

Supportive Commercial Needs Assessment
Premier Gateway Phase 1B Employment Area

Town of Halton Hills

Prepared for: Town of Halton Hills

October 2016

TATE ECONOMIC RESEARCH INC.



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TER Findings and Recommendations



Tate Economic Research Inc. (TER) has prepared the following Supportive Commercial Needs Assessment for the Premier Gateway Phase 1B Employment Area in the Town of Halton Hills.

TER is part of a multi-disciplinary team retained by the Town of Halton Hills to assist the Town by conducting the Premier Gateway Phase 1B Employment Area Integrated Planning Project. The overall purpose of this study is:

- To develop appropriate land use designations and policies for the Phase 1B Employment Area.
- To identify up to 75 hectares of additional land to be designated for employment and added to the area to replace the shortfall of employment lands to the 2021 planning horizon in the Town.

Within these broader goals of the Study, TER's role is to conduct the Supportive Commercial Needs Assessment for the future expanded Phase 1B Employment Area.

Supportive commercial uses contribute to creating comprehensive and complete employment areas and influence the vitality and connectivity of the local economy. The range of uses often includes: business supportive retail and services; tourism / travel oriented retail and services; accommodation / lodging; eating and dining; entertainment and amusement uses; health, fitness and recreational uses; automotive oriented retailing; highway commercial uses; warehouse / wholesale retailing and other forms of retail and service uses. In this report, these uses are referred to as *Supportive Commercial uses*.

Mandate

The mandate of this Supportive Commercial Needs Assessment is stated in the Towns Request For Proposal: "Premier Gateway Phase 1B Employment Area Integrated Planning Project", dated January 2015. With respect to the Supportive Commercial Needs Assessment component of this study, the RFP states:

This study will determine the need for commercial floor space in the new development area to support the employment uses and how much land should be designated/zoned for these commercial uses.

Summary of Findings



- A Study Area was defined by the Town of Halton Hills. The Study Area includes the Phase 1B Employment Area which is generally located north of Steeles Avenue, bounded by Eighth Line to the east and Sixth Line to the west. The Study Area also includes lands located to the north of the existing Phase 1B Employment Area which could accommodate a shortfall of employment land.
- Demand for supportive commercial uses is derived from various sources. These sources include future businesses and employees in the expanded Phase 1B Employment Area and existing and future businesses in the remainder of the Premier Gateway Employment Area. In addition, demand will also be generated through cross traffic from existing uses in the vicinity of the Study Area such as the Toronto Premium Outlets.
- In order to quantify the amount of supportive commercial space warranted in the expanded Phase 1B Employment Area, TER applied a supportive commercial floor space per acre ratio. This ratio is based on an examination of similar space in employment areas in Halton Hills, Milton and Oakville. Using these figures as a guide, TER has assumed that the expanded Phase 1B Employment Area should accommodate between 200 and 400 square feet of commercial space per acre of employment land.

WARRANTED SUPPORTIVE COMMERCIAL FLOOR SPACE

	Low	Medium	High
Recommended Supportive Commercial Floor Space ¹⁾	200	300	400
Employment Lands in Study Area (ac) ²⁾	415		
Study Area Warranted Supportive Commercial Floor Space ³⁾	83,000	124,500	166,000
Land Requirement (Acres) ⁴⁾	8	12	17

Source: TATE ECONOMIC RESEARCH INC.

¹⁾ Expressed as square feet / acre.

²⁾ TER estimate of gross employment land to be designated within Study Area, expressed in acres.

³⁾ Expressed in square feet, rounded to nearest 1,000.

⁴⁾ Expressed in acres, based on 10,000 square feet per acre, or approximately 25% coverage.

- TER determined that there is demand for 83,000 to 166,000 square feet of supportable commercial space in the Study Area. Based on typical coverage ratios, this range of space would require between 8 and 17 acres of land.



- TER reviewed the existing types of Employment Land designations in Oakville, Milton and Halton Hills. In a general sense, most employment designations allow only accessory retail that is directly related to the primary employment use. An example of an accessory use would be a furniture manufacturing business with a small portion of its floorspace dedicated to the retail sales of the furniture that is manufactured within the same building.
- Halton Hills includes the following employment designations:
 - General Employment Area;
 - Rural Industrial Area;
 - Prestige Industrial Area; and,
 - Gateway Area.
- *Prestige Industrial Area* makes up the majority of the employment area located near the Study Area. *Prestige Industrial Areas* are intended for businesses and professional offices as well as industrial uses. Secondary uses that relate to supportive commercial uses include:
 - limited commercial uses ancillary to industrial (takeout, full service restaurants);
 - financial institutions;
 - convenience stores;
 - commercial fitness centres;
 - limited retail sales of goods and material manufactured or assembled on the premises; and,
 - motor vehicle service centres.
- The *Gateway Area* is the only employment land designation in Halton Hills that permits hotels as well as conference and exhibition facilities.

CONCLUSIONS AND RECOMMENDATIONS

- TER determined the warranted supportive commercial space in the Study Area. Based on the assumption of 415 acres of employment land in the expanded Phase 1B Employment Area, TER determined that between 83,000 and 166,000 square feet of supportive commercial space is warranted.
- This range of supportive commercial space would require between 8 and 17 acres of land, assuming typical lot coverage ratios. This range represents between 2% and 4% of the total employment area.
- The current commercial permissions within the *Prestige Industrial Area* employment designation are sufficiently broad to accommodate the types of supportive commercial uses envisioned in the expanded Phase 1B



Employment Area. As a result, there is no requirement to designate or zone land specifically for supportive commercial uses within the Phase 1B Employment Area.

- The opportunity for supportive commercial uses should be provided in the Study Area, along Steeles Avenue. The current *Prestige Industrial Area* designation is recommended for this area. It is our opinion that market factors (such as demand, tenant availability) and site factors (limited number of sites with appropriate access, visibility, signage opportunities, etc.) will limit the potential for oversupply of supportive commercial development within the *Prestige Industrial Area*.
- TER has also reviewed the hotel market serving the Premier Gateway Employment Area and surrounding area. There is significant growth forecast in the hotel demand generators, namely residential population, employment levels and vehicle traffic along Highway 401. As a result, it has been determined that one or more hotels will be warranted in the expanded Phase 1B Employment Area.
- A significant portion of demand forecast for hotel uses in the Study Area will be generated by the local employment base. As such, a hotel is considered a supportive commercial use for the employment area.
- TER recommends that a hotel and associated uses, such as a convention centre, be added to the proposed *Prestige Industrial Area* designation for lands located north of Steeles Avenue, on both sides of Trafalgar Road.



1 Introduction & Background

Tate Economic Research Inc. (TER) was retained as part of a multi-disciplinary team led by Macaulay Shiomi Howson Ltd. to assist the Town of Halton Hills (Halton Hills) in the preparation of a plan for the Premier Gateway Phase 1B Employment Area. TER's role in this multi-disciplinary team is to conduct the Supportive Commercial Needs Assessment for the Premier Gateway Phase 1B Employment Area.

The findings of the TER Supportive Commercial Needs Assessment will be used as input by the team when developing the recommended plans and policies for the Phase 1B Employment Area.

1.1 Background

The overall purpose of this study is:

- To develop appropriate land use designations and policies for the Phase 1B Employment Area.
- To identify up to 75 ha of additional land to be designated for employment and added to the area to replace the shortfall of employment lands to the 2021 planning horizon in the Town.

Within these broader goals of the overall planning project, TER's role is to conduct the Supportive Commercial Needs Assessment for the Phase 1B Employment Area.

Supportive commercial uses contribute to creating comprehensive and complete employment areas and influence the vitality and connectivity of the local economy. The range of uses often include: business supportive retail and services; tourism / travel oriented retail and services; accommodation / lodging; eating and dining; entertainment and amusement uses; health, fitness and recreational uses; automotive oriented retailing; highway commercial uses; warehouse / wholesale retailing and other forms of retail and service uses. In this report, all of these uses are referred to as *Supportive Commercial uses*.

1.2 Mandate

The mandate of this Supportive Commercial Needs Assessment is stated in the Towns' Request For Proposal: "Premier Gateway Phase 1B Employment Area Integrated Planning Project", dated January 2015. With respect to the Supportive Commercial Needs Assessment component of this study, the RFP states:

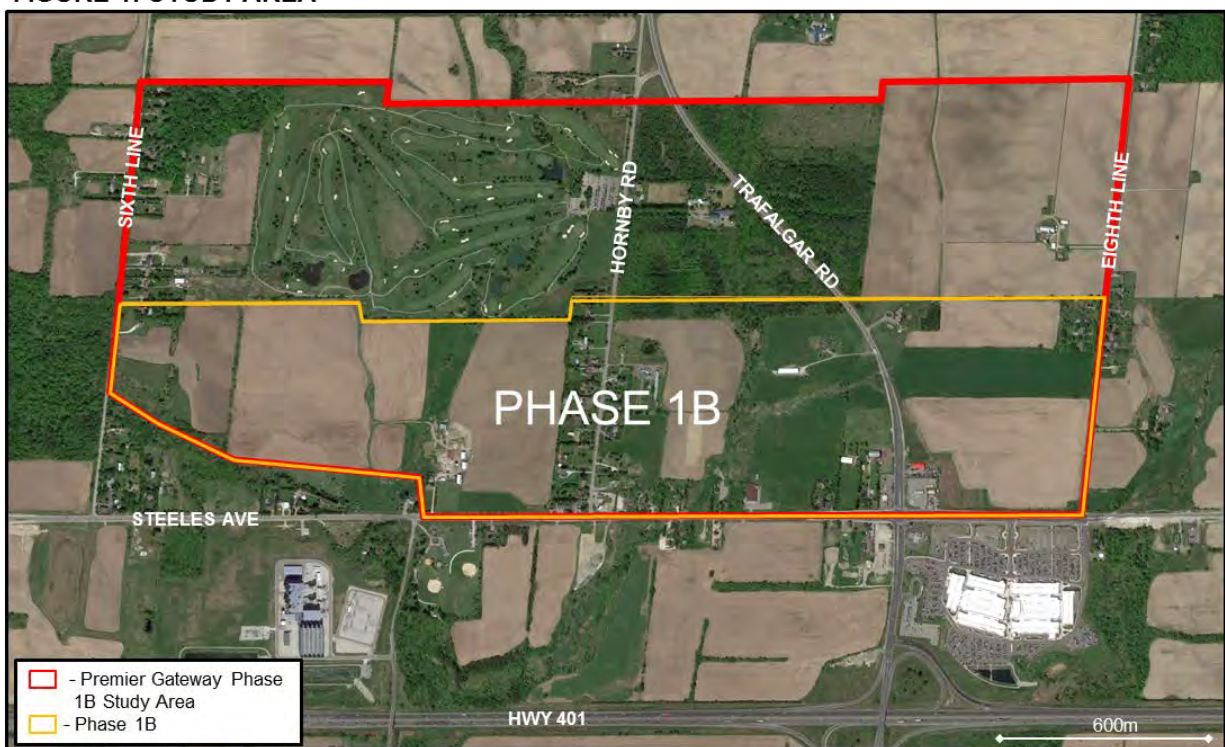


This study will determine the need for commercial floor space in the new development area to support the employment uses and how much land should be designated/zoned for these commercial uses.

1.3 Study Area

A Study Area was defined by the Town of Halton Hills. It is indicated as Figure 1. The Study Area includes the Phase 1B Employment Area which is generally located north of Steeles Avenue, bounded by Eighth Line to the east and Sixth Line to the west. The Study Area also includes lands located to the north of the existing Phase 1B Employment Area which could accommodate a shortfall of employment land.

FIGURE 1: STUDY AREA



1.4 Scope of Work

In order to address the mandate relating to Supportive Commercial Needs in the Study Area, TER conducted the following scope of work:

- A review of relevant background studies including demand forecasts for select retail categories and service commercial uses from the Town's Commercial Land Needs Analysis, as well as recent work conducted by TER and other market analysts that relate to retail commercial demand in Halton Hills;



- A review of the existing employment area land use and zoning policies as they relate to a range of uses permitted in employment areas. TER reviewed and summarized the policies that relate to Oakville, Milton and Halton Hills;
- An overview of common location characteristics and market factors that influence the attractiveness of employment areas as locations for supportive commercial uses;
- A profile of the amount and types of existing retail and service commercial uses established in employment areas. This profile is based on field inspections undertaken by TER and is provided for Oakville, Milton and Halton Hills;
- TER forecast commercial space benchmarks for a range of supportive commercial uses identified in other employment areas in the Halton Region. These benchmarks are based on research conducted in Halton Hills, as well as TER's existing inventory research database from Oakville and Milton. These benchmarks assisted TER in forecasting the opportunity for various types of supportive commercial uses in Halton Hills;
- The opportunity for hotels and complementary supportive commercial uses was also assessed. Demand for hotel and complementary uses is influenced by both the anticipated employment area uses, as well as opportunities relating to customer traffic generated from the Toronto Premium Outlets; and,
- An assessment of the recommended locations for supportive commercial uses has been provided. This assessment accounted for various locational characteristics for the range of uses identified in the analyses outlined above. Location characteristics under consideration included accessibility; visibility; exposure; and availability of critical land mass; etc. This assessment allowed TER to identify appropriate locations for these types of uses.

The results of this work plan assisted TER in assessing the supportive commercial needs of the expanded Phase 1B Employment Area.



2 Commercial Uses in Employment Areas - Policy Analysis

This section of the TER Report examines the policy framework guiding the development of supportive commercial uses in employment areas. A detailed table indicating the employment area land use policies is provided in Appendix A. Below, the policies are summarized by the Towns within the Region: Oakville, Milton and Halton Hills. The City of Burlington has been excluded from this analysis due to its locational attributes and the lack of available information regarding the existing inventory of supportive commercial space.

2.1 Town of Oakville Official Plan Employment Area Policies

In Oakville, there are four land use designations within employment areas. The designations are summarized below:

- Industrial – Intended primarily for light and heavy industrial operations. Major offices and offices are permitted within 500 metres of the Bronte GO station and within Bristol Circle. Retail use is permitted as accessory use that is on the same lot and directly related to the functioning of the industrial use.
- Business Employment – Intended primarily for offices and light industrial uses as well as banquet halls, conference centres and commercial schools. Retail use is permitted as accessory use that is on the same lot and directly related to the functioning of primary use.
- Office Employment – Intended primarily for major offices and offices, hotels, banquet halls, conventions centres, light industrial and training facilities and commercial schools. Limited convenience retail, accessory retail, service commercial uses and restaurants may be permitted in conjunction with primary use.
- Business Commercial – Intended for hotels, training facilities, and commercial schools, motor vehicle related uses, convenience retail, service commercial uses and restaurants. Offices may also be permitted.

To a certain extent, retail is permitted in all designations in Oakville. In three of the land use designations - Industrial, Business Employment and Office Employment - retail is permitted in association with the primary employment use on the site. The Business Commercial designation is most permissive with respect to retail uses. It allows convenience retail, service commercial and restaurant uses with convenience retail capped at 2,500 m² in total floor area.

In Oakville, the most common designations near major highways are Business Employment and Industrial. These designations allow only accessory retail that is directly related to the primary employment use.



2.2 Town of Milton Official Plan Employment Area Policies

There are four employment land designations in Milton. The designations are similar to those in Oakville. They are summarized below:

- Industrial Area – Intended primarily for light and general industrial uses. Retail is permitted as an accessory use directly related to the industrial use and within the industrial building.
- Business Park Area – Main permitted uses are light industrial and offices. Retail and restaurants are permitted as an accessory use directly related to the industrial/office use and within the industrial/office building.
- Office Employment Area – Primarily intended for business and medical offices as well as banquet halls, hotels and conference centres. Limited service commercial and complementary uses may be permitted on ground floor and in conjunction with primary use.
- Business Commercial Area – Primarily intended for hotels, motels, training and commercial educational facilities, automobile related facilities, convenience retail and service commercial uses, including restaurants. Offices may also be permitted.

As with Oakville, in Milton, retail is permitted to a certain extent, as an accessory use in all employment area land designations. In three of the land use designations - Industrial, Business Park and Office Employment - retail is only permitted as an accessory use. The Business Commercial land use designation is most permissive with respect to retail uses. It allows for convenience retail, restaurants and service commercial uses. Convenience retail within the Business Commercial designation is capped at 930 m² in total floor area.

In Milton, the most common designations near major highways are Industrial and Business Park. The Industrial Area designation allows only accessory retail that is directly related to the primary use and is within the same industrial building. Similarly, the Business Park Area also permits accessory retail and restaurant uses within the industrial/office building.

2.3 Town of Halton Hills Employment Area Policies

There are four employment area land use designations in Halton Hills. These designations are summarized below:



- General Employment Area – mainly intended for light and heavy industrial uses. Secondary uses include: self-storage, free standing office buildings, commercial fitness, restaurants, day nurseries, private and commercial schools, motor vehicle repair shops and adult entertainment establishments. Secondary uses are subject to zoning by-law amendment and site plan control.
- Rural Industrial Area – intended for dry industrial uses, office uses within industrial buildings or on the same lot, small-scale commercial uses that serve the rural area.
- Prestige Industrial Area – intended for businesses and professional offices as well as industrial uses. Secondary uses are also permitted and they include:
 - a) accessory administrative office uses;
 - b) limited commercial uses ancillary to industrial (takeout, full service restaurants);
 - c) financial institutions;
 - d) convenience stores;
 - e) commercial fitness centres;
 - f) limited retail sales of goods and material manufactured or assembled on premises on the premise;
 - g) post-secondary and other institutional facilities;
 - h) motor vehicle service stations.
- Gateway Area – lands intended for:
 - a) full service hotels with conference and exhibition facilities;
 - b) retail commercial uses;
 - c) banks and financial institutions;
 - d) motor vehicle service centres;
 - e) business and professional offices;
 - f) light industrial;
 - g) take-out restaurants as accessory use to primary use;
 - h) full service restaurants;
 - i) theatres, cinemas and similar places of entertainment.

To a certain extent, retail is permitted in all designations in Halton Hills. In three of the land use designations - General Employment, Rural Industrial and Prestige Industrial - retail is only permitted as an accessory use. Rural Industrial Area also allows for small scale commercial uses serving the local rural area. The Gateway Area designation is the most permissive with respect to retailers. It allows for retail uses up to 2,500 m² in floor space in individual areas and up to 10,000 m² of total floor space within a Gateway Area (Council may permit retail development to exceed size limits in Gateway Areas, as has occurred with Toronto Premium Outlets).



In Halton Hills, near the major highways, the dominant land use designations are Prestige Industrial Area and Gateway Area which allow for a wider range of commercial uses, including retail uses, subject to restrictions.

2.4 Halton Hills Urban Areas

The Urban Areas within the Town of Halton Hills are Georgetown and Acton. The only employment designation in the urban areas is General Employment Area. There are three General Employment Area designations located in Georgetown and three in Acton:

Georgetown

- a) The primary employment area in Georgetown is located to the north of Guelph Street and to the east of Mountainview Road in the Georgetown Urban Area. Additional smaller employment lands are located on the south side of Guelph Street between Sinclair Avenue and Delrex Boulevard and at the southeast corner of River Drive and Mountainview Road.

Acton

- b) The primary employment area in Acton is located in the northern portion of the Acton Urban Area on both sides of Main Street North. Additional smaller employment areas are located at the corner of Wallace Street and Perth Street and on the east side of Main Street South and Vimy Street.

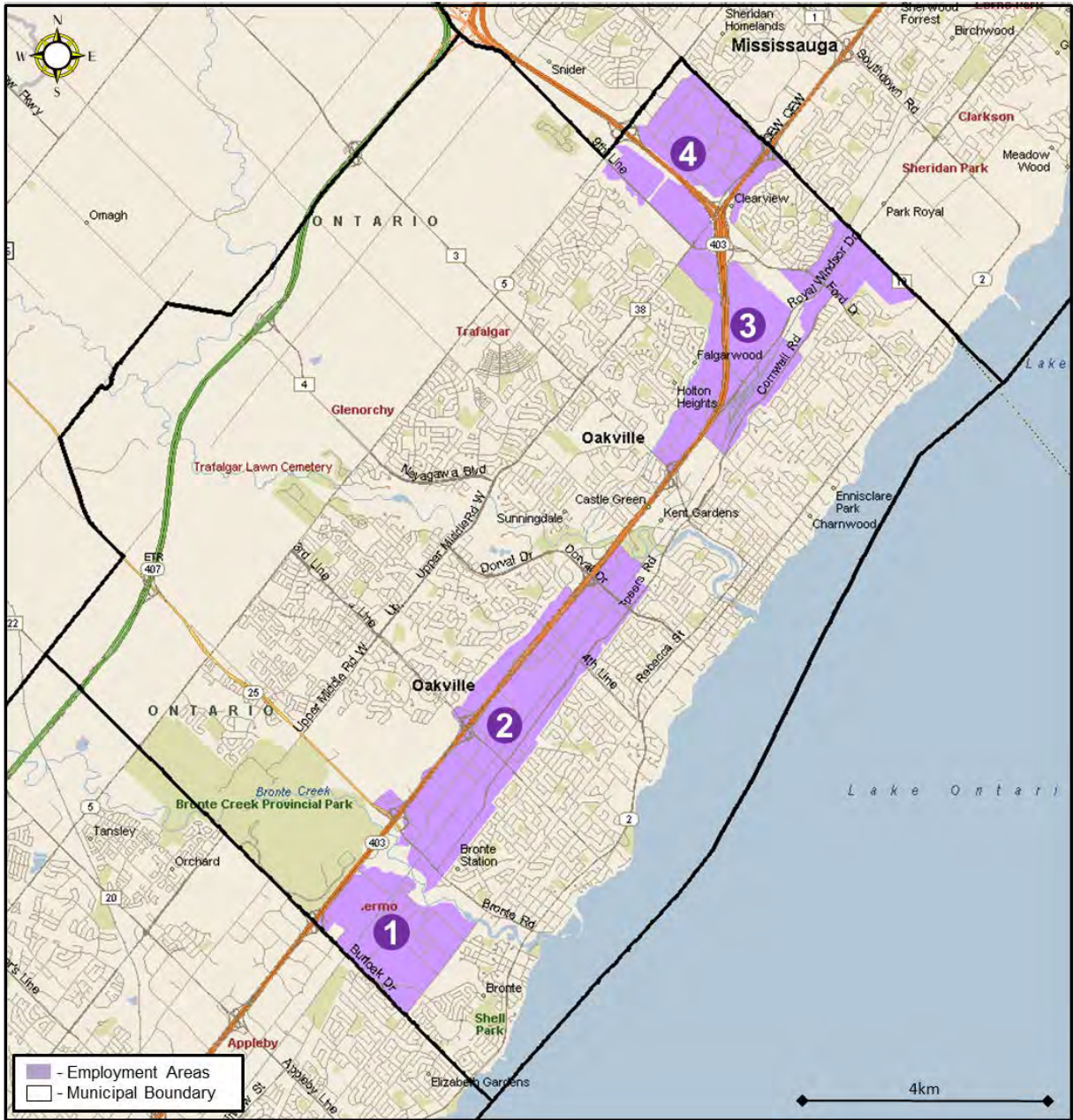
There is one other employment area in the south portion of Halton Hills. It is the only Rural Industrial Area in Halton Hills. It is located at north east corner of Regional Road 25 and 5th Sideroad. All of the Prestige Industrial and Gateway Area lands are located along Steeles Avenue and Highway 401.

2.5 Policy Analysis Conclusions

Oakville and Milton have similar policies relating to supportive commercial uses within Employment Areas. Generally, accessory retail uses are permitted in these Towns and there is one designation (Business Commercial) that permits convenience retail with caps on the amount of space. In Halton Hills, there are four employment land designations. A wider range of commercial uses are permitted, including hotels and retail uses, within the Gateway Area, and accessory retail uses are permitted in other Employment Areas.



FIGURE 2: TOWN OF OAKVILLE EMPLOYMENT AREAS



3 Supportive Commercial Uses in Employment Areas - Existing Conditions

This section of the report examines the existing supportive commercial uses in the employment areas in Oakville, Milton and Halton Hills. These areas are considered to have high functioning, successful employment areas and are therefore used as benchmarks regarding the extent of supportive commercial space that is located within them.

Supportive commercial space is often in the form of a retail component that is considered to be accessory to the main employment uses. Other commercial uses, such as convenience oriented retail, as well as services, including restaurants and financial institutions, are also typically located in employment areas. In this analysis, we have assumed that all retail and service commercial space that is located within employment areas is classified as supportive commercial space.

3.1 Supportive Commercial Uses in Employment Areas - Town of Oakville

There are 4 employment areas in the Town of Oakville. The employment areas are indicated in Figure 2. The employment land use designations within the employment areas are indicated below:

- *Burloak* - Business Employment, Business Commercial, Industrial, (Map Key 1),
- *QEW West* - Business Employment, Office Employment, Business Commercial, Industrial, (Map Key 2),
- *QEW East* - Business Employment, Office Employment, Business Commercial, Industrial, (Map Key 3), and,
- *Winston Park & Winston Park West* - Business Employment, Office Employment, Business Commercial, Industrial, (Map Key 4).

Figure 3, which follows, summarizes the retail and service space in Oakville employment lands. There is approximately 2.0 million square feet of retail and service space in Oakville employment areas. The majority of that space (66%) is comprised of service space and approximately 34% is comprised of retail space. Within the service category the space is primarily concentrated among three categories: Food Services (such as restaurants and fast food outlets), Medical, Dental, Health & Legal, and Other Services. Within the retail category, the largest retail types are Building & Outdoor Home Supplies followed by Miscellaneous Retailers and Furniture, Home Furnishings & Electronics.



FIGURE 3
SUMMARY OF RETAIL AND SERVICE SPACE IN TOWN OF OAKVILLE EMPLOYMENT LANDS ⁽¹⁾

	Burloak	QEW West	QEW East	Winston Park & Winston Park West	TOTAL OAKVILLE EMPLOYMENT AREAS
	1	2	3	4	
Food Oriented Retail (FOR) (Square Feet)					
Supermarkets	0	0	0	0	0
Convenience & Specialty Food Stores	0	20,300	4,500	2,000	26,800
Sub-Total Food Oriented Retail (FOR)	0	20,300	4,500	2,000	26,800
Non Food Oriented Retail (NFOR)					
Department Stores	0	0	0	0	0
General Merchandise	0	0	0	0	0
Clothing, Shoes & Accessories	0	4,400	11,500	300	16,200
Furniture, Home Furnishings & Electronics	0	107,300	9,200	45,300	161,800
Pharmacies & Personal Care Stores	0	35,000	1,700	2,200	38,900
Building & Outdoor Home Supplies	2,300	175,400	26,500	24,400	228,600
Miscellaneous Retailers	0	124,600	58,100	14,500	197,200
Automotive	0	21,400	1,200	0	22,600
Sub-Total Non Food Oriented Retail (NFOR)	2,300	468,100	108,200	86,700	665,300
Other Retail & Service Space					
Liquor, Beer & Wine	0	600	600	0	1,200
Food Services	8,800	91,600	46,600	82,200	229,200
Personal Services	0	14,700	23,400	1,700	39,800
Financial & Real Estate Services	0	53,200	33,200	12,200	98,600
Medical, Dental, Health & Legal Services	0	155,500	98,000	65,900	319,400
Other Services	0	318,000	157,200	191,500	666,700
Sub-Total Other Retail & Service Space	8,800	633,600	359,000	353,500	1,354,900
Total Occupied Retail & Service Space	11,100	1,122,000	471,700	442,200	2,047,000
Total Retail & Service Space in Employment Area	11,100	1,122,000	471,700	442,200	2,047,000

Source: TATE ECONOMIC RESEARCH INC.

¹⁾ Based on inventory and site inspections completed by TER in October / November 2014. Rounded to the nearest 100 square feet.

A number of retail concentrations can be identified in Oakville employment areas. One such retail concentration exists in QEW West employment area, where majority of the retail space is located in the vicinity of Speers Road. Another significant retail node is the 229,300 square foot Oakville Entertainment Centrum in the Winston Park employment area. The Oakville Entertainment Centrum represents over half of the retail and service space in the Winston Park employment area. Another smaller concentration is located in the QEW East employment area, at Royal Windsor Drive and Ford Drive, as well as along Cornwall Road.

3.1.1 Supportive Commercial Density in Employment Areas - Town of Oakville

Figure 4, which follows, summarizes TER's calculation of retail and service space per acre of occupied employment land. TER estimates that employment areas amount to 4,839 acres in Oakville. Overall, they are estimated to be 90% occupied, which represents 4,371 acres of occupied employment land.



**FIGURE 4
RETAIL AND SERVICE SPACE PER ACRE OF EMPLOYMENT LAND IN TOWN OF OAKVILLE**

	Burloak	QEW West	QEW East	Winston Park & Winston Park West	TOTAL OAKVILLE EMPLOYMENT AREAS
Employment Area Size (ac) ¹	771	1,753	1,657	658	4,839
Occupied Portion of Employment Area ²	79%	96%	94%	78%	90%
Occupied Employment Area Size (ac)	608	1,690	1,562	511	4,371
Commercial Space Square Feet Per Occupied Acre					
Total Retail & Service Space in Employment Areas (s.f.) ³	11,100	1,122,000	471,700	442,200	2,047,000
Retail Space / Acre	4	289	72	174	158
Service Space / Acre	14	375	230	692	310
Total Retail & Service Space / Acre	18	664	302	865	468

Source: TATE ECONOMIC RESEARCH INC.

¹ TER estimate of employment area size based on Google Earth aerial imagery expressed in gross acres.

² TER estimate of occupied employment area size based on Google Earth aerial imagery and field research.

³ Repeated from Figure 3.

Based on the inventory, there is a total of 2,047,000 square feet of retail commercial space in the Oakville employment areas. This figure represents approximately 468 square feet of retail commercial space per acre of occupied employment land in Oakville.¹ This figure will be utilized as a benchmark in TER’s analysis of warranted supportive commercial space in the Study Area.

3.2 Supportive Commercial Uses in Employment Areas - Town of Milton

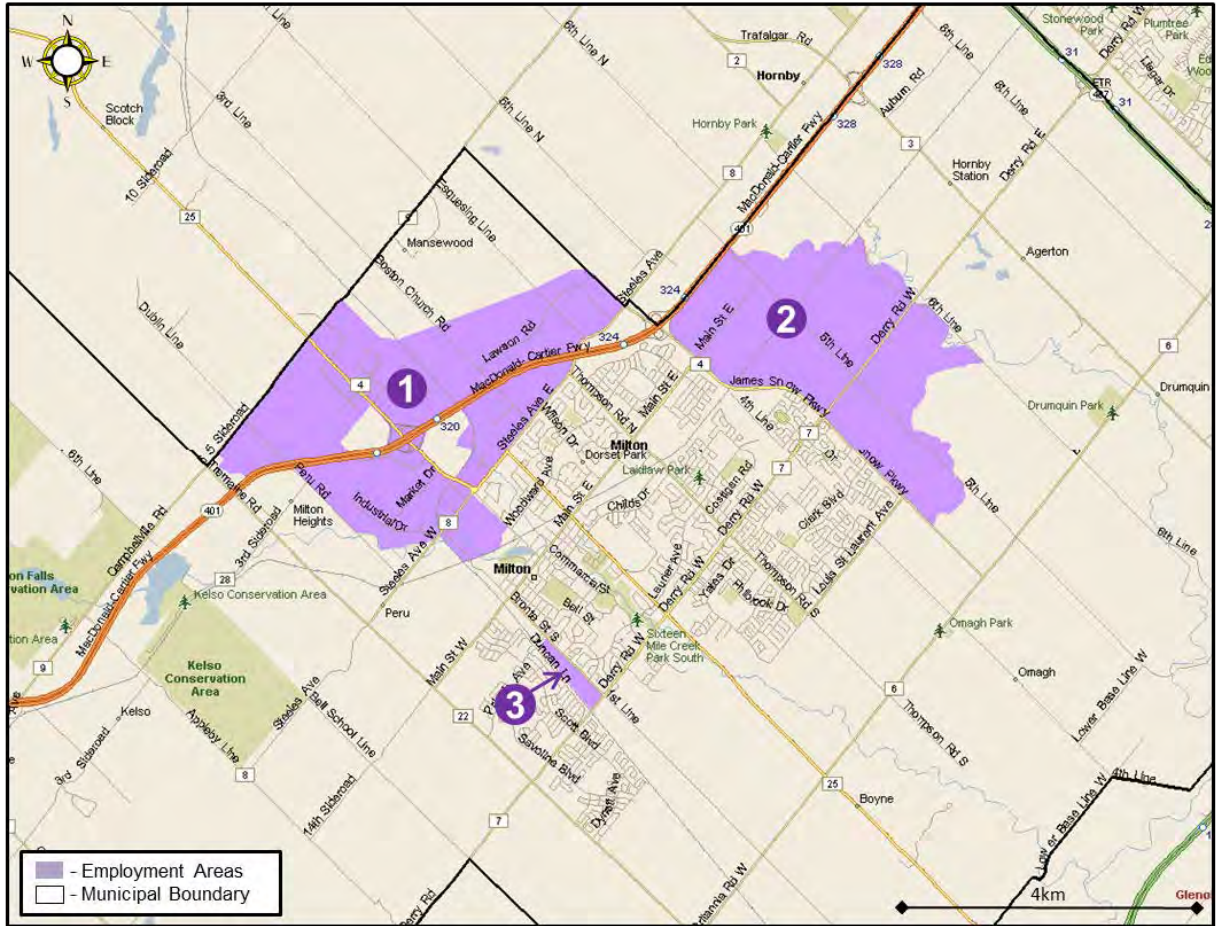
Milton employment areas are indicated in Figure 5. The following points summarize the employment areas in Milton and the employment land use designations within them:

- *401 Industrial & Business Park* - Business Park Area, Office Employment Area, Business Commercial Area, Industrial Area, (Map Key 1),
- *Derry Green Corporate Business Park* - Business Commercial Area, Business Park Area, Industrial Area, (Map Key 2), and,
- *Bronte Street South & Derry Road Employment Area* - Office Employment Area, (Map Key 3).

¹ If the Oakville Entertainment Centrum were excluded from this calculation, there is 419 square feet of retail commercial space per acre in Oakville. This calculation is based on the 34 acre Oakville Entertainment Centrum site containing 229,300 square feet of occupied retail commercial space.



FIGURE 5: TOWN OF MILTON EMPLOYMENT AREAS



As indicated in Figure 6, there is approximately 572,800 square feet of retail and service space in the Milton employment areas. The majority of that space (65%) is comprised of service space. Approximately 35% is comprised of retail space. Within the service category, the space is primarily concentrated among three categories: Food Services, Medical, Dental, Health & Legal, and Other Services. Within the retail category, over half the space is in the Building & Outdoor Home Supplies category followed by Miscellaneous Retailers and Furniture, Home Furnishings & Electronics.

FIGURE 6
SUMMARY OF RETAIL AND SERVICE SPACE IN TOWN OF MILTON EMPLOYMENT LANDS ⁽¹⁾

	401 Industrial & Business Park	Derry Green Corporate Business Park	Bronte St S & Derry Rd Employment Area	TOTAL MILTON EMPLOYMENT AREAS
Food Oriented Retail (FOR) (Square Feet)	1	2	3	
Supermarkets	0	0	0	0
Convenience & Specialty Food Stores	4,100	6,500	0	10,600
Sub-Total Food Oriented Retail (FOR)	4,100	6,500	0	10,600
Non Food Oriented Retail (NFOR)				
Department Stores	0	0	0	0
General Merchandise	7,900	0	0	7,900
Clothing, Shoes & Accessories	0	0	0	0
Furniture, Home Furnishings & Electronics	0	2,400	27,000	29,400
Pharmacies & Personal Care Stores	7,600	0	2,000	9,600
Building & Outdoor Home Supplies	87,600	4,700	15,000	107,300
Miscellaneous Retailers	24,300	0	6,100	30,400
Automotive	6,400	0	500	6,900
Sub-Total Non Food Oriented Retail (NFOR)	133,800	7,100	50,600	191,500
Other Retail & Service Space				
Liquor, Beer & Wine	0	0	0	0
Food Services	79,600	7,400	17,000	104,000
Personal Services	0	3,200	1,900	5,100
Financial & Real Estate Services	0	4,500	16,400	20,900
Medical, Dental, Health & Legal Services	19,100	2,000	95,700	116,800
Other Services	36,100	9,900	77,900	123,900
Sub-Total Other Retail & Service Space	134,800	27,000	208,900	370,700
Total Occupied Retail & Service Space	272,700	40,600	259,500	572,800
Total Retail & Service Space in Employment Area	272,700	40,600	259,500	572,800

Source: TATE ECONOMIC RESEARCH INC.

¹⁾ Based on inventory and site inspections completed by TER in July 2013. Rounded to the nearest 100 square feet.

A number of retail and service space concentrations can be identified in Milton employment areas. One concentration exists around Steeles Avenue and Martin Street. Another concentration exists along Bronte Street South, between Derry Road and Heslop Road.



3.2.1 Supportive Commercial Density in Employment Areas - Town of Milton

As indicated in Figure 7, TER estimates the employment areas amount to 4,542 acres in Milton. Overall, they are estimated to be 63% occupied, which represents 2,874 acres of occupied employment land.

**FIGURE 7
RETAIL AND SERVICE SPACE PER ACRE OF EMPLOYMENT LAND IN TOWN OF MILTON**

	Industrial & Business Park	Derry Green Corporate Business Park	& Derry Rd Employment Area	TOTAL MILTON EMPLOYMENT AREAS
Employment Area Size (ac) ¹	2,543	1,943	56	4,542
Occupied Portion of Employment Area ²	86%	33%	100%	63%
Occupied Employment Area Size (ac)	2,181	637	56	2,874
Commercial Space Square Feet Per Occupied Acre				
Total Retail & Service Space in Employment Areas (s.f.) ³	272,700	40,600	259,500	572,800
Retail Space / Acre	63	21	907	70
Service Space / Acre	62	42	3744	129
Total Retail & Service Space / Acre	125	64	4651	199

Source: TATE ECONOMIC RESEARCH INC.

¹) TER estimate of employment area size based Google Earth aerial imagery expressed in gross acres.

²) Town of Milton Employment Lands Needs Assessment Phase 1, January 2016.

³) Repeated from Figure 6.

There is 572,800 square feet of retail and space in the Milton employment areas. This figure represents approximately 199 square feet of supportive commercial space per acre of occupied employment land in Milton.

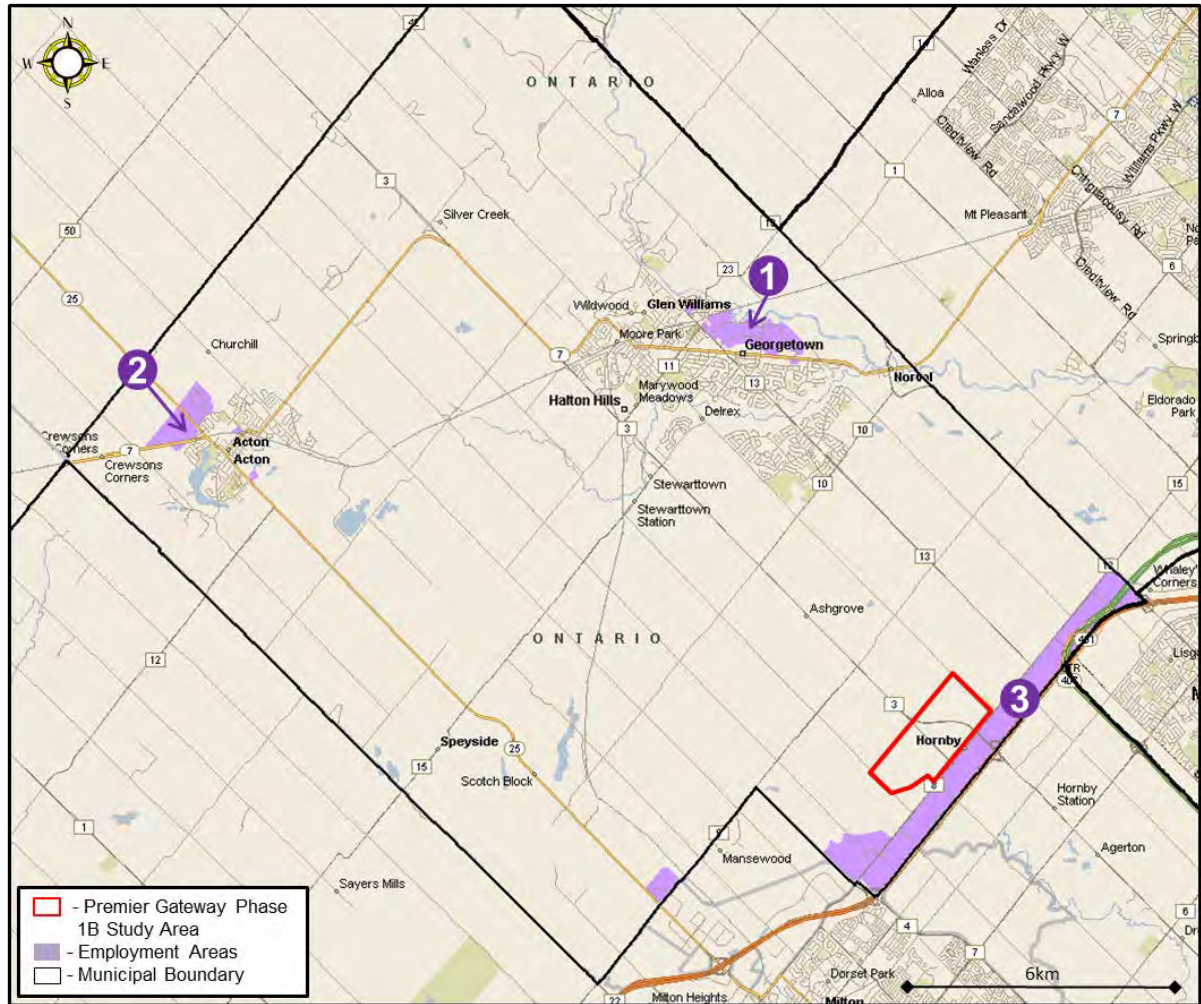
3.3 Supportive Commercial Uses in Employment Areas – Town of Halton Hills

In Halton Hills, retail and service space is located primarily within three employment areas. These employment areas are indicated in Figure 8. The following points list the employment areas and the land use designations within them:

- Georgetown Employment Area (General Employment Area), (Map Key 1)
- Acton Employment Area (General Employment Area), (Map Key 2), and,
- 401/407 Employment Area (Prestige and Gateway Employment Area), (Map Key 3).



FIGURE 8: TOWN OF HALTON HILLS EMPLOYMENT AREAS



As indicated in Figure 9, there is approximately 458,300 square feet of retail and service space in employment areas in Halton Hills. The majority of that space (90%) is comprised of retail space, largely due to the presence of the Toronto Premium Outlets in the 401/407 Employment Area which amounts to approximately 358,200 square feet. The remainder of the space, approximately 10%, is comprised of service space.

FIGURE 9
SUMMARY OF RETAIL AND SERVICE SPACE IN HALTON HILLS EMPLOYMENT AREAS ^(1,2)

	Georgetown Employment Areas	Acton Employment Areas	401/407 Employment Area	TOTAL HALTON HILLS EMPLOYMENT AREAS
	1	2	3	
Food Oriented Retail (FOR) (Square Feet)				
Supermarkets	0	0	0	0
Convenience & Specialty Food Stores	1,900	0	1,200	3,100
Sub-Total Food Oriented Retail (FOR)	1,900	0	1,200	3,100
Non Food Oriented Retail (NFOR)				
Department Stores	0	0	0	0
General Merchandise	0	0	0	0
Clothing, Shoes & Accessories	0	0	322,700	322,700
Furniture, Home Furnishings & Electronics	3,600	0	30,800	34,400
Pharmacies & Personal Care Stores	0	0	6,200	6,200
Building & Outdoor Home Supplies	17,600	7,400	3,900	28,900
Miscellaneous Retailers	5,400	0	2,600	8,000
Automotive	5,800	3,300	0	9,100
Sub-Total Non Food Oriented Retail (NFOR)	32,400	10,700	366,200	409,300
Other Retail & Service Space				
Liquor, Beer & Wine	0	0	0	0
Food Services	3,800	0	4,500	8,300
Personal Services	1,900	0	0	1,900
Financial & Real Estate Services	0	0	0	0
Medical, Dental, Health & Legal Services	25,900	0	0	25,900
Other Services	9,800	0	0	9,800
Sub-Total Other Retail & Service Space	41,400	0	4,500	45,900
Total Occupied Retail & Service Space	75,700	10,700	371,900	458,300

Source: TATE ECONOMIC RESEARCH INC.

¹⁾ Based on inventory and site inspections completed by TER in January 2016. Rounded to the nearest 100 square feet.

²⁾ We note there is no retail / service space in the Rural Industrial Area located at Regional Road 25 and 5 Sideroad.

Within the retail category, the space is primarily concentrated among Clothing, Shoes & Accessories category. If the outlet mall were excluded from the analysis, Building & Outdoor Home Supply would be the largest retail category. Within the service category, Medical, Dental, Health & Legal Services comprise the largest amount of space.

The largest retail concentration in the Halton Hills employment areas is the Toronto Premium Outlets. There is also a retail concentration along Mountainview Road North in Georgetown.



We note that the employment areas in Georgetown are nearing capacity, while development opportunities remain in Acton and in the 401/407 employment area.

3.3.1 Supportive Commercial Density in Employment Areas - Town of Halton Hills

As indicated in Figure 10, TER estimates there are 1,997 acres of employment land in Halton Hills. Overall, they are estimated to be 59% occupied, which represents 1,173 acres of occupied employment land.

**FIGURE 10
RETAIL AND SERVICE SPACE PER ACRE OF EMPLOYMENT LAND IN TOWN OF HALTON HILLS**

	Georgetown Employment Areas	Acton Employment Areas	401/407 Employment Area ⁽¹⁾	TOTAL HALTON HILLS EMPLOYMENT AREAS
Employment Area Size (ac) ⁽¹⁾	308	242	1,447	1,997
Occupied Portion of Employment Area ⁽²⁾	99%	53%	51%	59%
Occupied Employment Area Size (ac)	304	129	740	1,173
Commercial Space Square Feet Per Occupied Acre				
Total Retail & Service Space in Employment Areas (s.f.) ⁽³⁾	75,700	10,700	371,900	458,300
Retail Space / Acre	113	83	496	351
Service Space / Acre	136	0	6	39
Total Retail & Service Space / Acre	249	83	502	391

Source: TATE ECONOMIC RESEARCH INC.

¹⁾ TER estimate of employment area size based Google Earth aerial imagery expressed in gross acres.

²⁾ TER estimate of occupied employment area size based Google Earth aerial imagery field research.

³⁾ Repeated from Figure 9.

There is 458,300 square feet of retail and service space in the Halton Hills employment areas. This figure represents approximately 391 square feet of retail commercial space per acre of occupied employment land in Halton Hills.²

3.4 Existing Commercial Conditions Summary

Much of the retail and service space in employment areas in Oakville, Milton and Halton Hills serves as an accessory use to the existing primary employment land uses. However, there are retail and service concentrations in Oakville (the Oakville

² If the Toronto Premium Outlet Mall is excluded from this calculation, there is 291 square feet of retail commercial space per acre of occupied employment land in Halton Hills. This calculation is based on the 47 acre Toronto Premium Outlet Mall site containing 358,200 square feet of occupied retail commercial space.



Entertainment Centrum) and Halton Hills (Toronto Premium Outlets) that serve a market extending well beyond the nearby employment areas.

Retail commercial space tends to be located near major intersections and fronting onto major arterial roads. The majority of that space tends to be service oriented, including Food Services and professional office space providing Medical / Dental / Health and Legal Services.

There is a wide range of types and uses of supportive commercial space within the employment areas of Oakville, Milton and Halton Hills. TER calculated the amount of supportive commercial space per occupied acre of employment lands in Oakville, Milton and Halton Hills. These figures ranged from 199 square feet per occupied acre in Milton to 468 square feet per occupied acre in Oakville. Halton Hills has 391 square feet of supportive commercial space per occupied acre of employment land.



4 Supportive Commercial Needs Characteristics

This section of the TER Report provides an overview of the types of supportive commercial uses that typically locate within employment lands. It also provides commentary relating to the common location characteristics, market factors and tenant trends that influence the attractiveness of employment areas as locations for supportive commercial uses.

4.1 Supportive Commercial Uses in Employment Areas

There are a wide variety of supportive commercial uses that locate within employment areas. As indicated in the previous sections of this report, there is a portion of retail commercial uses that are considered “accessory” to the primary industrial uses. Examples of these types of uses typically include retailing such as home furnishings items that are manufactured in the “back” of a facility and retailed in the “front”.

There is also a wide range of “ancillary” (or in addition) to the employment uses. Within Oakville, Milton and Halton Hills, these retail uses most frequently include:

- Convenience and specialty food;
- Home furnishings; and,
- Home improvement.

There are more service space than retail space in the employment areas. Ancillary service uses typically include:

- Restaurants;
- Fast food;
- Medical / Dental;
- Financial Institutions; and,
- Personal services such as hair, nails, travel agents, dry cleaners, etc.

4.2 Locational Characteristics of Supportive Commercial Uses in Employment Areas

Retail and service operators, such as the ones outlined above, typically consider a range of factors when selecting appropriate locations. These factors include:

- Accessibility – It is important for retailers to be easily accessible to potential customers and accessibility is a significant factor in locational decisions.
- Parking – In many locations, the availability of parking, in particular parking that is directly accessible to the retailer, is a key consideration.



- Visibility – Exposure to passing vehicle traffic and potential customers is essential for many retail operations.
- Signage – The ability of a retailer to provide standardized signage that is visible to potential customers is often a factor influencing retail location decisions.
- Co-tenancies – Some retail tenants tend to cluster together to capitalize on cross-shopping opportunities. For example, pharmacies tend to locate near medical offices, and some types of restaurants tend to cluster together.
- Competition – The location of competition is often a factor that influences retail decisions.

4.3 Supportive Commercial Needs Characteristics Conclusion

There are a wide range of supportive commercial uses that typically locate within employment areas. Retail uses can be considered “accessory” or “ancillary” to the primary employment use. Service uses are ancillary to employment uses.

Supportive commercial uses tend to require sites with good accessibility, visibility and parking. They are typically located on, or near, major roads.

In terms of other supportive commercial uses in employment areas, there is also a range of uses, such as hotels and convention facilities that typically locate in employment areas. Hotels are addressed in the following section of this TER Report.



5 Supportive Commercial Needs – Hotel Assessment

TER's analysis of supportive commercial needs indicated a number of lodging facilities (hotels and motels) located within, and near, employment lands. This section of the TER Report provides commentary relating to the hotel market segment and demand for a hotel facility in the Study Area.

5.1 Hotel Market Demand Factors

Market demand for hotels is typically derived from three market segments. These segments are:

- Commercial;
- Meeting and Group; and,
- Leisure.

In most markets, business travel, including individual commercial travelers and corporate groups, is the predominant source of demand on Monday through Thursday nights. Leisure travelers and non-business-related groups generate a majority of demand on Friday and Saturday nights.

The portion of hotel demand generated from each market segment can vary considerably. On a national basis, business travellers represent over 40% of hotel stays. However, a significant component of market demand for hotels is often generated by employment uses located nearby. Hotels in employment areas can generate 80% to 90% of total demand from the "Commercial" and "Meeting and Group" market segments.

A hotel, and any complementary facilities such as a conference centre or convention hall, are typically supported by users of the adjacent employment areas. As such, hotel uses are considered to be complementary and supportive of surrounding employment areas.

5.2 Hotel Locations Near Study Area

Figure 11, which follows, indicates the hotels and motels located in Halton Hills and near the Study Area, along Highway 401. As indicated in the map, there are three hotels in Milton, approximately 5.5 kilometres west of the Study Area. There is also a concentration of seven hotels located in Mississauga near the intersections of Highway 401 and Winston Churchill Road and Highway 401 and Mississauga Road.



The hotels near the Study Area are operated by national chains such as Holiday Inn, Hilton, Comfort Inn, Marriot and Sheraton. These hotels generally range between 100 and 200 rooms and are 5 to 10 storeys. They focus on the business market segment and the travelling public.

5.3 Hotel Market Opportunity

There are a number of factors which contribute to the market opportunity for additional hotels in the Study Area. These factors include:

- Population growth in Halton Hills and Milton;
- Employment growth in Halton Hills and Milton;
- Forecast increases in traffic volumes on Highway 401.

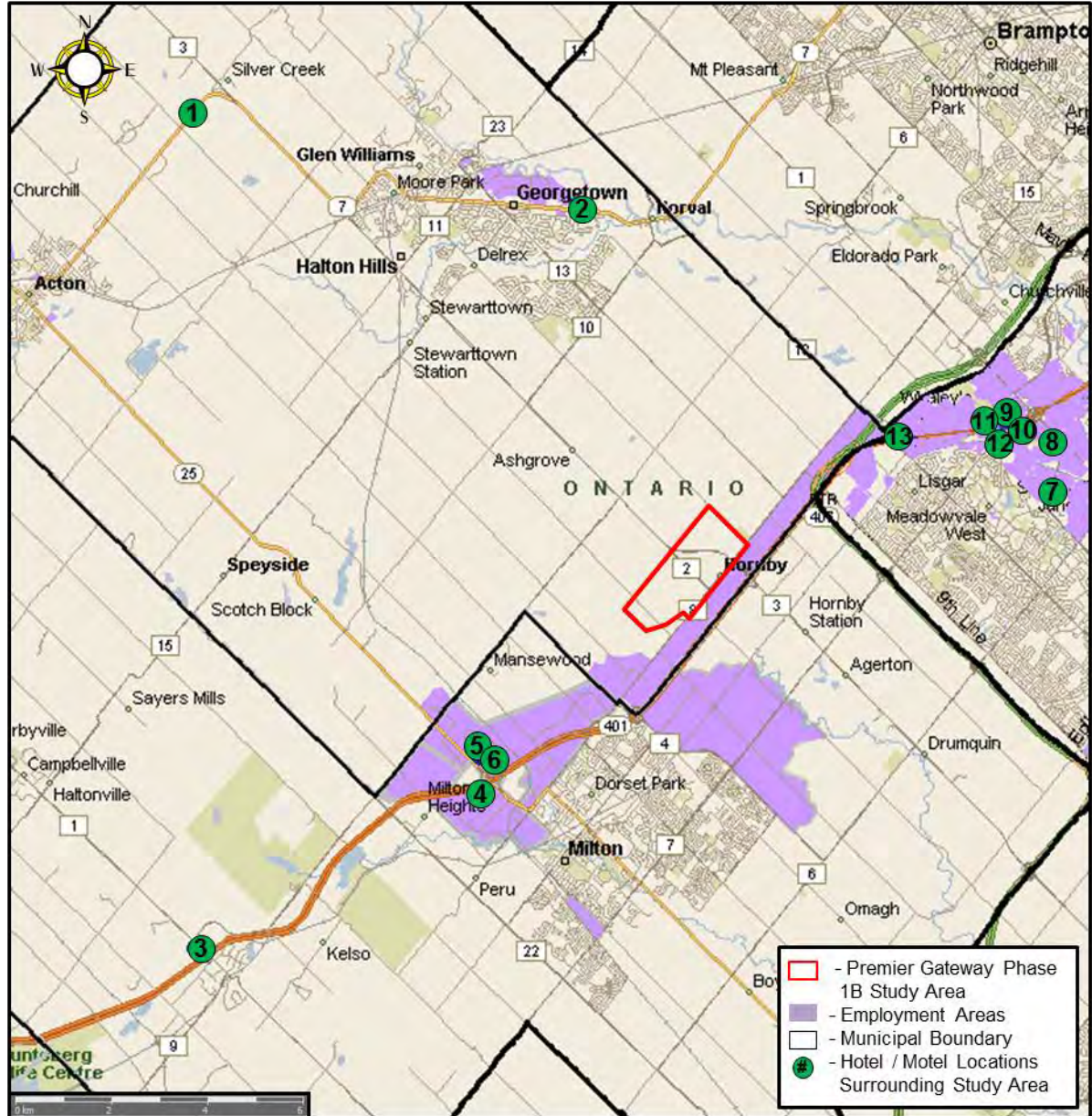
Given these factors, in conjunction with the synergistic relationship that could exist with the Toronto Premium Outlets, it is TER's opinion that there is opportunity for additional hotel uses in the Study Area. The locational factors, such as access and visibility, provided by locations within the Study Area near Trafalgar Road indicate that this location would be suitable for one or more hotel operators.

5.4 Supportive Commercial Needs - Hotel Assessment

A portion of demand for hotels is typically generated by the local employment base. A hotel in the Study Area would be supportive of the proposed employment uses. There are a number of hotels operating near the Study Area, along Highway 401 and as can be seen from Figure 11, they are primarily located within employment areas. Forecast continued residential, employment and traffic growth is indicative of market demand for additional hotel operators. The Study Area, in particular the lands near Trafalgar Road, are well suited as a potential location for hotel uses.



FIGURE 11: HOTELS / MOTELS SURROUNDING STUDY AREA



Map Key	Name	Location	Address	# of Rooms	# of Storeys
1	Cedar Springs Motel	Halton Hills	12363 Hwy 7	51	2
2	Best Western Inn On The Hill	Halton Hills	365 Guelph St.	59	2
3	Mohawk Inn	Milton	9230 Guelph Line	40	1
4	Best Western Milton Inn	Milton	161 Chisholm Dr.	94	5
5	Holiday Inn	Milton	2750 High Point Dr.	92	5
6	Home2 by Hilton	Milton	8490 Parkhill Dr.	100	6
7	Comfort Inn	Mississauga	2420 Surveyor Rd.	112	2
8	Hilton	Mississauga	6750 Mississauga Rd	374	15
9	Courtyard Marriott	Mississauga	7015 Century Ave.	144	6
10	Residence Inn Marriott	Mississauga	7005 Century Ave.	100	5
11	Holiday Inn	Mississauga	2565 Argentia Rd.	120	8
12	Four Points by Sheraton	Mississauga	2501 Argentia Rd.	205	8
13	Motel 6	Mississauga	2935 Argentia Rd.	123	3



6 Supportive Commercial Needs Assessment

One of the primary goals of this TER Report is to determine the need for commercial floor space in the Study Area to support the employment uses and how much land should be designated/zoned for these commercial uses. This section of the report specifically addresses demand for supportive commercial space in the Study Area.

6.1 Quantification of Demand

Supportive commercial space in employment lands benchmarks were determined based on the inventory of space in Oakville, Milton and Halton Hills. These municipalities are considered to be acceptable comparisons for the future demand for supportive commercial space in the Premier Gateway Phase 1B Employment Area due to their proximity, the success of the employment areas in which they are located and the level of commercial service provided.

The analysis summarized in Section 3 of this report indicated the following ratios for the municipalities studied:

- Oakville: 468 square feet of retail commercial space per acre of occupied employment land;
- Milton: 199 square feet of retail commercial space per acre of occupied employment land; and,
- Halton Hills: 391 square feet of retail commercial space per acre of occupied employment land.

We note that there are two particular retail commercial developments that influence these average results. There are retail commercial concentrations in Oakville (the Oakville Entertainment Centrum) and Halton Hills (Toronto Premium Outlets) that serve a market extending well beyond the nearby employment areas. These developments may not be considered to be “supportive” of the surrounding employment areas. If these developments are excluded from the calculations, there is 419 square feet per acre in Oakville and 291 square feet per acre in Halton Hills.

Based on this benchmark approach, our demand analysis has been summarized below:



**FIGURE 12
WARRANTED SUPPORTIVE COMMERCIAL FLOOR SPACE**

	Low	Medium	High
Recommended Supportive Commercial Floor Space ¹⁾	200	300	400
Employment Lands in Study Area (ac) ²⁾	415		
Study Area Warranted Supportive Commercial Floor Space ³⁾	83,000	124,500	166,000
Land Requirement (Acres) ⁴⁾	8	12	17

Source: TATE ECONOMIC RESEARCH INC.

¹⁾ Expressed as square feet / acre.

²⁾ TER estimate of gross employment land to be designated within Study Area, expressed in acres.

³⁾ Expressed in square feet, rounded to nearest 1,000.

⁴⁾ Expressed in acres, based on 10,000 square feet per acre, or approximately 25% coverage.

This analysis indicates various scenarios for supportive warranted retail commercial space in the Study Area. Based on a Study Area size of approximately 415 acres, TER’s analysis indicates demand for between 83,000 square feet and 166,000 square feet of retail commercial space in the Study Area. Based on an industry standard factor of 25% building to lot coverage, the 83,000 square feet to 166,000 square feet would require 8 to 17 acres of land.

In addition to this retail commercial space, it is our recommendation that the opportunity be provided for additional hotel and conference / convention space within the Study Area. As outlined previously, hotels support the surrounding employment uses and there are various components of hotel demand that are forecast to increase, resulting in market demand for a hotel and associated uses.

6.2 Supportive Commercial Needs Locational Assessment

TER has provided the following recommendations with respect to appropriate locations for supportive commercial retail and service space within the Study Area.

The Gateway Area designation is currently located on both sides of Trafalgar Road, between Highway 401 and Steeles Avenue. TER is recommending that permission for a hotel and associated facilities be added to the Prestige Industrial Area lands located north of the Gateway Area designation as an ancillary use. It is our opinion that additional hotel uses are warranted in this area and provide support to the surrounding employment uses. The expanded permissions would provide the opportunity for the development of this use.



Supportive commercial uses typically require locations with good access, visibility, parking, exposure, etc. TER is recommending that supportive commercial uses be located along Steeles Avenue, throughout the Study Area. A Prestige Industrial Area designation should include permission for limited supportive commercial uses and is TER's recommended designation for these lands.

There are other new employment lands that will be added to Phase 1B in the Study Area, in addition to those located along Steeles Avenue. These lands can be expected to have supportive commercial permissions, due to the anticipated Prestige Industrial Area designations, which will address employee requirements as the area develops and matures.

6.3 Supportive Commercial Needs Assessment Conclusion

The TER analysis indicates market demand for 83,000 square feet to 166,000 square feet of supportive commercial space in the Study Area. This amount of supportive commercial space will require between 8 and 17 acres of land. In addition, there is market demand to support a hotel and associated facilities which will support the employment uses. Expanded permissions that allow a hotel and associated uses are recommended on both sides of Trafalgar Road, north of Steeles Avenue. In addition, the opportunity for supportive commercial uses should be provided in the Study Area, along Steeles Avenue.



Appendix A



FIGURE A-1
SUMMARY OF RETAIL PERMISSIONS IN EMPLOYMENT LAND USE DESIGNATIONS IN OAKVILLE, MILTON AND HALTON HILLS

TOWN OF OAKVILLE ¹⁾	
Land Use / Permitted Uses	Permitted Retail
GENERAL EMPLOYMENT / INDUSTRIAL	
<u>Industrial</u>	
14.5.1 Light industrial, heavy industrial operations such as manufacturing, assembling, processing, fabricating, refining, repairing, warehousing, and wholesaling. Training facilities and commercial schools, where they are related to and supportive of an industrial use. Waste processing station, waste transfer station and transportation terminal. Major offices and offices within 500 m of Bronte GO and within Bristol Circle. Motor vehicle uses on selected industrial lands. Accessory uses may be permitted in conjunction with permitted industrial uses. Accessory retail uses shall be on the same lot and clearly subordinate, and directly related, to the functioning of the permitted use.	Accessory retail uses on same lot and supporting the function of the permitted use.
BUSINESS PARK / PRESTIGE INDUSTRIAL	
<u>Business Employment</u>	
14.4.1 Offices and light industrial uses such as manufacturing, assembling, processing, fabricating, repairing, warehousing and wholesaling. Banquet halls, meeting halls and convention centres, and training facilities and commercial schools. 14.4.2 Accessory uses may be permitted in conjunction with permitted light industrial uses. Accessory retail uses shall be on the same lot and clearly subordinate, and directly related, to the functioning of the permitted use.	Accessory retail uses on same lot and supporting the function of the permitted use.
OFFICE RELATED	
<u>Office Employment</u>	
14.3.1 Major offices and offices hotels, banquet halls, meeting halls and convention centres, light industrial uses and training facilities and commercial schools. Limited convenience retail, accessory retail and service commercial uses, including restaurants, may be permitted in conjunction with the permitted uses.	Limited convenience retail, accessory retail, service commercial uses and restaurants.
BUSINESS COMMERCIAL	
<u>Business Commercial</u>	
14.6.1 Hotels, public halls, training facilities and commercial schools, motor vehicle related uses, convenience retail and service commercial uses, including restaurants. Offices may also be permitted. 14.6.3 Convenience retail uses on sites designated Business Commercial shall not exceed 2,500 square metres in total floor area.	Convenience retail (up to 2,500 s.m.), service commercial and restaurants.

Source: TATE ECONOMIC RESEARCH INC.

¹⁾ Town of Oakville Official Plan 2009 (Office Consolidation: February 23, 2015).



FIGURE A-1 (continued)

SUMMARY OF RETAIL PERMISSIONS IN EMPLOYMENT LAND USE DESIGNATIONS IN OAKVILLE, MILTON AND HALTON HILLS

TOWN OF MILTON ^(2,4)	
Land Use / Permitted Uses	Permitted Retail
GENERAL EMPLOYMENT / INDUSTRIAL	
<u>Industrial Area</u>	
3.9.2.1 Main permitted uses shall be light and general industrial uses including recycling industries. In addition accessory service, w holesale, retail and office uses directly related to the industrial use shall be permitted within the industrial building.	Accessory service, retail and restaurants that are located within the industrial/office building.
BUSINESS PARK / PRESTIGE INDUSTRIAL	
<u>Business Park Area</u>	
3.8.2.1 Main permitted uses shall be light industrial and office. 3.8.2.2 In addition to main uses, these uses shall also be permitted: accessory service, w holesale, retail and office uses directly related to the industrial use and located within the industrial building. Restaurants there are part of and are located w holly within a light industrial or office building, other than an industrial mall.	Accessory service, retail and restaurants that are located within the industrial/office building.
OFFICE RELATED	
<u>Office Employment Area</u>	
3.7.3.3 Primarily for business and medical offices in free standing buildings, banquet halls, places of assembly and convention centres, hotels and motels, and training and commercial educational facilities. Limited service commercial uses and complementary uses, may be permitted on the ground floor of and in conjunction w ith permitted uses.	Limited service commercial uses on ground floor and in conjunction with office uses.
BUSINESS COMMERCIAL	
<u>Business Commercial Area</u>	
3.7.6.2 Uses permitted may include hotels, motels, training and commercial educational facilities, automobile related uses including vehicle wash facilities, automobile sales and service, truck stops and convenience retail and service commercial uses, including restaurants. Offices may also be permitted. 3.7.6.8 Convenience retail uses shall not exceed 930 sm in total floor area.	Convenience retail and service commercial uses, including restaurants. Convenience retail shall not exceed 930 sm. In total floor area.

Source: TATE ECONOMIC RESEARCH INC.

²⁾ Town of Milton Official Plan Amendment 31, June 14, 2010.

⁴⁾ Hamlet Industrial designations located in Campbellville and Moffat have been excluded from this review .



FIGURE A-1 (continued)

SUMMARY OF RETAIL PERMISSIONS IN EMPLOYMENT LAND USE DESIGNATIONS IN OAKVILLE, MILTON AND HALTON HILLS

TOWN OF HALTON HILLS ³	
Land Use / Permitted Uses	Permitted Retail
GENERAL EMPLOYMENT / INDUSTRIAL	
<u>Rural Industrial Area</u> E7.3 Dry industrial within wholly enclosed buildings, such as manufacturing, assembling, processing, fabricating, warehousing, wholesaling and distribution facilities; transportation terminals; office uses within industrial buildings, or on the same lot as an industrial building; small-scale commercial uses that serve the rural area; private recreational facilities; and, utility facilities.	
<u>General Employment Area</u> D3.4.1.3 Main permitted uses are Industrial within wholly enclosed buildings, such as manufacturing, assembling, processing, fabricating, warehousing, wholesaling and distribution facilities, research and training establishments, computer, electronics and data processing facilities, printing and associated service establishments, industrial malls, containing one or more of the uses permitted in this designation. D3.4.1.4.2 Secondary Uses: commercial self storage, free-standing office buildings, commercial fitness centre, restaurants, day nurseries, private and commercial schools, motor vehicle repair and body shops and adult entertainment establishments. Secondary Uses subject ZBA and Site Plan Control.	
BUSINESS PARK / PRESTIGE INDUSTRIAL	
<u>Prestige Industrial Area</u> D3.5.4.1 Businesses and professional offices in free-standing buildings; industrial uses within wholly enclosed buildings, such as manufacturing, assembling, processing, fabricating, warehousing, wholesaling and distribution facilities; computer, electronics and data processing facilities, R & D facilities, printing and associated service establishments, industrial mall containing one or more of the uses permitted in this designation. D3.5.4.1.2 Secondary Uses: administrative office uses accessory to and on same lot as industrial use; limited commercial uses ancillary to industrial use such as takeout or full service restaurants, financial institutions, convenience stores and commercial fitness centres; commercial or trade school facilities, public park and recreational facilities, limited private parks and recreational facilities; limited retail sales of goods and materials manufactured, or substantially assembled on the premises; post secondary and other institutional facilities; motor vehicle service stations; uses that legally existed at the date of adoption of this Plan.	
OFFICE RELATED	
There is no specific office related designation in the Halton Hills OP. Office uses are permitted in all employment designations.	
BUSINESS COMMERCIAL	
<u>Gateway Area</u> D3.5.4.2.1 Full service hotels including hotels with conference and exhibition facilities; retail commercial uses not exceeding individual areas of 2,750 sm in floor space and a total area of up to 10,000 sm within the Gateway Area (exception may be granted); banks and financial institutions; motor vehicle service centres; business and prof. office in free-standing buildings; computer, electronics and data processing facilities; R&D facilities, printing and associated service establishments; take-out restaurants providing they are incorporated into larger developments and are ancillary to the primary use; full service restaurants; theatres, cinemas and similar places of entertainment (excluding adult); used that legally existed at date of adoption of plan.	
Retail commercial uses not exceeding 2,750 sm in floor space and a total area of 10,000 sm within the Gateway Area. Bank and financial institutions, take-out restaurants incorporated into larger development and ancillary to primary use, full service restaurants, theaters, cinemas and similar entertainments.	

Source: TATE ECONOMIC RESEARCH INC.

³⁾ Town of Halton Hills Official Plan 2006 (Consolidated, May 2008).

