

Supportive Commercial Needs Assessment Premier Gateway Phase 2B Employment Area Town of Halton Hills

*Prepared for: Town of Halton Hills
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1 TER Findings and Recommendations

Tate Economic Research Inc. (“TER”) has been retained as part of a multi-disciplinary team led by Macauley Shiomi Howson Ltd. to assist the Town of Halton Hills (“Halton Hills”) in the preparation of a Secondary Plan for the Premier Gateway Phase 2B Employment Area. TER’s report addresses the market demand for Supportive Commercial Uses in the Premier Gateway Phase 2B Employment Area.

The range of Supportive Commercial Uses often include:

- Business supportive retail and services;
- Tourism / travel-oriented retail and services;
- Accommodation / lodging;
- Eating & 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.

Supportive Commercial Uses contribute to creating comprehensive and complete employment areas and influence the vitality and connectivity of the local economy.

1.1 Mandate

The purpose of this study, as set out in the RFP, is to 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.

1.2 Summary of Findings

The following points summarize the findings of our research and analysis:

Study Area

- A Study Area was defined by the Town of Halton Hills. The Study Area includes the Phase 2B Employment Area which is bound by
 - South: Steeles Avenue;
 - West: Eighth Line;
 - North: Property boundaries which follow a line parallel to, and approximately 1.2 kilometres north of, Steeles Avenue; and,

- East: Winston Churchill Boulevard (City of Brampton border).

Existing Supportive Commercial Uses in Halton Hills

- There are employment areas located in Acton, Georgetown, Mansewood, and in the Premier Gateway Employment Area Phase 1.
- Existing Supportive Commercial Uses include a range of retail and service space. The majority (70%) of Supportive Commercial Uses are comprised of Entertainment & Recreation Services, Building & Outdoor Home Supplies, and Miscellaneous Retailers.
- Employment designations include General Employment Area, Prestige Industrial Area, and Gateway Area. The Prestige Industrial Area designation applies to the majority of lands within the Premier Gateway Employment Area Phase 1. The Prestige Industrial Area designation permits a variety of Supportive Commercial Uses, including restaurants, financial institutions, convenience stores, and commercial fitness centres, among others.

Sources of Demand

- Demand for Supportive Commercial Uses is influenced by various sources. In particular, these sources include:
 - Demand generated from businesses and employees forecast for the Premier Gateway Phase 2B Employment Area and other employment areas in the vicinity; and,
 - Traffic generated from existing uses in the vicinity of the new development area such as the Toronto Premium Outlets, commuter traffic, visitors and the general travelling public.

Analysis Methodology – Influence of Surrounding Opportunities

- The market demand for Supportive Commercial Uses on the Phase 2B Lands is influenced by the existing and future commercial and employment uses in the surrounding area. The most significant existing commercial use in the vicinity of the Study Area is the Toronto Premium Outlet Mall. This “factory outlet style” shopping centre comprises approximately 500,000 square feet of retail commercial uses and includes an enclosed food court.
- Future uses, such as additional retail commercial, accommodations, convention centre, entertainment and amusement uses, food and beverage, and health and fitness uses, are all potentially locating in the vicinity of the Study Area.

- As such, it can be anticipated that a portion of market demand generated by Phase 2B employees will be served by the commercial uses located nearby.

Analysis Methodology – Quantitative Approach

- In order to quantify the amount of Supportive Commercial space warranted in the Phase 2B Employment Area, TER applied a Supportive Commercial floor space per gross acre ratio. This ratio is based on an examination of similar space in the existing employment areas in Halton Hills – Acton, Georgetown, Mansewood and the Premier Gateway lands. In addition, TER investigated Supportive Commercial uses in employment areas in other municipalities, such as Ajax, Milton, Oakville and Vaughan.
- Using these benchmark figures as a guide, TER has forecast that the Phase 2B Employment Area should accommodate between 150 and 300 square feet of commercial space per gross acre of employment land.
- This analysis is summarized in the following Figure 1-1:

Figure 1-1: Warranted Supportive Commercial Floor Space

	Low	Medium	High
Recommended Supportive Commercial Floor Space ⁽¹⁾	150	225	300
Employment Lands in Study Area (ac)⁽²⁾	269		
Study Area Warranted Supportive Commercial Floor Space ⁽³⁾	40,400	60,600	80,800
Land Requirement (Acres) ⁽⁴⁾	4	6	8

Source: Tate Economic Research Inc.

¹⁾ Expressed as square feet / acre.

²⁾ TER estimate of gross (excluding environmental area) employment land designated within Premier Gateway Phase 2B area, expressed in acres.

³⁾ Expressed in square feet, rounded to nearest 100.

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

- TER determined that there is demand for 40,000 to 80,000 square feet of Supportive Commercial space in the Study Area. Based on typical coverage ratios, this range of space would require between 4 and 8 acres of land.
- It is noted that the land requirements of the GTA West Highway Corridor could impact the amount of land available for development in the Phase 2B Employment Area. Accordingly, it is anticipated that the Warranted Supportive Space would remain consistent on a per gross acre basis, however, variations

in the amount of developable land may impact the overall demand and land requirements. The Environmental Assessment for the GTA West Highway Corridor is expected to be completed by 2022 and refinements to the corridor will be considered as the Phase 2B project progresses.

1.3 Conclusions

- TER determined the warranted Supportive Commercial space in the Study Area. Based on the assumption of 269 acres of gross employment land in the Phase 2B Employment Area, TER forecasts that between 40,000 and 80,000 square feet of Supportive Commercial space is warranted.
- This range of Supportive Commercial space would require between 4 and 8 acres of land, assuming typical lot coverage ratios. This range represents between 2% and 3% of the land area in the Phase 2B 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 Phase 2B Employment Area. As a result, there is no requirement to designate or zone land specifically for Supportive Commercial Uses within the Phase 2B Employment Area.
- It is noted that the accessibility and visibility characteristics of the Phase 2B Employment Area, if the GTA West Highway is completed, could result in opportunity for / pressure on the municipality to permit the development of large scale retail commercial and / or entertainment uses near the interchange of Highway 401 / 407 / GTA West. This type of development has not been considered in this analysis and should be evaluated on its own merits.
- Furthermore, any other applications for large retail commercial and / or entertainment uses that do not fall under the Supportive Commercial Uses umbrella should be evaluated on their own merit.
- The opportunity for Supportive Commercial Uses should be provided in the Study Area, along Steeles Avenue and Winston Churchill Boulevard. The 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 Uses within the Prestige Industrial Area.

2 Introduction & Background

Tate Economic Research Inc. (“TER”) was retained as part of a multi-disciplinary team led by Macauley Shiomi Howson Ltd. to assist the Town of Halton Hills (“Halton Hills”) in the preparation of a plan for the Premier Gateway Phase 2B Employment Area.

The range of Supportive Commercial Uses often include: business supportive retail and services; tourism / travel-oriented retail and services; accommodation / lodging; eating & 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 TER Report, these types of retail commercial uses are referred to as Supportive Commercial Uses. Supportive Commercial Uses contribute to creating comprehensive and complete employment areas and influence the vitality and connectivity of the local economy.

Demand for Supportive Commercial Uses is influenced from various sources. In particular, sources of demand include:

- Demand generated from businesses and employees forecast for the Premier Gateway Phase 2B Employment Area and other employment areas in the vicinity; and,
- Traffic generated from existing uses in the vicinity of the new development area such as the Toronto Premium Outlets, commuter traffic, visitors and the general travelling public.

2.1 Background

The purpose of this study, as set out in the RFP, is to determine the need for Supportive Commercial Uses in the new development area to support the employment uses and how much land should be designated/zoned for these uses.

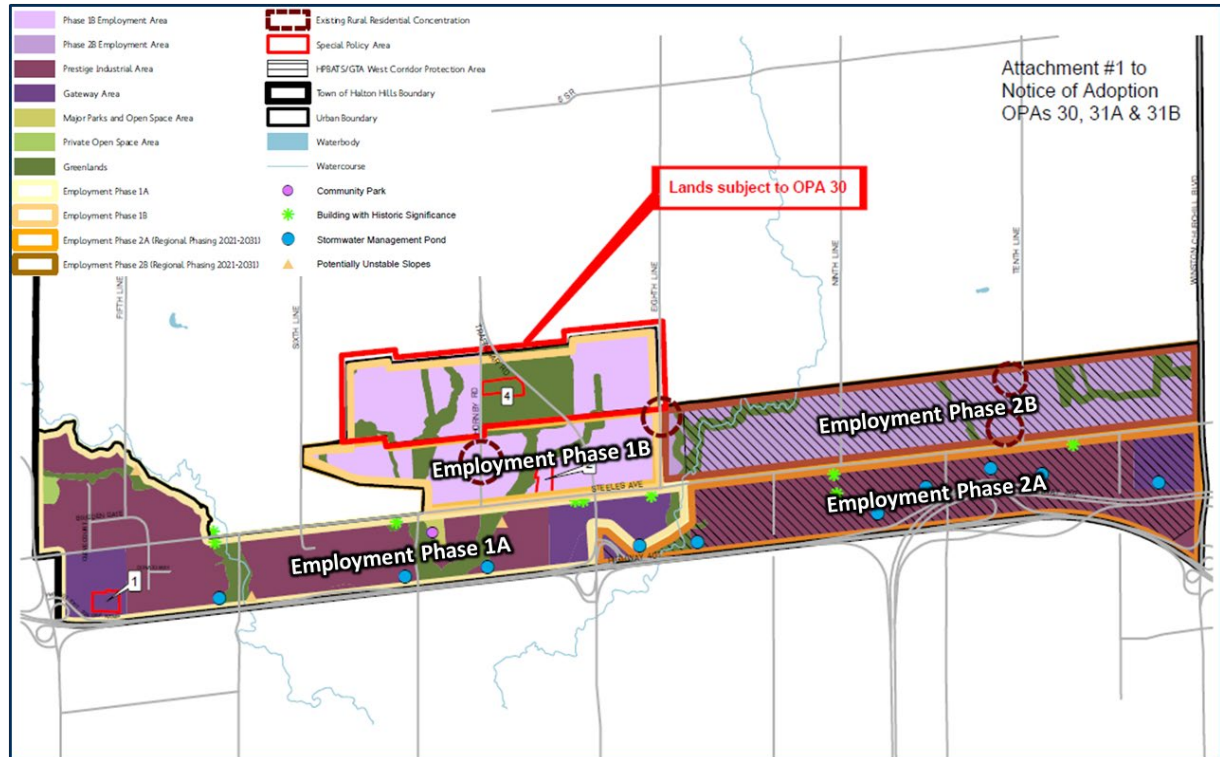
TER’s role in this multi-disciplinary team is to conduct the Supportive Commercial Needs Assessment for the Premier Gateway Phase 2B Employment Area. The findings of this study are inputs to the recommended plans and policies for the Phase 2B Employment Area.

The purpose of the overall study is to undertake the Phase 2B Employment Area Integrated Planning Project. More specifically, it is to develop a Secondary Plan for the Phase 2B Employment Lands. Within these broader goals of the overall planning project, TER’s role is to conduct the Supportive Commercial Needs Assessment for the Phase 2B Employment Area.

2.2 Study Area

The Phase 2B Study Area was defined by Halton Hills. The location of the Premier Gateway Phase 2B area is indicated in Figure 2-1. The Study Area is the Phase 2B Employment Area which is generally located north of Steeles Avenue, between Eighth Line to the west and the City of Brampton border (Winston Churchill Boulevard) to the east.

Figure 2-1: Premier Gateway Employment Area

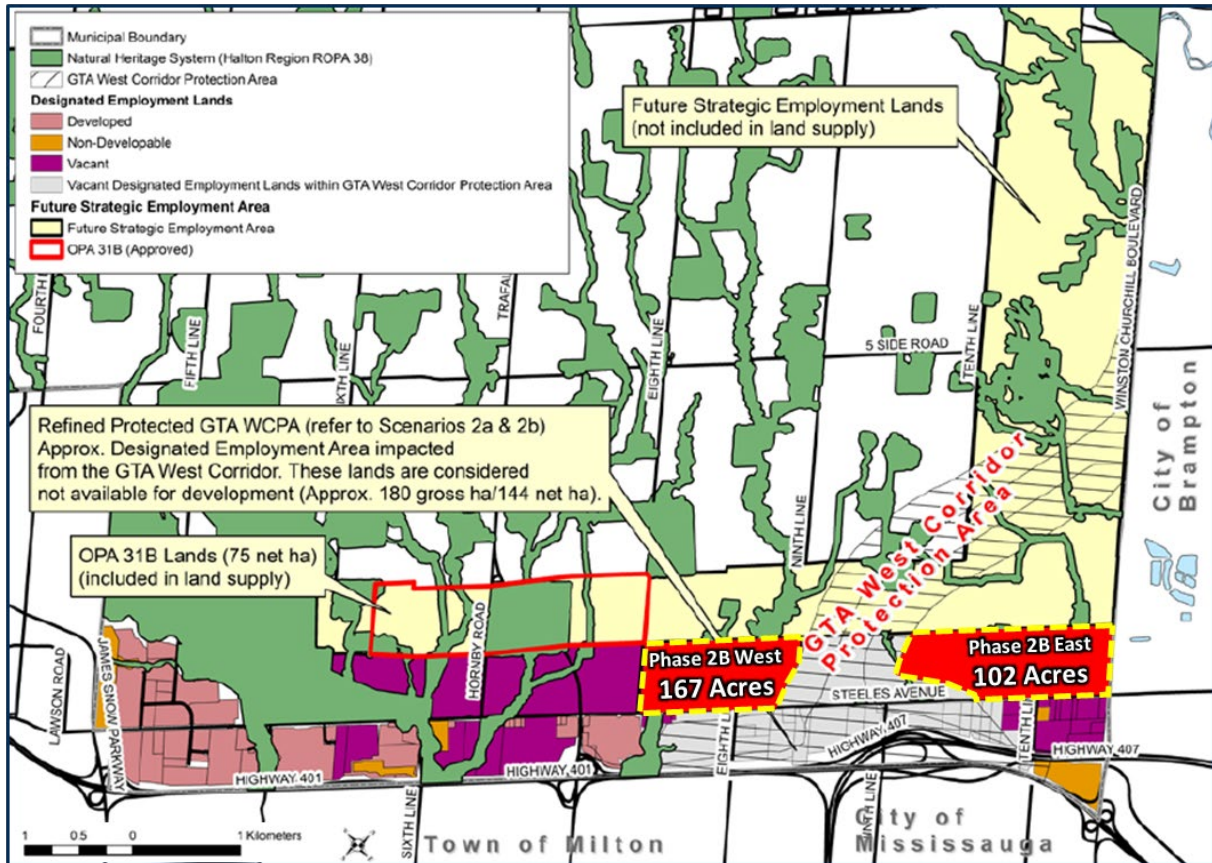


Source: Tate Economic Research Inc.; Basemap: Town of Halton Hills Official Plan, Schedule A8.

TER has reviewed the Watson & Associates Economists Ltd. report titled Employment Land Needs Assessment, Town of Halton Hills, Phases 1 & 2 Final Report, dated January 14, 2020 (“Watson Report”). The Watson Report indicates a gross size of 269 acres, (excluding environmental areas) for the Premier Gateway Phase 2B Employment Area. This size excludes lands reserved for the development of the GTA West Highway. The GTA West Highway is a major transportation corridor planned to include a 400 series highway that will link the 401 / 407 to Highways 410, 427 and 400. It is intended to run through the Premier Gateway Phase 2B Employment Area, as indicated in Figure 2-2. The preferred route for the GTA West Highway was finalized in August 2020. Any differences between the route assumed in the Watson

Report and the final preferred route will not have a material impact on the findings of this report.

Figure 2-2: GTA West Highway



Source: Tate Economic Research Inc.; Basemap: Watson Report, Map F-2.

2.3 Mandate

The overall mandate of this Supportive Commercial Needs Assessment is stated in the Town’s Request For Proposal: “Premier Gateway Phase 2B Employment Area Integrated Planning Project”, dated January 30, 2020. 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.

There are multiple phases of the overall study. These phases include:

- Phase 1: Project Initiation

- Phase 2A: Existing Conditions
- Phase 2B: Subwatershed and Natural Heritage System Planning
- Phase 3: Detailed Planning Study

The Supportive Commercial Needs Assessment is one of the studies that supports the development of Secondary Plan policies and land use designations. It is included in Phase 3, the Detailed Planning Study.

After completion of Phase 3, the following phases will be completed:

- Phase 4A: Recommended Land Use Option
- Phase 4B: Preferred Land Use Plan
- Phase 5A: Draft Secondary Plan, Official Plan & Zoning By-law Amendments
- Phase 5B: Final Secondary Plan, Official Plan & Zoning By-law Amendments

2.4 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 the previous Supportive Commercial Needs Assessment conducted for the Phase 1B Employment Area;
- An overview of common location characteristics, market factors and tenant trends that influence the attractiveness of employment areas as locations for Supportive Commercial Uses;
- A review of the Town's existing employment area land use and zoning policies as they relate to a range of uses including hotel and lodging facilities; health, fitness and recreation; entertainment and amusement uses; eating & dining; automotive oriented retailing; highway commercial uses, warehouse / wholesale retailing; tourist commercial uses and other retail and service commercial uses permitted in the Town's employment areas;
- A profile of the amount and types of existing retail and service commercial uses established in the Town's employment areas. This profile has been based on field inspections undertaken by TER;
- The opportunity for a range of common and complimentary Supportive Commercial Uses has been identified using the commercial space benchmarks for a range of common Supportive Commercial Uses based on other employment areas in the Town and elsewhere. These benchmarks for municipalities outside of Halton Hills were based on TER's existing inventory

research database from the Town of Ajax, Town of Oakville, Town of Milton and City of Vaughan.

The types of uses analysed included:

- Health and fitness uses;
 - Entertainment and amusement uses;
 - Eating & dining;
 - FIRE professional services;
 - Personal services;
 - Medical / Dental services;
 - Building and home supply retail;
 - Automotive retail; and
 - Other select types of retail uses.
- Review of employee forecasts and land absorption rates, as prepared by Watson; 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 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 purpose of this work plan is to assist TER in identifying the opportunity for Supportive Commercial Uses and estimate the approximate land requirements needed to accommodate a range of Supportive Commercial land use categories in the Premier Gateway Phase 2B Employment Area.

3 Halton Hills Employment Area Review

This section of the TER Report examines the policy framework guiding the development of employment areas in Halton Hills, with a particular emphasis on Supportive Commercial Uses in employment areas.

3.1 Designations and Locations

The Town of Halton Hills Official Plan (“OP”) states “The Employment Area designation recognizes the existing industrial areas in Acton, Georgetown and Mansewood, as well as the emerging Premier Gateway Employment Area.” TER notes that there is no significant Supportive Commercial Uses in Mansewood.

There are two types of Employment Land use areas. These types are General Employment Area and Premier Gateway Employment Area Phase 1. The types are outlined in greater detail below.

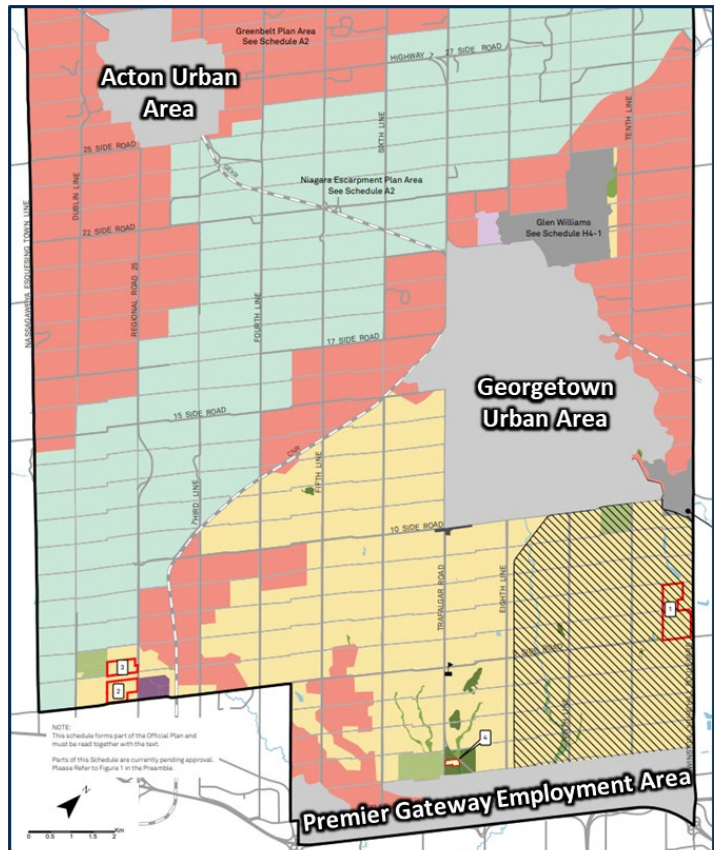
3.2 General Employment Area

The General Employment Area includes Main Permitted Uses and Secondary Permitted Uses:

The Main Permitted Uses are:

- a) Industrial uses within wholly enclosed buildings, such as manufacturing, assembling, processing, fabricating, warehousing, wholesaling and distribution facilities;
- b) Industrial uses that involve outdoor storage and / or processing such as concrete batching plants, aggregate transfer stations and contractors’ establishments, subject to restrictions;

Figure 3-1: Halton Hills Land Use



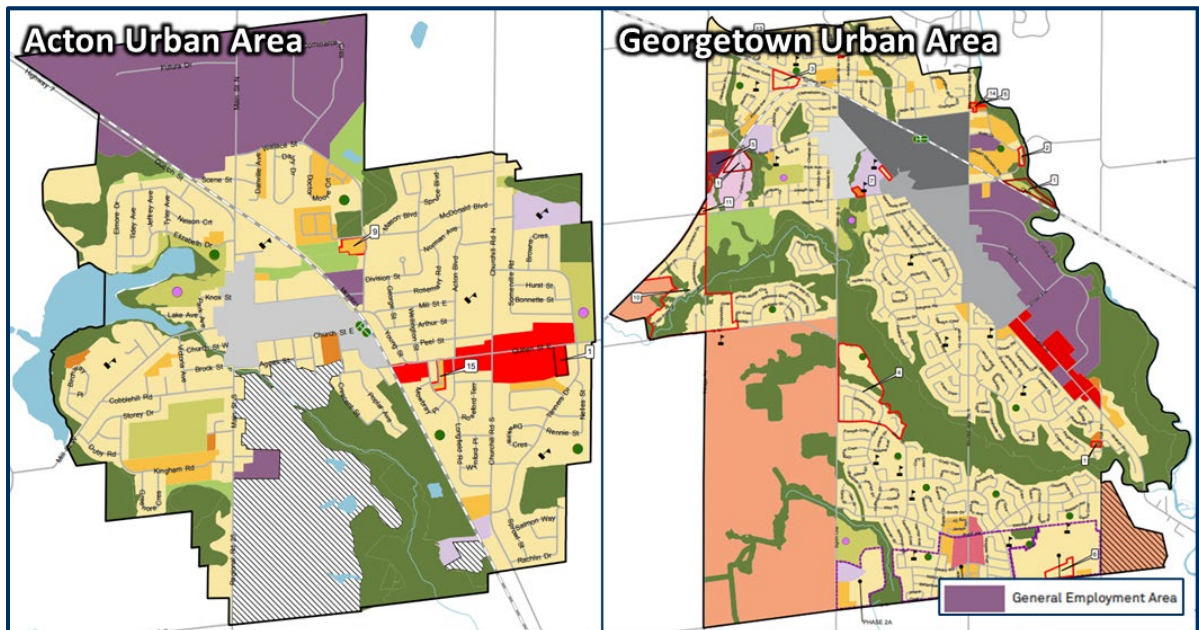
Source: Tate Economic Research Inc.; Basemap: Town of Halton Hills Official Plan, Schedule A1.

- c) Research and training establishments;
- d) Computer, electronics and data processing facilities;
- e) Printing and associated service establishments;

The Secondary Permitted Uses are:

- a) Commercial self-storage establishments;
- b) Freestanding office buildings;
- c) Commercial fitness centres;
- d) Restaurants;
- e) Day nurseries subject to restrictions;
- f) Private and commercial schools subject to restrictions; and,
- g) Motor vehicle repair establishments and motor vehicle body shops.

Figure 3-2: Halton Hills General Employment Areas



Source: Tate Economic Research Inc.; Basemap: Town of Halton Hills Official Plan, Schedule A3 and A6.

3.3 Premier Gateway Employment Area Phase 1

The Premier Gateway Employment Area Phase 1 is intended to be developed with a range of industrial, office, commercial and institutional uses. Its objectives include:

- a) Provide for the development of a major new employment area that takes advantage of the area's accessibility and visibility in the Town, Region and the Greater Toronto Area;

- b) Ensure that the design of new development in the area is representative of the area's location as one of the gateways into the Town of Halton Hills and is sensitive to the character of the area;
- c) Ensure that new development occurs in an orderly manner; and,
- d) Ensure that all new development is provided with appropriate water and wastewater services and other infrastructure.

Lands within the Premier Gateway Employment Area Phase 1 are divided into six land use designations, as outlined below:

- Prestige Industrial Area;
- Gateway Area;
- Greenlands;
- Major Parks and Open Space Area;
- Private Open Space Area, and,
- Phase 1B Employment Area.

Prestige Industrial Area

The Prestige Industrial Area comprises the majority of the lands within the Premier Gateway Employment Area Phase 1A. The permitted uses are described as "Permitted Uses" and "Permitted Secondary Uses".

Permitted Uses:

- a) Business and professional offices in free-standing buildings;
- b) Industrial uses within wholly enclosed buildings, such as manufacturing, assembling, processing, fabricating, warehousing, wholesaling and distribution facilities;
- c) Computer, electronics and data processing;
- d) Research and development facilities excluding those that produce biomedical wastes;
- e) Printing and associated service establishments; and,
- f) Industrial malls, containing one or more of the uses permitted in this designation.

Permitted Secondary Uses:

- a) Administrative office uses accessory to, and located on the same lot as a permitted industrial use;
- b) Limited commercial uses which are ancillary to the main permitted industrial uses, such as take-out or full-service restaurants, financial institutions, convenience stores, and commercial fitness centres;
- c) Commercial or trade schools;

- d) Public parks and recreational facilities, in accordance with Section F7 (Parkland) of this Plan
- e) Limited private parks and recreational facilities;
- f) Limited retail sales of goods and materials manufactured, or substantially assembled on the premises;
- g) Post secondary education and other institutional facilities;
- h) Motor vehicle service stations; and,
- i) Uses that legally existed at the date of adoption of this Plan and expansions or alterations thereto which conform to the implementing Zoning By-law for the Premier Gateway Employment Area Phases 1A and 2A.

Gateway Area

Lands within the Premier Gateway Employment Area Phases 1A and 2A in the immediate vicinity of James Snow Parkway, Winston Churchill Boulevard and Trafalgar Road are designated as Gateway Area.

The Gateway Area objectives include:

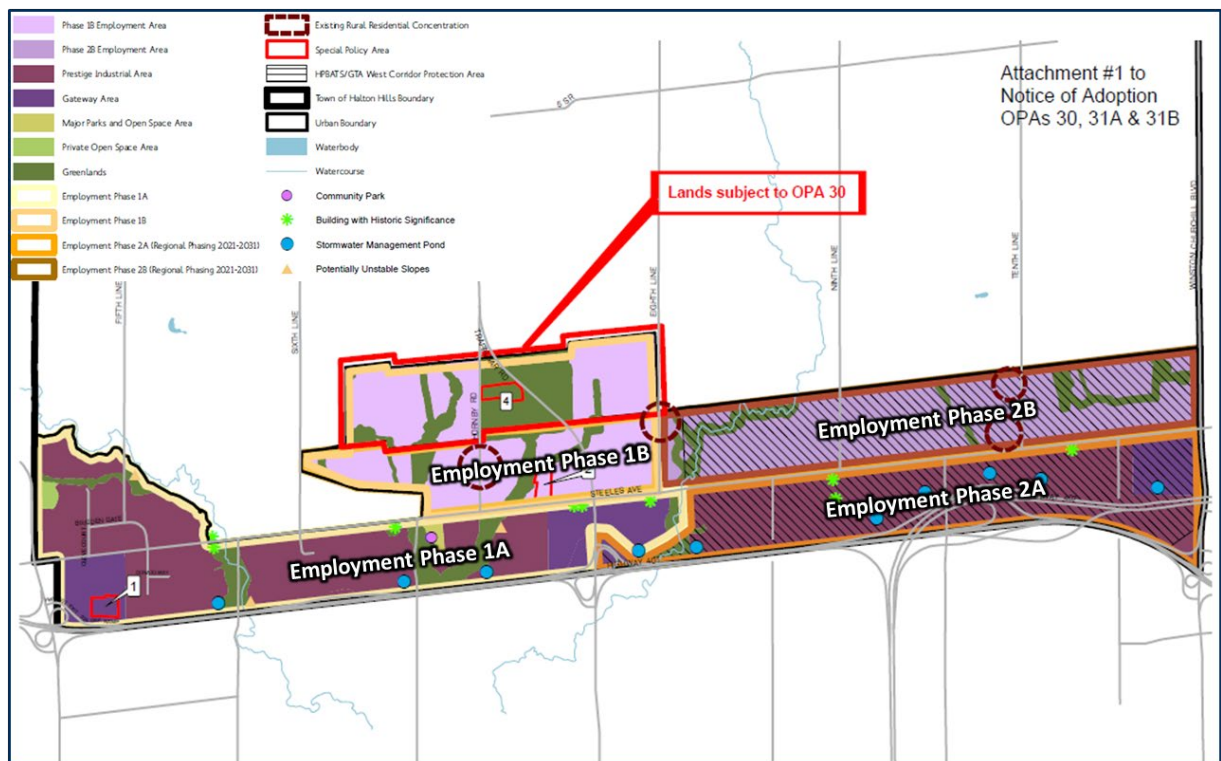
- a) Establish visually attractive points of entry into the Town of Halton Hills that will provide commercial services in support of the Prestige Industrial Area;
- b) Draw the travelling public off the Highway 401/407 allowing an introduction to the Town of Halton Hills and its attractions and amenities beyond the Premier Gateway Employment Area; and,
- c) Provide a location for services that are important to the support of the primary industrial function of the Corridor such as hotels, financial services and opportunities for shopping.

Permitted Uses in the Gateway Area are:

- a) Full service hotels including full service hotels with conference and exhibition facilities;
- b) Retail commercial uses not exceeding individual areas of 2,750 square metres in floor area;
- c) Council may pass by-laws to permit individual retail commercial uses of individual stores over 2,750 square metres and over 10,000 square metres in total retail space within the Gateway Area designation providing the use meets the objectives of this Plan and: i) is supported by studies addressing regional market and transportation impacts; ii) is supported by an Urban Design Study outlining how the project can meet the objectives contained in this Plan and the 401 Corridor Urban Design Guidelines, and, iii) is supported by other appropriate studies requested by the Town.
- d) Banks and financial institutions and services;
- e) Motor vehicle service centres, but not with 200 metres of the intersection of Steeles Avenue with Trafalgar Road and James Snow Parkway;

- f) Business and professional offices in free-standing buildings;
- g) Computer, electronics and data processing facilities;
- h) Research and development facilities excluding those that produce biomedical wastes;
- i) Printing and associated service establishments;
- j) Take out restaurants providing they are incorporated into larger developments and are ancillary to the primary use;
- k) Full service restaurants;
- l) Theatres, cinemas and similar places of entertainment but not an adult entertainment establishment; and,
- m) Uses that legally existed at the date of the adoption of this Plan and expansion or alterations thereto, which conform to the implementing Zoning By-law for the Premier Gateway Employment Area Phases 1A and 2A.

Figure 3-3: Premier Gateway Employment Area



Source: Tate Economic Research Inc.; Basemap: Town of Halton Hills Official Plan, Schedule A8.

The Gateway Area designation is the most permissive with respect to retailing. It allows for retail uses up to 2,750 m² (30,000 square feet) in floor space in individual areas and up to 10,000 m² (107,000 square feet) 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, which is approximately 47,000 m² (500,000 square feet).

3.4 Policy Analysis Conclusions

A wider range of commercial uses are permitted, including hotels and retail uses, within the Gateway Area, and a more limited selection of retail / accessory uses are permitted in the General and Prestige Employment Areas.

4 Supportive Commercial Uses in Employment Areas

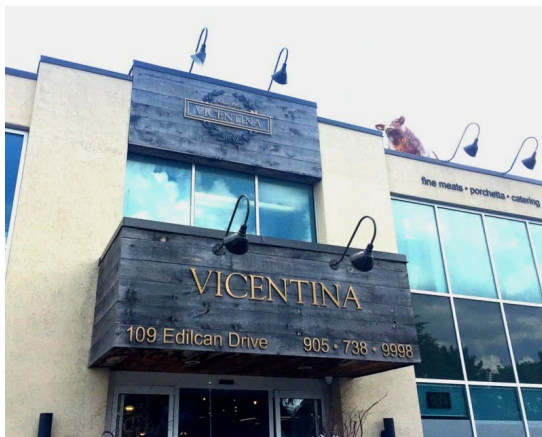
This section of the TER Report provides an overview of the types of Supportive Commercial Uses that typically locate within employment lands. It also provides commentary relating to the common location characteristics, market factors and tenant trends that influence the attractiveness of employment areas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

4.1 Types of Supportive Commercial Uses

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) uses located in employment areas, which often include:

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



Vicentina Meats - Vaughan



Oakville Home Leisure - Oakville

In terms of retail commercial space, there is typically more service space than retail space in the employment areas. Ancillary service uses include:

- Hotels,
- Restaurants;
- Fast food;

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

These service uses are intended to primarily serve the users of the employment area in terms of employees and visitors. They also rely on the travelling public and as a result, locational attributes are important factors in their success.



Home2 Suites - Milton

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.

5 Supportive Commercial Uses in Employment Areas – Existing Conditions

This section of the report examines the existing commercial uses in the employment areas of Halton Hills. As outlined in the previous section, 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 found in employment areas. In this analysis, we have assumed that all retail and service commercial space that is located within employment areas are classified as Supportive Commercial Uses.

5.1 Supportive Commercial Uses in Employment Areas

An inventory of all retail commercial space in employment areas in the Town was conducted by TER in December 2020. Retail and service space is located primarily within three employment areas. These employment areas are indicated in Figure 5-1. The following points list the employment areas:

- Map Key 1 – Acton Employment Area
- Map Key 2 – Georgetown Employment Area
- Map Key 3 – Premier Gateway Employment Area

Figure 5-1: Halton Hills Employment Areas



Source: Tate Economic Research Inc.; Basemap: ESRI ArcGIS.

Figure 5-2, on the following page, indicates the amount and distribution of retail commercial space in employment areas in the Town. This analysis is summarized as follows:

- Overall, there is approximately 664,100 square feet of retail and service space in employment areas in the Town. The majority of that space (83%) is located within the Premier Gateway Employment Area. This is largely due to the presence of the Toronto Premium Outlets which total approximately 500,000 square feet;
- The majority of space in employment areas in the Town (82%) is comprised of retail space, largely due to the presence of the Toronto Premium Outlets in the Premier Gateway Employment Area;
- 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, Entertainment & Recreation comprise the largest amount of space; and,

Figure 5-2: Summary of Retail and Service Space in Halton Hills Employment Areas ⁽¹⁾

	Acton Employment Area	Georgetown Employment Area	Premier Gateway Employment Area	TOTAL HALTON HILLS EMPLOYMENT AREAS
Food & Beverage Retail (FBR)				
Supermarkets & Grocery Stores	0	0	0	0
Convenience & Specialty Food Stores	0	3,600	12,800	16,400
Beer, Wine & Liquor	0	0	0	0
Food & Beverage Retail (FBR)	0	3,600	12,800	16,400
Non-Food & Beverage Retail (NFBR)				
Department Stores	0	0	0	0
General Merchandise	0	0	0	0
Clothing, Shoes & Accessories	0	0	446,200	446,200
Furniture, Home Furnishings & Electronics	0	3,600	26,900	30,500
Pharmacies & Personal Care Stores	0	0	7,800	7,800
Building & Outdoor Home Supplies	7,400	19,300	3,900	30,600
Miscellaneous Retailers	0	3,800	18,900	22,700
Automotive	3,300	5,000	0	8,300
Subtotal Non-Food & Beverage Retail (NFBR)	10,700	31,700	503,700	546,100
Service Space				
Food Services & Drinking Places	0	3,800	17,700	21,500
Personal Care & Laundry Services	0	1,900	0	1,900
Financial, Insurance, Legal & Real Estate Services	0	1,600	5,800	7,400
Health Care & Social Assistance Services	0	5,900	0	5,900
Entertainment & Recreation Services	5,300	48,700	10,900	64,900
Other Services	0	0	0	0
Subtotal Service Space	5,300	61,900	34,400	101,600
Total Retail & Service Space	16,000	97,200	550,900	664,100
Percent Distribution	2%	15%	83%	100%

Source: Tate Economic Research Inc.

¹⁾ Based on inventory and site inspections completed by TER in December 2020. Rounded to the nearest 100 square feet.

- 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.



Toronto Premium Outlets – Halton Hills

We note that the employment areas in Georgetown are nearing capacity, while development opportunities remain in Acton and in the Premier Gateway Employment Area.

5.2 Types of Supportive Commercial Uses in Halton Hills

Based on the inventory, TER notes a wide range of Supportive Commercial Uses in Halton Hills. A brief description of these uses is provided below:

Acton

Supportive Commercial Uses in Acton include Leathertown Lumber, NAPA Auto Parts and Halton Indoor Golf. Acton has a limited offering of Supportive Commercial Uses in comparison to Georgetown and the Premier Gateway Employment Area.



Leathertown Lumber - Halton Hills

Georgetown

Supportive Commercial Uses in Georgetown are primarily concentrated along Mountainview Road and Armstrong Avenue. The majority of retail commercial space (70%) in the employment areas in Georgetown is composed of Entertainment & Recreation Services and Building & Outdoor Home Supplies. This includes businesses such as the Halton Hills Gymnastic Centre, CrossFit GT and City Electric Supply.

Traditional retail commercial space within Georgetown employment areas is limited to 71 Mountainview Road Plaza which provides a range of uses including Convenience & Specialty Food Stores, Food Services & Drinking Places, Health Care & Social Assistance, Miscellaneous Retail, and Personal Care & Laundry.



71 Mountainview Road N - Halton Hills

Premier Gateway Employment Area

The Toronto Premium Outlet Mall represents 90% of retail commercial space in the Premier Gateway Employment Area. The Toronto Premium Outlet Mall is primarily composed of Clothing, Shoes & Accessories stores but also includes Furniture, Home Furnishings & Electronics, Food Services & Drinking Places, Convenience & Specialty Food Stores, and Miscellaneous Retailers.



Livno Meat and Deli - Halton Hills

The remainder of retail commercial space in the Premier Gateway Employment Area is located along Steeles Avenue and includes businesses such as Halton Homestead Furniture, Bahr Saddlery, Livno Meat and Deli, Rugs 4 Home, and AthElite Lab.



Bahr Saddlery - Halton Hills

Mansewood

There is no significant presence of Supportive Commercial Uses within the Mansewood employment area.

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

As indicated in Figure 5-3, based on figures provided by Watson, TER estimates there are 2,747 gross acres of employment land in Halton Hills. Overall, the employment lands are estimated to be 42% occupied, which represents 1,153 acres of occupied land.

There is 664,100 square feet of retail and service space in the Halton Hills employment areas. This figure represents approximately 576 square feet of retail commercial space per acre of occupied employment land in Halton Hills.¹

Figure 5-3: Retail and Service Space Per Acre of Employment Land in Town of Halton Hills

	Acton Employment Areas	Georgetown Employment Areas	Premier Gateway Employment Area ⁽¹⁾	Total Halton Hills Employment Areas
Employment Area Size (ac) ⁽²⁾	309	314	2,124	2,747
Occupied Portion of Employment Area ⁽²⁾	64%	98%	30%	42%
Occupied Employment Area Size (ac)	198	309	647	1,153
Commercial Space Square Feet Per Occupied Acre				
Total Retail & Service Space in Employment Areas (s.f.) ⁽³⁾	16,000	97,200	550,900	664,100
Retail Space / Acre	54	114	798	488
Service Space / Acre	27	200	53	88
Total Retail & Service Space / Acre	81	315	851	576

Source: Tate Economic Research Inc.

¹⁾ Employment area size includes Mansewood.

²⁾ Based on Watson & Associates Economists Ltd. Employment Land Needs Assessment, Town of Halton Hills, Phases 1 & 2 Final Report (January 14, 2020). Expressed in gross acres.

³⁾ Repeated from Figure 5-2.

5.4 Existing Commercial Conditions Summary

The Toronto Premium Outlet Mall comprises the majority of retail and service space in employment areas in Halton Hills. The Toronto Premium Outlet Mall has a destination function, serving a market extending well beyond the nearby employment areas. This type of retail commercial space is not intended to serve the daily shopping needs of employees in the surrounding area. However, it is considered an amenity for the nearby employees and it is important to consider it in our market assessment.

There is a wide range of types and uses of Supportive Commercial space within the employment areas of Halton Hills. Halton Hills has 576 square feet of Supportive Commercial space per occupied acre of employment land. However, excluding the Toronto Premium Outlet Mall, the Town has 147 square feet of Supportive Commercial space per occupied acre of employment land.

¹ If the Toronto Premium Outlet Mall is excluded from this calculation, there is 147 square feet of retail commercial space per acre of occupied employment land in Halton Hills. This calculation is based on the 45 acre Toronto Premium Outlet Mall site containing 501,600 square feet of occupied retail commercial space.

6 Commercial Uses in Employment Areas – Case Studies

It is important to understand the Halton Hills Supportive Commercial Uses situation in the context of other municipalities. TER has reviewed inventories of retail commercial space in employment areas in the following locations:

- Ajax;
- Oakville;
- Milton; and,
- Vaughan.

These benchmarks are based on TER's existing inventory research database. These locations were selected based on their location within the Greater Toronto Area providing a similar context to the Town. The following section of the report establishes ratios of retail commercial space per acre of employment land for the above noted locations.

6.1 Case Study – Town of Ajax

The Town of Ajax employment lands are composed of three land use designations: General Employment, Prestige Employment, and GO Transit Station Mixed Use Area. Figure 6-1, on the following page, summarizes an inventory of retail commercial space within employment lands in the Town of Ajax. This analysis is summarized as follows:

- Overall, there is approximately 696,700 square feet of retail and service space in the Ajax employment areas;
- The majority of that space (68%) is comprised of service space. Within the service category, the space is primarily comprised of Entertainment & Recreation Services and Other Services; and,
- There is approximately 222,300 square feet of retail space in the Ajax employment areas. The largest categories of retail space are Furniture, Home Furnishings & Electronics and Miscellaneous Retail.

As indicated in Figure 6-2, on the following page, TER estimates that employment areas amount to 1,761 acres in Ajax. Overall, they are estimated to be 68% occupied, which represents 1,198 acres of occupied employment land.

There is 696,700 square feet of retail and service space in the Ajax employment areas. This figure represents approximately 582 square feet of Supportive Commercial space per acre of occupied employment land in Ajax.

Figure 6-1: Summary of Retail and Service Space in Ajax Employment Areas ⁽¹⁾

	General Employment	Prestige Employment	GO Transit Station Mixed Use Area	Total Ajax Employment Areas
Food & Beverage Retail (FBR)				
Supermarkets & Grocery Stores	0	0	0	0
Convenience & Specialty Food Stores	0	2,200	1,000	3,200
Beer, Wine & Liquor	0	0	0	0
Subtotal Food & Beverage Retail (FBR)	0	2,200	1,000	3,200
Non Food & Beverage Retail (NFBR)				
Department Stores	0	0	0	0
General Merchandise	0	0	0	0
Clothing, Shoes & Accessories	3,800	0	0	3,800
Furniture, Home Furnishings & Electronics	5,200	72,800	5,000	83,000
Pharmacies & Personal Care Stores	0	6,800	0	6,800
Building & Outdoor Home Supplies	3,000	13,900	0	16,900
Miscellaneous Retailers	55,200	28,200	0	83,400
Automotive	12,000	13,200	0	25,200
Subtotal Non Food & Beverage Retail (NFBR)	79,200	134,900	5,000	219,100
Service Space				
Food Services & Drinking Places	0	44,800	10,200	55,000
Personal Care & Laundry Services	9,500	23,300	0	32,800
Financial, Insurance, Legal & Real Estate Services	10,000	45,500	1,000	56,500
Health Care & Social Assistance Services	0	29,600	6,400	36,000
Entertainment & Recreation Services	0	182,300	0	182,300
Other Services	14,900	95,000	1,900	111,800
Subtotal Service Space	34,400	420,500	19,500	474,400
Total Occupied Retail & Service Space	113,600	557,600	25,500	696,700

Source: Tate Economic Research Inc.

¹⁾ Based on inventory obtained from the Region of Durham's 2016 Employment Survey. Rounded to the nearest 100 square feet.

Figure 6-2: Retail and Service Space Per Acre of Employment Land in Town of Ajax

	General Employment	Prestige Employment	GO Transit Station Mixed Use Area	Total Ajax Employment Areas
Employment Area Size (ac) ⁽¹⁾	689	1,008	64	1,761
Occupied Portion of Employment Area ⁽¹⁾	66%	67%	100%	68%
Occupied Employment Area Size (ac)	457	679	64	1,198
Commercial Space Square Feet Per Occupied Acre				
Total Retail & Service Space in Employment Areas (s.f.) ⁽²⁾	113,600	557,600	25,500	696,700
Retail Space / Acre	173	202	93	186
Service Space / Acre	75	619	304	396
Total Retail & Service Space / Acre	249	821	397	582

Source: Tate Economic Research Inc.

¹⁾ Based on Watson & Associates Economists Ltd. Commercial and Employment Review, Town of Ajax (2019). Expressed in gross acres.²⁾ Repeated from Figure 6-1.

6.2 Case Study - Town of Oakville

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

- Burloak - Business Employment, Business Commercial, Industrial;
- QEW West - Business Employment, Office Employment, Business Commercial, Industrial;
- QEW East - Business Employment, Office Employment, Business Commercial, Industrial; and,
- Winston Park & Winston Park West - Business Employment, Office Employment, Business Commercial, Industrial.

Figure 6-3, on the following page, summarizes an inventory of retail commercial space within employment lands in the Town of Oakville. This analysis is summarized as follows:

- 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. Within the service category, the space is primarily concentrated among three categories: Food Services & Drinking Places, Healthcare & Social Assistance Services, and Other Services; and,
- There is approximately 693,300 square feet of retail space in the Oakville employment areas. Within the retail category, the largest retail types are Building & Outdoor Home Supplies followed by Miscellaneous Retailers and Furniture, Home Furnishings & Electronics.

As indicated in Figure 6-4, on the following page, 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.

There is 2,047,000 square feet of retail and service space in the Oakville employment areas. This figure represents approximately 468 square feet of Supportive Commercial space per acre of occupied employment land in Oakville.

Figure 6-3: 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
Food & Beverage Retail (FBR)					
Supermarkets	0	0	0	0	0
Convenience & Specialty Food Stores	0	20,300	4,500	2,000	26,800
Liquor, Beer & Wine	0	600	600	0	1,200
Subtotal Food & Beverage Retail (FBR)	0	20,900	5,100	2,000	28,000
Non Food & Beverage Retail (NFBR)					
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
Subtotal Non Food & Beverage Retail (NFBR)	2,300	468,100	108,200	86,700	665,300
Service Space					
Food Services & Drinking Places	8,800	91,600	46,600	82,200	229,200
Personal Care & Laundry Services	0	14,700	23,400	1,700	39,800
Financial, Insurance, Legal & Real Estate Services	0	53,200	33,200	12,200	98,600
Health Care & Social Assistance Services	0	155,500	98,000	65,900	319,400
Other Services	0	318,000	157,200	191,500	666,700
Subtotal Service Space	8,800	633,000	358,400	353,500	1,353,700
Total Occupied Retail & Service Space	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.

Figure 6-4: 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	73	174	159
Service Space / Acre	14	375	229	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 6-3.

6.3 Case Study - Town of Milton

There are three employment areas in the Town of Milton. The employment land use designations within the employment areas are indicated below:

- 401 Industrial & Business Park - Business Park Area, Office Employment Area, Business Commercial Area, Industrial Area;
- Derry Green Corporate Business Park - Business Commercial Area, Business Park Area, Industrial Area; and,
- Bronte Street South & Derry Road Employment Area - Office Employment Area.

Figure 6-5, on the following page, summarizes an inventory of retail commercial space within employment lands in the Town of Milton. This analysis is summarized as follows:

- There is approximately 572,800 square feet of retail and service space in Milton employment areas;
- The majority of that space (65%) is comprised of service space. Within the service category, the space is primarily concentrated among three categories: Food Services & Drinking Places, Healthcare & Social Assistance Services, and Other Services; and,
- There is approximately 370,700 square feet of retail space in the Milton employment areas. Within the retail category, the largest retail types are Building & Outdoor Home Supplies followed by Miscellaneous Retailers and Furniture, Home Furnishings & Electronics.

As indicated in Figure 6-6, on the following page, TER estimates that 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.

There is 572,800 square feet of retail and service 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.

Figure 6-5: 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 & Beverage Retail (FBR)				
Supermarkets	0	0	0	0
Convenience & Specialty Food Stores	4,100	6,500	0	10,600
Liquor, Beer & Wine	0	0	0	0
Subtotal Food & Beverage Retail (FBR)	4,100	6,500	0	10,600
Non Food & Beverage Retail (NFBR)				
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
Subtotal Non Food & Beverage Retail (NFBR)	133,800	7,100	50,600	191,500
Service Space				
Food Services & Drinking Places	79,600	7,400	17,000	104,000
Personal Care & Laundry Services	0	3,200	1,900	5,100
Financial, Insurance, Legal & Real Estate Services	0	4,500	16,400	20,900
Health Care & Social Assistance Services	19,100	2,000	95,700	116,800
Other Services	36,100	9,900	77,900	123,900
Subtotal Service Space	134,800	27,000	208,900	370,700
Total Occupied Retail & Service Space	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.

Figure 6-6: Retail and Service Space Per Acre of Employment Land in Town of Milton

	401 Industrial & Business Park	Derry Green Corporate Business Park	Bronte St S & 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. Expressed in gross acres.³⁾ Repeated from Figure 6-5.

6.4 Case Study – City of Vaughan

There are four employment land use designations in the City of Vaughan: Employment Commercial Mixed-Use, Prestige Employment, General Employment, and Secondary Plan. For the purpose of this analysis, TER has excluded Employment Commercial Mixed-Use and Secondary Plan designations as they include non employment lands and uses that are not indicative of typical industrial uses. Figure 6-7, on the following page, summarizes an inventory of retail commercial space within employment lands in the City of Vaughan. This analysis is summarized as follows:

- Overall, there is approximately 3,658,200 square feet of retail and service space in the Vaughan employment areas;
- Service space represents approximately half of the total space in Vaughan employment areas. Within the service category the space is primarily concentrated among three categories: Entertainment & Recreation Services, Financial, Insurance, Legal & Real Estate Services, and Other Services; and,
- There is approximately 1,795,800 square feet of retail space in the Vaughan employment areas. The largest categories of retail space are Building & Outdoor Home Supplies and Furniture, Home Furnishings & Electronics.

As indicated in Figure 6-8, on the following page, TER estimates that employment areas amount to 7,586 acres in Vaughan. Overall, they are estimated to be 73% occupied, which represents 5,530 acres of occupied employment land.

There is 3,658,200 square feet of retail and service space in the Vaughan employment areas. This figure represents approximately 662 square feet of Supportive Commercial space per acre of occupied employment land in Vaughan.

Figure 6-7: Summary of Retail and Service Space in City of Vaughan Employment Lands ^(1,2)

	Prestige Employment	General Employment	Total Vaughan Employment Areas
Food & Beverage Retail (FBR)			
Supermarkets & Grocery Stores	0	0	0
Convenience & Specialty Food Stores	25,400	69,700	95,100
Beer, Wine & Liquor	5,900	12,300	18,200
Food & Beverage Retail (FBR)	31,300	82,000	113,300
Non-Food & Beverage Retail (NFBR)			
Department Stores	0	0	0
General Merchandise	0	0	0
Clothing, Shoes & Accessories	59,500	18,100	77,600
Furniture, Home Furnishings & Electronics	363,500	262,100	625,600
Pharmacies & Personal Care Stores	2,200	10,700	12,900
Building & Outdoor Home Supplies	555,900	209,600	765,500
Miscellaneous Retailers	44,400	87,900	132,300
Automotive	37,500	31,100	68,600
Subtotal Non-Food & Beverage Retail (NFBR)	1,063,000	619,500	1,682,500
Service Space			
Food Services & Drinking Places	142,200	77,500	219,700
Personal Care & Laundry Services	69,500	80,300	149,800
Financial, Insurance, Legal & Real Estate Services	116,600	167,400	284,000
Health Care & Social Assistance Services	56,000	66,300	122,300
Entertainment & Recreation Services	470,900	332,900	803,800
Other Services	180,900	101,900	282,800
Subtotal Service Space	1,036,100	826,300	1,862,400
Total Occupied Retail & Service Space	2,130,400	1,527,800	3,658,200

Source: Tate Economic Research Inc.

¹⁾ Inventory was completed by TER staff during February to May 2020, rounded to the nearest 100 square feet.

²⁾ Employment Commercial Mixed-Use and Secondary Plan designations have been excluded as they are not representative of typical industrial uses.

Figure 6-8: Retail and Service Space Per Acre of Employment Land in City of Vaughan

	Prestige Employment	General Employment	Total Vaughan Employment Areas
Employment Area Size (ac) ¹⁾	2,155	5,431	7,586
Occupied Portion of Employment Area ²⁾	73%	73%	73%
Occupied Employment Area Size (ac)	1,571	3,959	5,530
Commercial Space Square Feet Per Occupied Acre			
Total Retail & Service Space in Employment Areas (s.f.) ³⁾	2,130,400	1,527,800	3,658,200
Retail Space / Acre	697	177	325
Service Space / Acre	659	209	337
Total Retail & Service Space / Acre	1,356	386	662

Source: Tate Economic Research Inc.

¹⁾ TER estimate of employment area size based on City of Vaughan Land Use data expressed in gross acres.

²⁾ York Region 2017 Vacant Employment Land Inventory, March 2018.

³⁾ Repeated from Figure 6-7.

6.5 Commercial Uses in Employment Areas – Case Studies Summary

Much of the retail and service space in employment areas in the benchmark areas of Milton, Oakville, Vaughan and Ajax serves as an accessory use to the existing primary employment land uses. However, there are retail and service concentrations in Oakville (the Oakville Entertainment Centrum) and Vaughan (Improve Canada) that serve a market extending well beyond the nearby employment areas. In addition, the Lifetime Fitness facility in Ajax would likely serve a broader area.

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 & Drinking Places 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. TER calculated the amount of Supportive Commercial space per occupied acre of employment lands in Milton, Oakville, Vaughan and Ajax. These figures ranged from 199 square feet per occupied acre in Milton to 662 square feet per occupied acre in Vaughan. In comparison, Halton Hills has 576 square feet of Supportive Commercial space per occupied acre of employment land.

7 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 Uses in the Study Area.

7.1 Employment Land Demand Overview

The Watson Report, referenced previously in this TER Report, was completed in 2020. It includes an assessment of existing employment areas and forecasts future demand for employment lands in Halton Hills.

Watson forecasts significant growth in employment in Halton Hills, from 25,500 employees in 2016 to 53,000 by 2041. This employment growth is accompanied by a significant increase in demand for employment lands. Watson has estimated there is 929 net acres of designated, vacant employment lands. Watson has forecast a shortfall in employment lands by 2041. The Watson Report states that the Town “will need approximately 338 gross hectares (835 gross acres) of additional designated employment lands to accommodate forecast demand to 2041.”²

Based on the analysis summarized in the Watson Report, it is concluded that there is sufficient demand for the Premier Gateway Phase 2B Employment Area Phase 2B lands to be absorbed and occupied in the near to mid term, prior to 2041.

7.2 Quantification of Supportive Commercial Demand

Supportive Commercial space in employment lands benchmarks were determined based on the inventory of space in Halton Hills, Oakville, Milton, Ajax, and Vaughan. These municipalities are considered to be acceptable comparisons for the future demand for Supportive Commercial space in the Premier Gateway Phase 2B Employment Area.

The analysis summarized in Sections 5 and 6 of this TER Report indicated the following ratios for the municipalities studied:

- Halton Hills: 576 square feet of retail commercial space per acre of occupied employment land;
- Ajax: 582 square feet of retail commercial space per acre of occupied employment land

² Watson & Associates Economists Ltd. “*Employment Land Needs Assessment, Town of Halton Hills, Phases 1 & 2 Final Report*” dated January 14, 2020, Page vi.

- Milton: 199 square feet of retail commercial space per acre of occupied employment land;
- Oakville: 468 square feet of retail commercial space per acre of occupied employment land; and,
- Vaughan: 662 square feet of retail commercial space per acre of occupied employment land.

We note that there are retail commercial developments that influence these average results. There are retail commercial concentrations in Oakville (the Oakville Entertainment Centrum), Halton Hills (Toronto Premium Outlets), and Vaughan (Improve Canada) that serve a market extending well beyond the nearby employment areas. In addition, the Lifetime Fitness facility in Ajax would likely serve a broader market area. 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, 147 square feet per acre in Halton Hills, 498 square feet per acre in Ajax, and 609 square feet per acre in Vaughan.

It is also noted that there is the opportunity for the existing and planned Supportive Commercial Uses in Phase 1B to serve the employees of Phase 2B. As such, the market demand for warranted space is reduced in the Phase 2B lands.

In order to reflect the focus on actual Supportive Commercial Uses and to recognize the retail commercial uses in the adjacent Phase 1 lands, TER has used a benchmark that is lower than in the Case Studies. Based on this approach, our demand analysis has been summarized in Figure 7-1, on the following page.

This analysis indicates various scenarios for warranted Supportive Commercial space in the Premier Gateway Phase 2B Employment Area. Based on a size of approximately 269 gross acres, TER’s analysis indicates demand for between 40,000 square feet and 80,000 square feet of retail commercial space in the Premier Gateway Phase 2B Employment Area. Based on an industry standard factor of 25% building to lot coverage, the 40,000 square feet to 80,000 square feet would require 4 to 8 acres of land.

Figure 7-1: Warranted Supportive Commercial Floor Space

	Low	Medium	High
Recommended Supportive Commercial Floor Space ⁽¹⁾	150	225	300
Employment Lands in Study Area (ac)⁽²⁾	269		
Study Area Warranted Supportive Commercial Floor Space ⁽³⁾	40,400	60,600	80,800
Land Requirement (Acres) ⁽⁴⁾	4	6	8

Source: Tate Economic Research Inc.

¹⁾ Expressed as square feet / acre.

²⁾ TER estimate of gross (excluding environmental area) employment land designated within Premier Gateway Phase 2B area, expressed in acres.

³⁾ Expressed in square feet, rounded to nearest 100.

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

7.3 Location of Warranted Supportive Commercial Uses

The factors that influence the locational patterns of Supportive Commercial Uses in Section 3 of this TER Report. Based on this review, in conjunction with our assessment of the opportunities in the Study Area, a recommended locational strategy has been determined.

It is necessary that Supportive Commercial Uses have adequate frontage, exposure and accessibility. In the Study Area, these characteristics are provided via Steeles Avenue and Winston Churchill Boulevard. In addition, it is noted that the Phase 2B Lands are divided into east and west portions, resulting from the planned GTA West Corridor. Both east and west portions have frontage, exposure and accessibility to Steeles Avenue. In addition, the GTA West Corridor is proposing to include a future transitway with a stop at Steeles Avenue. As such, it is recommended that Supportive Commercial Uses be located on both sides of the GTA West Corridor, on Steeles Avenue.

In addition, the east portion of the Phase 2B Lands has exposure and frontage on Winston Churchill Boulevard. It is noted that there are constraints to the extent of development that could occur on Winston Churchill Boulevard due to the limited distance to Highway 407. However, it is noted that the lands at the intersection of Winston Churchill Boulevard and Steeles Avenue would provide opportunity for Supportive Commercial Uses, as would lands located north of this intersection.

7.4 Recommended Designation / Zoning For Supportive Commercial Uses

Lands in the adjacent Premier Gateway Phase 1B Area are designated Prestige Industrial. With respect to Supportive Commercial Uses, this designation permits

“Limited commercial uses which are ancillary to the main permitted industrial uses, such as take-out or full-service restaurants, financial institutions, convenience stores, and commercial fitness centres;” and “Limited retail sales of goods and materials manufactured, or substantially assembled on the premises;”

The Prestige Industrial designation is recommended for the Phase 2B Lands. It will provide the opportunity for a sufficient range of Supportive Commercial Uses.

7.5 Supportive Commercial Needs Assessment Conclusion

The TER analysis indicates market demand for 40,000 square feet to 80,000 square feet of Supportive Commercial space in the Premier Gateway Phase 2B Employment Area. This amount of Supportive Commercial space will require between 4 and 8 acres of land. The opportunity for Supportive Commercial uses should be provided along Steeles Avenue, on both sides of the GTA West Corridor lands. The Prestige Industrial designation is recommended for the Phase 2B Lands.