

Employment and Commercial Council Sub-committee Workshop Comments

Commercial Sub-Committee Workshop - Monday July 25, 2016

| Sub-Committee Comments | Consultant Team's Responses |
|--|--|
| 1. More details on retail sites and residential uses. | Section 13.1.2, Commercial, of the Livable Oakville Plan directs the majority of new commercial to occur as intensification and redevelopment. Section 5.3 of the Commercial Report outlines the opportunity for infill and intensification of commercial lands. Infill and intensification could take the form of increased retail space through addition of retail development with increased site coverage or mixed use development that could include increased retail space in addition to residential uses. The scope of this assignment is city-wide and a detailed retail site and residential site analysis was not included. Recommendation # 3 of the Commercial Report outlines that design policies and parking standards should be prepared to support the City's direction for intensification and redevelopment of commercial lands. |
| 2. Explore the south Oakville retail space surplus versus the north Oakville deficit in more detail. | There is a south Oakville retail space deficit and a north Oakville retail space surplus. The unbalanced supply is discussed in section 6.2.1 of the Commercial Report. Recommendation #2, #3 and #4 are all intended to deal with this supply issue. |
| 3. The town should not get ahead of and/or exceed the province's population forecasts, having regard for the recent OMB decision for Niagara Region. | The Town's Official Plan must conform to Halton Region Official Plan policies which implement the Growth Plan. This included population and employment to 2031. The 2041 forecasts for the Town will be confirmed during Halton Region's current Municipal Comprehensive Review (MCR) process. It is prudent for the Town to consider the long term population and employment forecasts as part of the Employment and Commercial Review, in order to provide input into the Region's MCR process. However, the employment forecasts to 2041 should be confirmed before any significant changes are considered in the supply. |
| 4. What assumptions and planning considerations were made by Watson & Associates in determining the 2041 population forecast of 265,000? Drill down the numbers for population (e.g., Midtown, Downtown, and Palermo, etc.). | Details associated with the 2041 population forecast are being confirmed through the Town's Urban Structure Review. |

| Sub-Committee Comments | Consultant Team's Responses |
|---|---|
| 5. Define employment spaces and recognize trends 10 years from now and in the future. Allow some flexibility in demographics to plan for 2031 and 2041. | Comment noted. The analysis included in the Employment and Commercial Reports provide forecast for 2031 and 2041 and the recommendations are intended to provide for flexibility in implementation recognizing emerging trends and the limitations of forecasting. |
| 6. Address the impact on jobs and population if the activity rate falls. | A note has been added to section 4.6 of the Employment Report to define the term activity rate and provide context for the Town of Oakville. |
| 7. There seems to be a disparity in terms of too much population to jobs. | Compared to the activity rate for the Greater Golden Horseshoe overall, which is projected to be 0.47 by 2041, the Town of Oakville is projecting a more balanced ratio of employment and population. A note has been added to section 4.6 of the Employment Report to this regard. |
| 8. There is no evidence to support a belief that the modal split can move from 6% to 20% (e.g., Active Transportation Master Plan (ATMP) and modal split). It is important to monitor the variable. Can goods, services, and people be moved? | Monitoring of travel demand is certainly very important. The Transportation Master Plan that the Town is undertaking should set forward the transit mode share that will be planned to. This level of detail is not normally considered in an employment and commercial review. |
| 9. Retail impact on the downtown and local Business Improvement Areas (BIAs) in Oakville and how to protect these areas from large scale retailers (e.g., Toronto Premium Outlet Mall on Trafalgar Road and improvements to malls). | The Downtown Oakville Economic Study, dated June 26, 2014 was prepared by JC Williams Group. This Study directly focused on Downtown Oakville and noted the competitive effects of Sherway Gardens, Toronto Premium Outlets and other large scale retail developments. |
| 10. Review Table B1 Oakville Retail Zones and correct the numbers as needed, and provide a revised Table B1. | Table B1 of the Commercial Report has been updated. |
| 11. The employment rate, commercial competition, businesses moving, and retail spaces relative to saving Downtown Oakville. Opportunities for the downtown (e.g., proximity to water). | The Downtown Oakville Economic Study recommended a number of improvements for retailers including their merchandise mix, assortment, marketing, online sales opportunities, etc. for the Town and BIA, recommendations also include retention and recruitment programs such as retail mix, marketing, parking solutions, etc. Further improvements relating to roads, sidewalks and other design oriented solutions are also noted. |

| Sub-Committee Comments | Consultant Team's Responses |
|---|---|
| 12. There appears to be an issue with retail. There is too much retail supply in South Central Oakville. Look at planning mechanisms to support additional retail in North Oakville. | The commercial analysis has identified a gap in the commercial market in the northwest zone of the Town. Policy recommendation #2 of the Commercial Report indicated that the Town should review the policies for Palermo Village, consider permissions for additional commercial in Palermo Village and provide permissions at the northeast corner of Dundas Street and Neyagawa Boulevard. |
| 13. It is an addition to the community to have small convenience retail and/or commercial uses in the residential neighbourhood (e.g., Mac's Convenience Store). Look at remaining sites which are vacant and accessible, and how long they have not been built on. Should sites with limited retail opportunity remain vacant? | It is recognized that convenience oriented retail is a community amenity. However, providing the opportunity does not guarantee that commercial space will be developed. If applications are made to convert convenience retail sites to other uses (likely residential), they should be investigated on a site specific basis. |
| 14. Change map colours (e.g., the shades of red look the same for Core Commercial designation, etc.). | The mapping colours used are intended to be consistent with those that have been used in the Town of Oakville Official Plan. Contrast has been increased in Figure 2-4 and 5-1 of the Commercial Report to improve clarity. |
| 15. The compatibility issue in terms of adding multiple stories above retail which is not retail, and providing additional parking to accommodate these uses which may be difficult. | Comment noted. Commercial policy direction # 1 identifies the need to strengthen the design policies for mixed use and commercial developments. Land use compatibility should be considered as part of the design policy review. Land use compatibility should also be considered on a site by site basis during development approvals processes. |
| 16. Address commercial sites in low rise neighbourhoods more closely. | As discussed above, any applications made to convert commercial sites to other uses will have to be investigated on a site specific basis. |
| 17. Office versus commercial for Burloak Drive area. | In the longer term, there is an opportunity to intensify existing retail commercial sites in the Burloak Drive area with office uses. This opportunity should be provided for and market forces will ultimately determine if office uses are appropriate. |

| Sub-Committee Comments | Consultant Team's Responses |
|--|---|
| 18. Provide clarification with respect to preliminary direction #5: Develop a monitoring program. A sub direction may be required. | The Town should develop a monitoring program that includes an examination of commercial development and changing trends. This monitoring program should include an annual update of the inventory of both the existing retail commercial space and the unbuilt/designated commercial land supply in the Town. In addition, the program should monitor retail trends and demographics, including influences such as the implications of e-commerce on the demand for commercial space in Oakville. This additional detail has been added to direction #5 of the Commercial Report (Section 7.1). |
| 19. Land supply in terms of running out of land, pacing development out slower, and developing every piece of land or keeping some land. | Given the fixed supply of land in Oakville, there will be increasing pressure for development of all types of land. There could be some advantage to slowing down the overall development timeline, however the Town will be facing pressure from private interests to proceed with development. It is likely contrary to traditional planning approaches to preserve land for future development, if the opportunity presently exists for its development. |
| 20. Portion of vacant retail space that consists of small units (e.g., 5000 sq. ft. or less). | The commercial land analysis considers vacant parcels, not vacant buildings. Table 5-3 of the Commercial Report presents the size of each vacant commercial parcel in the supply. It notes that 12 of the 21 infill sites with a fair, good or excellent overall retail assessment are small and offer potential retail floor area of only between 150 and 500 square metres, which limits the type of commercial uses that would likely occupy on these sites. The second key commercial issue identified in section 6.2.1 of the Commercial Report identifies the issue of full build out of vacant commercial lands may not be realistic. It notes that some of the available vacant commercial lands are vacant due to site conditions or limitations of the site (intending to include size). It notes many of the sites south of Dundas Street are small or poorly located. |
| 21. Evaluate whether combining the Community Commercial and Core Commercial designations would provide better service to the community. | The commercial analysis identified that the Core Commercial designation provides major concentrations of commercial facilities servicing the broader region and permits a full range of commercial uses, while the Community Commercial provides for a variety of retail and service commercial uses to the local surrounding community. The differentiation between these designations is the target customer of the services and retail stores. The commercial analysis did not identify a need to consolidate the land use designations as they provide different services for different target users. |

Employment Sub-Committee Workshop - Tuesday September 6, 2016

| Sub-Committee Comments | Consultant Team's Responses |
|--|--|
| 1. What is the current jobs figure for Ford? | <i>Based on the company's website, the current employment at Ford Motor Assembly is 4,500. A footnote has been added to the Employment Report section 5.4.1 to this regard.</i> |
| 2. What is the cause of the decrease in manufacturing jobs in Oakville? | <i>As noted in section 4.10, over the next two decades, it is anticipated that the manufacturing sector will continue to experience a moderate employment increase in Oakville, driven by the gradual recovery of the US economy and declining Canada/US dollar exchange rate.</i> |
| 3. Impact of the CN Intermodal facility in Milton. | <i>It is anticipated that the development of an intermodal facility in Milton would be the catalyst for the development of an industry cluster within the Town of Milton centred around the transportation/logistics sector. While the CN Intermodal facility in Milton would potentially provide a positive impact to the goods movement sector in North Oakville, the Town of Oakville is not aggressively pursuing this sector as part of its economic development strategy. Furthermore, due to the relatively higher price of serviced industrial land in Oakville, future demand related to this sector in the Town of Oakville will likely be relatively lower than the Town of Milton.</i> |
| 4. Clarify why the hospital site is not included in the analysis of development activity on Employment Lands. | <i>The new hospital (1.5 million sq. ft.) was excluded from Figure 4-7, Construction Activity, as the purpose of this figure was to establish the historic trend. The hospital was not included as it is not representative of typical construction levels. However, ancillary development to the hospital (i.e., medical offices) was included in the analysis. If the hospital was included in the analysis, the average construction would be 616,000 sq.ft. per year instead of the 420,000 sq.ft. per year identified in Figure 4-7 of the Employment Report.</i> |
| 5. How much of the industrial growth category is dedicated to warehousing & how much warehousing currently exists in Oakville? | <i>Approximately 14% of Oakville's existing employment base is comprised of employment categorized as warehousing and transportation and wholesale trade. Over the past 10 years, 17% of non-residential Gross Floor Area (GFA) has been associated with the warehousing/transportation and wholesale trade sector. Over the 2015 to 2041 planning horizon, approximately 13% of total employment growth within the Town of Oakville is anticipated from the warehousing/transportation and wholesale trade sector.</i> |
| 6. More discussion on existing population and employment density versus proposed Growth Plan/Regional Plan density. | <i>Section 2.2.1 of the Employment Report presents the Halton Region and Growth Plan minimum density target (minimum of 46 residents and jobs per hectare for Oakville's Greenfield areas and a minimum of 13,500 new housing units to be accommodated within the built up area). Section 2.3.2 presents the North Oakville East and West Secondary Plans</i> |

| Sub-Committee Comments | Consultant Team's Responses |
|---|---|
| | <i>target employment density of 55 jobs per net hectare and a suggested density of 0.35 FSI. Section 4.7 presents the existing and forecast employment density on employment lands city-wide, including a detailed discussion on the rationale for the forecast density that is being used in the employment land analysis.</i> |
| 7. Provide discussion on what is a healthy activity rate. | <i>We have added a note to section 4.6 of the Employment Report outlining the activity rate of the Greater Golden Horseshoe municipalities for comparison with the Town of Oakville.</i> |
| 8. Provide baseline data on employment industries and number of businesses in each industry. | <i>The following provides the number of business establishments in 2014 for the Town of Oakville. This was the base data used in Figure 4-3 of the Employment Report. Please refer to Table 1: Number of Business Establishments, 2014 at the end of this document.</i> |
| 9. Provide baseline data for the industry clusters by number of jobs. | <i>The following table provides the number of employees by sector in 2014 for the Town of Oakville. This is the base data used in Figure 4-1 of the Employment Report. Please refer to Table 2: Number of Employees by Sector, 2014 at the end of this document.</i> |
| 10. Is it appropriate to express the town's current employment land supply remaining in years to support the case to use it wisely? | <i>Given the sufficiency of the Town's employment land supply to well beyond 2041, we do not believe that this statistic is overly helpful.</i> |
| 11. Could the town consider more than one innovation district within its Urban Structure? | <i>The Town could plan for multiple innovation districts if that fits within the vision and economic development objectives of the Town. A note has been included to this regard in section 7.2.2 of the Employment Report.</i> |
| 12. Consideration to height, compatibility, and attracting quality jobs in Winston Park West. | <i>Winston Park West has been identified as having a high concentration of vacant employment parcels, excellent exposure and access to the QEW/Highway 403 and access to Mississauga and Oakville Public Transit in Table 5-10 of the Employment Report. Its small parcels and servicing challenges have been identified as challenges to development. The recommendations for Winston Park West include the designation of additional Business Commercial lands, however, there were no specific limitations on height, compatibility or urban design considerations that were identified in the analysis specifically for this area. Policy direction #12 identifies the need to update policies on land use compatibility and policy direction #13 identifies the need to update policies on urban design, and site specific considerations for Winston Park West can be addressed through these activities.</i> |
| 13. Designating additional Business Commercial lands to support | <i>Policy direction #11 of the Employment Report identifies the need to designate additional business commercial lands</i> |

| Sub-Committee Comments | Consultant Team's Responses |
|----------------------------|---|
| existing Employment Areas. | <i>within existing industrial and business employment designations at gateway locations including southwestern Oakville (west of Third Line, east of Third Line north of CN Rail line) and Winston Park West.</i> |

**Table 1: Town of Oakville
Number of Business Establishments, 2014**

| Sector | Number of Businesses |
|---|----------------------|
| Agriculture, forestry, fishing and hunting | 41 |
| Mining, quarrying, and oil and gas extraction | 32 |
| Utilities | 17 |
| Construction | 1,553 |
| Manufacturing | 545 |
| Wholesale trade | 914 |
| Retail trade | 1,330 |
| Transportation and warehousing | 621 |
| Information and cultural industries | 313 |
| Finance and insurance | 1,203 |
| Real estate and rental and leasing | 2,000 |
| Professional, scientific and technical services | 4,230 |
| Management of companies and enterprises | 768 |
| Administrative and support, waste management and remediation services | 791 |
| Educational services | 251 |
| Health care and social assistance | 1,257 |
| Arts, entertainment and recreation | 255 |
| Accommodation and food services | 494 |
| Other services (except public administration) | 1,110 |
| Public administration | 7 |
| TOTAL | 17,732 |
| Source: Canadian Business Patterns Data, 2014, data compiled by Watson & Associates Economists Ltd. | |

**Table 2: Town of Oakville
Number of Employees by Sector, 2014**

| Sector | Employees |
|-----------------------------------|-----------|
| Manufacturing | 10,773 |
| Retail trade | 10,638 |
| Health care and social assistance | 7,662 |

| Sector | Employees |
|--|---------------|
| Educational services | 6,496 |
| Accommodation and food services | 6,448 |
| Wholesale trade | 6,229 |
| Professional, scientific and technical services | 6,129 |
| Admin/support, waste manage and remediation services | 4,682 |
| Construction | 4,455 |
| Public administration | 4,269 |
| Finance and insurance | 3,963 |
| Other services (except public administration) | 3,765 |
| Transportation and warehousing | 2,734 |
| Information and cultural industries | 1,630 |
| Real estate and rental and leasing | 1,489 |
| Arts, entertainment and recreation | 1,222 |
| Management of companies and enterprises | 1,116 |
| Utilities | 527 |
| TOTAL | 84,227 |
| Source: EMSI OMAFRA Analyst 2014 data, compiled by Watson & Associates Economists Ltd. | |