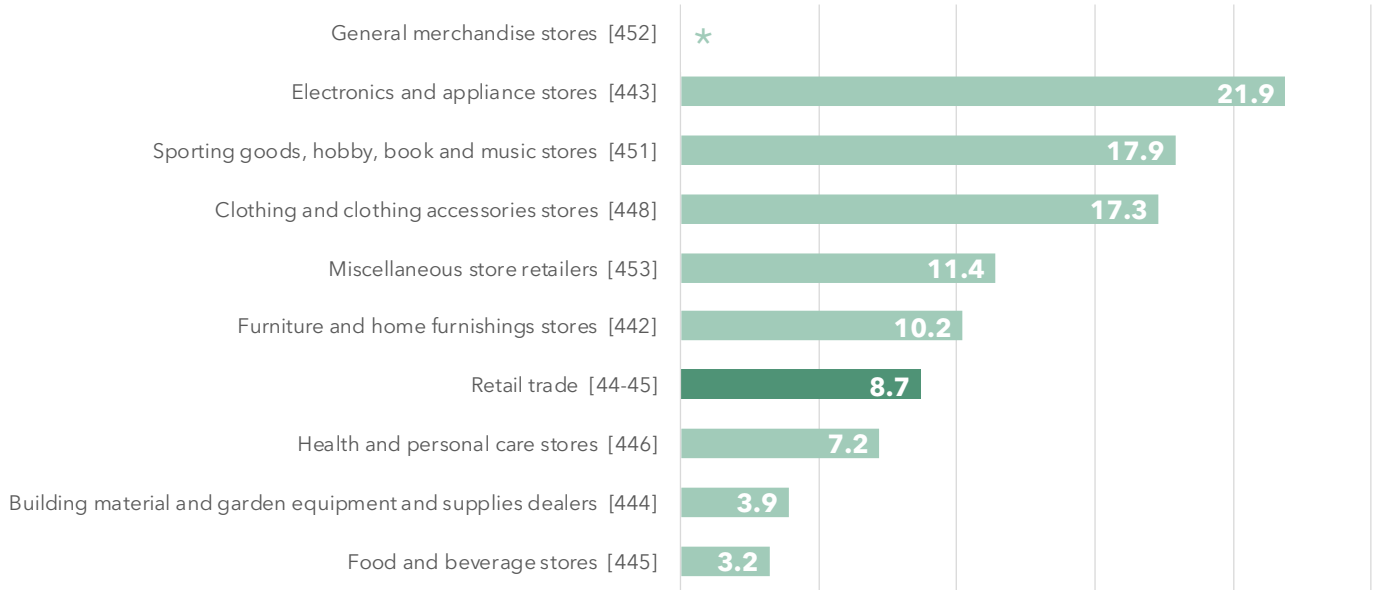
Source: Parcel, based on Statistics Canada Table 20-10-0065-01 (Retail trade, total sales and e-commerce sales).

Figure D further demonstrates the lack of consistency across store categories, with obvious variation in the level of e-commerce penetration across traditional market segments that involve material products that are not necessarily customizable, do not benefit from substitution/testing, and are relatively easy to ship (e.g., electronics, sporting goods, and to a certain extent clothing).

Many retailers in these categories have shifted to more of a centralized “showroom” format in major shopping districts where consumers can browse for products but ultimately purchasing online. This **limits the extent to which many traditional retailers will now locate in secondary or tertiary locations**—even in major urban centres—instead limiting their physical store presence to a few selected locations. This has implications for NO-E and other similar communities that may not as easily attract such retailers.

Figure D.7.2

Growth in E-Commerce – Percentage of Total Sales by Subcategory (2021)



Source: Parcel, based on Statistics Canada Table 20-10-0065-01 (Retail trade, total sales and e-commerce sales).

*Percentage of e-commerce sales for the General merchandise stores category suppressed for the purposes of confidentiality by Statistics Canada (per requirements of the Statistics Act). Equivalent data for previous annual periods since 2012 were in the range of 0.2 to 0.7.

Trend #4:

Typologies & Unit Sizes

As a function of both broader shifts in the retail sector (e.g., e-commerce, segmentation of “winners” and “losers”, etc., as noted earlier), as well as challenges to affordability of commercial space in an environment with heightened operating and development-related costs for all types of real estate, there has been a renewed emphasis on unit sizes and typologies in the context of the delivery of new / operation of existing commercial spaces. These can differ substantially across locational contexts.

Fine-Grained Commercial Corridors

In the context of the Greater Toronto Area and across much of North America, there has been a renewed focus on retail “main streets” and other related commercial corridors. Regardless of their overall health and real estate performance, these **typically take the form of well-established, neighbourhood-oriented commercial corridors on major arterial roads**. In many cases, these areas are primarily centred around downtowns (e.g., Downtown Oakville), near higher order transit infrastructure and/or around premier shopping and cultural destinations capable of leveraging their own unique identities and therefore customer draws that have been established over many decades (e.g., Toronto’s West Queen West or Yorkville neighbourhoods).

Although routinely accommodating much larger retail anchors and chain stores as well, smaller unit sizes in this type of commercial environment typically range between 800 to 1,500 square feet and often favour independent retailers and/or service providers (e.g., restaurants / cafes / bars, boutique shops, etc.).

By comparison, these types of commercial environments can be challenging to establish “from scratch” in new-build contexts, especially in the absence of one or more of the following pre-conditions:

- Substantial existing and/or planned residential densities offering a source of “built-in” customer support and a scale of development that supports viable mixed use projects;
- Replacement or evolution of pre-existing commercial functions that are being repurposed and/or “right-sized” through redevelopment (e.g., mall redevelopment or infill projects); and/or,
- Locations offering immediate access to higher-order transit infrastructure (e.g., major transit station area developments or similar).

“Micro-Retail” Units

True “micro-retail” units are significantly smaller than the traditional fine-grained retail units noted above and tend to be much more concentrated within a single cluster. Individual stalls may fall out closer to 200 - 400 square feet per unit in size in many cases. This format has a number of distinct benefits in terms of affordability and supporting entrepreneurship / fledgeling new businesses, but ultimately poses unique challenges to commercial property managers, lenders, and other stakeholders involved too. With limited widespread adoption, these are more typically reserved for more novel or unique commercial districts (e.g., Toronto’s shipping container markets or Markham’s Pacific Mall), or in conjunction with other more traditional commercial offerings within the same developments (e.g., Mirvish Village, the under-construction redevelopment of the former Honest Ed’s store in Toronto).

It is also important to note that micro-retailing typically **represents just one component of a broader commercial strategy and is not commonly considered an option for tenanting the entire commercial footprint of an urban, mixed use development and/or more suburban commercial development context.**

Mixed Use Feasibility

Although not comprising a core element of the scope of work for this study, it is also important to consider the **implications of financial feasibility on the delivery of commercial space in new developments.** As it relates to project viability, it is unsurprising that market residential uses continue to represent the “highest and best use” of lands throughout NO-E, consistent with elsewhere in Oakville and across many other parts of the GTA / beyond. Despite the historically favourable market conditions for residential development, however—mixed use projects can often become challenged or overburdened financially by the cumulative effects of various other limiting factors affecting feasibility (e.g., including requirements for commercial or other non-residential space where demand may not be available, but also conditions such as carve-outs for other non-revenue or relatively limited revenue-generating uses, such as affordable housing, parkland dedication, etc.).

Based on our own experience preparing development pro forma analyses for both public and private sector interests, any time that a project is forced to include too significant a share of non-revenue (or limited revenue) generating uses, it begins to materially strain feasibility, thereby disincentivizing investment that begins to look elsewhere. This represents a material risk to new developments in NO-E and—for better or worse—could counteract the underlying intent of the Town’s policies. For retail / service commercial uses at this type of location in particular, this dynamic could be especially strong given that there **likely is not sufficient demand from tenants to command the commercial rents (i.e., revenues) necessary to counteract the significant capital costs of new construction.** Similarly, along with factors such as expensive underground parking, this factor can be especially

impactful for **low and mid-rise building typologies that are generally incapable of spreading the added costs (or reduced revenues) across much larger projects.**

Lastly, notwithstanding the potential successes or failures of other mixed-use developments across the GTA as of late, the past several years have brought significant challenges to the advancement of feasible real estate projects of any / all kinds. This includes **record increases to hard construction costs, a rising interest rate environment, as well as shifting land use policy conditions at all levels of government** that have caused additional uncertainty and risk. All of these factors have affected the delivery of a full range of preferred development formats and use types, including but not necessarily unique to retail/service commercial uses. In this manner, commercial uses have become similar to affordable housing insofar as they represent important elements of complete and healthy communities, but ultimately extremely challenging to achieve due to strained financial feasibility conditions.

Trend #5:

Shifting Tenant Formats & Requirements

Although issues of affordability, online shopping growth and other changes in the retail sector will undoubtedly continue to challenge the feasibility of developing new retail/service commercial uses in the future, it remains our opinion that these factors **will not entirely replace in-person shopping experiences for all store types**. Large segments of the population still view shopping as an enjoyable, social event and the composition of a given commercial area can contribute to the unique identity of a neighbourhood. Similarly, retail uses serve an important community hub function, providing a place for gathering and shared experience.

Experiential Retail

As e-commerce continues to account for an increasingly significant proportion of overall consumer expenditures, the total share is likely to “max out” or taper off. Consequently, it remains to be seen what composition of retailers will continue to:

- Operate as usual (“status quo”);
- Seek a significant reduction in their physical store footprints and/or presence in certain markets; and/or,
- Establish an appropriate balance of selected retail locations that serve as a place for physical browsing, entertainment and gathering (i.e., “experiential retailing”). Similarly, many are likely to establish flagship “showroom” type functions of varying sizes and neighbourhood contexts augmented by a robust online presence.

Cultural, Entertainment & Recreation Facilities

Mirroring the ongoing shift above to more of an experiential, services-based direction for retail/service commercial spaces, it is also increasingly common for growing neighbourhoods like in NO-E to accommodate a range of non-traditional retail formats and unique commercial offerings that can help to differentiate them from the crowd and ultimately deviate from typical development patterns. This includes seasonal markets, pop-up shops and other temporary / semi-permanent retail spaces, as well as the integration of a whole new subset of ground floor programming focused more on community and cultural spaces.

In the context of NO-E, there may be opportunities to leverage the co-location benefits of retail/service commercial spaces if planned adjacent to other civic, social or institutional infrastructure throughout the neighbourhood. In addition to contributing to a unique sense of place in and of themselves, this form of programming can help drive

additional visitation to an area and bolster the level of customer support available to nearby retail/service commercial uses that may not otherwise exist.

Chains vs. Independents

Established “main street” commercial environments and other neighbourhood-based commercial nodes are evolving in the face of new challenges of affordability and development pressures for residential-only or predominantly residential mixed use developments. This has led to a mixing of traditional “mom and pop” type commercial establishments that have historically lined the streets of more established, mature communities with the introduction of new chain retailers and basic neighbourhood anchors that are often required to keep pace with growing populations in key intensification areas (e.g., chain supermarkets, drugstores, financial institutions, etc.). These national and multi-national retailers also tend to be the most stable, thereby appearing favourable to lenders and improving the financial feasibility of new developments.

This dynamic necessitates an appropriate balancing of both independent and chain retailers to foster a complete commercial environment capable of supporting all levels of the commercial hierarchy. It is important to include elements of both, without the “pendulum” swinging too far in either direction on the spectrum.

Urban vs. Suburban Contexts

Tenant needs and interests can also vary significantly across different development contexts. For example, even the same retail chain—or “banner”—can differ in terms of the specific types, sizes and/or configurations of commercial units that they are willing to tenant depending on whether it happens to be in a densely populated, major urban centre or a lower-density, suburban environment surrounded by predominantly single and semi-detached housing. This can also influence other commercial development parameters and conditions of lease agreements with respect to the number and location of available parking stalls, visibility / frontage / signage offered, as well as access characteristics for more practical day-to-day ease of operations (e.g., deliveries, storage, etc.).

In many cases, **with a proven “formula” established that has been proven to successful and highly replicable across multiple store locations, this often has the effect of perpetuating the status quo in terms of commercial development formats.** For many major retailers, this can involve strong preferences for—and therefore obligation on the behalf of the development community to satisfy—more traditional commercial formats (e.g., single-storey, open-air commercial plazas with ample parking, especially more auto-oriented communities such as Oakville and other parts of the 905-Region). Change or compromise to these more traditional development formats—including willingness to locate in mixed use projects—are typically only made under more exceptional circumstances (e.g., when there is another driver such as desire to locate in a premier shopping destination, major urban market or other strategic site).

Trend #6:

Influence of COVID-19

Similar to the discussion above relating to the magnitude of impacts derived from online shopping, the longer-term effects of the COVID-19 pandemic cannot be fully known at this time either. It is our opinion that—while the pandemic has undoubtedly resulted in material changes in the retail sector and accelerated its evolution—it is nonetheless important to recognize that **most of these changes continue to be a function of pre-existing conditions**. That is, many of the foregoing trends have been developing for some time and the pandemic simply catalyzed these changes, albeit seemingly “overnight”.

As highlighted above, this has resulted in increasing segmentation, with clear “winners” and “losers” as part of this ongoing evolution. For better or worse, NO-E likely does not represent a development context that is unique enough to be capable of breaking these patterns.



Appendix E:
Market Analysis Background

Figure E.1
Retail Expenditures NOE

Trade Area (NOE)	2023		2026		2031		2041		2051		
Per Capita Retail Expenditures	\$11,421		\$11,571		\$11,822		\$12,322		\$12,823		
Population	25,200		40,400		65,600		110,400		142,100		
Total Retail Expenditure Potential (\$m)	\$287.8		\$467.5		\$775.5		\$1,360.3		\$1,822.1		
Food Store Retail (FSR)	\$67.9	23.6%	\$110.2	23.6%	\$182.9	23.6%	\$320.8	23.6%	\$429.7	23.6%	
Supermarket & Grocery	\$ 57.3	19.9%	\$ 93.1	19.9%	\$ 154.5	19.9%	\$ 270.9	19.9%	\$ 362.9	19.9%	
Convenience & Specialty Food	\$ 10.5	3.7%	\$ 17.1	3.7%	\$ 28.4	3.7%	\$ 49.8	3.7%	\$ 66.7	3.7%	
Beer, Wine & Liquor	\$16.0	5.6%	\$26.0	5.6%	\$43.1	5.6%	\$75.6	5.6%	\$101.2	5.6%	
Non-Food Store Retail (NFSR)	\$203.9	70.9%	\$331.3	70.9%	\$549.6	70.9%	\$964.0	70.9%	\$1,291.3	70.9%	
General Merchandise Stores	\$ 62.2	21.6%	\$101.0	21.6%	\$167.5	21.6%	\$293.9	21.6%	\$393.7	21.6%	
Clothing & Accessories	\$ 22.8	7.9%	\$37.0	7.9%	\$61.3	7.9%	\$107.6	7.9%	\$144.1	7.9%	
Furnishing, Home Furnishing	\$ 12.0	4.2%	\$19.5	4.2%	\$32.4	4.2%	\$56.9	4.2%	\$76.2	4.2%	
Electronics & Appliances	\$ 14.1	4.9%	\$22.9	4.9%	\$37.9	4.9%	\$66.5	4.9%	\$89.1	4.9%	
Miscellaneous Retailers	\$ 26.6	9.3%	\$43.2	9.3%	\$71.7	9.3%	\$125.8	9.3%	\$168.5	9.3%	
Health & Personal Care	\$ 33.3	11.6%	\$54.2	11.6%	\$89.9	11.6%	\$157.6	11.6%	\$211.1	11.6%	
Tires/Batteries/Automotive Accessories	\$ 7.3	2.5%	\$11.9	2.5%	\$19.7	2.5%	\$34.6	2.5%	\$46.4	2.5%	
Building & Outdoor Home Supplies	\$ 25.6	8.9%	\$41.6	8.9%	\$69.0	8.9%	\$121.1	8.9%	\$162.2	8.9%	
Total Trade Area (NOE) Expenditure Potential (\$m)	\$287.8	100%	\$467.5	100%	\$775.5	100%	\$1,360.3	100%	\$1,822.1	100%	
Cumulative Growth in Expenditure Potential											
Food Store Retail (FSR)			\$42.4			\$115.0			\$252.9		
Supermarket & Grocery			\$ 35.8			\$ 97.1			\$ 213.6		
Convenience & Specialty Food			\$ 6.6			\$ 17.9			\$ 39.3		
Beer, Wine & Liquor			\$10.0			\$27.1			\$59.6		
Non-Food Store Retail (NFSR)			\$127.3			\$345.6			\$760.1		
General Merchandise Stores			\$ 38.8			\$ 105.4			\$ 231.7		
Clothing & Accessories			\$ 14.2			\$ 38.6			\$ 84.8		
Furnishing, Home Furnishing			\$ 7.5			\$ 20.4			\$ 44.8		
Electronics & Appliances			\$ 8.8			\$ 23.9			\$ 52.5		
Miscellaneous Retailers			\$ 16.6			\$ 45.1			\$ 99.2		
Health & Personal Care			\$ 20.8			\$ 56.5			\$ 124.3		
Tires/Batteries/Automotive Accessories			\$ 4.6			\$ 12.4			\$ 27.3		
Building & Outdoor Home Supplies			\$ 16.0			\$ 43.4			\$ 95.5		
Total Trade Area Retail Expenditures (\$m)			\$179.7			\$487.7			\$1,072.6		

Figure E.2

Food Store Retail Expenditure Analysis

Food Store Retail (FSR)	2023	2026	2031	2041	2051
Trade Area (NOE)					
Food Store Retail (FSR) Expenditures (\$m)	\$ 67.9	\$ 110.2	\$ 182.9	\$ 320.8	\$ 429.7
Estimated Trade Area Share (%)	55.0%	60.0%	65.0%	70.0%	75.0%
Estimated Trade Area Share (\$m)	\$ 37.3	\$ 66.1	\$ 118.9	\$ 224.5	\$ 322.2
Residual Potential (\$m)		\$ 28.8	\$ 81.5	\$ 187.2	\$ 284.9
Total Trade Area					
Food Store Retail (FSR) Expenditures (\$m)	\$ 67.9	\$ 110.2	\$ 182.9	\$ 320.8	\$ 429.7
Estimated Trade Area Share (\$m)	\$ 37.3	\$ 66.1	\$ 118.9	\$ 224.5	\$ 322.2
Estimated Trade Area Share (%)	55.0%	60.0%	65.0%	70.0%	75.0%
Residual Potential (\$m)		\$ 28.8	\$ 81.5	\$ 187.2	\$ 284.9
Existing Food Store Retail (FSR) Sales Performance					
	\$652				
Total Trade Area Warranted Additional Food Store Retail (FSR) Space					
Additional Residual Potential from Total Trade Area Residents		\$ 28.8	\$ 81.5	\$ 187.2	\$ 284.9
Inflow (%)		15%	15%	15%	15%
Inflow (\$m)		\$ 5.1	\$ 14.4	\$ 33.0	\$ 50.3
		\$ 33.9	\$ 95.9	\$ 220.3	\$ 335.2
Space Warranted					
@\$600 per square foot		56,000 sf	160,000 sf	367,000 sf	559,000 sf
@\$800 per square foot		42,000 sf	120,000 sf	275,000 sf	419,000 sf
@\$1000 per square foot		34,000 sf	96,000 sf	220,000 sf	335,000 sf
Beer, Wine & Liquor					
	2023	2026	2031	2041	2051
Trade Area (NOE)					
Beer, Wine & Liquor Expenditures (\$m)	\$ 16.0	\$ 26.0	\$ 43.1	\$ 75.6	\$ 101.2
Estimated Trade Area Share (%)	50.0%	55.0%	60.0%	60.0%	60.0%
Estimated Trade Area Share (\$m)	\$ 8.0	\$ 14.3	\$ 25.8	\$ 45.3	\$ 60.7
Residual Potential (\$m)		\$ 6.3	\$ 17.9	\$ 37.3	\$ 52.7
Estimated Trade Area Share (%)					
Beer, Wine & Liquor Expenditures (\$m)	\$ 16.0	\$ 26.0	\$ 43.1	\$ 75.6	\$ 101.2
Estimated Trade Area Share (\$m)	\$ 8.0	\$ 14.3	\$ 25.8	\$ 45.3	\$ 60.7
Estimated Trade Area Share (%)	50.0%	55.0%	60.0%	60.0%	60.0%
Residual Potential (\$m)		\$ 6.3	\$ 17.9	\$ 37.3	\$ 52.7
Existing Beer, Wine & Liquor Sales Performance					
	\$980				
Estimated Trade Area Share (%) Warranted Additional Beer, Wine & Liquor Space					
Additional Residual Potential from Estimated Trade Area Share (%) Residents		\$ 6.3	\$ 17.9	\$ 37.3	\$ 52.7
Inflow (%)		15%	15%	15%	15%
Inflow (\$m)		\$ 1.1	\$ 3.2	\$ 6.6	\$ 9.3
		\$ 7.4	\$ 21.0	\$ 43.9	\$ 62.0
Space Warranted					
@\$900 per square foot		8,000 sf	23,000 sf	49,000 sf	69,000 sf
@\$1050 per square foot		7,000 sf	20,000 sf	42,000 sf	59,000 sf
@\$1200 per square foot		6,000 sf	18,000 sf	37,000 sf	52,000 sf

Figure E.3

Health & Personal Care Retail Expenditure Analysis

Health & Personal Care	2023	2026	2031	2041	2051
Trade Area (NOE)					
Health & Personal Care Expenditures (\$m)	\$ 33.3	\$ 54.2	\$ 89.9	\$ 157.6	\$ 211.1
Estimated Trade Area Share (%)	30.0%	45.0%	65.0%	75.0%	75.0%
Estimated Trade Area Share (\$m)	\$ 10.0	\$ 24.4	\$ 58.4	\$ 118.2	\$ 158.3
Residual Potential (\$m)		\$ 14.4	\$ 48.4	\$ 108.2	\$ 148.3
Trade Area (NOE)					
Health & Personal Care Expenditures (\$m)	\$ 33.3	\$ 54.2	\$ 89.9	\$ 157.6	\$ 211.1
Estimated Trade Area Share (\$m)	\$ 10.0	\$ 24.4	\$ 58.4	\$ 118.2	\$ 158.3
Estimated Trade Area Share (%)	30.0%	45.0%	65.0%	75.0%	75.0%
Residual Potential (\$m)		\$ 14.4	\$ 48.4	\$ 108.2	\$ 148.3
Existing Health & Personal Care Sales Performance					
	\$900				
Trade Area (NOE) Warranted Additional Health & Personal Care Space					
Additional Residual Potential from Trade Area (NOE) Residents		\$ 14.4	\$ 48.4	\$ 108.2	\$ 148.3
Inflow (%)		10%	10%	10%	10%
Inflow (\$m)		\$ 1.6	\$ 5.4	\$ 12.0	\$ 16.5
		\$ 16.0	\$ 53.8	\$ 120.2	\$ 164.8
Space Warranted					
@\$900 per square foot		18,000 sf	60,000 sf	134,000 sf	183,000 sf
@\$1000 per square foot		16,000 sf	54,000 sf	120,000 sf	165,000 sf
@\$1100 per square foot		15,000 sf	49,000 sf	109,000 sf	150,000 sf

Figure E. 4

Non-Food Store Retail Expenditure Analysis

Non-Food Store Retail (NFSR)	2023	2026	2031	2041	2051
<i>Excluding Health and Personal Care</i>					
Trade Area (NOE)					
Non-Food Store Retail (NFSR) Expenditures (\$m)	\$ 203.9	\$ 266.8	\$ 442.6	\$ 776.4	\$ 1,039.9
Less: Health & Personal Care	\$ 33.3	\$ 54.2	\$ 89.9	\$ 157.6	\$ 211.1
Other Non-Food Store Retail (NFSR) Expenditures (\$m)	\$ 170.6	\$ 212.6	\$ 352.8	\$ 618.8	\$ 828.8
Estimated Trade Area Share (%)	25.0% 35.0%	25.0%	25.0%	25.0%	25.0%
Estimated Trade Area Share (\$m)	\$ 42.7	\$ 53.2	\$ 88.2	\$ 154.7	\$ 207.2
Residual Potential (\$m)		\$ 10.5	\$ 45.5	\$ 112.0	\$ 164.6
Trade Area (NOE)					
Other Estimated Trade Area Share (%) Expenditures (\$m)	\$ 170.6	\$ 212.6	\$ 352.8	\$ 618.8	\$ 828.8
Estimated Trade Area Share (\$m)	\$ 42.7	\$ 53.2	\$ 88.2	\$ 154.7	\$ 207.2
Estimated Trade Area Share (%)	25.0%	25.0%	25.0%	25.0%	25.0%
Residual Potential (\$m)		\$ 10.5	\$ 45.5	\$ 112.0	\$ 164.6
Existing Other Non-Food Store Retail (NFSR) Sales Performance					
	\$551				
Warranted Additional Non-Food Store Retail (NFSR) Space					
Additional Residual Potential from Trade Area (NOE) Residents		\$ 10.5	\$ 45.5	\$ 112.0	\$ 164.6
Inflow (%)		10%	10%	10%	10%
Inflow (\$m)		\$ 1.2	\$ 5.1	\$ 12.4	\$ 18.3
		\$ 11.7	\$ 50.6	\$ 124.5	\$ 182.8
Space Warranted					
@\$400 per square foot		29,000 sf	126,000 sf	311,000 sf	457,000 sf
@\$500 per square foot		23,000 sf	101,000 sf	249,000 sf	366,000 sf
@\$600 per square foot		19,000 sf	84,000 sf	207,000 sf	305,000 sf

Figure E.5
Services Per Capita

		Typical Space per Capita		Space Req'd by Residents		Target Capture		Adjusted Space		Inflow		Warranted Space	
Net New Growth (2031)	40,400	x	A	=	B	x	C	=	D	x	E	=	F
Finance, Insurance + Real Estate			2.0 sf		80,800 sf		65%		52,520 sf		15%		61,788 sf
Business Services ¹			1.5 sf		60,600 sf		35%		21,210 sf		20%		26,513 sf
Health Care			1.5 sf		60,600 sf		65%		39,390 sf		20%		49,238 sf
Food + Drinking Places			3.5 sf		141,400 sf		60%		84,840 sf		20%		106,050 sf
Personal Care			2.0 sf		80,800 sf		60%		48,480 sf		10%		53,867 sf
Cultural, Entertainment + Recreation			1.0 sf		40,400 sf		35%		14,140 sf		15%		16,635 sf
Other ²			2.0 sf		80,800 sf		20%		16,160 sf		10%		17,956 sf
TOTAL			13.5 sf		545,400 sf		51%		276,740 sf		17%		332,046 sf
Net New Growth (2041)	85,200	x	A	=	B	x	C	=	D	x	E	=	F
Finance, Insurance + Real Estate			2.0 sf		170,400 sf		65%		110,760 sf		15%		130,306 sf
Business Services ¹			1.5 sf		127,800 sf		35%		44,730 sf		20%		55,913 sf
Health Care			1.5 sf		127,800 sf		65%		83,070 sf		20%		103,838 sf
Food + Drinking Places			3.5 sf		298,200 sf		60%		178,920 sf		20%		223,650 sf
Personal Care			2.0 sf		170,400 sf		60%		102,240 sf		10%		113,600 sf
Cultural, Entertainment + Recreation			1.0 sf		85,200 sf		35%		29,820 sf		15%		35,082 sf
Other ²			2.0 sf		170,400 sf		20%		34,080 sf		10%		37,867 sf
TOTAL			13.5 sf		1,150,200 sf		51%		583,620 sf		17%		700,255 sf
Net New Growth (2051)	116,900	x	A	=	B	x	C	=	D	x	E	=	F
Finance, Insurance + Real Estate			2.0 sf		233,800 sf		65%		151,970 sf		15%		178,788 sf
Business Services ¹			1.5 sf		175,350 sf		35%		61,373 sf		20%		76,716 sf
Health Care			1.5 sf		175,350 sf		65%		113,978 sf		20%		142,472 sf
Food + Drinking Places			3.5 sf		409,150 sf		60%		245,490 sf		20%		306,863 sf
Personal Care			2.0 sf		233,800 sf		60%		140,280 sf		10%		155,867 sf
Cultural, Entertainment + Recreation			1.0 sf		116,900 sf		35%		40,915 sf		15%		48,135 sf
Other ²			2.0 sf		233,800 sf		20%		46,760 sf		10%		51,956 sf
TOTAL			13.5 sf		1,578,150 sf		51%		800,765 sf		17%		960,796 sf

¹ Professional + Scientific Services; Selected Office Administrative Services; Selected Educational Services.


² Selected Civic + Social Organizations

Figure E.6

Summary of Warranted Space by Location

	Square Footage
Key Intersections	1,010,000 sf
Trafalgar / Dundas UCA	350,000 sf
Neyagawa / Dundas UCA	300,000 sf
Neyagawa UCA	180,000 sf
Burnhamthorpe / Trafalgar	180,000 sf
Neighbourhood Activity Centres (Primary)	480,000 sf
<i>per Primary Centre (@ 3 Centres)</i>	160,000 sf
Neighbourhood Activity Centres (Secondary)	320,000 sf
<i>per Secondary Centre (@ 11 Centres)</i>	29,000 sf
Total	1,810,000 sf

Source: Parcel, based on the results of the store category-specific market analysis presented above and elsewhere in this report. We note that these allocations have been included for demonstration purposes only and are intended to provide a rough order-of-magnitude indication as to how the total space warranted could potentially be allocated across different geographic contexts in NO-E. The actual distribution of space by location will inevitably differ from this summary, both in terms of potential future policy direction(s) and actual construction of new commercial spaces.



Appendix F:
**Guiding Design Principles for
Commercial Spaces in NO-E**

Parallel Considerations:

Town of Oakville Guiding Design Principles

As part of the broader study process for this engagement, Town staff have independently prepared a summary of key design principles for consideration as part of the advancement of land use directions at NO-E. These build upon pre-existing urban design guidelines referenced throughout this document and in light of the key market / land use policy-based recommendations resulting from this study.

The design principles referenced herein have been **prepared directly by Town staff and were developed in parallel to the core work program undertaken by Parcel and Gladki Planning Associates.**

1. Urban Integration and Streetscape Framing

- **Location:** Position commercial developments at key intersections, gateways, and community nodes, especially near transit services and open spaces.
- **Street Orientation:** Commercial developments should contribute to a strong street edge along arterial, collector, and local streets. Larger retail stores should be positioned in the interior, with smaller retail buildings oriented towards the street.
- **Built Form:** Prioritize urban design that frames important streets, corners, and public open spaces, contributing to a cohesive streetscape.
- **Prominent Entrances:** Design buildings with transparent facades featuring large windows and prominent entrances to foster pedestrian interaction and a welcoming environment.
- **Compact Block Patterns:** Establish block patterns that promote future intensification, encouraging pedestrian activity and facilitating mixed-use developments over time.

2. Direct Pedestrian and Active Transportation Access

- **Continuous Connections:** Provide safe and unobstructed pedestrian and active transportation connections between main roads and building entrances. These connections should be direct, ensuring ease of access.
- **Integration of Amenities:** Incorporate features like transparent glazing, awnings for weather protection, greenery, and landscaping, and additional street furniture to create inviting and engaging pedestrian pathways and encourage socialization and gathering.

3. Design for Pedestrian Experience

- **Public and Spill-out Spaces:** Include patios, forecourts, and urban squares along the streetscape to allow businesses to extend into the public realm with outdoor seating and communal areas.
- **Landscaping and Public Art:** Promote elements that enhance the sense of place and character, such as public art, landscaping, and active frontages, to create visual interest and vibrancy.

4. Height and Scale Consideration

- **Ground Floor:** Maintain a minimum height of 4.5 meters for ground floors to accommodate diverse retail and commercial uses, promoting street vitality.
- **Scale Transition:** Ensure a gradual transition in building scale adjacent to residential neighborhoods to preserve community character while allowing for mixed-use development.

5. Large Format Commercial Integration

- **Site Organization:** Design large format commercial buildings to include smaller shops wrapping around their edges, ensuring a diverse retail experience. As an alternative, locate their primary footprint above the ground floor.
- **Articulated Frontages:** Ensure that a minimum of 75% of the building frontage facing a public street is highly articulated and animated with windows and entrances. Avoid long, non-active building frontages; if necessary, limit them to a maximum of 25% of the frontage.
- **Frequent Entrances:** Incorporate frequent entrances and transparent shop front windows to create a vibrant street experience.
- **Contextual Design:** When large format buildings are proposed near existing development, design elevations to respond to the prevailing street character by incorporating wall articulation and consistent fenestration patterns.

6. Architectural Consistency and Character

- **Signage Integration:** Ensure signage is integrated into the architecture, enhancing building character and streetscape aesthetics without being obtrusive.
- **Transparent Facades:** Avoid false frontages on primary streets by designing functional and visually engaging building facades.

7. Parking and Accessibility

- **Structured Parking:** Position parking structures behind or integrated with principal buildings to minimize visual impact on the streetscape while preserving pedestrian experience.
- **Vehicular Access:** Locate vehicular entrances and parking access points at the rear or side of buildings, integrating access ramps into the overall building design.

8. Mixed-use and Flexible Design

- **Encouragement of Mixed-use:** Promote ground-floor retail or office uses, with upper floors dedicated to residential or additional commercial spaces, facilitating live/work opportunities.
- **Future Growth Flexibility:** Create development plans that allow for phased growth and adaptation, accommodating both short- and long-term community needs.

9. Challenges and Future Considerations

- **Addressing Car Dependency:** Tackle current challenges posed by car-dependent developments by fostering pedestrian-friendly environments, reducing surface parking, and enhancing public space utilization.
- **Visionary Planning:** Develop a master plan that outlines long-term development goals for commercial spaces, balancing immediate improvements with future expansion opportunities.



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