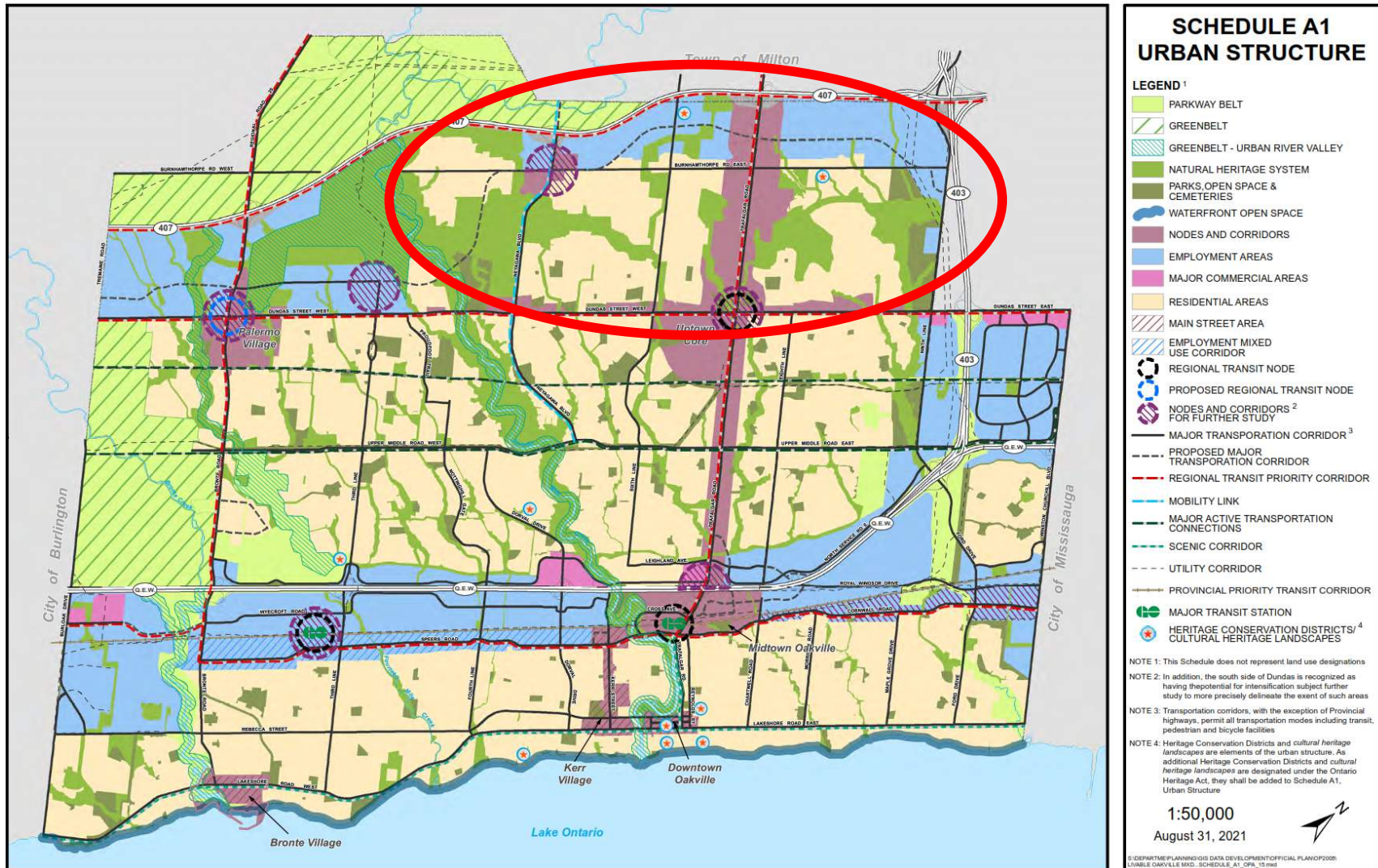


North Oakville East Commercial Study

Planning and Development Council
Monday, 25 November 2024 @ 6:30 PM
Council Chamber

Location – Urban Structure

North Oakville East Secondary Plan Area



Vision for North Oakville



- Intended as a mixed-use, complete community supported by transit
- Overly flexible official plan policies have resulted in primarily residential growth with limited commercial development
- Market conditions, retail trends, and rising construction costs are also factors limiting commercial development

Background

January 2008

North Oakville East Secondary Plan

- Approved based on 1997 Provincial Policy and Town's 1984 Official Plan
- Plan horizon to 2021 under review through the ongoing Official Plan Review

2008 - Present

Ongoing Planning and Development in North Oakville

- Studies and interventions to induce additional commercial development
- Limited uptake, commercial supply deficiencies across plan area

May 2023

North Oakville East Commercial Study

- Study initiated to evaluate current and future commercial needs for plan area

North Oakville East Commercial Study

Study consultants:

- Parcel Economics Inc.
- Gladki Planning Associates

Study findings provide direction to update policies to deliver **commercial development as part of a complete community**



NOVEMBER 2024

NORTH OAKVILLE EAST: COMMERCIAL STUDY

Parcel



A map of North Oakville East, Ontario, Canada, showing a grid of streets. The map is overlaid with a dark green semi-transparent layer. A white horizontal line is positioned above the word 'CONTEXT'. The word 'CONTEXT' is written in large, white, bold, sans-serif capital letters. Below the word, the map shows several streets: Burnhamthorpe Road W, Burnhamthorpe Road E, Dundas Street W, and Dundas Street E. There are four numbered circular markers (1, 2, 3, 4) placed at specific intersections. Marker 1 is at the intersection of Dundas Street E and Trafalgar Road. Marker 2 is at the intersection of Dundas Street W and Neyagawa Boulevard. Marker 3 is at the intersection of Burnhamthorpe Road W and a street to the west. Marker 4 is at the intersection of Burnhamthorpe Road E and a street to the east. There are also several diamond-shaped markers placed at various intersections. The background of the map shows a detailed street grid and some green spaces.

CONTEXT

NORTH OAKVILLE EAST: COMMERCIAL STUDY

PURPOSE + SCOPE

NORTH OAKVILLE EAST: COMMERCIAL STUDY

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Background

- The **North Oakville East Secondary Plan (NO-E)** envisions and supports the development of mixed-use, complete communities
- Challenge = limited commercial development to date

Purpose

- In response to these challenges, Parcel Economics Inc. ("**Parcel**") and Gladki Planning Associates ("**GPA**") retained by the Town in 2023
- Objective = provide additional research / analytical support + strategic insights from **market/economic + land use policy** perspectives

PURPOSE + SCOPE

NORTH OAKVILLE EAST: COMMERCIAL STUDY

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Scope

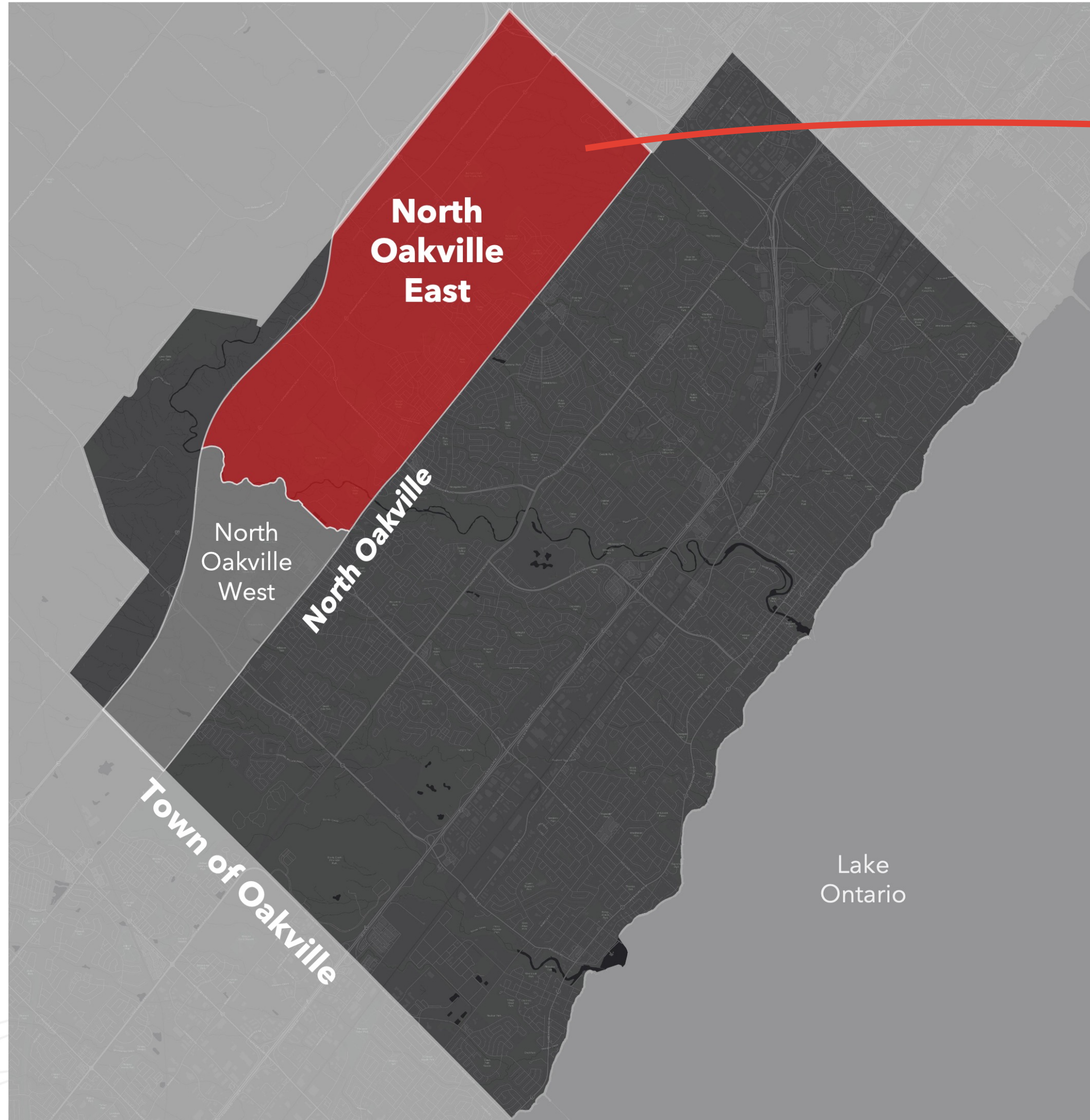
- **Site Profile** (Physical Conditions, Access, Competitive Positioning, etc.)
- **Land Use Policy Context** (Town-Specific + Provincial)
- **Research Program:**
 - Demographics (Historical + Forecast Population, Income, etc.)
 - Commercial Supply (Existing + Proposed Retail/Service Inventories)
 - Online Survey of Local Residents
 - Customer Origins Surveys
 - Stakeholder Research Interviews (Developers/Landowners, BIAs, etc.)
 - Commercial Development Trends
- **Market Demand Assessment**
- **Recommendations** (Market-Based + Policy-Based)

KEY GEOGRAPHIES ("TRADE AREAS")

RESEARCH DIRECTIONS

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DEMAND PROFILE: POPULATION GROWTH

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NORTH OAKVILLE EAST: COMMERCIAL STUDY

	Historical¹	Current²	Forecast³		
	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%	

Total population growth of **116,000+** = need for commercial space.



SUPPLY PROFILE: INVENTORY

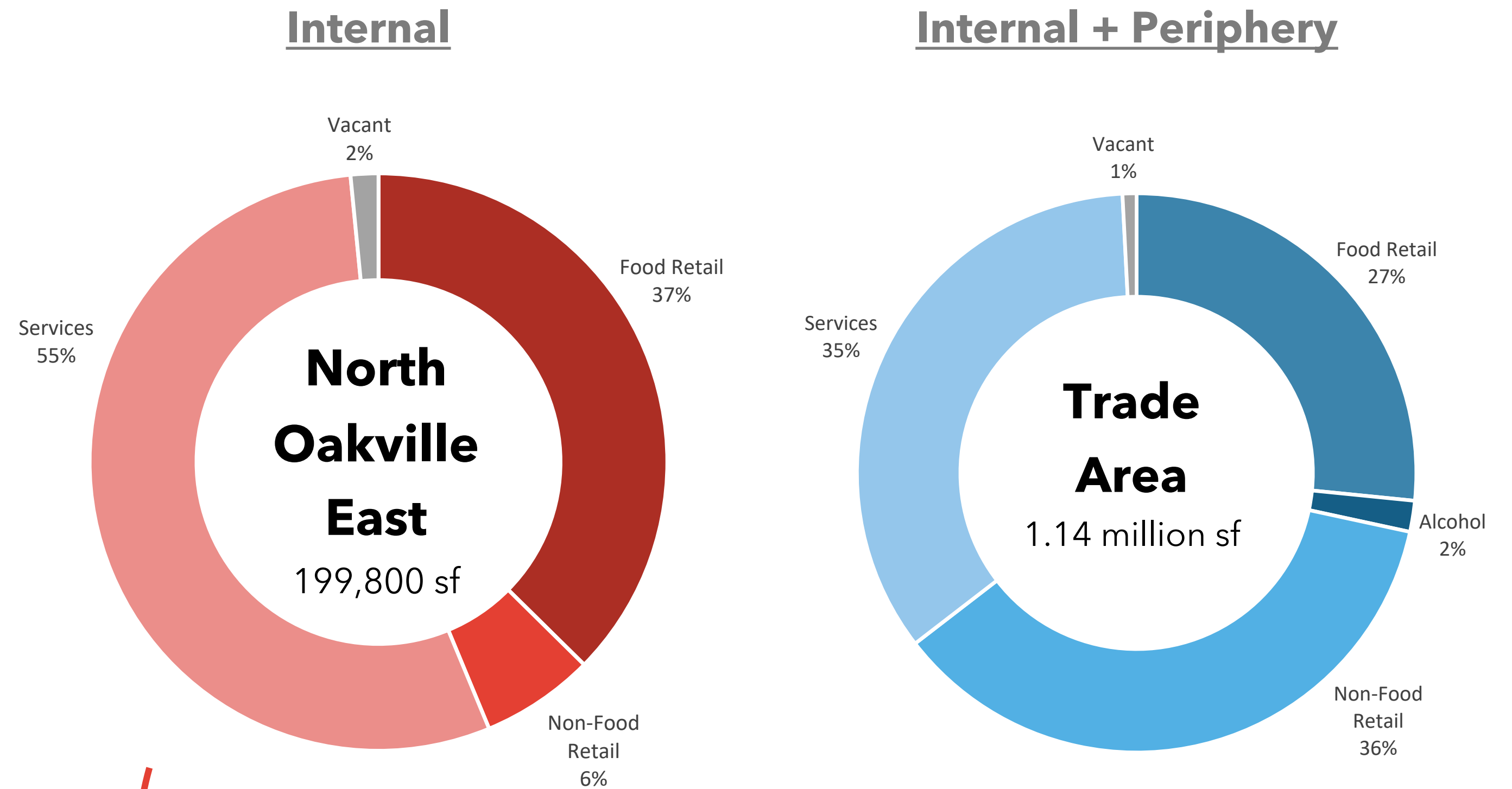
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Existing Commercial Inventory

- Retail at the periphery of NO-E included due to the lack of space located internally
- Only **18% of the retail/service commercial** space in the Trade Area can be found within NO-E, with the other 82% surrounding the periphery of NO-E, primarily in regional-serving nodes along Dundas Street West
- In many communities, service space comprises approximately half of retail/service commercial space. The Trade Area contains a more significant concentration of non-food store retail due to the significance of big-box stores



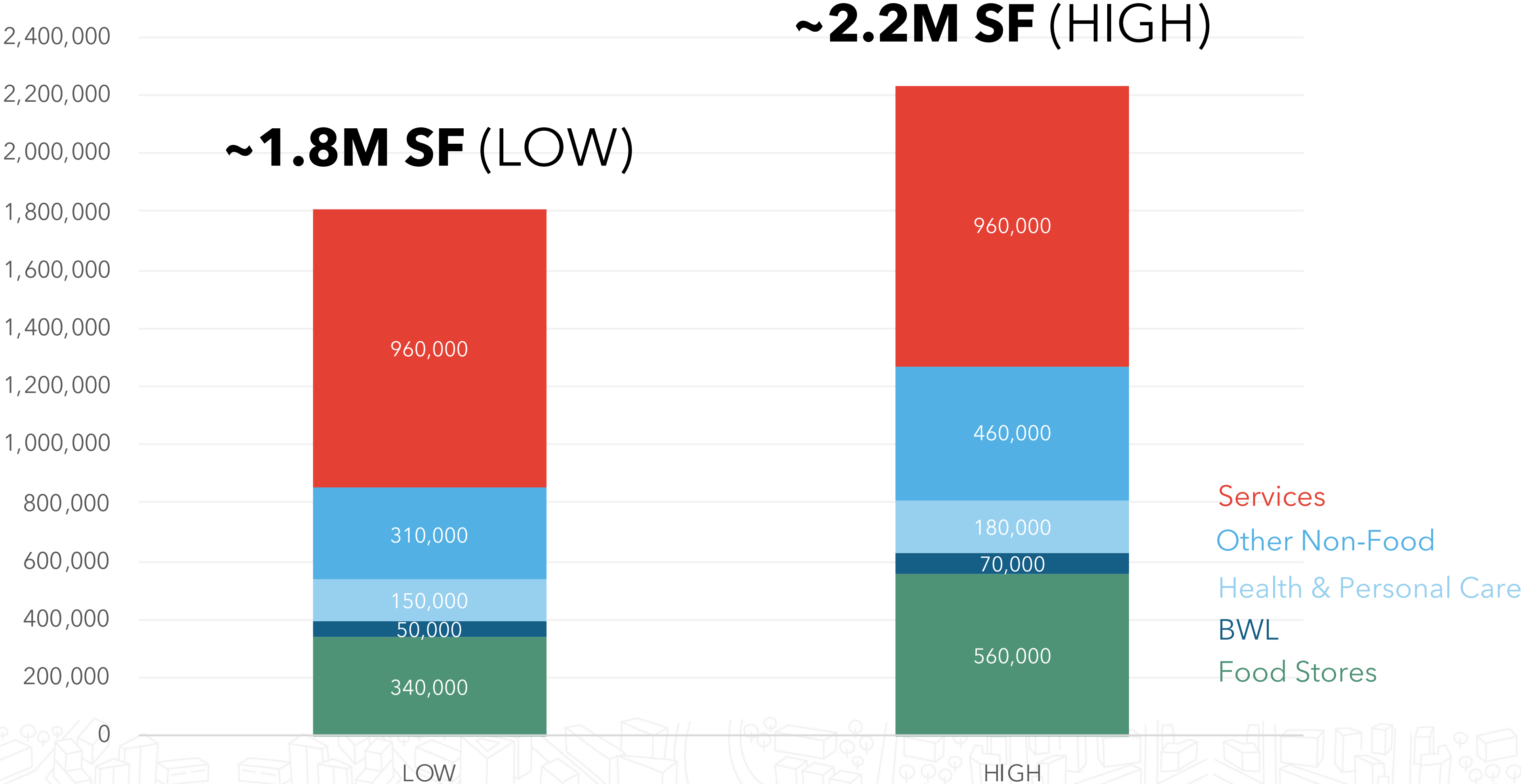
PLUS: proposed developments include 21 distinct and active applications comprising some **185,600 square feet** of new retail/service commercial space.

DEMAND/SUPPLY RECONCILIATION

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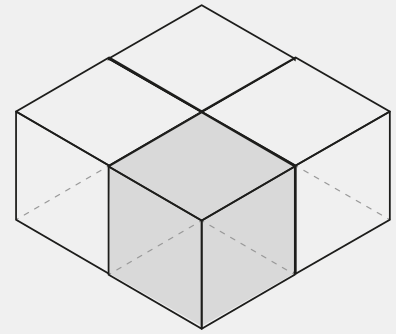


MARKET-BASED FINDINGS

NORTH OAKVILLE EAST: COMMERCIAL STUDY

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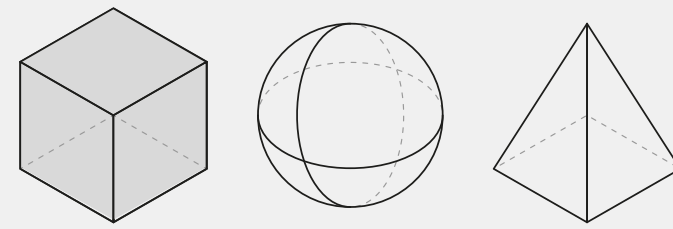
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Amount

(Floor Area)

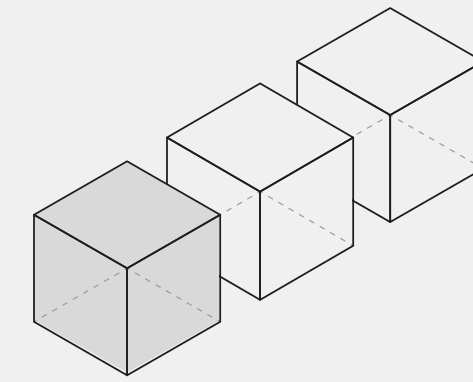
- 1.8M+ sq ft of space warranted to 2051
- **1.6M+ sq ft "new new"** space, upon accounting for active commercial proposals



Type

(Store Category)

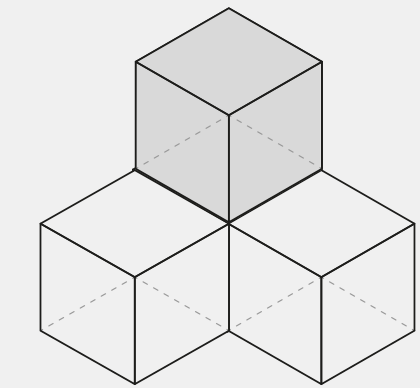
- Focus of commercial development in NO-E should be on satisfying the **basic day-to-day shopping needs** of current and future residents



Location

(Geography)

- Seek to not compromise other primary focuses of commercial activity in Town
- Concentrating commercial space delivery at **key locations vs. "spread too thin"**



Format

(Building Typology)

- Balanced approach (mix of sizes + formats) / unlikely that all space in mixed use context
- Allow a **hybrid of formats** in the interim and/or transition
- **Layer on other solutions**



KEY TAKEAWAYS: MARKET-BASED

NORTH OAKVILLE EAST: COMMERCIAL STUDY

MARKET-BASED FINDINGS

NORTH OAKVILLE EAST: COMMERCIAL STUDY

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UNIQUE CONDITIONS

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 span both market-based and financial feasibility-based challenges.

2

ESTABLISHED "NEED"

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.

3

FLEXIBILITY

The continued evolution in the retail industry and other broad macroeconomic shifts necessitate some flexibility to **adapt to changing market conditions**

4

PRIORITIZE OBJECTIVES

To achieve a path forward, it will be important to prioritize a full range of municipal strategic objectives, both specific to retail / service commercial uses but also touching on many **other facets of urban development.**

5

PATIENCE / URGENCY DILEMMA

It will be necessary to **evaluate the trade-offs** associated with: (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.

6

CONSIDER ALTERNATIVES

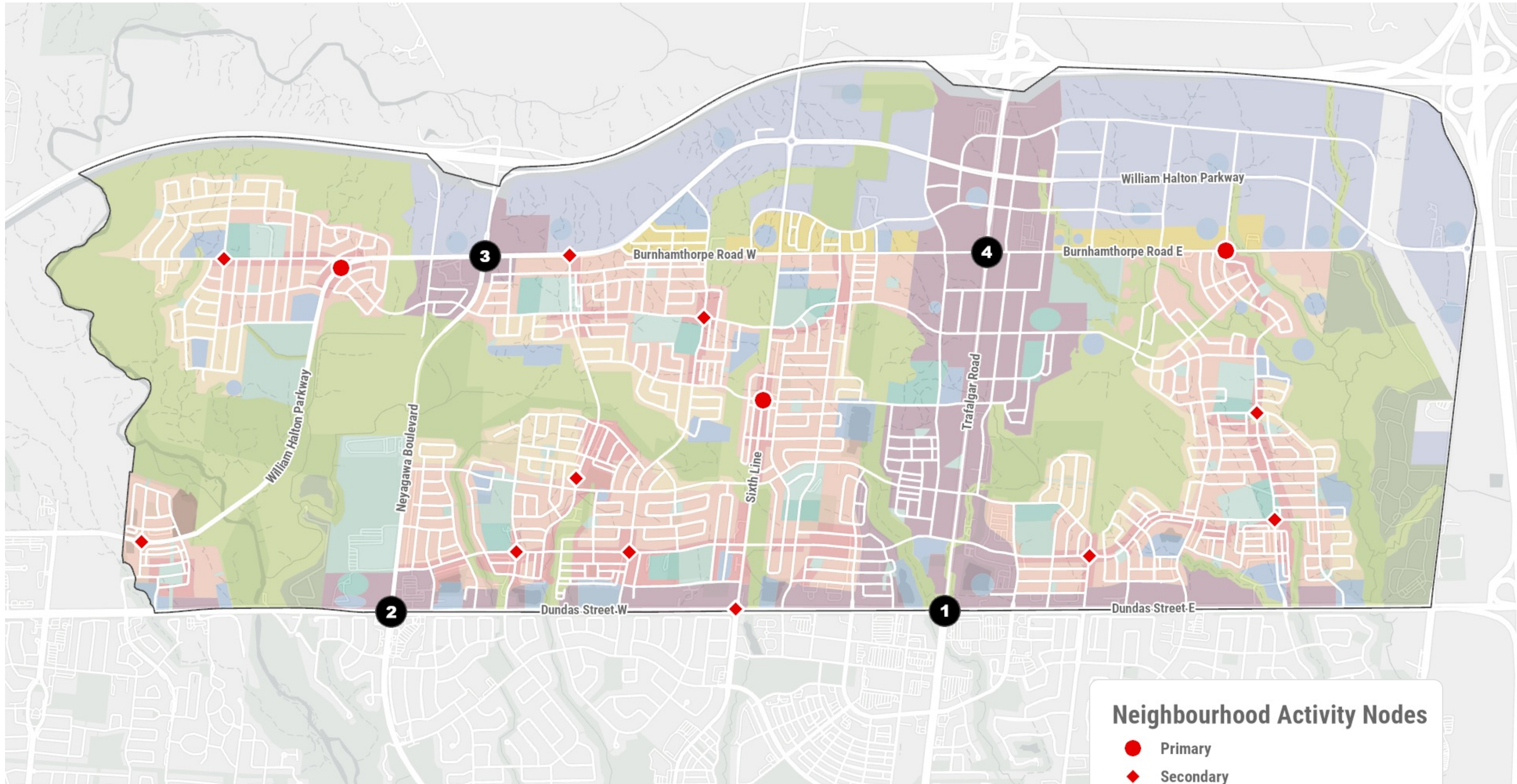
Alternative options should be explored to encourage the development of retail / service commercial uses and other non-residential functions to satisfy the vision for this area (e.g., temporary / shared spaces, reduced footprints, incentives, other non-retail uses, etc.)¹¹

MARKET-BASED FINDINGS

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Notes:

- Leverage existing nodes / key intersections as areas of focus
- Balanced distribution + “right-sizing” of neighbourhood activity nodes
- Direction for “primary” vs. “secondary” hierarchy among neighbourhood nodes

A map of North Oakville East, Ontario, Canada, overlaid with a blue grid. The map highlights four key areas with numbered circles: 1 (Dundas Street E), 2 (Dundas Street W), 3 (Burnhamthorpe Road W), and 4 (Burnhamthorpe Road E). Other streets shown include William Halton Parkway, William Parkway, Neyawawa Boulevard, Sixth Line, and Trafalgar Road. A white horizontal line is positioned above the main title text.

KEY TAKEAWAYS: POLICY DIRECTIONS

NORTH OAKVILLE EAST: COMMERCIAL STUDY

Context

- The market findings and stakeholder feedback established through this study have revealed **constraints that could impede successful mixed-use commercial development** in NO-E.
- Given the constraints identified, the Town may wish to **rethink the approach taken for commercial uses** in the North Oakville East Secondary Plan.

Policy Objectives

- An **appropriate supply** of commercial development to support a complete community
- Access by **active transportation** and minimizing car trips and trip distances
- At-grade **animation that contributes to placemaking** and the creation of a comfortable and vibrant public realm
- The creation of **community focal points**



POLICY DIRECTIONS

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1

PRINCIPLE #1

Rethinking the Place of Commercial Uses Within the Urban Structure

2

PRINCIPLE #2

Allowing Interim Typologies / Building Formats

3

PRINCIPLE #3

Considering Commercial Use Requirements & Incentives

4

PRINCIPLE #4

Design & Placemaking for Interim Typologies / Formats



CONTACT US

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250 University Avenue, #217, Toronto, Ontario, M5H 3E5



NOVEMBER 2024

THANKS

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Public Engagement

Fall 2023

Key Stakeholder Engagement & Research

- Interviews with key stakeholders including local developers, landowners and industry groups
- Feedback highlighted key challenges to achieving successful mixed-use commercial development in North Oakville East.

Fall 2023

Parallel Engagement – Business Improvement Areas

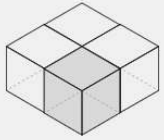
- Relevant themes emerged – rising commercial costs, increasing population supports business, competitive advantages from design and location

Fall 2024

Key Stakeholder Follow-up Sessions

- Staff and consultant team follow-up with stakeholders on study findings
- Insights led to refinements in findings and recommendations

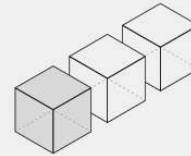
Study Directions



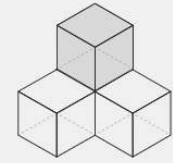
Amount
(Floor Area)



Type
(Store Category)



Location
(Geography)



Format
(Building Typology)

- An **appropriate supply** of commercial development to support a complete community
- Access by **active transportation** and minimizing car trips and trip distances
- At-grade **animation that contributes to placemaking** and the creation of a comfortable and vibrant public realm
- The creation of **community focal points**

Study Directions

1

Rethinking
the place of
commercial
uses within
the urban
structure

2

Allowing
interim
typologies/
building
format

3

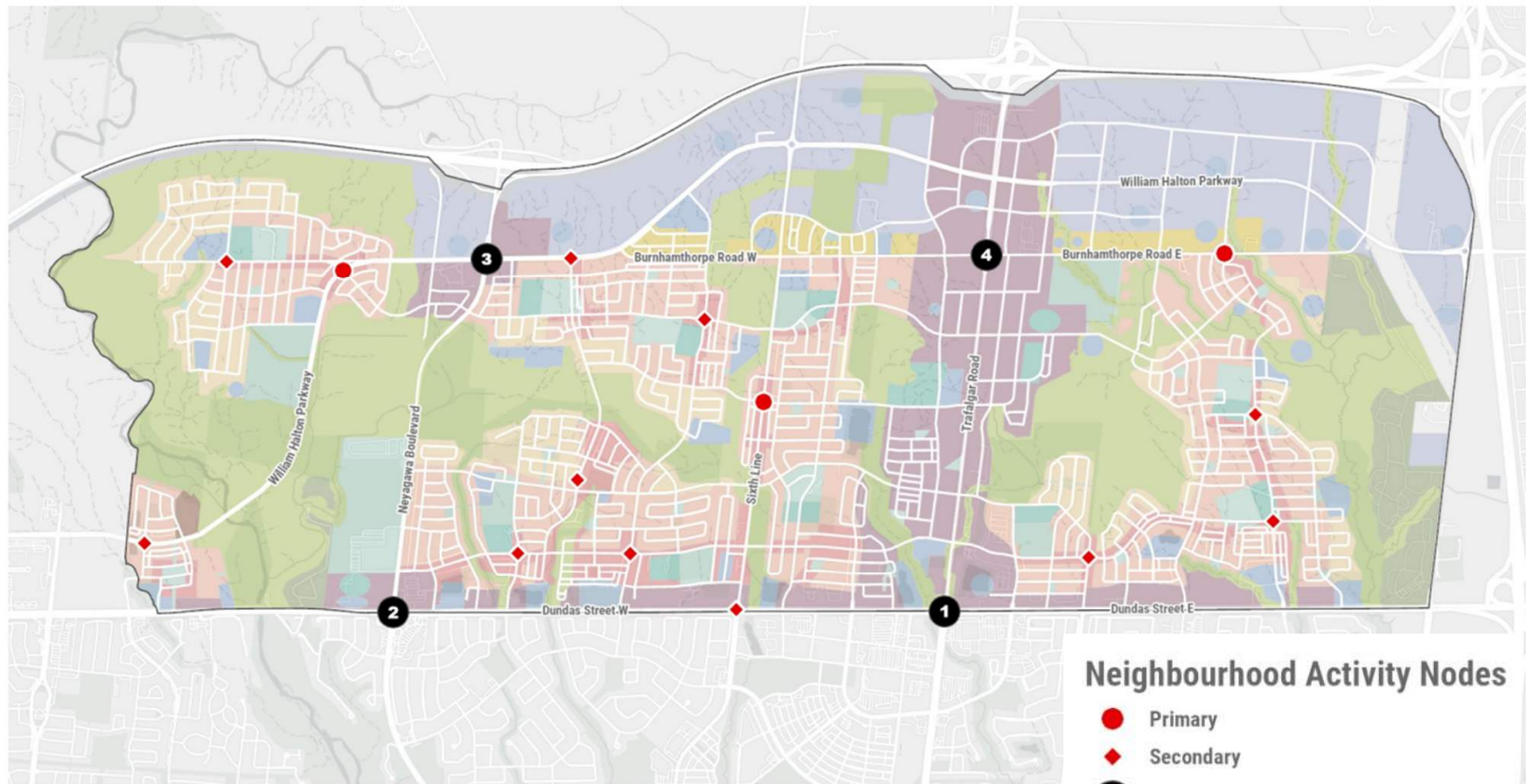
Considering
commercial
use
requirements
& incentives

4

Design &
Placemaking
for Interim
Typologies/
Formats

Study Directions

Intersections of Interest & Neighbourhood Activity Nodes



Next Steps

- The North Oakville East Commercial Study is part of the North Oakville Secondary Plans Review and the town's ongoing Official Plan Review
- The study directions will be incorporated by way of amendment to the North Oakville East Secondary Plan
- Urban design guidelines to be created to outline expectations for interim built form and site functionality to enhance policies
- Changes will be made through town-initiated official plan amendments and in collaboration with landowners through planning applications
- Overall goal is to use remaining opportunities to deliver appropriate amounts of commercial development.

Recommendations

1. That the “North Oakville East Commercial Study”, attached as Appendix A to report titled North Oakville East Commercial Study, dated November 12, 2024, be endorsed.
2. That staff be directed to implement the directions from the North Oakville East Commercial Study and report back with amendments to the Town’s Official Plan for approval, as appropriate.