



**urban
Metrics**

4099 ERIN MILLS PARKWAY

Retail Market Study

Mississauga, Ontario

Prepared for Queenscorp (Erin Mills) Inc.

August 31, 2022



QUEENSCORP
GROUP

This document is available in alternative formats upon request by contacting:

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August 31, 2022

Ms. Ida Assogna
VP of Land Development
Queenscorp (Erin Mills) Inc.
2 Queen Elizabeth Boulevard
Toronto, Ontario
M8Z 1L8

Dear Ida:

RE: 4099 Erin Mills Parkway – Retail Market Study (Mississauga, Ontario)

urbanMetrics inc. (“urbanMetrics”) is pleased to submit this Retail Market Study for your site at 4099 Erin Mills Parkway (the “subject site”) in the City of Mississauga, Ontario. The subject property is located at the southeast corner of Erin Mills Parkway and Folkway Drive, south of Highway 403, west of Sawmill Valley Drive. It is some 2.6 hectares in size and is currently occupied by a retail plaza with ancillary surface parking.

The purpose of this study has been to identify the market demand for ground floor retail/service commercial space that can be supported after the redevelopment of the existing shopping centre. It is also to ensure that the loss of commercial space on the site, does not negatively impact the amount of local-serving retail and service space from a community amenity and needs perspective. It has been a pleasure conducting this report on your behalf and we look forward to discussing the results of our findings with you.

Yours truly,

urbanMetrics inc.

A handwritten signature in black ink, appearing to read "D. R. Annand".

Douglas R. Annand, CMC, PLE
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A handwritten signature in black ink, appearing to read "Megan Easton".

Megan Easton
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1.0 Introduction

1.1 Background

urbanMetrics inc. (“urbanMetrics”) has been retained by Queenscorp (Erin Mills) Inc. (“Queenscorp”) to prepare a *Retail Market Study* for the proposed redevelopment of their existing shopping centre located at 4099 Erin Mills Parkway, hereafter referred to as the subject site.

The subject site—which comprises approximately 2.6 hectares—is located in the City of Mississauga at the southeast corner of Erin Mills Parkway and Folkway Drive, south of Highway 403, and west of Sawmill Valley Drive. It is currently occupied by a retail plaza with ancillary parking. Queenscorp’s proposal is to demolish the existing retail/service commercial uses at this location in order to redevelop the site as a new mixed-use project. This redevelopment is proposed to include less retail/service commercial square footage than is currently provided on the subject site.

The site is designated *Urban System* in the Peel Region Official Plan which permits a wide range of uses, including residential uses. The City of Mississauga Official Plan designates the site as *Neighbourhood* located within the Erin Mills Neighbourhood. The subject site is further designated as *Mixed Use*.

As per the policies of the Mississauga Official Plan, areas designated *Neighbourhood* are regarded as stable areas and will not accommodate significant intensification. Existing policies recognize that residential intensification will occur through both infilling and the development of existing commercial developments with Mixed-Use developments. **However, Policy 5.3.5.4 indicates that redevelopment that results in a loss of commercial floor space will not be permitted unless the existing function of the non-residential development can be maintained post redevelopment.** It is the loss of commercial space that has prompted the City of Mississauga to require a *Retail Market Study* for this application.

This *Retail Market Study* evaluates the suitability of the site for neighbourhood-serving commercial uses and provides an assessment of whether existing and future residents living on the subject site or in the surrounding area will have an adequate level of commercial service given the proposed redevelopment of the existing shopping centre. It will consider the impact, if any, of a reduction in local-serving retail and service commercial space from a community amenity and needs perspective, in particular the loss of the existing supermarket on the subject site.

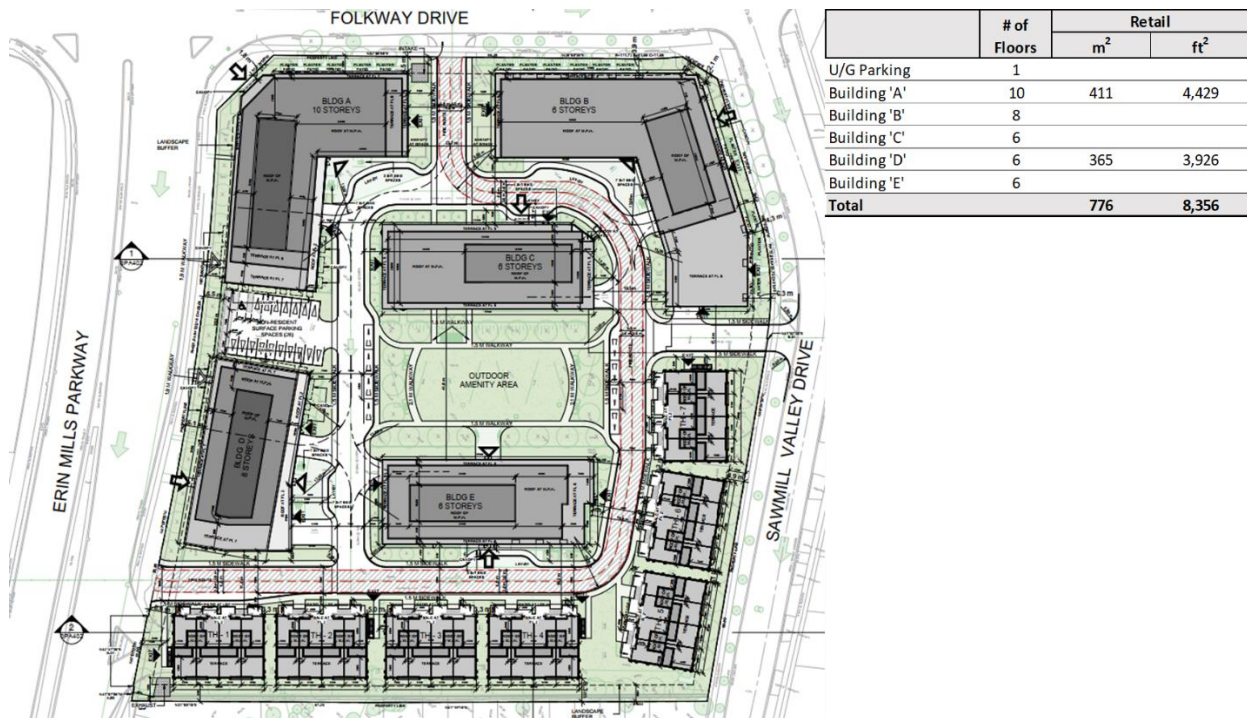
1.2 Proposed Development

The proposed development is a mixed-use project consisting of a four-storey 112-unit stacked townhouse building, and five-condominium buildings consisting of a combined total of 610 condominium units. These condominium buildings range in size between 6 and 10-storeys. Office and retail/service space is also proposed at grade fronting onto Erin Mills Parkway.

This ground floor commercial space is intended to replace the existing commercial space on the subject site and current plans show a total of some 8,356 square feet (776 square metres) gross floor area (“GFA”) as detailed in Figure 1-1.

The proposed redevelopment will not include a supermarket but proposes to include a range of locally based retail/service commercial space, including uses such as: a convenience store, smaller specialty food stores, a take-out restaurant, pet grooming, personal grooming, a dry cleaner, medical uses (such as dentists, physiotherapist etc.), office uses (such as accountants, consultant services etc.) and similar uses some of which already are located on site.

Figure 1-1: Proposed Development



SOURCE: Turner Fleisher Architects Inc. as provided on August 22, 2022. Site statistics summarized by urbanMetrics based on August 22, 2022, statistics summary provided by Turner Fleisher Architects Inc. Figures may not add due to rounding.

1.3 Study Approach

This *Retail Market Study* centres on addressing three key issues, those being:

- From a need or market perspective, is the subject site still a suitable location for the neighbourhood-serving commercial uses that are already located on the site?
- Based on the amount of existing and potential future retail commercial space in the area, will residents of the surrounding area and on the subject site have an adequate level of commercial service after the subject site is redeveloped as proposed?
- What is the potential impact of a reduction in local-serving retail and service commercial space from a community amenity and needs perspective?

Below we have detailed the steps we have taken to address each of these issues.

- 1) **Site and Access** – We have evaluated the suitability of the site as a viable local-serving neighbourhood commercial centre. This includes the subject site’s physical characteristics, the site’s accessibility to the surrounding and broader residential community it is intended to serve, its walkability, and its compatibility with surrounding land uses.
- 2) **Study Area Delineation** – A Study Area has been delineated as the basis for our market analysis. This Study Area represents the geographic area from which the majority of regular customer support will be derived both for the on-site commercial facilities and those located elsewhere in the area. The remainder of customer support will come from pass-by traffic, employees working in the area, and other non-Study Area residents living in other parts of Mississauga and beyond.
- 3) **Population** – The current population residing within the Study Area and the future population that may be accommodated going forward has been considered based on Statistics Canada Census data, as well as data published by the City of Mississauga. This forecast includes the population generated by the residential components being proposed on the subject site.
- 4) **Retail/Service Commercial Inventory** – We have conducted an inventory of all retail/service commercial uses located within the Study Area. This inventory includes all Food Store Retail (FSR); Non-Food Store Retail (NFSR); Beer, Wine and Liquor (BWL) stores; as well as all types of service commercial facilities. It also includes existing vacant retail/service commercial space.

We have also gathered information on other planned and proposed commercial developments in the Study Area, based on information provided by the City of Mississauga. This has enabled us to determine what, if any, developments could

consume a portion of the demand created by the new population being added in the proposed mixed-use development and elsewhere in the Study Area.

- 5) **Calculate Study Area Market Need** – We have conducted a per capita space analysis for select retail and service categories in the Study Area to estimate the future local neighbourhood commercial need of current and future residents living in the Study Area—including residents in the new residential development being proposed on the subject site.

1.4 Assumptions

There are several underlying and basic assumptions upon which the validity of the findings presented in this report depend. Based on our experience in the retail planning process, we recognize and appreciate the problems associated with making broad and generalized assumptions about future conditions. Undoubtedly, deviations from historical and current trends will take place in the future, however, basic assumptions are required regarding the possible extent of such deviations.

These basic assumptions are:

- During the forecast period discussed in this report, a reasonable degree of economic stability will prevail in the Province of Ontario and specifically in the City of Mississauga. The recent impacts of the COVID-19 pandemic will not prevail over the longer term.
- Estimates of the current and future population growth in the Study Area have been based on Census population and planning application information available from the City of Mississauga.
- The official statistical sources utilized in this report (based largely on Statistics Canada, Province of Ontario and City of Mississauga data, which have been footnoted where utilized) are considered sufficiently accurate for the purposes of this analysis (i.e., for historical and current population levels).

Our research and analysis have been conducted in accordance with our authorized scope of work. The findings and recommendations presented in this report represent our best judgment based on the information available to us as of the date of our research. Although every effort has been taken to ensure the accuracy, completeness, and reliability of the information provided in this report, urbanMetrics assumes no responsibility for the consequences of anyone's use of the information contained in this report.

If for any reason major changes occur which would influence the basic assumptions stated above, the recommendations or conclusions contained in this report should be reviewed in light of such changed conditions and revised, if necessary.

2.0 Site and Access

Key Findings

- The subject site is located in the City of Mississauga, at the southeast corner of Erin Mills Parkway and Folkway Drive, south of Highway 403 and west of Sawmill Drive. It is comprised of approximately 2.6 hectares.
- The subject site is located adjacent to Erin Mills Parkway—a *Regional Arterial Road*—in addition to Folkway Drive, and Sawmill Valley Drive—two *Minor Collector Roads*. The subject site will benefit from heightened levels of pass-by traffic along Erin Mills Parkway. The subject site is surrounded by a mix of low and medium density residential development, public open space and a mix of uses.
- The Mississauga Official Plan designates the subject site as *Neighbourhood*, located within the Erin Mills Neighbourhood. The site is further designated *Mixed-Use* under the City of Mississauga Official Plan. While Neighbourhoods are supportive of intensification through the development of commercial sites as mixed-use sites, redevelopment that results in a loss of commercial floor space is not generally permitted—unless the planned function of the existing non-residential space on the site is not impacted. This study is required to determine if current and future residents will still have access to an adequate level of commercial service despite the loss of commercial space on the subject site. It is also, to determine the potential impact—if any—on reducing the local-serving retail/commercial space on the subject site from a community amenity and needs perspective.
- The subject site is located under two kilometres southeast of the Erin Mills Town Centre, a large retail shopping centre with a variety of local and regional serving retail/service commercial space. It is also located less than a kilometre northwest of the South Common Centre that contains a Walmart Supercentre, a No Frills and other local serving retail amenities. The South Common Centre is designated as a Community Node, meaning future residents of the subject site and surrounding area will be supported by continued access to retail/service commercial amenities within a reasonable distance.

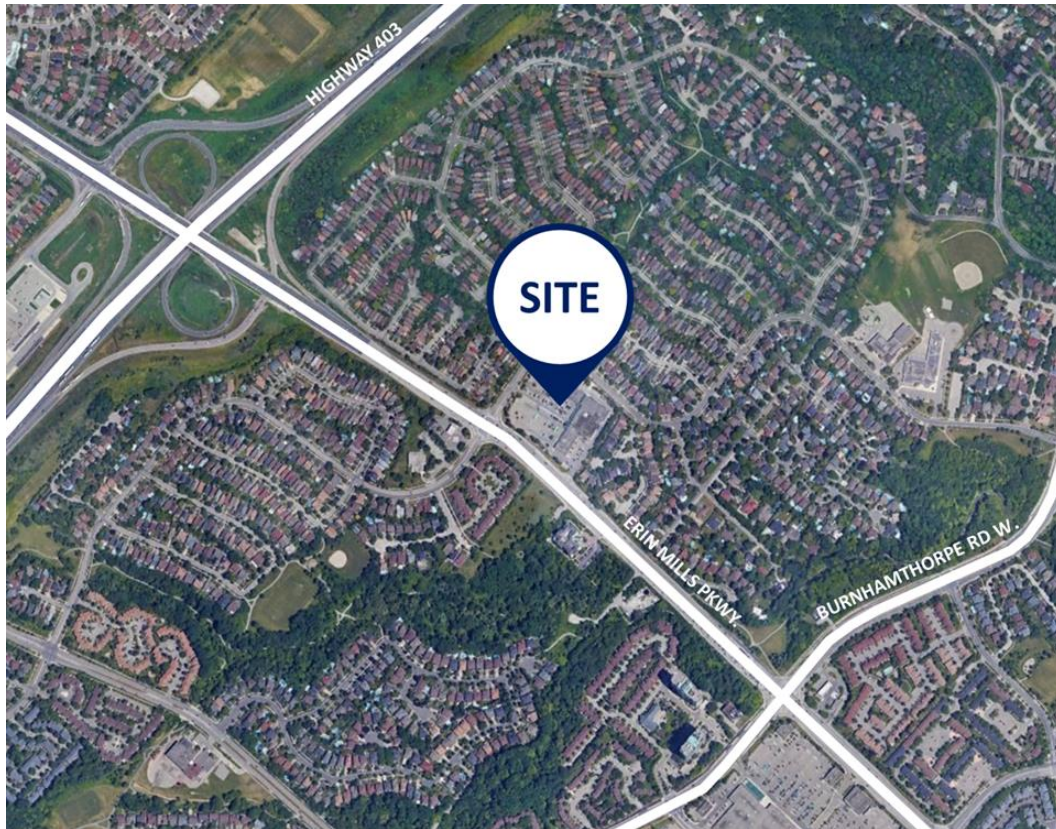
The following section provides an evaluation of the site from an accessibility and market viability perspective. This includes an overview of existing land uses surrounding the site, the surrounding transportation network, and the site's overall access and visibility.

2.1 Site Location

The subject site is located in the southwest portion of the City of Mississauga. As shown in Figure 2-1, it is situated at the southeast corner of Erin Mills Parkway and Folkway Drive, south of Highway 403, and west of Sawmill Valley Drive.

Located in Ward 8 of the City of Mississauga, the subject site is approximately 2.6 hectares (some 26,405 square metres) in size.

Figure 2-1: Site Location



SOURCE: urbanMetrics inc., with Google Earth Imagery.

2.2 Planning Policy

Official Plan

The subject site is designated *Urban System* in the Peel Region Official Plan. Under this designation, the subject site is permitted to develop with a range of uses, including residential. The City of Mississauga Official Plan designates the subject site—which is within the *Erin Mills Neighbourhood*—as a *Neighbourhood* that is specifically located along a *Corridor*. The site is further designated *Mixed-Use* under the City of Mississauga Official Plan.

Sites designated as *Neighbourhood* are considered stable areas under the Official Plan where residential intensification through infilling, and the redevelopment of commercial sites as mixed-use areas, is encouraged. However, Policy 5.3.5.4 of the Official Plan details that:

“Redevelopment of Mixed-Use sites that result in a loss of commercial floor space will not be permitted unless it can be demonstrated that the planned function of the existing non-residential component will be maintained after redevelopment.”

It is the reduction of commercial space on the subject site that results in the City’s requirement for this *Retail Market Study*. Specifically, this study is required to determine if residents of the area have, and will continue to have, an adequate level of commercial service from existing and proposed commercial centres in the surrounding area. It is also to determine the potential impact, if any, of a reduction in the local-serving retail/service commercial space on the subject site.

Zoning

Zoning By-law 0225-2007 for the City of Mississauga zones the site as **C2-Neighbourhood Commercial**. This zone permits retail stores, restaurants, commercial schools, medical offices, recreational uses, and general office uses. Residential Uses are not permitted under the C2 zone.

2.3 Surrounding Land Uses

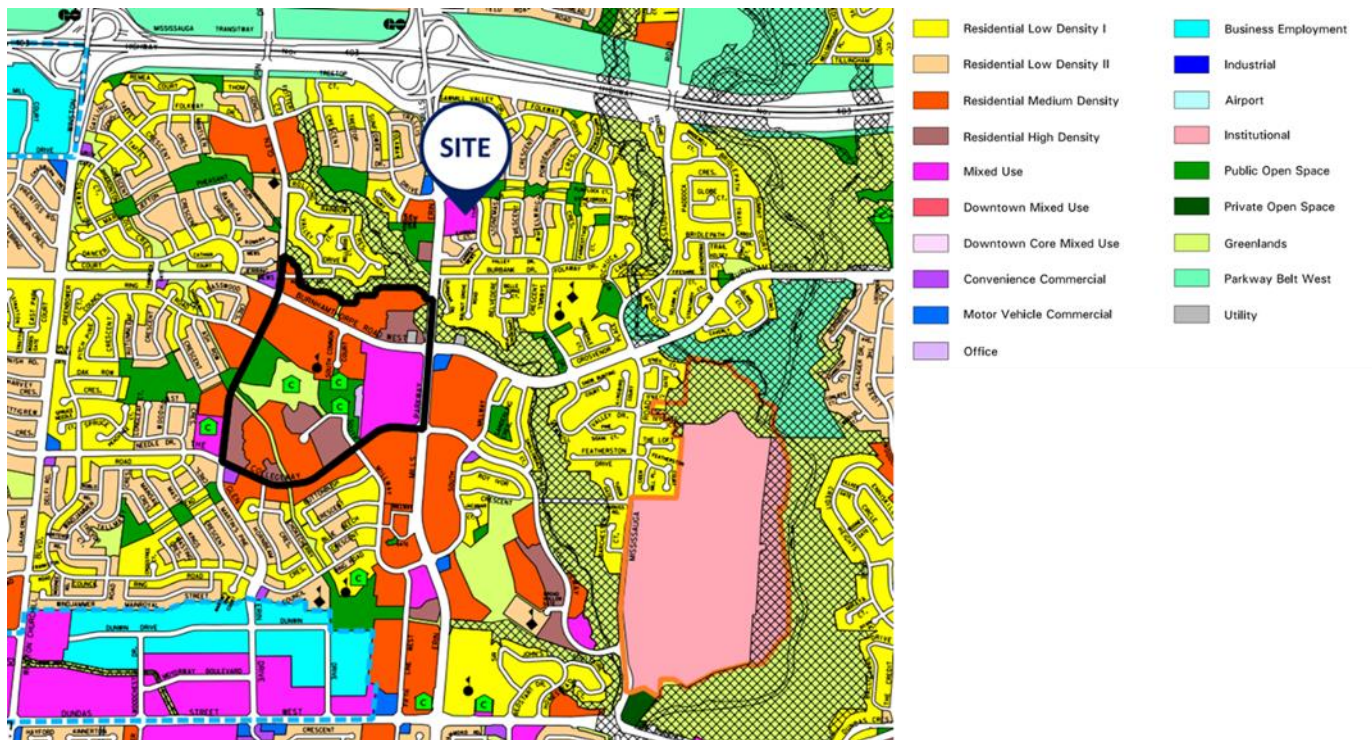
The composition of land uses in the vicinity of the subject site can generally be characterized by a mix of residential uses of various densities, public open space, and other mixed-uses. There is a variety of commercial uses concentrated to the north and south of the subject site. Below, we have provided a more detailed overview of the land uses which surround the subject site.

- **North** of the site is a low-density residential area comprised of single-detached housing. Interspersed in this residential area are multiple neighbourhood parks, including: Coppersmith Grove Park, Trapper’s Green and Folkway Park.
- **East** of the site is comprised of mainly low-density residential development. Further east, on the west side of Burnhamthorpe Road West, is the Sawmill Valley Public School and Woodchuck Green Park. East and south of the site is the South Common Centre that contains a significant concentration of retail/service commercial uses, including: a Walmart Supercentre, a Shoppers Drug Mart and a No Frills supermarket.

The South Common Centre is also located in a designated Community Node in the City of Mississauga Official Plan. Under Policy 14.1.7 it is more specifically identified as a Mall-based Community Node. As per this designation, this node was established around the existing concentration of retail and service commercial uses. While future development and intensification at this location is expected to evolve overtime, the ongoing planned function of this area as the focal point of commercial, community and transit uses is to remain. As this Community Node—which includes the South Common Centre—is less than one kilometre from the subject site, it is anticipated that future residents on site and in the surrounding area will have continued access to a wide range of retail/service commercial amenities within a short distance.

- Directly **south** of the subject site, beyond Erin Mills Parkway is the Sunrise of Erin Mills Retirement Community. There are also single-and-semi-detached housing units to the south interspersed around Dunn Park and the Sawmill Creek Trail. Further south is the Glen Gate Plaza which contains neighbourhood serving retail uses (i.e., convenience store, food services) and medical offices (i.e., dentist, pharmacy).
- Low and medium density residential development comprise the majority of lands to the **west** of the subject site. There is a townhome complex and housing cooperative—Forest Grove Townhomes and the Terra Cotta Housing Co-Op—at Glen Erin Drive and Folkway Drive. Further west and north of the subject site is the Erin Mills Town Centre and a distinct cluster of additional retail/service commercial uses along Eglinton Avenue West.

Figure 2-2: Surrounding Land Uses



SOURCE: urbanMetrics inc., based on Schedule 10 Land Use Designation of the City of Mississauga Official Plan.

2.4 Site Access

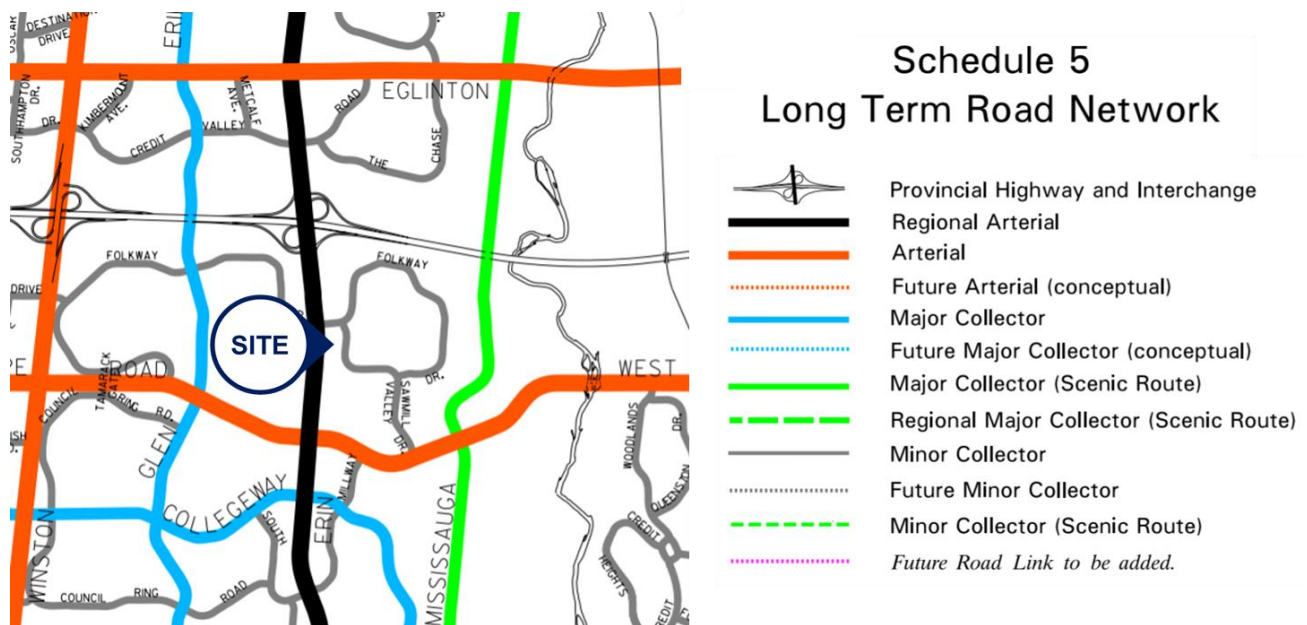
Based on the most recent concept plan, the proposed development would be accessible from Erin Mills Parkway, and Folkway Drive. Vehicular access is also proposed at Sawmill Valley Road. As illustrated in

Figure 2-3, Erin Mills Parkway is classified as a *Regional Arterial Road*, while Folkway Drive and Sawmill Valley Drive are classified as *Minor Collector Roads*. We would also note that the subject site is located just southeast of Highway 403.

The subject site benefits from heightened levels of pass-by traffic along Erin Mills Parkway. Further, the proximity of this location to Highway 403 will to some degree benefit existing and future retail establishments in the area and on-site from traffic coming into the south end of Mississauga.

That said, the Erin Mills Town Centre is located approximately one kilometre northwest of the same Highway 403 interchange. The proximity of this significant retail/service commercial cluster to Highway 403 would draw much of this regional traffic north of the highway to the existing regional and local serving retail offerings in that area instead of south to the subject site.

Figure 2-3: Long Term Road Network – Schedule 5 City of Mississauga Official Plan



SOURCE: City of Mississauga Official Plan, Schedule 5 – Long Term Road Network.

3.0 Retail Context

Key Findings

- A Study or Trade Area reflects the geographic area from which the most support for any retail/service commercial uses on the subject site would be derived.
- The Study Area delineated for our analysis generally extends from Thomas Street to the northwest, to the Credit River to the northeast, Dundas Street to the southeast, and Winston Churchill Boulevard to the southwest.
- The 2021 population of the Study Area is some 61,600 persons. By 2031, which would include the complete build-out of the subject site as currently proposed, it is estimated that the Study Area will house a population of some 64,200 persons.
- Existing retail/service commercial facilities within the Study Area are frequented by residents and visitors residing within the local area, the City of Mississauga and beyond.

The following section describes the Study Area that we have used to assess the existing and future retail/service commercial market available to the proposed uses on the subject site. The population living in the Study Area today and going forward is also described.

3.1 Study Area

The total market influence attributed to any commercial development typically extends over a wide geographic area, beyond any precise boundary that can be drawn. However, for the purposes of determining if there is sufficient commercial space in the area to support a reduction of the commercial square footage on the subject site, a Study Area has been delineated. This Study Area reflects the geographic area from which the majority of support for potential retail and service commercial facilities on the subject site would be derived. The remaining market support would include occasional expenditures of customers living outside the Study Area (i.e., inflow). These customers could include visitors, non-permanent residents, the traveling public and/or individuals who work in or near the Study Area but reside elsewhere.

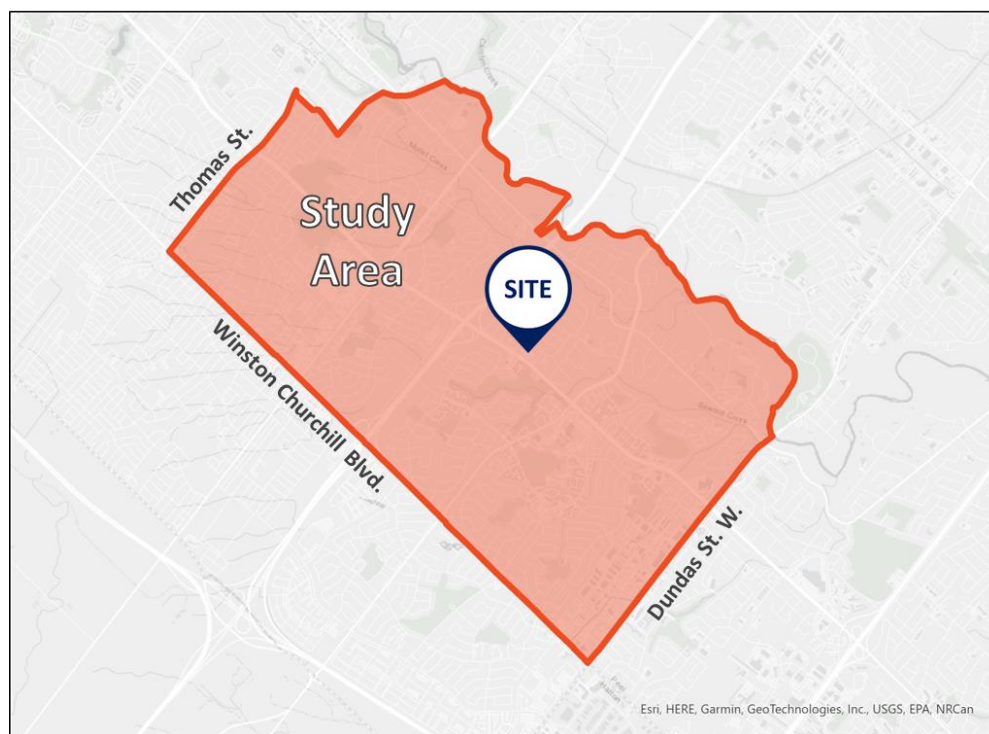
- The delineation of the Study Area considers several factors, including:
- Geographic distance and travel times;
- The location of existing competition in the local area, including the subject site's proximity to the regional-serving Erin Mills Town Centre, and the South Common Centre;

- The potential nature and size of retail/service development existing or being contemplated on the subject site;
- Natural and man-made barriers that may inhibit or restrict the ease of movement for customers; and,
- The access characteristics of the site, including the accessibility and visibility of the site provided by the local and regional road network.

Based on our experience, localized neighbourhood and convenience shopping is typically undertaken within one or two kilometres of a person's home and does not typically align with a specific neighbourhood or community plan boundary. Given the local scale and type of retail/service commercial being considered on the subject site, this has also been a factor in delineating the Study Area for this analysis.

Figure 3-1 shows the Study Area. As shown, the Study Area is generally bound by Thomas Street to the northwest, the Credit River to the northeast, Dundas Street to the southeast, and Winston Churchill Boulevard to the southwest. This Study Area serves as the focus for our inventory and per capita space analysis included herein.

Figure 3-1: Study Area



SOURCE: urbanMetrics inc.

3.2 Population

In evaluating the commercial market demand in the Study Area, it is important to establish the local population base and any projected changes expected in future years. As detailed in Figure 3-2, the residential population of the Study Area was estimated at 61,600 persons in 2021. This represents growth of 4,800 persons since the 2016 Census, or an average annual growth rate of 1.7%.

Based on planning application data available through the City of Mississauga's active development application portal, we estimate that the 2031 population of the Study Area will increase to approximately 64,200 persons. This includes the 722 residential units being proposed on the subject site. Population growth can increase the demand for additional retail/service commercial space in an area. **That said, the minimal population growth anticipated in the Study Area over the forecast period to 2031, is unlikely to create significant demand for additional retail/service commercial space.**

Figure 3-2: Study Area Population

	Census ¹				Forecast ²	
	2006	2011	2016	2021	2026	2031
Study Area	55,800	55,700	56,800	61,600	62,600	64,200
<i>Average Annual Growth</i>	-20	220	960	200	320	
<i>Average Annual Growth %</i>	0.0%	0.4%	1.7%	0.3%	0.5%	

SOURCE: urbanMetrics inc. Rounded to the nearest 100 residents.

¹ Based on Statistics Canada Census data, adjusted for net undercount.

² Based on the City of Mississauga's planning application data and PPU estimates included in the City of Mississauga Development Charge Background Study. Includes residential development on the subject site.

The new and intensified residential development being proposed on the subject site is also valuable in supporting population growth in the City of Mississauga more generally. In March 2021, Mississauga council endorsed draft 2051 population and employment forecasts for the city for the purposes of informing long-range transportation and capital planning decisions related to the City's 2022 Development Charges and Community Benefits Charges By-law review. These forecasts indicate that the population of the City of Mississauga is anticipated to grow to some 995,000 persons by 2051, with some 343,500 total occupied households. This growth trajectory for the city will increase demand for intensified residential development in the city going forward. This highlights the potential value of the subject proposal as a Mixed-Use development over the longer-term planning horizon as it will support and add to the population of the city.

4.0 Competitive Review

Key Findings

- The Study Area currently contains some 349,200 square feet of Food Store Retail (FSR) space; some 22,700 square feet of Beer, Wine, Liquor space; some 1,161,500 square feet of Non-Food Store Retail (NFSR) space; and some 533,200 square feet of Services. There is also 196,400 square feet of vacant space. **The low projected vacancy rate highlights that the area is already well-served and indicates that the impact of reducing retail/service commercial space on the subject site would be limited.**
- Much of the existing retail/service commercial space within the Study Area is located in distinct clusters around the subject site. The Erin Mills Town Centre located just northwest of the subject site contains over 925,000 square feet of retail/service commercial space, while the South Common Centre located just southwest of the subject site contains an additional 288,300 square feet of space. Current and future residents of the subject site and Study Area have ample access to a variety of regional and local serving retail/service commercial amenities within a reasonable distance.
- There are three development applications for new or redeveloped retail/service commercial development in the Study Area. This includes the redevelopment of the former Sears at Erin Mills Town Centre for a new Cineplex theatre which would simultaneously reduce the overall vacancy rate in the area today.

A review of the existing and competitive retail and service facilities is key to understanding what retail roles and functions are currently provided for residents and visitors of the Study Area, as well as for understanding what competitive factors may influence, detract from, or drive demand for retail/service commercial uses on the subject site. In addition, understanding the Study Area's existing commercial structure is important in evaluating any future impact that these existing facilities may potentially suffer as a result of the development of additional retail/service space in the community.

An inventory of all retail/service commercial space in the Study Area was conducted by urbanMetrics in October 2021. This inventory includes:

- Food Store Retail ("FSR");
- Non-Food Store Retail ("NFSR");
- Beer, Wine and Liquor ("BWL");
- Services; and,
- Vacant Space.

Appendix A provides a listing of the various store types included in the FSR, NFSR and service categories inventoried.

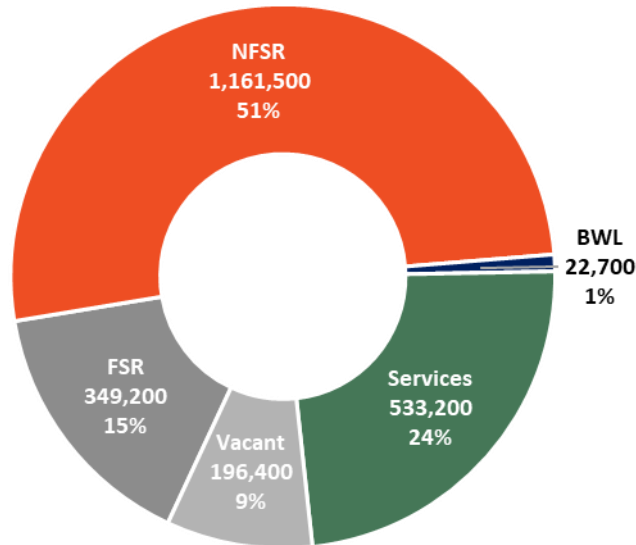
4.1 Existing Retail/Service Commercial Inventory

Figure 4-1 summarizes the results of urbanMetrics' research undertaken in October 2021. It is evident that Study Area residents have access to a significant amount of retail and service space, including both local, convenience and regional serving amenities.

In total, 2,263,000 square feet of retail and service commercial space has been identified in the Study Area. The existing inventory includes 349,200 square feet of FSR space, 1,161,000 square feet of NFSR space, 22,700 square feet of BWL space, and 533,200 square feet of Service space.

There is also 196,400 square feet of vacant space (i.e., a vacancy rate of 8.7%). While a vacancy rate between 5.0% and 7.5% is generally considered indicative of a healthy market—or one in equilibrium—we note that a significant 103,700 square feet of this vacant space is from the former Sear's store at Erin Mills Town Centre. While currently vacant, this area of the mall is planned to be demolished, with redevelopment of the western portion anticipated for a new Cineplex movie theatre. Eliminating the former Sears unit from the total vacant space, would reduce the amount of vacant space in the Study Area to some 92,700 square feet or a vacancy rate of 4.1%. **It is our opinion that this vacancy rate reflects the fact that Study Area residents are currently well-served with a range of regional-serving establishments and local/convenience store and services.** We would also note that the current amount of vacant space in the Study Area provides more than enough space for new tenants and would more than satisfy any reduction in the commercial space proposed on the subject site.

Figure 4-1: Existing Study Area Inventory



SOURCE: urbanMetrics inc. based on the desktop inventory completed in October 2021.

4.2 E-Commerce and COVID-19

Prior to the COVID-19 pandemic, the impacts of increased e-commerce and internet shopping were already being felt throughout the retail sector, resulting in a significant slowdown in the development of large format retail space; the consolidation/or closing of many retail chains; a reduction in store size modules; and the strategic placement of stores to support on-line shopping.

While the longer-term implications of the ongoing pandemic are not known and remain subject to change, the following provides some context as it relates to the subject proposal, and our latest understanding of current retail trends:

- Retail restrictions and lockdowns have resulted in increased online shopping activity. Most notably, this activity has occurred in new retail sectors (i.e., grocery) that were not previously affected, and penetrated older demographic – segments of the population who previously were not users of online shopping. Early indications suggest that this ‘bump’ will not translate into significant permanent changes in shopping patterns. However, it has exposed more customer demographic sectors to a range of opportunities associated with online shopping that will likely impact their future shopping behaviour.
- The impact of e-commerce will affect each retail sector differently, and bricks and mortar stores will have to reorganize and respond to their own unique situation.

Some retailers will experience minimal, if any, impact; some will see a reduction in their physical space needs; others will draw a harmonious balance between providing sufficient space for physical browsing and gathering – with a more robust online presence. The City of Mississauga, and the subject site more specifically, will definitely be impacted by this trend—by reducing the need for new retail/service commercial development over the longer-term, particularly given the subject site’s proximity to Erin Mills Town Centre and other commercial facilities in the Study Area.

- For many, shopping is an enjoyable, social activity. Despite the convenience of online shopping, a segment of the population will still prefer the in-person element of browsing. Despite possible increases in online shopping demands, bricks and mortar retailing will always appeal to a certain segment of the population. The redevelopment of the commercial facilities now proposed on the subject site will strike a balance in maintaining adequate access to local-serving retail uses, while integrating residential uses that can provide immediate support for new and existing retail offerings.
- It is still unclear if the impact of COVID-19 will result in a more permanent shift to online shopping, or if this shift was borne out of necessity rather than consumer preference. It is apparent that the COVID-19 pandemic has resulted in the acceleration of online shopping trends, particularly with respect to staple goods; however, post-pandemic it remains to be seen if this uptick in on-line shopping will continue. This uncertainty means that the pool of tenants who may be attracted to or remain on the subject site may be more limited than prior to the pandemic.

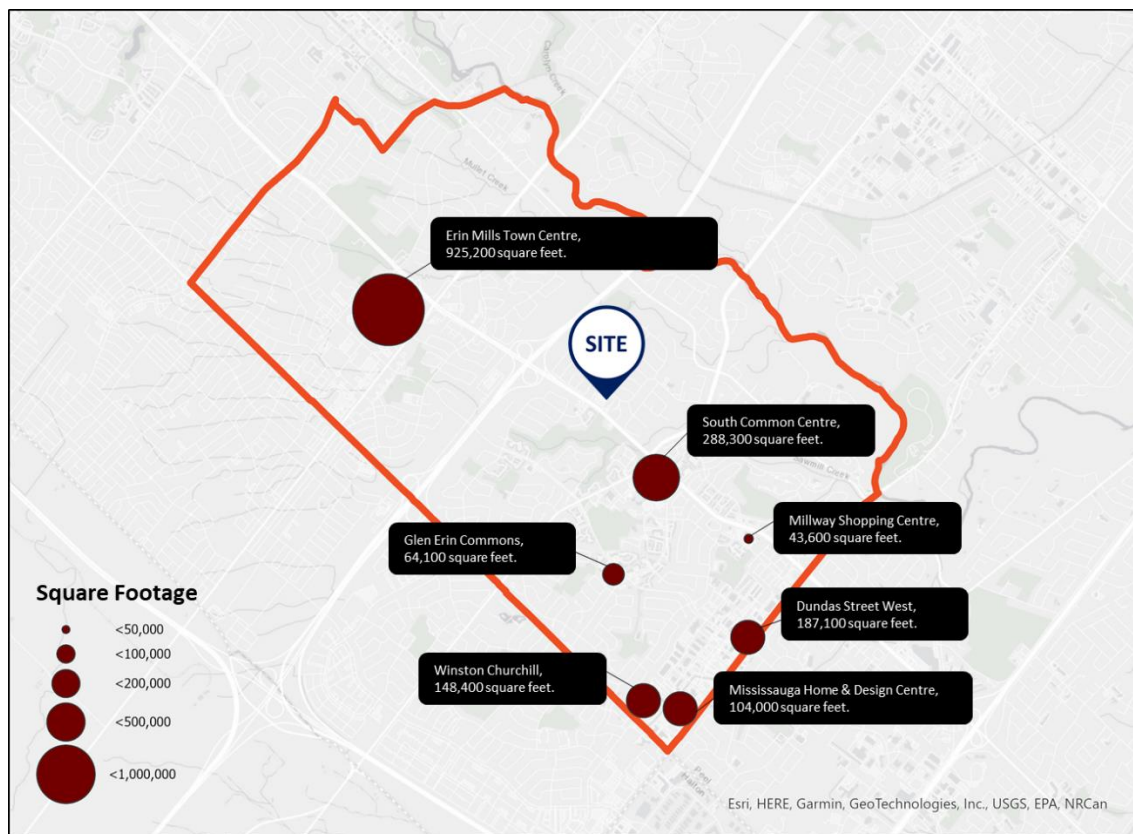
In our opinion, growth in retail space will likely be slower than in the past. The explosive growth of big box retailers, which occurred in the 1990’s and early 2000’s is over. Many large format retailers are retrenching with a reduced number of stores, smaller store footprints and cautiously entering only high growth markets. The pandemic also appears to have increased familiarity and comfort with e-commerce as a viable way to procure a range of retail/service commercial merchandise. That said, demand continues to persist for local serving retail and service uses, which either cannot be substituted by on-line commerce, or are required to satisfy short term needs (e.g., food, pharmaceuticals, health and recreation services).

Overall, and based on the foregoing trends, the pool of tenants who could be successfully located on the subject site may be more limited, resulting in less need for commercial development on the subject site. Permitting mixed-use development as proposed will intensify the development of the site, introducing enhanced customer support for the retail/service commercial space proposed and still supporting the local serving retail needs of the Study Area, and in particular the residential uses added to the subject site.

4.3 Proximity to Existing Retail/Service Commercial Uses

Figure 4-2 identifies the location of key commercial areas in the Study Area. As shown, much of the existing retail/service commercial space is located on the south side of Highway 403, within two to three kilometres of the subject site. Erin Mills Town Centre is also located just north of Highway 403, approximately two kilometres northwest of the subject site that contains some 925,200 square feet of local/convenience and regional serving retail/service commercial space, 779,100 square feet of which is currently occupied.

Figure 4-2: Clusters of Existing Commercial Establishments



SOURCE: urbanMetrics inc.

4.4 Proposed Retail/Service Commercial Space

As part of our analysis, we have also identified any proposed commercial developments in the Study Area. These developments have been identified based on a review of the City of Mississauga's development applications website, current as of October 2021 (i.e., site plan, subdivision application, official plan/zoning applications and application summaries as provided by the planning department). The identified proposals would add new retail/service commercial space in proximity to the subject site over the longer-term planning horizon to replace the lower amount of space proposed on the subject site.

As illustrated in Figure 4-3, there are three development proposals involving the addition of new or redeveloped retail/service commercial space in the Study Area. These developments include:

1. **5267 Mississauga Road** – The proponent has requested an Official Plan Amendment, Rezoning and Draft Plan of Subdivision to develop this vacant site with ten detached dwellings and five retail/service commercial buildings. The five commercial buildings are proposed to have a gross floor area (“GFA”) of 112,594 square feet (10,460 square metres), involving:
 - 85,576 square feet (7,950 square metres) of retail uses;
 - 27,018 square feet (2,510 square metres) of professional office uses.

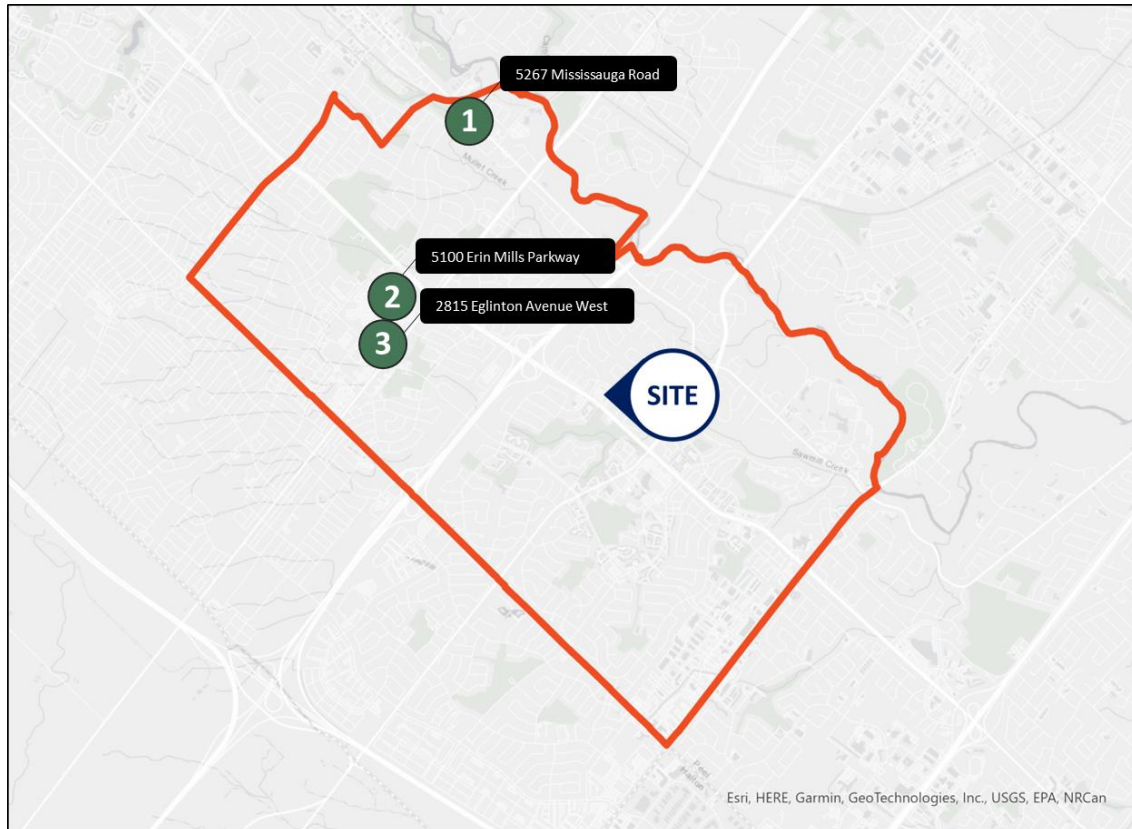
Based on the City of Mississauga's failure to adopt the requested amendment, and refusal or neglect to decide, this application went to the Ontario Municipal Board (“OMB”). Based on an OMB file issued September 9, 2015, City staff proposed that the five commercial buildings be capped at 53,821 square feet (5,000 square metres) of total combined GFA for retail/personal service, restaurant and similar commercial uses. This cap was opposed by the proponent. To date, the site is still vacant and information pertaining to the status of the application has not been updated since 2015.

While this application is still active, given the lack of recent information it is unlikely that it will be developed over the build-out period of the subject site.

2. **5100 Erin Mills Parkway** – An approved site plan application to demolish and redevelop the western portion of the former Sears unit at Erin Mills Town Centre, with a Cineplex movie theatre. This redevelopment is anticipated to involve 45,000 square feet for auditoriums, a food hall, an amusement gaming area and a space for live events. It is anticipated to open in 2022.

3. **2815 Eglinton Avenue East** – A building permit was issued in June 2021 for a new Shopper’s Drug Mart store. The store is anticipated at a size of 17,168 square feet (1,595 square metres).

Figure 4-3: Proposed Retail/Service Commercial Space in the Study Area



SOURCE: urbanMetrics inc.

5.0 Retail Needs Analysis

Key Findings

- Study Area residents are well-served with an ample variety of regional and local-serving retail/service commercial space. Based on the estimated 2021 Study Area population and the inventory completed by urbanMetrics in October 2021, it is estimated that there is currently approximately 36.7 square feet of retail/service space per capita in the Study Area. This service level is in-line with the amount of retail/service commercial space typically required to serve residents day-to-day shopping needs (i.e., 35-40 square feet per capita on average).
- Our per capita space analysis has focused on the market need for retail/service space in selected store categories. In particular, those providing a range of neighbourhood-serving local convenience retail and service offerings, which are the types of uses that are being contemplated in the redevelopment of the subject site. Excepting the existing supermarket, these uses are also consistent with the form and function of retail/service commercial uses on the subject site today. Currently, the Study Area contains 698,800 square feet of retail and service commercial space in these select store categories.
- Based on our analysis, a limited amount of additional space is expected to be warranted across many of the selected store categories in 2031, despite the elimination of the existing commercial facilities on the subject site, and the addition of the residential population generated by the subject site as currently proposed. That said, there will be demand for some local serving retail/service commercial space across a select range of store categories. This includes Convenience and Speciality Food; Finance, Insurance and Real Estate; and Culture, Entertainment and Recreation Establishments. There is also limited demand for Food Services and Drinking Places, and Personal Care Services—the stores which will likely consider staying as tenants, or represent new tenants, in the 8,356 GFA of space being proposed on the subject site.

To determine the amount of additional retail/service commercial space that could be supported by Study Area residents, and the need, if any, for commercial space on the subject site, urbanMetrics has undertaken a per capita space analysis that addresses the market need for a range of convenience serving retail uses (e.g., food stores, pharmacies/personal care stores) and service commercial/local uses (e.g., restaurants, financial services, personal services, health care services and selected other services). These are the types of uses that are being considered as typical or existing tenants in the mixed-use development being planned for the subject site.

We note that utilizing the per capita space methodology provides a general guide as to the retail and service commercial space required to serve the local population in a given market area. The actual space required locally may vary depending on income levels and the amount of spending inflow and outflow which occurs. However, this analysis provides a

strong indication of whether there is a shortage, or surplus of commercial space in the Study Area.

5.1 Existing Space Per Capita

Figure 5-1 details the current market per capita space levels in the Study Area based on the estimated 2021 population of 61,600 persons, and the inventory completed by urbanMetrics in October 2021. Although we recognize that some of the retail/service commercial space in the Study Area serves customers who live outside the Study Area, as well as tourists/visitors to the area, Study Area residents are well served on a per capita basis by the existing supply of retail and service commercial facilities within a short distance of their homes. Estimated at 36.7 square feet of retail/service space per capita in 2021, the existing service level in the Study Area is comparable to the amount typically required to serve residents day-to-day shopping needs (typical service level ranges between 35 – 40 square feet per capita).

Figure 5-1: Existing Study Area Retail/Service Commercial Space Per Capita

FSR	Sq. Ft.	%	
Convenience & Specialty Food	40,600	1.8%	0.7
Supermarkets & Grocery	308,600	13.6%	5.0
FSR Total	349,200	15.4%	5.7
BWL	22,700	1.0%	0.4
NFSR			
Apparel and Accessories	251,500	11.1%	4.1
Automotive	4,800	0.2%	0.1
Building and Outdoor Home Supply	83,100	3.7%	1.3
Furniture, Home Furnishings & Electronics Store	362,200	16.0%	5.9
General Merchandise	319,800	14.1%	5.2
Miscellaneous Retailers	62,500	2.8%	1.0
Pharmacies & Personal Care	77,600	3.4%	1.3
NFSR Total	1,161,500	51.3%	18.9
SERVICES			
Cultural, Entertainment & Recreation	61,000	2.7%	1.0
Finance	56,000	2.5%	0.9
Food Services & Drinking Places	171,100	7.6%	2.8
Health Care	103,700	4.6%	1.7
Insurance and Real Estate	16,600	0.7%	0.3
Personal & Household Goods Repair & Maintenance	7,700	0.3%	0.1
Personal Care	59,700	2.6%	1.0
Professional, Scientific & Technical Services	18,400	0.8%	0.3
Selected Educational Services	29,800	1.3%	0.5
Selected Office Administrative Services	1,800	0.1%	0.0
Social Services	4,000	0.2%	0.1
Transportation	3,400	0.2%	0.1
SERVICES Total	533,200	23.6%	8.7
VACANT	196,400	8.7%	3.2
Grand Total	2,263,000	100.0%	36.7

SOURCE: urbanMetrics inc., based on desktop inventory completed by urbanMetrics in October 2021. Rounded to the nearest 100 square feet.

Excepting the supermarket presently on the subject site, we note that the existing plaza at 4099 Erin Mills is comprised of mainly local retail/service commercial space (i.e., health care services, food services, personal care services, convenience etc.). The existing supermarket draws people from outside the community, increasing the demand for, and use of, the other existing retail/service commercial services on the site.

The supermarket serves a larger population, owing to its unique food offerings and composition. By contrast, the other retail/service commercial offerings function as local-

serving entities which rely on—and serve—customers living within one to two kilometres from the site. The proposed redevelopment maintains the function of the existing site by proposing to include neighbourhood serving uses such as: a convenience store, smaller specialty food stores, a take-out restaurant, pet grooming, personal grooming, a dry cleaner, medical uses (such as dentists, physiotherapist etc.), office uses (such as accountants, consultant services etc.) and similar uses some of which already are located on site.

We would note that the Study Area is particularly well-served in many of the retail/service commercial categories that are currently located on the subject site, therefore validating that the reduction of space on this site would not negatively impact the amount of retail and service commercial space accessible to Study Area residents now and in the future.

In particular, we note that the Study Area and its residents are already very well served, with a significant concentration of Supermarket and Grocery store space. As detailed in Figure 5-1, we estimate that there is currently 308,600 square feet of Supermarket and Grocery store space in the Study Area, including the existing supermarket on the subject site, but excluding the grocery component of the two Walmart Supercentres in the Study Area and the nearby Costco. Based on the 2021 Study Area population of 61,600, this represents 5.0 square feet per capita, well above industry norms of between 3.5 to 4.0 square feet per capita.

One of the key factors that supports the size of the existing shopping centre on the subject site is the size and significant drawing power of the existing supermarket anchor. Subject to the redevelopment of the subject site—which would eliminate the existing supermarket—the question remains whether there is sufficient market available to attract a new supermarket anchor. Recognizing the closing of the supermarket at 4099 Erin Mills, existing supermarkets in the Study Area would still comprise some 276,000 square feet of space (excluding the two Wal-marts and nearby Costco) or 4.5 square feet per capita, which is still well above a normal ratio of 3.5-4.0.

The existing oversupply of supermarket space in the Study Area, even after the elimination of the supermarket on the subject site, highlights that Study Area residents will continue to be well-served and have access to ample Supermarket and Grocery store space over the longer-term planning horizon. Further, we note that the existing supply of supermarket space per capita could be even greater if the grocery component of the two Walmart Supercentres and the Costco located just west of the Study Area were included in this analysis. Given the existing supply of supermarket space in the Study Area it is also likely that potential future adjustments to supermarket space in the Study Area would not have a negative impact on the supply of supermarket and grocery store space in the Study Area.

Based on these estimates, of the current and future supply of supermarket space in the Study Area, it is our opinion that the elimination of the existing supermarket on the subject site will not negatively impact the adequacy of neighbourhood-serving uses and existing supermarket space available to Study Area residents. Further, it is our opinion that a replacement supermarket would be very unlikely to locate on the subject site, which would result in less additional smaller ancillary retail and service space being attracted to the commercial component of this mixed-use project.

5.2 Per Capita Space Analysis

The per capita space analysis detailed herein focuses on the more local serving neighbourhood, convenience-oriented uses as these are the types of uses that either currently exist or are expected to locate on the subject site as currently proposed. The following subsection summarizes the methodology and assumptions utilized in our per capita space analysis.

- Based on urbanMetrics' market experience, Study Area residents' per capita space requirements have been estimated for the selected retail and service space categories that would likely located on the subject site. This includes the types of uses that would typically locate in a local serving neighbourhood/convenience commercial node. We have estimated that each Study Area resident would require approximately 17.0 square feet of the selected retail and service commercial space that could potentially locate in the proposed centre.
- These per capita space ratios have been applied to the 2021 estimated Study Area population, and the 2031 population (which includes the anticipated build-out of the site), to provide an estimate of the total local-serving neighbourhood commercial space required by Study Area residents today and in the future.
- The resulting space requirements have been compared to the existing space in the Study Area. This space requirement recognizes support from Study Area residents, in addition to, other residents of the City of Mississauga, pass-by traffic, employees working in the area but living elsewhere, and other visitors.

2021 Market Conditions

Figure 5-2 details the current market conditions for neighbourhood-serving retail/service commercial space in the Study Area. Based on the 2021 estimated population of the Study Area, residents currently support a total of some 1,011,500 square feet of neighbourhood-serving retail/service commercial space.

Recognizing that existing and future residents of the Study Area will continue to shop in other retail/service areas outside of the Study Area, we have estimated target Study Area capture rates, which vary by store category depending on their normal drawing power (e.g., local versus community wide, or regional). Applying these estimated capture rates, to the total space requirements by residents, a total of some 563,800 square feet of space is required by Study Area residents across these selected retail/service categories.

In addition to the sales generated from Study Area residents, future retail/service commercial businesses in the community will also generate a portion of their sales from customers living outside the Study Area, also known as inflow. The majority of this inflow is anticipated to come from residents living in other parts of the City of Mississauga. The amount of inflow similarly varies by store category, resulting in an estimated overall increase in the total space warranted in the Study Area. After adjusting for inflow, we estimate that there is **some 657,300 square feet of retail/commercial space currently warranted in the Study Area.**

The total warranted space by store category is then compared to the existing space in the Study Area. As detailed, there is some 698,800 square feet of existing neighbourhood-serving retail/service commercial space already provided in the Study Area, meaning that the Study Area currently contains slightly more local neighbourhood-serving retail/service commercial space than is currently required. [This means that there is no immediate need for additional neighbourhood serving retail/servicing commercial.](#)

Figure 5-2: Study Area Per Capita Commercial Needs Analysis (2021)

Commercial Needs - Retail Category	Typical Space Per Capita (Sq Ft)	Total Space Required by Residents (Sq Ft)	Target Capture	Space Required (Sq Ft)	Inflow	Total Warranted Space (Sq Ft)	Less: Existing Space	Total Net New Space Required
2021 Population	61,600							
SELECTED FOOD STORE RETAIL (FSR)								
FSR: Convenience & Specialty Food Stores	1.0	61,600	55%	33,880	15%	39,900	40,600	-700
SUB TOTAL	1.0	61,600		33,880		39,900	40,600	
SELECTED NON-FOOD STORE RETAIL (NFSR)								
NFSR: Pharmacies & Personal Care Stores	1.5	92,400	65%	60,060	20%	75,100	77,600	-2,500
NFSR: Other Miscellaneous Stores	2.0	123,200	40%	49,280	15%	58,000	62,500	-4,500
SUB TOTAL	3.5	215,600		109,340		133,100	140,100	
SERVICES								
Finance, Insurance & Real Estate	2.0	123,200	50%	61,600	10%	68,400	72,600	-4,200
Food Services & Drinking Establishments	4.0	246,400	60%	147,840	10%	164,300	171,100	-6,800
Personal Care Services	1.5	92,400	55%	50,820	10%	56,500	59,700	-3,200
Cultural, Entertainment & Recreation Establishments	1.5	92,400	55%	50,820	10%	56,500	61,000	-4,500
Health Care Services	2.0	123,200	60%	73,920	20%	92,400	103,700	-11,300
Business Services ¹	1.5	92,400	45%	41,580	10%	46,200	50,000	-3,800
SUB TOTAL	12.5	770,000		426,580		484,300	518,100	
GRAND TOTAL - Neighbourhood Serving	17.0	1,047,200		569,800		657,300	698,800	-41,500

SOURCE: urbanMetrics inc., based on the inventory completed by urbanMetrics in October 2021. Rounded to the nearest 100 square feet.

NOTE: Population estimate based on Figure 3-2.

¹ Includes Professional, Scientific and Technical Services, Selected Educational Services and Selected Office Administrative Services.

2031 Market Conditions

Figure 5-3 below demonstrates the results of the per capita commercial needs analysis, based on the 2031 population estimate for the Study Area of some 64,200 persons. For this analysis we have held capture and inflow rates constant to estimate the amount of net new space warranted. We have also excluded the existing square footage of the subject site to ensure that our analysis accounts for the loss of these stores.

As detailed, a limited amount of additional space is expected to be warranted across many of the selected store categories by 2031, based on the estimated 2031 Study Area population. Included in this demand is space for Convenience and Speciality Food Stores; Pharmacies and Personal Care Stores; and Food Service and Drinking Places (e.g., restaurants and bars). There is limited demand for Finance Insurance and Real Estate and Personal Care Services. We note however that the future demand for Pharmacies and Personal Care Stores noted above will likely be met by the new Shopper's location along Eglinton Avenue East. Owing to the significant level of existing supply, certain store categories are still forecast to be in an oversupply situation in 2031, including Health Care Services; Cultural, Entertainment and Recreation; and Business Services.

Based on the conceptual plans for the subject site—including 8,356 square feet GFA of neighbourhood-serving retail/service commercial space—the proposed redevelopment would effectively continue to support the ongoing retail/service commercial needs of the Study Area over the longer-term planning horizon. In our opinion, the proposed reduced amount of neighbourhood-serving commercial space would be sufficient in maintaining an adequate level of local retail service through to 2031 and would introduce a more effective use of the subject site.

Existing and future residents of the Study Area are already well-served by larger format regional-serving retailers in the vicinity of the subject site (i.e., Erin Mills Town Centre, Walmart Supercentres etc.) and many smaller retail/service uses south of the site. The proposed redevelopment introduces a more efficient use of the subject site by increasing residential opportunity and intensification, while maintaining an appropriate retail/service commercial component. In doing so, it also helps ensure that future residents of the subject site and in the Study Area, will be supported by an adequate amount of convenient, local-serving retail.

Figure 5-3: Study Area Per Capita Commercial Needs Analysis (2031)

Commercial Needs - Retail Category	Typical Space Per Capita (Sq Ft)	Total Space Required by Residents (Sq Ft)	Target Capture	Space Required (Sq Ft)	Inflow	Total Warranted Space (Sq Ft)	Less: Existing Space	Total Net New Space Required
2031 Population	64,200							
SELECTED FOOD STORE RETAIL (FSR)								
FSR: Convenience & Specialty Food Stores	1.0	64,200	55%	35,310	15%	41,500	37,800	3,700
SUB TOTAL	1.0	64,200		35,310		41,500	37,800	
SELECTED NON FOOD STORE RETAIL (NFSR)								
NFSR: Pharmacies & Personal Care Stores	1.5	96,300	65%	62,595	20%	78,200	71,100	7,100
NFSR: Other Miscellaneous Stores	2.0	128,400	40%	51,360	15%	60,400	61,200	-800
SUB TOTAL	3.5	224,700		113,955		138,600	132,300	
SERVICES								
Finance, Insurance & Real Estate	2.0	128,400	50%	64,200	10%	71,300	69,900	1,400
Food Services & Drinking Establishments	4.0	256,800	60%	154,080	10%	171,200	165,600	5,600
Personal Care Services	1.5	96,300	55%	52,965	10%	58,900	56,200	2,700
Cultural, Entertainment & Recreation Establishments	1.5	96,300	55%	52,965	10%	58,900	61,000	-2,100
Health Care Services	2.0	128,400	60%	77,040	20%	96,300	102,300	-6,000
Business Services ¹	1.5	96,300	45%	43,335	10%	48,200	48,600	-400
SUB TOTAL	12.5	802,500		444,585		504,800	503,600	
GRAND TOTAL - Neighbourhood Serving	17.0	1,091,400		593,850		684,900	673,700	11,200

SOURCE: urbanMetrics inc., based on the inventory completed by urbanMetrics in October 2021. Rounded to the nearest 100 square feet.

NOTE: Population estimate based on Figure 3-2.

¹ Includes Professional, Scientific and Technical Services, Selected Educational Services and Selected Office Administrative Services.

6.0 Conclusions

This study has examined the potential market available to retail/service commercial uses on the subject site located at 4099 Erin Mills Parkway in the City of Mississauga once it is redeveloped to include a higher density residential component. Based on the analysis and research included above, the following provides a brief summary of our key research findings and study conclusions with respect to the proposed redevelopment.

- The subject site is located in the City of Mississauga at the southeast corner of Erin Mills Parkway and Folkway Drive, south of Highway 403, west of Sawmill Valley Drive. The subject site is well situated from an accessibility perspective for developing the proposed residential and commercial uses. At a minimum, the subject site will maintain its frontage and direct access from a *Regional Arterial Road* (Erin Mills Parkway) and a *Minor Collector Road* (Folkway Drive).
- Lands in the vicinity of the subject site consist of mainly residential uses of various densities, public open space, and mixed-uses. There are also distinct commercial nodes located near to the subject site, which provide existing and future residents access to a variety of local and regional serving retail/service commercial space. This includes the Erin Mills Town Centre less than two-kilometres northwest of the subject site, which includes over 925,200 square feet of retail space, 779,100 square feet of which is currently occupied. It also includes the South Common Centre which is located less than one kilometre southeast of the subject site and contains a Walmart Supercentre, a Shoppers Drug Mart and a No Frills supermarket.
- The Study Area delineated for this analysis is generally bound by Thomas Street to the northwest, the Credit River to the northeast, Dundas Street to the southeast, and Winston Churchill Boulevard to the southwest. The 2021 population of the Study Area has been estimated at 61,600 persons. Going forward, marginal population growth is anticipated in the area, with a 2031 population for the Study Area forecast at 64,200 persons, including the complete build-out of the subject site as currently proposed.
- The Study Area contains a significant supply of Supermarket and Grocery Store space. Subject to the redevelopment of the subject site—which would eliminate the existing supermarket—Supermarket and Grocery Store space would still comprise some 276,000 square feet of space or 4.5 square feet per capita, which is still well above a normal ratio of 3.5-4.0. This also excludes the food store component of the two Walmart Supercentres in the Study Area, and the Costco located just west of the Study Area. It is our opinion that the elimination of the Supermarket on the subject site will not negatively impact the adequacy of neighbourhood-serving uses and supermarket space available to Study Area residents. Furthermore, based on the existing provision of Supermarket space, it is very unlikely that a replacement supermarket would locate on the subject site.

- Based on our analysis, Study Area residents currently require some 1,047,200 square feet of neighbourhood-serving retail/service commercial space. Recognizing typical shopping patterns, including capture rates and inflows, this reduces the requirement to some 657,300 square feet of space across the selected retail/service commercial categories. In the Study Area, there is already 698,800 square feet of neighbourhood-serving retail space—including the subject site as currently comprised—and indicating a current over supply of local serving commercial space.
- Our per capita analysis for 2031, which excludes the existing retail/service commercial space on the subject site was used to determine how much additional commercial space is warranted in the Study Area if the subject site were to be redeveloped. Based on a 2031 population estimate of 64,200 persons, a total of some 684,900 square feet of select retail space would be warranted in the Study Area going forward. This means that there would be demand for a limited amount of neighbourhood serving commercial space, including, Convenience & Specialty Food Stores; Food Services and Drinking Establishments; and Personal Care Services.
- The 8,356 square feet GFA of new neighbourhood-serving retail/service space included in the proposal for the subject site would effectively consume the majority of forecasted demand to 2031, while providing additional opportunity for existing and future development applications involving new retail/service commercial space elsewhere in the Study Area. Future residents of the subject site and Study Area will be supported by a significant range of regional and local serving retail amenities, while still having access to immediate local-serving amenities that are being introduced in the subject proposal.

Based on the foregoing conclusions, it is our opinion that the loss of commercial space on the subject site that would result from the proposed redevelopment will not negatively impact the needs of existing or future residents of the Study Area. Given the substantial range of retail/service commercial offerings already available today—which includes a range of regional and local-serving retail/service space—residents of the surrounding area and on the subject site will have more than adequate access to commercial space. Also, local-serving retail and service space will still be provided in the 8,356 square feet proposed on the subject site and will serve the future needs for new neighbourhood-local serving commercial space in the Study Area going forward.

Appendix A North American Industry Classification System

Figure A-1: uMi Retail Store Classifications Based on North American Industry Classification System (NAICS)

Group	NAICS	Description
FOOD		
90	Supermarkets	
	44511	Supermarkets and Other Grocery (except Convenience) Stores
100	Convenience and Specialty Food Stores	
	44512	Convenience Stores
	44521	Meat Markets
	44522	Fish and Seafood Markets
	44523	Fruit and Vegetable Markets
	44529	Other Specialty Food Stores, including Baked Goods Stores, & Confectionary & Nut
BEVERAGE STORES		
110	Beer, Wine and Liquor Stores	
	44531	Beer, Wine and Liquor Stores
NON-FOOD STORE RETAIL (NFSR)		
Automot		
20	Used and Recreational Motor Vehicle and Parks Dealers (Tires, Batteries, Automotive Accessories component)	
	44131	Automotive Parts and Accessories Stores
	44132	Tire Dealers
Furniture, Home Furnishings and Electronics Stores		
30	Furniture Stores	
	44211	Furniture Stores
40	Home Furnishings Stores	
	44221	Floor Covering Stores (excludes retailers or only ceramic or only hardwood flooring which are in Building Supply)
	44229	Other Home Furnishings Stores (e.g. window treatments, fire place/accessories, kitchen and tableware, bedding and linens, brooms and brushes, lamps and shades, and prints and picture frames).
50	Computer and Software Stores	
	44312	Computer and Software Stores (includes retailing new computers, computer peripherals, pre-packaged software, game software and related products)
60	Home Electronics and Appliance Stores	
	44311	Appliance, Television and other Electronics Stores
	44313	Camera and Photographic Supplies Stores
Building and Outdoor Home Supplies Stores		
70	Home Centres and Hardware Stores	
	44411	Home Centres
	44413	Hardware Stores (includes tool stores)
80	Specialized Building Materials and Garden Stores	
	44412	Paint and Wallpaper Stores
	44419	Other Building Material Dealers (excluding manufacturing and construction firms) (includes doors, windows, kitchen cabinets, electrical, glass, plumbing,
	44421	Outdoor Power Equipment Stores (lawn mowers, tractors, hedge trimmers, snow blowers)
	44422	Nursery Stores and Garden Centres
Pharmacies and Personal Care Stores		
120	Pharmacies and Personal Care Stores	
	44611	Pharmacies and Drug Stores
	44612	Cosmetics, Beauty Supplies and Perfume Stores
	44613	Optical Goods Stores
	44619	Other Health and Personal Care Stores (includes stores retailing health and personal care items, such as vitamin supplements, hearing aids, and medical

...Continued

Group	NAICS	Description
Clothing and Accessories Stores		
140	Clothing Stores	
	44811	Men's Clothing Stores
	44812	Women's Clothing Stores
	44813	Children's and Infant's Clothing Stores
	44814	Family Clothing Stores
	44819	Other Clothing Stores
150	Shoe, Clothing Accessories and Jewellery Stores	
	44815	Clothing Accessories Stores
	44821	Shoe Stores (includes athletic shoe retailers)
	44831	Jewellery Stores
	44832	Luggage and Leather Goods Stores
General Merchandise Stores		
170	Department Stores	
	45211	Department Stores
175	45211	Department Stores with a Large food component (i.e. Walmart Supercentres)
180	Other General Merchandise Stores	
	45291	Warehouse Clubs and Superstores
	45299	All Other General Merchandise Stores: <i>Home & Auto (i.e. Canadian Tire)</i> <i>Other General Merchandise Stores (e.g. general stores, variety stores, "dollar" stores)</i>
Miscellaneous Retailers		
160	Sporting Goods, Hobby, Music and Book Stores	
	45111	Sporting Goods Stores (excludes athletic shoe retailers)
	45112	Hobby, Toy and Game Stores (excludes computer games and software)
	45113	Sewing, Needlework and Piece Goods Stores
	45114	Musical Instrument and Supplies Stores
	45121	Book Stores and News Dealers
	45122	Pre-Recorded Tape, Compact Disc and Record Stores
190	Miscellaneous Store	
	45311	Florists
	45321	Office Supplies and Stationery Stores
	45322	Gift, Novelty and Souvenir Stores
	45331	Used Merchandise Stores
	45391	Pet and Pet Supplies Stores
	45392	Art Dealers (excludes art galleries)
	45399	All Other Miscellaneous Store Retailers (e.g. tobacco supplies, artist supplies, collectors items, beer & wine making, swimming pool/spas/accessories, religious goods and accessories)

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Group	NAICS	Description
SERVICES		
200	Consumer Goods Rental	
	53221	Consumer Electronics and Appliance (Appliance rental and leasing, rental of consumer audio-visual equipment (including rent-to-own), Television
	53222	Formal Wear and Costume Rental
	53223	Video Tape and Disc Rental
	53229	Other Rental (sporting goods, garden equipment, home health, fitness etc.)
	53231	General Rental Centres (including contractors' and builders' tools and equipment, home repair tools, lawn and garden equipment, moving equipment
210	Finance	
	52211	Banks
	52213	Credit Unions
215	52239	Other Financial (including cheque cashing, mortgage brokers, other financial services (e.g. Edward Jones))
220	Insurance and Real Estate	
	52421	Insurance Agencies and Brokerages
	53121	Offices of Real Estate Agents and Brokers
	53132	Office of Real Estate Appraisers
230	Professional, Scientific & Technical Services	
	54111	Offices of Lawyers
	54119	Other Legal Services (eg. Paralegal, Title search, immigration consultation, notaries)
	54121	Offices of Accountants, Tax Preparation Services, Bookings, Payroll
	54131	Architectural Services
	54132	Landscape Architecture (includes urban planners, industrial development planning, landscape architects)
	54134	Drafting Services
	54137	Survey and Mapping Services
	54138	Testing Labs (excluding medical, auto, veterinary)
	54141	Interior Design Services
	54143	Graphic Design Services (includes art studios)
	54149	Other Specialized Design Services (e.g. clothing, jewellery, fashion)
	54151	Computer Systems Design and Related Services (e.g. computer consulting and programming)
	54161	Management Consulting Services
	54162	Environmental Consulting Services
	54169	Other Scientific and Technical Consulting (e.g. economic, hydrology, safety)
	54171	Research & Development in the Physical, Engineering and Life Sciences (includes medical research labs)
	54172	Research & Development in the Social Sciences and Humanities (eg. demographic, education, psychology research)
	54181	Advertising Agencies
	54182	Public Relations Services (e.g. lobbyists, political consultants)
	54191	Marketing Research & Public opinion polling
	54192	Photographic Services (e.g. passport photography, photo studios portrait photography studies)
	54193	Translation and Interpretation Services
	54194	Veterinary Services (excludes pet care (81291))
	54199	All Other Professional, Scientific and Technical Services (includes consumer credit counselling)
240	Selected Office Administrative Services	
	56131	Employment Services (includes placements, executive search, casting agencies etc.)
	56141	Document Preparation Services (proofreading, word processing, desktop publishing etc.)
	56142	Telephone Call Centres
	56143	Business Service Centres (eg. printing, copying, mail centres) (excludes commercial printing)
	56144	Collection Agencies
	56145	Credit Bureaus
241	56151	Travel Agencies
	56159	Other Travel Arrangement & Reservation Services (eg. ticket sales agency, tourist info, bus ticket offices, etc.)
	56162	Security Systems (includes security system sales, installation and monitoring; locksmiths (excluding key duplication - 81149))
245	Selected Educational Services	
	61161	Fine Arts Schools (e.g. dance, drama, music, art, handicrafts)
	61162	Athletic Instruction (e.g. aerobic dance, gymnastics, jiu, karate, martial arts, scuba, swimming) (excludes athletic instruction in sport and recreation
	61163	Language Schools
	61169	All Other Schools and Instruction (e.g. driving instruction, public speaking, Kumon, Oxford)

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Group	NAICS	Description
250	Health Care	
	63111	Offices of Physicians
	62121	Offices of Dentists
	62131	Offices of Chiropractors
	62132	Offices of Optometrists (excludes eyeglass stores - 44613)
	62133	Offices of Mental Health Practitioners (psychologists, psychiatric social workers)
	62134	Offices of Physical, Occupational, Speech Therapists and Audiologists
	62135	Offices of Other Health Practitioners (e.g. acupuncturists, dental hygienists, dietitians, naturopath, podiatrists)
	62141	Family Planning Centres
	62142	Outpatient Mental Health and Substance Abuse Centres
	62149	Other Outpatient Care Centres (e.g. public health clinics, hearing testing, dialysis)
	62151	Medical and Diagnostic Laboratories (e.g. medical, x-ray, dental lab (excluding making of dentures, ortho appliances, teeth))
255	Social Services	
	62411	Child and Youth Social Services (e.g. Children's aid, youth centres, adoption)
	62149	Other Individual and Family Services (e.g. AA, marriage counselling, outreach)
	62441	Child Day Care
260	Cultural, Entertainment and Recreation	
261	71312	Amusement Arcades (e.g. indoor play areas, pinball arcades, video game arcades)
		Fitness & Recreational Sports Centres (includes athletic clubs, spas (w/o accommodation), aerobic dance centres, health clubs)
262	71394	
263	71395	Bowling Centres
264	71399	All other Amusement and Recreation Industries (includes billiards parlours)
265	51213	Motion Picture and Video Exhibition (includes cinemas)
270	Food Services and Drinking Places	
271	72211	Full-Service Restaurants
272	72221	Limited-Service Eating Places
273	72232	Caterers (includes banquet halls)
274	72241	Drinking Places (Alcoholic Beverages) -(includes night clubs, bars (including those with gaming), pubs, taverns
280	Personal and Household Goods Repair and Maintenance	
281	81111	Automotive Mechanical & Electrical Repair & Maintenance (includes engine repair, exhausts, transmission, electrical system repair)
281	81112	Automotive Body, Paint, Interior and Glass Repair (includes collision repair, auto upholstery, paint & body shops)
281	81119	Other Automotive Repair & Maintenance (includes auto detail, washing, diagnostic centres, lub, rustproofing, undercoating, emissions testing)
282	81121	Electronic and Precision Equipment Repair and Maintenance (includes inkjet cartridges (cleaning and refilling), tv repair)
	81141	Home and Garden Equipment and Appliance Repair & Maintenance (e.g. small engine repair)
	81142	Reupholstery and Furniture Repair
	81143	Footwear and Leather Goods Repair (e.g. shoe repair)
282	81149	Other Personal and Household Goods Repair and Maintenance (includes key cutting, china firing/decorating, jewellery repair, sharpening of knives, skate sharpening, watch repair etc.)
290	Personal Care Services	
	81211	Hair care and Esthetic Services (includes barber, beauty, hair salons)
	81219	Other Personal Care services (includes day spa, diet centres, hair removal, massage parlours, tanning salons, tattoo parlours, weight reduction centres)
	81231	Coin-operated Laundries and dry cleaners (self service)
	81232	Dry Cleaning and Laundry services (except coin operated)
	81233	Linen and Uniform Supply (includes work clothing supply services - industrial)
	81291	Pet Care (except veterinary)
	81292	Photofinishing Services
	81299	All other Personal Services (e.g. fortune tellers, dating services, psychic services, shoeshine)
295	Civic and Social Organizations	
	81341	Civic and Social Organizations (includes clubs)
	81391	Business Associations (includes board of trade, real estate boards etc.)
	Transportation	
296	49111	Postal Service (post office)
300	VACANT	
	9999	VACANT RETAIL/SERVICE SPACE