



BLOCK 297 JOSHUA CREEK

Commercial Study

Oakville, Ontario

Prepared for Valery Homes

May 30, 2025



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May 30, 2025

Danielle Braemer
Valery Homes
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Hamilton, Ontario
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Dear Ms. Braemer

RE: Block 297 Joshua Creek – Commercial Study (Oakville, Ontario)

urbanMetrics inc. is pleased to submit a commercial study in support of your application with respect to Block 297 in the North Oakville East Community.

The attached study examines the market for retail commercial and related uses on the subject property as requested by the Town of Oakville through its pre-application meeting process.

If you have any questions regarding our findings or conclusions, please do not hesitate to contact us.

Yours truly,

A handwritten signature in blue ink that reads "Rowan Faludi". The signature is fluid and cursive, with the first name "Rowan" and last name "Faludi" clearly distinguishable.

Rowan Faludi, MCIP, RPP, PLE, CMC
Partner,
urbanMetrics Inc.

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1.0 Executive Summary

- The subject site is situated at the southeast corner of Meadowridge Boulevard and Wheat Boom Drive within the North Oakville East Secondary Plan area, which is currently under development.
- The subject site is 1.09 acres in size. Valery Homes is proposing to develop the site with three separate buildings including a total of 60 stacked townhome units.
- The site is designated as Neighbourhood Centre within the North Oakville East Secondary Plan. This designation would provide for a range of residential and non-residential uses. The intersection of Wheat Boom and Meadowridge is identified in the Secondary Plan as a Neighbourhood Activity Node. Neighbourhood Activity nodes are intended to provide public, and other facilities to serve the surrounding neighbourhood. At least one non-residential building or use is required at the intersection of each activity node.
- Although the requirement for a minimum of one mixed-use or residential building only applies to the Activity Node in general and not specifically to the subject site, the other three corners of the Meadowridge and Wheat Boom intersection are already reserved in the plan of subdivision for townhomes (northeast and southwest corner) and a public park (northwest corner). Consequently, by default the only way for this condition to be met is on the subject site.
- The zoning for the site contains a site-specific provision that the buildings on the site be restricted to:
 - Mixed-use building
 - Office building
 - Institutional building
 - Commercial building
 - Commercial/residential building
- As per the planning analysis conducted by MHBC, the proponent's planner, an Official Plan Amendment and a Zoning Amendment would be required to support the proposed stacked townhome development on the subject site.

- In our opinion, the site is poorly located for a commercial use owing to its internal location without exposure or direct access to a major roadway. In our experience, local commercial sites function best when they are situated at the gateways into neighbourhoods with access and exposure to arterial roadways.
- In our opinion, the location of the site would severely limit its ability to function as a commercial shopping centre because Wheat Boom Drive and Meadowridge Boulevard would not carry sufficient traffic to make the site viable for most potential retail and service tenants.
- We would note that there are a number of live-work blocks in north Oakville which are functioning relatively well at the current time. This is largely because of the shortage of retail sites in North Oakville due, at least in part, to planning and design restrictions which have made commercial development prohibitively costly.
- However, we would caution that live-work units are very small and attract a very limited range of commercial uses and are not a replacement for properly designed and located retail sites.
- There is a large local serving commercial site within walking and cycling distance from the site, and a second local serving commercial node nearing completion that will be equally accessible to residents near the subject site. From a suburban retail perspective, the surrounding neighbourhoods will be well served by nearby retail facilities at all levels of the retail hierarchy. There are multiple supermarkets a short driving distance away from the site, as well as a wide range of regional serving retail facilities.
- While live-work units may currently be viable on the subject site owing to the general lack of retail facilities in North Oakville as a whole, they are not necessary to provide adequate retail, and service uses for the nearby population. In the longer term, if commercial uses are developed at gateway locations along Dundas Street, Trafalgar Road and other major roadways, it is likely that the viability of live-work units on interior sites will be diminished, which is a phenomenon witnessed in other municipalities where the function of interior commercial sites has ultimately been usurped by much better located commercial projects along arterial roadways.

Summary of Conclusions with Respect to the Questions Addressed by this Study

Is the Subject Site Suitable for Commercial Uses?

No. As a predominantly commercial site, the subject property would be very disadvantaged by its location internal to the community with no access or visibility from an arterial or major roadways.

This would make the site very unattractive to retailers such as reasonably-sized grocery/convenience stores, pharmacies, or food service operators who would be relied upon to draw traffic to the centre.

Typically, local shopping centres - which a one-acre site would support – would be located at the gateway to a neighbourhood (i.e. at the intersection of an arterial and collector road), where it would be easily accessible to both passing traffic and persons entering and leaving the neighbourhood. In addition, it would have a high degree of exposure to local residents where it would be a “top of mind” shopping destination. In our opinion, the location of the subject site would not benefit from these dynamics.

Are there Gaps in the Local Commercial Supply and Could the Site Reasonably Fill Them?

There are a wide range of retail and service tenants within a short distance of the subject site at all levels of the retail hierarchy. Within walking and cycling distance is a 70,000 square foot shopping centre anchored by a Shoppers Drug Mart and a TD Bank, with a wide range of other local-serving retail and service tenants. A similar distance away will be a new mixed-use development with some 12,000 square feet of local-serving space. Within about two kilometres, is a 215,000 square foot shopping node with a Longos supermarket and a Canadian Tire, with many other smaller stores and services. Further east is the Oakville Uptown Core, including a Loblaws supercentre and a Walmart department store. To the west is the Winston Park power centre cluster in Mississauga, both of which are a short drive from the subject site. In addition, Dundas Street is designated as an Urban Core area in the North Oakville Secondary Plan. The Dundas Urban Core designation encourages commercial uses in mixed-use developments at gateway sites into the adjacent neighbourhoods.

In our opinion, there are no current gaps in terms of the supply of retail and service uses available to residents of the neighbourhoods immediately surrounding the site.

While we acknowledge that as the North Oakville East Community builds out over time, and particularly when higher density uses begin to be realized along the Trafalgar Road Urban Core, there will be a need for much more retail than has been developed to date. While a number of live-work blocks have been developed west of Trafalgar Road, these should not be considered suitable replacements for well-designed and located retail projects. Over time, the market for these blocks may be diminished when new retail facilities are developed

What Are the Implications of Not Including Commercial Uses in the Subject Development in Terms of the Availability of Retail Opportunities?

As noted above, the neighbourhoods in the vicinity of the site already have easy and abundant access to retail and service commercial uses at all levels of the retail hierarchy. In addition, it is important to note that the Town of Oakville is in the process of preparing an Official Plan Amendment to address

the lack of retail development that will be required as the North Oakville East Secondary Plan builds out.

2.0 Background

2.1 Introduction

The subject site is situated at the southeast corner of Wheat Boom Drive and Meadowridge Boulevard in the developing portion of Oakville north of Dundas Street. Development of this area is guided by the North Oakville East Secondary Plan.

The proponents, Valery Homes, are proposing a stacked townhome development comprising 60 residential units.

The underlying issue addressed by this study is whether the proposed residential development is appropriate from a market perspective rather than some form of commercial or mixed-use development as encouraged by the planning policies.

2.2 Methodology

A Terms of Reference was prepared and submitted to the Town. This document has been included in the appendix section of this report. The objectives of the study are to provide our opinion with respect to:

- The suitability of the site for commercial uses;
- Gaps in the local commercial supply and whether the site could reasonably fill them; and,
- The implications of not including commercial uses in the subject development in term of the availability of retail opportunities.

The principal components of the study would be:

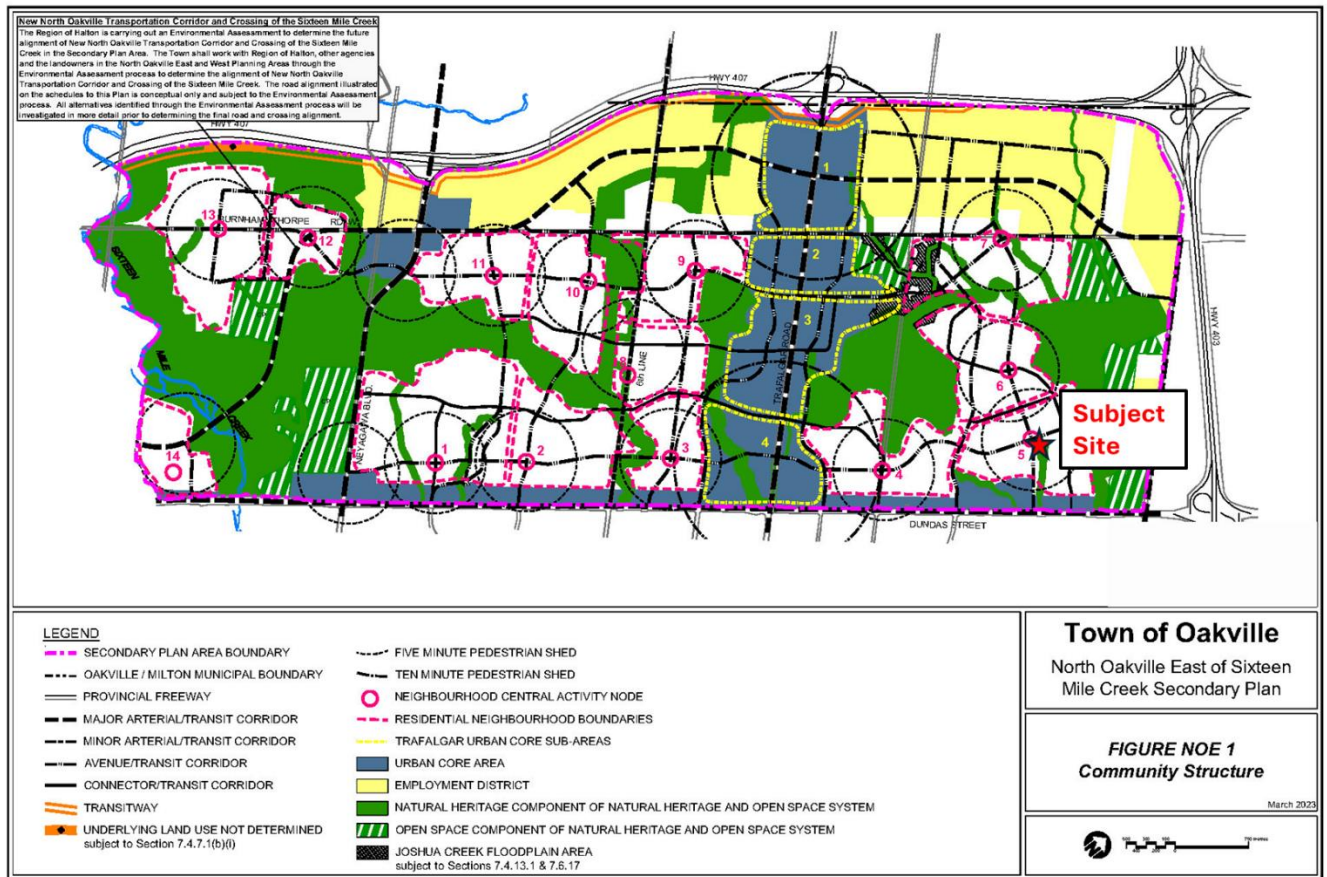
- An introduction of the study approach and methods with a review of background issues, objectives, assumptions and rationale.
- Evaluate the site location, accessibility, and size from a commercial market perspective.
- Provide an assessment of the planned function of possible commercial uses on the site.
- Determine the potential market area of the possible commercial uses on the site.
- Estimate the future population within the market area.
- Identify the existing and potential future commercial facilities serving the study area.

In addition, comments from the pre-consultation meeting suggested that the applicant should consider appropriately scaled live-work units, or a single commercial building with or without residential uses. In terms of the live-work units, the pre-consultation comments suggested that the

applicant should consider mixed-use activity node developments at Marvin Drive and Sixth Line; Preserve Drive and Kaitting Trail, and George Savage Avenue and Hibiscus Gardens. Our study has also taken these comments into consideration.

2.3 Location

The subject site is situated at the southeast corner of Wheat Boom Drive and Meadowridge Drive in the North Oakville East Secondary Plan Area within the Town of Oakville. This part of Oakville is under development with homes and streets under various stages of construction. Lots in the vicinity of the site will ultimately be developed with a combination of single-detached and townhome units. Figure 1-1 indicates the location of the site on the North Oakville East Secondary land use map. The area around the site is still under development. Some roads shown on the map have actual or planned alignments which differ slightly from the Secondary Plan.

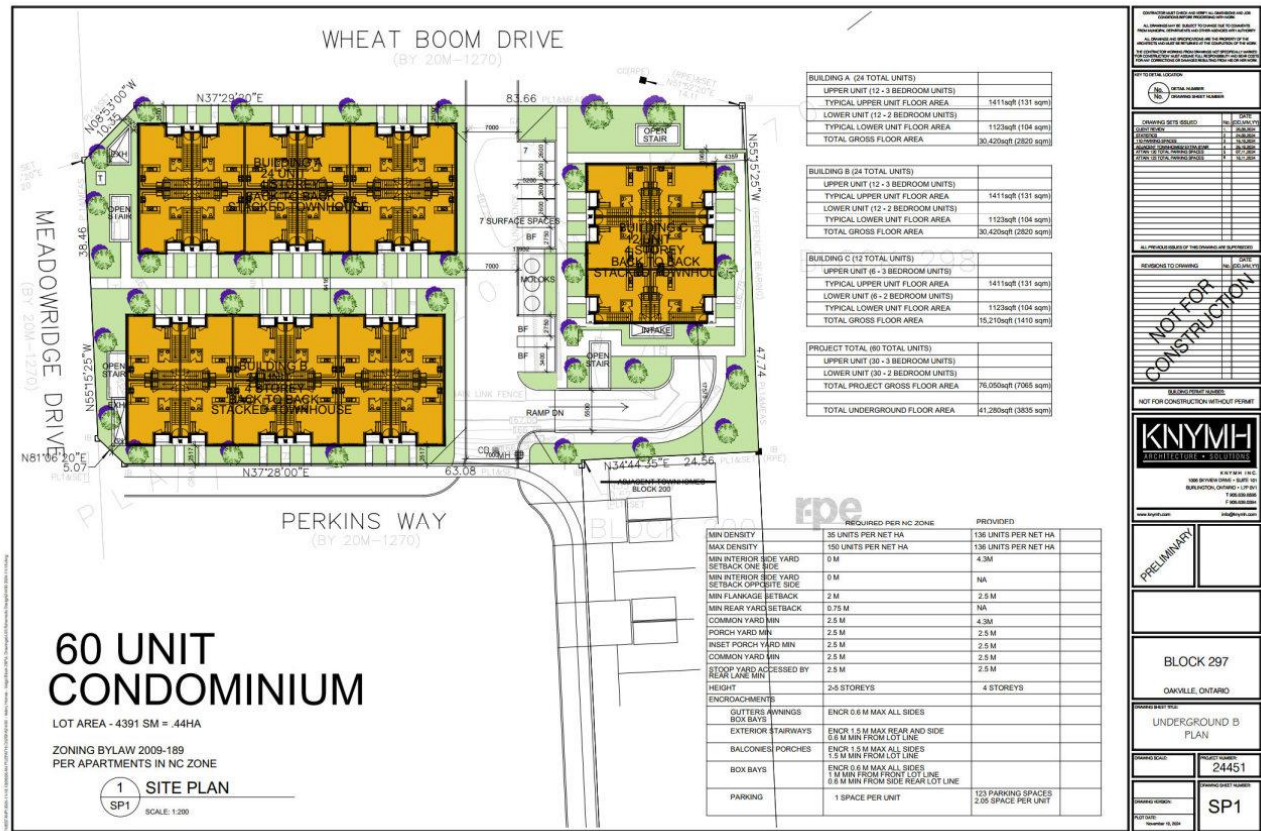
Figure 2-1: Site Location with Respect to the Secondary Plan Area

Source: North Oakville East Secondary Plan with site added by urbanMetrics

2.4 Proposed Development Concept

Figure 1-2 indicates the proposed concept plan for the subject site. Currently, the plan calls for some 60 stacked townhome units in three separate blocks. The building would be facilitated by underground resident parking and 7 surface spaces.

Figure 2-2: Site Plan



Source: KNYMH Architecture, November 18, 2024

2.5 Context

As discussed in this report, as a traditional local commercial site, the subject property is poorly located in the interior of a neighbourhood. Ideally, local commercial sites should be situated at the gateway to a community to maximize traffic passing the site – thus augmenting both exposure and accessibility to the development and convenience to customers. This allows for a more successful development, thus benefiting the retail uses available to serve the local community.

Historically, some new communities attempted to designate internal commercial sites under the assumption that they would be more conveniently situated near to the neighbourhoods which they would be serving. However, in many cases these types of sites either never developed or ultimately suffered from poor market support as shoppers and tenants gravitated to sites on arterial or other

major roadways where greater customer traffic allowed for the development of more extensive commercial uses and retail chains that could not be supported on internal sites. In recent years, planners have avoided internal commercial sites for these reasons.

However, in the case of North Oakville, with a goal towards encouraging walkable complete communities, planning regulations and design guidelines were put in force which included many internal sites and strongly encouraged mixed-use development with design guidelines that were very costly to implement in the context of North Oakville, and in many cases, made retail development uneconomical to build. This has led to a situation in which very little retail development has occurred throughout all of north Oakville, and mostly in the form of a few blocks of live-work units west of Trafalgar Road.

In our opinion, the market for live-work units has been artificially bolstered as these are the only types of commercial development that are economical to be included in a development, particularly on internal sites. However, live-work units are very small and are very limited in terms of the types of retail and services that they can accommodate and are not a replacement for properly designed and located retail projects which are needed to support residential development and complete communities.

At 0.4391 hectares (1.09 acres), the site is small for a commercial development. At traditional suburban commercial densities, this type of development could accommodate approximately 10,000 square feet of commercial space¹. This type of centre would function as a convenience commercial node serving the day-to-day retail and service needs of the community. In our opinion, the location of the centre would not be ideally located for this type of development, which would likely struggle to be successful if developed.

The question, therefore, is whether or not adding live-work type units to the site would be supported from a market perspective and whether this would fulfill the function envisioned for it in the planning documents.

¹ Traditional single storey commercial shopping centres with at-grade parking are developed at approximately 25% coverage. While there is minor variability in this density, this is largely constant across all shopping centres, regardless of the size.

3.0 Site and Access

3.1 Accessibility

As indicated by Figure 2-1, the site is situated at the southeast corner of Wheat Boom Drive and Meadowridge Drive in north Oakville. Wheat Boom Drive and Meadowridge Drive are designated as “Avenues” in the North Oakville East Secondary Plan and would effectively function as collector roads within the neighbourhood. In addition to Wheat Boom and Meadowridge, the site would also have frontage on Perkins Way - a local road extending from the south and turning westerly in front of the site. Wheat Boom, Meadowridge and Perkins Way are intended to have street front parking in front of the site.

Wheat Boom Drive is an east-west roadway which extends to the Trafalgar Urban Core approximately 2 kilometres to the west. To the east, Wheat Boom Drive extends only some 250 metres where it ends at Lakeport Crescent – a local street which would serve only local traffic on the crescent. Meadowridge Drive is a north-south roadway which connects to Dundas Street – some 500 metres to the south and Burnhamthorpe Road – approximately 1.6 kilometres to the north and ultimately to William Halton Parkway some 2.0 kilometres north of the site.

Dundas Street, William Halton Parkway and Trafalgar Roads are designated as Major Arterial Roadways in the Halton Region Official Plan (now part of the Official Plan of the local municipalities, including Oakville). Burnhamthorpe Road is designated as a Minor Arterial Roadway.

Trafalgar Road and Dundas Street are also designated as Urban Core Areas in the North Oakville East Secondary Plan. Trafalgar Road is designated to play a service, employment, residential and community activity focus. (Policy 7.5.14). Retail and service commercial development will be encouraged in a “main street” format where retail and service commercial uses are oriented to the street creating a pleasant pedestrian shopping environment. (Policy 7.5.14 f)). Similarly, Dundas Street is intended for mixed use development, although retail and service commercial development is limited only to the intersections. Where retail and service commercial development is permitted it will be encouraged in a “main street” format where retail and service commercial uses are oriented to the street creating a pleasant, pedestrian shopping environment. (Policy 7.5.15) and Policy 7.5.15 c))

Figure 3-1: Air Photo of the Subject Site



Source: Town of Oakville. Subject site added by urbanMetrics.

3.2 Surrounding Land Uses

Land uses surrounding the site are in various stages of development and construction. To the immediate south, west and southwest of the site, lands are predominantly being developed in townhome formats. To the north and east of the site, lands are being developed predominantly with single-detached homes.

Immediately east of the site is a strip of land which is part of the natural heritage system. At the northwest corner of Wheat Boom and Meadowridge will be a future park of 4.44 hectares. Immediately west of the park will be a future elementary school.

The site is situated approximately 500 metres from Dundas Street, which is an important arterial roadway spanning the western GTA in an east-west direction. As noted above, Dundas Street is also designated as an Urban Core Area in the North Oakville East Secondary Plan, which is intended to encourage mixed-use development at medium and high densities. As discussed later, the site is situated within walking and cycling distance of a number of local-serving retail facilities on Dundas Street.

3.3 Site Evaluation

We have evaluated the site from two perspectives. First as a predominantly commercial site serving the day-to-day convenience needs of the neighbourhood, and secondly, from the perspective of accommodating some live-work units.

Predominantly Commercial Site

As a predominantly commercial site, the subject property would be very disadvantaged by its location internal to the community with no access or visibility from an arterial or major roadway. This would make the site very unattractive to retailers such as well-known grocery/convenience stores, pharmacies, or food service operators who would be relied upon to draw traffic to the centre.

Typically, local shopping centres - which a one-acre site would support – should be located at the gateway to a neighbourhood (i.e. at the intersection of an arterial and collector road), where it would be easily accessible to both passing traffic and persons entering and leaving the neighbourhood. In addition, it would have a high degree of exposure to local residents where it would be a “top of mind” shopping destination. In our opinion, the location of the subject site would not benefit from these dynamics. While it would benefit from some pass-by traffic particularly for vehicles travelling in a north-south direction, there simply would not be sufficient traffic to be attractive to many retailers and service providers that would be needed to attract customers to the site. It is also important to note that east of Trafalgar Road, there are multiple north-south routes extending from Dundas to

Burnhamthorpe so that traffic in the neighbourhood will be disbursed rather than concentrated on a single roadway. Just 500 metres west of Meadowridge Boulevard is John McKay Boulevard, which effectively duplicates the function of Meadowridge. About 300 metres east of Meadowridge is William Cutmore Boulevard, which ultimately connects with Meadowridge north of the subject property, allowing traffic to completely by-pass the site.

East-west routes are more limited, and Wheat Boom Drive will be an important neighbourhood access point for vehicles entering the neighbourhood from Trafalgar Road. However, immediately east of the site, Wheat Boom transitions to a local crescent so that the majority of traffic will already have turned into the neighbourhood before reaching the site.

From a pedestrian retail perspective, surrounding residential uses are comprised of medium- to low-density residential units. While persons living in close proximity to the site will often choose to walk to the site, there is not enough population living within walking distance to support a commercial development without a significant volume of vehicular traffic using the site. Residential development in the neighbourhood is also very fragmented by large scale environmental features, storm water ponds and parkland further extending walking distances.

It is also key to note that North Oakville, being an affluent community, has and will continue to have a high propensity for car ownership. According to the 2016 Transportation for Tomorrow survey, 96% of Oakville households have access to at least one vehicle, while 66% have access to two or more vehicles². This is especially true in the vicinity of the site where residential uses are comprised entirely of single detached homes and townhomes. In addition, there is currently no transit service within the neighbourhoods. As a result, the vast majority of shopping trips will be made by car to large shopping centres where there is a much greater variety of goods and services. For the most part, isolated local shopping centres, such as the hypothetical one on the subject site, will be forced to compete with much larger retail destinations, which are not a significantly further drive, and provide open-air free parking areas, which are generally preferred by shoppers for their proximity to stores and personal safety. Our opinion is that the site could not function effectively as a retail shopping centre.

Live-Work Units

Live-Work Units are a type of mixed-use development which provide for small street-related commercial units attached to either a traditional townhome or a stacked townhome. Examples in North Oakville include:

² Transportation for Tomorrow Survey, GTHA Residents, March 2018, compiled by the University of Toronto Data Management Group, in cooperation with the municipalities across the GTHA, the Ministry of Transportation, Metrolinx and the Toronto Transit Commission.

- Preserve Drive and Kaitting Trail.
- Marvin Avenue and Sixth Line.
- Burnhamthorpe Drive east of 6th Line (2 Blocks).
- George Savage Avenue and Hibiscus Gardens.
- Carding Mill Trail and Harold Dent Trail

All of these are comprised of small street front commercial units underneath three storey townhomes. The first four of these projects occupy superior locations to the subject site. The Preserve Drive and Marvin Drive projects occupy gateway sites on arterial roadways. The two live-work blocks on Burnhamthorpe Drive are situated along a minor arterial roadway that extends across Halton and Peel Regions and into the City of Toronto. The George Savage project is situated only about 200 metres north of Dundas Street. Although it does not offer direct exposure to Dundas, it is situated near the gateway to the neighbourhood. The only project that has a truly interior location is the Carding Mill site which comprises two blocks of live-work units on either side of Carding Mill Trail.

For the most part these projects are fully occupied by small commercial units. However, it is important to note that the market for these types of retail uses is artificially bolstered because the supply of local commercial space in North Oakville has been constrained by very strict planning and design guidelines. For example, the Community Design Strategy within the North Oakville East Secondary Plan places significant restrictions on format, location, frontage, location of entranceways, parking, and height of commercial structures. This is particularly true for larger retailers (which are often required to anchor or attract shoppers to a shopping node) which are seen as “not often conducive to a vibrant and active street life”³. Retail and service commercial development is encouraged in a “main street” format with detailed guidelines as to how this should occur. These restrictions have, for many developers, made retail development prohibitively expensive, impractical and contrary to the requirements of the retail tenants they would seek to attract.

As has been discussed with Town staff by local land owners and their consultants, including urbanMetrics, the current policy framework for the North Oakville East Secondary Plan is insufficient to address the commercial needs in North Oakville East. In particular, revised policies are required to address locations, height, density, parking and site design in order to facilitate a functional commercial structure that will support a complete community. As a result, for the most part, the only commercial projects that have been developed to date in North Oakville East have been small scale live-work blocks. As discussed later in this report, a Retail Study conducted in November 2024 on behalf of the Town has recommended relaxing these restrictions. The Town is in the process of preparing an Official Plan Amendment in this regard.

³ North Oakville East Secondary Plan Policy 7.5.13 b).

In our opinion, live-work blocks can play a limited role in the commercial structure. They are not a replacement for properly planned commercial facilities. A September 26, 2013, report prepared by Oakville Planning Staff, identified a number of significant limitations with regards to live-work units⁴. These include:

- No control over whether the owner will use the commercial unit for commercial purposes.
- The size of live-work units is very small at about 500 square feet, which limits the type of business that can operate in them. Further use restrictions are imposed by the zoning by-law, presumably to restrict conflicts between the commercial uses and on-site and nearby residential uses.

We would note for example, that Oakville zoning by-law 2014-014 restricts uses in live-work units to those that do not include food preparation requiring exhaust hood ventilation or producing grease-laden vapour. This would eliminate almost all restaurant and food service tenants. In addition, other uses would be effectively restricted from locating in live-work units. For example, uses that require more traditional floor plates (Note: In commercial plazas, ancillary retail units can range from about 1,000 to 5,000 square feet and typically provide for storage areas and rear entry or loading bays to facilitate deliveries, pick-ups and trash collection. This is compared to live-work units at about 500 square feet with no rear loading facilities and very limited storage.

- Parking is also an issue as spaces are often limited to on street spaces, which may be challenging for both employees and visitors.

In addition to these issues raised by the Town of Oakville, we would also note that because live-work units are separately owned, there is no opportunity to develop an overall leasing plan which is common for commercial developments. Consequently, there are often duplicate store types within the same block. In addition, because all the units tend to be of a small size, there is no opportunity to lease to an anchor tenant that would act as a significant draw to support the balance of tenancies.

The following table summarizes the number of units by retail type at four of the five live-work blocks noted above. The only one not included was Marvin Avenue, as we did not have sufficient information, although there is no reason to believe that this block was not representative of the overall trend shown by the other blocks.

⁴ Live-Work Information Report, Planning Services Department, September 26, 2013.

Figure 3-2: North Oakville East Live-Work Blocks by Tenant Type

	Burnhamthorpe Road	Preserve Drive	George Savage Avenue	Carding Mill Trail	Total	Percent of Total
Date of Inventory	January 2025	June 2024	August 2023	May 2021		
Hair/Nail/ Beauty	9	5	5	3	22	33%
Health Care	3	5	1	2	11	16%
Office	3	3	5		11	16%
Food Service	2	1	2		5	7%
Convenience Store	1	1	1	1	4	6%
Vacant	1	1	1		3	4%
Bakery	1		1		2	3%
School			1	1	2	3%
Other Non-Food Retail	1				1	1%
Pharmacy	1				1	1%
Pet Grooming	1				1	1%
Recording Studio	1				1	1%
Cleaners			1		1	1%
Yoga Studio			1		1	1%
Halal Grocery			1		1	1%
Total	24	16	20	7	67	100%

Source: Burnhamthorpe - on-site inventory; Preserve, George Savage and Carding Mill - Google Maps

The vacancy rate was only 4% which suggests that the blocks have been successful in attracting tenants, although as noted previously, the supply of retail uses has been artificially constrained through restrictive planning and design policies. Typically about 5 to 10% is considered a balanced market. We would also note that two-thirds of occupants fall into three categories, including: hair/nail/beauty services; health care; and offices. The concentration of commercial uses in only a small number of service categories, with limited retail and food service uses severely constrains these blocks from fulfilling a role as an active neighbourhood hub.

There were a small number of food related shops, including four convenience stores, 2 bakeries and a Halal grocery store. These stores would be much smaller than typical stores in these categories so that their offerings would be very small in terms of depth and breadth of merchandise (i.e. number of different types and number of brands of each type). Other services included: a pet groomers, two commercial schools, a cleaners, a recording studio, and a yoga studio.

We would stress that many local serving uses were absent or nearly absent from the inventory, which is typical for live work units. These include:

- Grocery stores (large and small) providing food and household items required for daily or weekly living;
- Financial services, such as banks and credit unions;
- Non-food retail stores;
- Full-service restaurants;
- Fast food providers;
- Automotive uses;
- LCBO stores;
- Dollar/Discount stores;
- Places of entertainment; and,
- Popular retail and service chains.

For the most part, these uses are excluded from live-work units due to their small size, location, design and potential conflicts with residential uses. The lack of these uses severely limits the ability of live-work units from fully serving the local retail and service needs of nearby residents. For these reasons, while these live-work blocks fill a minor function in the overall retail system, they are not a replacement for properly and purposely designed retail sites.

4.0 Planning Policies

4.1 North Oakville East Secondary Plan

The North Oakville East Secondary Plan (NOESP) was originally approved by the Town of Oakville Council in 2008 and approved by the Ontario Municipal Board in 2010. The NOESP establishes the planning framework for lands in the Town of Oakville north of Dundas Street and east of Sixteen Mile Creek. While there have been amendments to this plan since then, the planned urban structure, particularly with respect to lands in the vicinity of the site has been left fundamentally unchanged.

It is important to note that during the 17 years since the original adoption of the plan, significant changes have occurred to the overall retail market. Most notable has been the rise in online retailing, which has significantly reduced the need for physical commercial space due to a number of specific impacts:

- Chains which directly compete for sales from online channels and have either closed stores in existing locations or have reduced their expansion plans, or a combination of both.
- Stores that have been made largely redundant by electronic retailing, such as bookstores, music stores, and video rental stores.
- Stores which have incorporated online sales, deliveries and customer pick-ups into their operations and have reduced the space devoted to direct customer interactions. This has become prevalent in the restaurant and food service industry, where seating areas have been reduced. Many big box retail organizations are developing smaller retail formats.
- On-site food and convenience retailing has partly been replaced by a number of increasingly popular services, including delivery services offered by the major supermarket chains, such as PC Express (Loblaws) and Voila (Sobeys); third party delivery services, such as Instacart and Uber Eats Grocery; and prepared meal services, such as Hello Fresh; Chef's Plate and Factor.

The North Oakville East Commercial Study prepared on behalf of the Town of Oakville in October 2024 notes these trends as well:

Although often over-stated and misrepresented in the context of commercial development planning—especially for new development communities like NO-E—there has been a discernable and undeniable growth in e-commerce activity as of late, amplified through the COVID-19 pandemic. With significant variation across different store categories (e.g., electronics stores vs. food stores), this has in many cases limited the pool of eligible retailers now opting to locate in secondary or tertiary markets (i.e., instead choosing to reduce their physical space footprints to very few selected locations or key areas)⁵.

⁵ North Oakville East Secondary Plan Commercial Study, Parcel Economics, November 12, 2024, p. 48.

In our opinion, the commercial policies contained in the current North Oakville East Secondary Plan should be viewed in this context. It is also recognized that the Town will be considering amendments to the North Oakville East Secondary Plan, in light of more recent changes to the commercial market, stemming from the directions contained in the North Oakville East Commercial Study.

As per the North Oakville East Secondary Plan, the site is situated within a Neighbourhood Centre Area and within a Neighbourhood Activity Node. Neighbourhood Centre Areas are intended to accommodate a range of medium-density residential, mixed-use, and limited commercial and civic uses focused around a central Neighbourhood Activity Node.

The Activity Node for the neighbourhood is situated at the intersection of Wheat Boom Drive and Meadowridge Drive. On the Secondary Plan Map NOE 1, Activity Nodes are not assigned to specific sites but are generically drawn around the four corners of their respective intersections.

Under North Oakville East Secondary Plan Policy (OPA 321) 7.6.7.1 b), with respect to Neighbourhood Centre Areas:

- The permitted uses shall be medium-density residential, mixed-use and small-scale convenience retail, personal service, restaurants and business activity, as well as public and institutional uses including village squares. Business activity may include a range of small scale uses including offices, medical clinics, workshops for artisans and artists studios.
- Permitted uses shall be primarily located in live/work mixed-use or medium-density residential buildings. Both mixed-use, single-use buildings shall be permitted, and this may include convenience commercial buildings in accordance with the provisions in Subsection c) below.
- Notwithstanding the above, a minimum of one mixed-use or non-residential building, in accordance with the provisions in Section 7.6.7.1.c) is required at the intersection of each neighbourhood activity node identified on Figure NOE 1.

Under Policy: 7.6.7.1 c):

Mixed-use development will be focused at neighbourhood activity nodes, identified on Figure NOE 1, which will include a transit stop and other public facilities which serve the neighbourhood such as central mail boxes, or mail pickup facilities. In addition, convenience commercial facilities or similar uses will be encouraged to locate in these areas.

Although the requirement for a minimum of one mixed-use or non-residential building only applies to the Activity Node in general and not specifically the subject site, the other three corners of the Meadowridge and Wheat Boom intersection are already reserved in the plan of subdivision for townhomes (southwest corner), detached homes and townhomes (northeast

corner) and a public park (northwest corner). Consequently, by default the only way for this condition to be met is on the subject site.

4.2 Zoning By-law 2009-189

Zoning By-law 2009-189 applies to lands between Dundas Street and Highway 407. Under this by-law, the site is zoned “Neighbourhood Centre” with Special Provision 98. The Neighbourhood Centre zoning category provides for an extensive range of residential and commercial uses. It also allows for a wide range of building types, including:

- Mixed-use building;
- Office building;
- Institutional building;
- Parking garage;
- Commercial building;
- Commercial/residential building;
- Apartment;
- Triplex;
- Townhome (both street and lane access); and,
- Back-to-back Townhome.

The townhouses proposed on the subject site would be consistent with the uses and building types in the Neighbourhood Centre zoning category. However, Special Provision 98 restricts building types on the site to only:

- Mixed-use building
- Office building
- Institutional building
- Commercial building
- Commercial/residential building

As the proposed townhomes would not provide for commercial space, they would not be consistent with the requirements under this site-specific special provision. The site is not appropriate for an office building or a stand-alone commercial building due to the interior location of the site, as well as, the generally poor market for stand-alone office buildings. The site would also not be appropriate for institutional uses due to its small size and poor location with respect to major transportation routes. There appears to be no interest on behalf of a potential public sector user for an institutional building on the subject site.

Under the zoning by-law 2009-189, a mixed-use building and a commercial/residential building are essentially the same, although a mixed-use building may include two or more non-residential components, providing that together they do not constitute a “commercial building”. In the context of the site and the surrounding neighbourhood, the most appropriate form of mixed-use or commercial/residential building would be live-work blocks. We would stress that this does not suggest that the stacked townhomes proposed by the applicant are not appropriate, only that if a mixed-use or commercial/residential building were contemplated for the site, the format most compatible with the site and surrounding land uses would be live-work units.

4.3 North Oakville East Commercial Study

The Town of Oakville commissioned a commercial study of North Oakville East. The North Oakville East Commercial Study was undertaken jointly by Parcel Economics and Gladki Planning Associates and released on November 12, 2024.

As described by the study, despite the vision of the Town to create a mixed-use complete community in North Oakville, there has been limited commercial development to date. According to the study:

This has been a function of a variety of factors, many of which are beyond the immediate control of both the Town and the local development community (e.g., prevailing market conditions and the state of the retail industry more broadly, shifting consumer and tenant preferences, heightened construction costs and development financing affecting financial feasibility, etc.).⁶

The objective of the study is described as:

To this end, our role for this study has been to provide additional research, analysis and strategic insight from a market and economic perspective, as well as in the context of establishing an appropriate land use policy framework that has regard for key objectives of the Town.

After completing its analysis, the study suggests that some 1,810,000 square feet of commercial space is warranted in the study area. The study proposes that it be divided amongst key intersections, including: Trafalgar/Dundas, Neyagawa/Dundas, Neyagawa Urban Growth Centre, and Burnhamthorpe/Trafalgar; 3 Primary Neighbourhood Activity Centres and 11 Secondary Neighbourhood Activity Centres.

Within the study, the subject site is identified as a Secondary Neighbourhood Activity Centre. Secondary Neighbourhood Activity Centres are described as:

⁶ North Oakville East Commercial Study, p. i.

Feature smaller groupings of commercial uses located primarily within the interior of neighbourhoods. They provide access to a range of convenience retail, locally-oriented services and community-oriented businesses, serving as local focal points of community at a walkable scale⁷.

In total, the Study proposes that 320,000 square feet be allocated to Secondary Neighbourhood Activity Centres with each being approximately 29,000 square feet. Although the study does acknowledge that these allocations are “for demonstration purposes only” and that the actual distribution of space will inevitably differ from this summary⁸.

With respect to the subject site, the size of the property (approximately 1.09 acres) could not realistically accommodate anywhere near to 29,000 square feet. At typical retail densities, a single use retail development on the subject site could accommodate just under 12,000 square feet and less if it was developed as part of a mixed-use building. Secondly, as describe above, the interior location of the site is not suitable for a retail development of the size suggested in the study, or even at the smaller scale at traditional retail densities. For these reasons, the subject site would not be appropriate for a Secondary Neighbourhood Activity Centre as envisioned by the study.

There is also a very significant issue with the Commercial Study from a market perspective. The study based its commercial demand on the most aggressive population projection emanating from the Joint Best Planning Estimates prepared by Halton Region in August 2023. As such, their space projections are derived from the assumption that by 2051 the population of North Oakville East will reach 142,100. This population is almost three times the upper range of the planned population for the approved Oakville East Secondary Plan (45,000 to 55,000). Given that much of the secondary plan is either already developed or part of approved plans of subdivision, it is questionable whether the JBPE population can be achieved. It is also important to note that the JBPE population projection is also well in excess of both the ROPA 49 MMAH approved projection for the Region, as well as, the most recent Ministry of Finance Projection for the Region.

We would note that using the upper end of the projected population in the North Oakville East Secondary Plan of 55,000, the total warranted space using the same demand model and assumptions as in the Commercial Study analysis would amount to just 536,000 square feet instead of the 1,810,000 square feet. This would have significant implications on the need for commercial space at all levels of the hierarchy, including the Secondary Neighbourhood Activity Centres, such as the one identified on the subject site. Until the build-out population for the North Oakville East Secondary Plan can be finalized, the space projections in the Commercial study are not a reliable indicator of either the total amount of space warranted in the Secondary Plan nor the amount of space warranted at the Key Intersections or the Neighbourhood Activity Centres.

⁷ North Oakville East Commercial Study p. 72.

⁸ North Oakville East Commercial Study p. 152.

In the staff report accompanying the Commercial Study⁹, staff recommended that the Town undertake amendments to the Official Plan to implement the directions of the study.

A key direction noted in the Staff Report is that:

Based on the market-based research and analysis, the North Oakville East Commercial Study states that retail/service commercial activity in North Oakville East will thrive if concentrated in a smaller number of strategic locations, rather than being dispersed across the entire community as originally envisioned in the Secondary Plan. This approach may require a re-evaluation of current policies from a locational standpoint, with a focus on strengthening requirements for commercial space at key sites. It could also involve replacing these policies with alternatives designed to "encourage" or "enable" additional retail and service commercial growth in other areas. Overall, this would emphasize a "quality over quantity" approach to commercial development in North Oakville East.

While we are not necessarily in agreement with all of the individual potential commercial locations suggested in the report, we strongly agree with the approach outlined above. In other words, that the Town focus on a smaller number of larger strategically located commercial sites, rather than encourage many marginal commercial sites, such as the subject property, spread throughout the planning area.

Although the commercial study does not specifically assess the issues with the current design guidelines, it does suggest that more flexibility is required and that interim solutions should be considered. In particular, the study acknowledges that the “main street” approach will not work everywhere, particularly along the Dundas Street and Trafalgar Road Urban Cores, which are designed to carry high volumes of traffic that is not conducive to an enjoyable pedestrian environment, and that alternative configurations should be considered¹⁰. Depending on the Official Plan amendments implemented by the Town, this may lead to more and better located commercial development opportunities.

⁹ Planning and Development Staff Report dated November 12, 2024.

¹⁰ North Oakville East Retail Study, p. 73.

5.0 Market Analysis

5.1 Planned Function of Hypothetical Commercial Uses on the Site

Given the small size of the site, any commercial uses developed on it would serve a very localized function catering to the convenience needs of the nearby population.

5.2 Commercial Competition

We have examined the commercial competition in the vicinity of the site. This has been undertaken for several reasons. First, to determine how well served the area around the site is in terms of retail and service uses. And secondly to understand what area would be served by hypothetical commercial uses on the subject site. Because the area around the subject site is still under development, some potential retail sites have not been constructed and for this reason we have relied on planning policies to identify where they might be located.

Figure 4-1 illustrates the existing commercial competition in the vicinity of the site. It consists of a number of existing and potential commercial nodes.

Existing

- **Shoppes on Dundas Street** – This is a 70,000 square foot retail plaza situated at the southeast corner of Dundas Street and John McKay Boulevard and is anchored by an 18,000 square foot Shoppers Drug Mart and a TD Bank. It contains a wide range of other stores and services, including a Starbucks and a childcare centre. It is situated approximately one kilometre from the subject site. It is easily walkable or cyclable from the subject site.
- **Longos/Canadian Tire Retail Node** – This is a 215,000 square foot retail node comprised of a number of different properties at the southeast corner of Dundas Street and Trafalgar Road. The principal tenants are a 49,000 square foot Longos supermarket and an 88,000 square foot Canadian Tire. The site is situated approximately 2.2 kilometres from the subject site, which is within the expected trade area of a suburban supermarket. It is beyond typical retail walking distances but is within a 6-to-8-minute bicycle ride.
- **Oakville Uptown Core** - The Uptown Core is a major shopping node containing a number of large-format uses as well as a broad assortment of other retail stores and services serving a wide trade area incorporating northern Oakville and western Mississauga. Its main anchors are a Walmart Superstore and a Real Canadian Superstore, both of which have large scale supermarket components. Situated at the southwest corner of Dundas and Trafalgar Road,

the Uptown Core is situated approximately 3.0 kilometres from the site. It is a short drive from the subject site and a bike ride of approximately 8 to 10 minutes.

- **Bressa Duc Phase 1** – A mixed use development with 12,000 square feet of ground floor commercial space is nearing completion at the northwest corner of William Cutmore Boulevard and Dundas Street approximately 1 kilometre east of the site. This could be considered a gateway site, as it is situated on Dundas Street and a collector road which acts as the entrance to the neighbourhood. Although the tenancies are not known at this time, it is likely that this amount of space would serve a convenience function for residents of the neighbourhoods to the north. This site is within an easy walk or bike ride of the subject site.
- **Winston Park Power Node** - This is a regional cluster of power centre uses in Mississauga near its border with Oakville. It contains many of the most popular large format retailers serving the GTA, including Costco, Home Depot, Canadian Tire, Leons Furniture, and The Brick, among others. It also contains a wide variety of food and non-food retailers and services. Located approximately 2.5 kilometres from the subject site, it would also be a short drive from the neighbourhoods near the property.

Potential Future Retail Sites

- **The intersection of William Cutmore Boulevard and Meadowridge Boulevard**, some 700 metres north of the subject site is a property which is also situated within a Neighbourhood Activity Node. It has site specific zoning that permits only a Connected Commercial/Residential building. This type of building would require that the ground floor of each residential unit have a commercial unit. As a “Connected Commercial/Residential Building” as defined in the zoning by-law, only relates to townhomes and stacked townhomes, this would appear to require that the site be developed only with live-work type units.
- **The intersection of John McKay Boulevard and Wheat Boom Drive**, some 500 metres west of the subject site is a property also within an Activity Node. It has a site-specific zoning that would permit only a Mixed-use or a Commercial/Residential building.

We would note that these two sites share many of the same problems as the subject site, being interior properties with no access of exposure to a major road. If either of these properties develops with commercial uses, depending on the nature of commercial development, they could serve the convenience retail needs of the neighbourhood in which the subject site is located, owing to their close proximity.

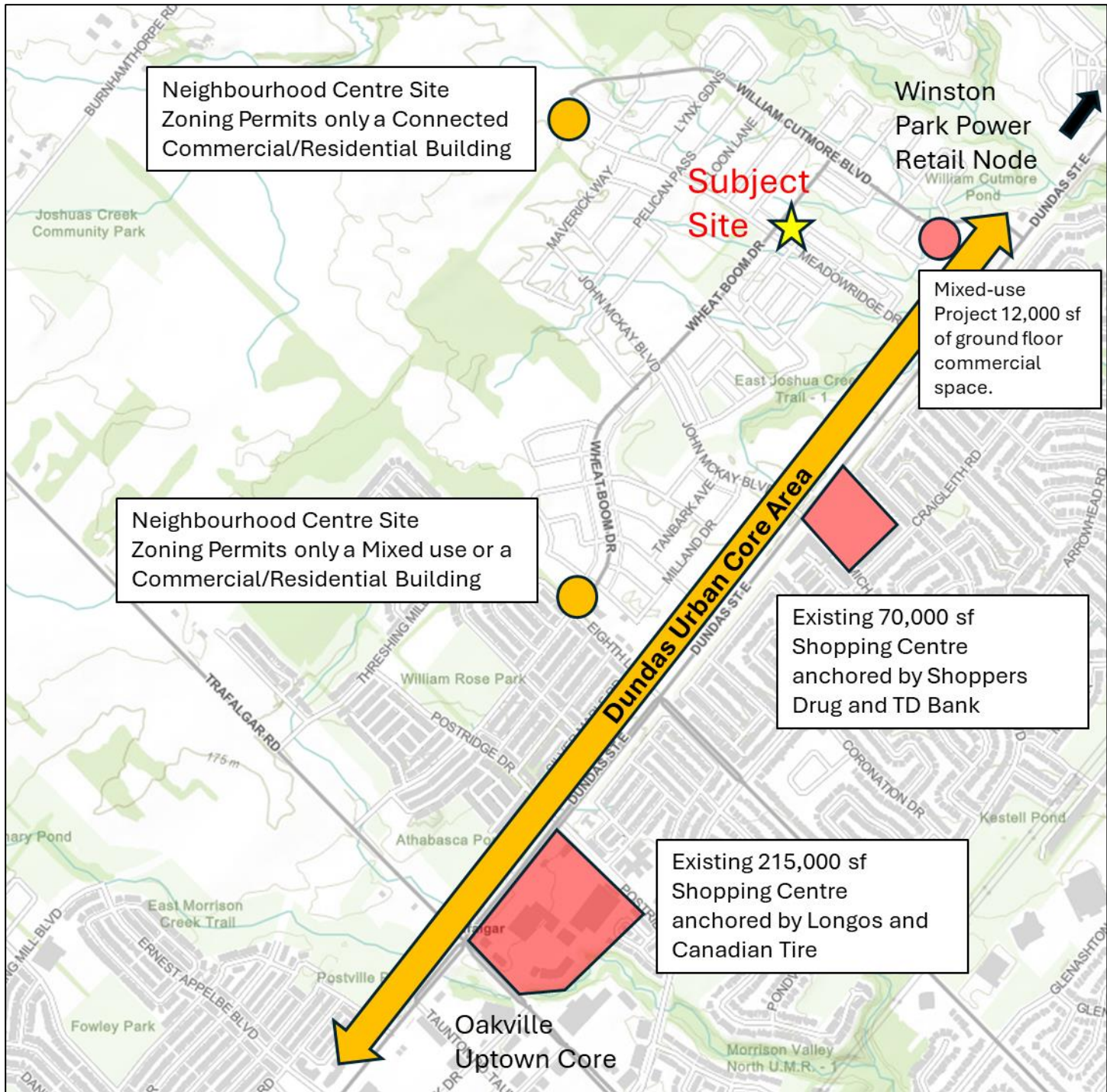
- **The Dundas Urban Core** – The north side of Dundas Street is designated as an Urban Core Area in the North Oakville Secondary Plan. The wide range of uses and densities of development, including live/work units, would be permitted throughout the Urban Core Area, with the exception that retail and service commercial development shall generally be located

at the intersections of Minor Arterials, Avenues and Connectors with Dundas Street. This part of Dundas Street is still under development. To our understanding, no commercial development has been proposed in the vicinity of the site, other than the Bressa Duc buildings noted above. However, we would note that “gateway” sites described within the North Oakville East Secondary Plan are, in our opinion, the preferred location of neighbourhood serving commercial uses, rather than internal sites, such as the subject property.

In summary, there is a large local serving commercial site within walking and cycling distance from the site, and a second local serving commercial node nearing completion that will be equally accessible to residents near the subject site. From a suburban retail perspective, the surrounding neighbourhoods will be well served by nearby retail facilities at all levels of the retail hierarchy. There are multiple supermarkets a short driving distance away from the site, as well as, a wide range of regional serving retail facilities.

While live-work units may currently be viable on the subject site owing to the general lack of retail facilities in North Oakville as a whole, they are not necessary to provide adequate retail, and service uses for the nearby population. As noted above, live-work units provide for a very limited range of tenants and are not a replacement for well designed and located retail facilities, some of which already exist in close proximity to the subject site. In the longer term, if commercial uses are developed at gateway locations along Dundas, Trafalgar Roads and other major roadways, it is likely that the viability of live-work units on interior sites will be diminished, which is a phenomenon witnessed in other municipalities where the function of interior commercial sites was ultimately usurped by much better located commercial projects along arterial roadways.

Figure 5-1: Commercial Competition in the Vicinity of the Subject Site



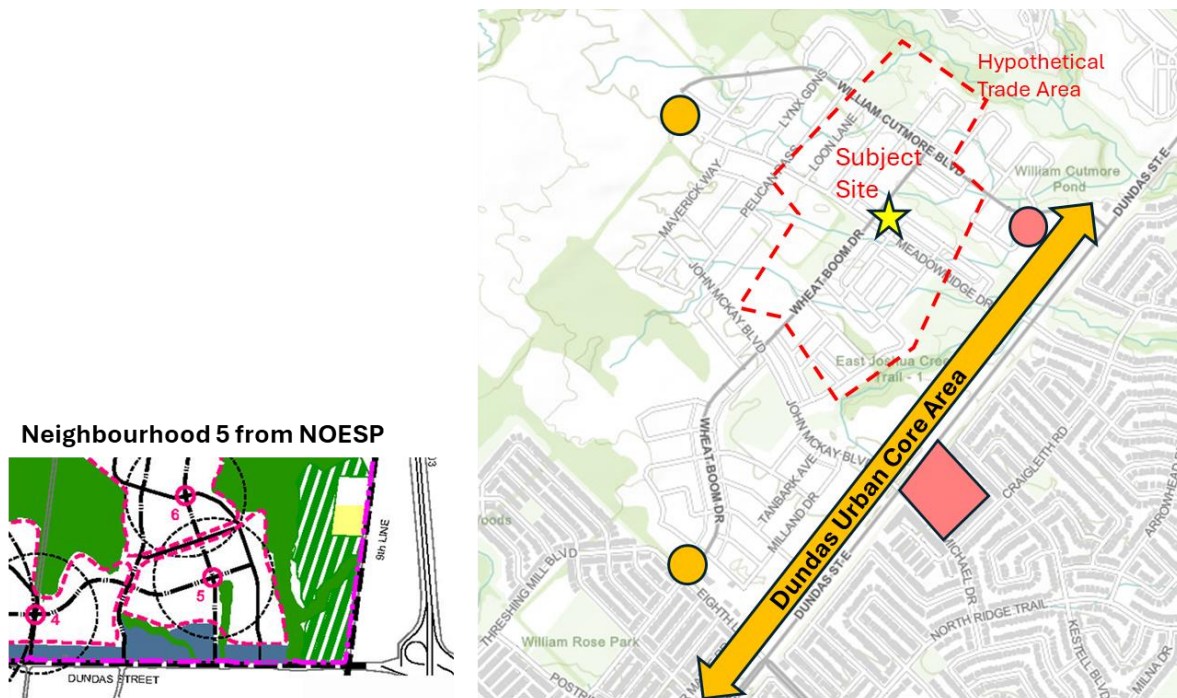
Source: urbanMetrics inc.

5.3 Trade Area for Hypothetical Retail Uses on the Site

A trade area accounts for the majority of visitors to a retail centre, typically around 75% to 80%, with the balance of customers being intermittent pass-by traffic, nearby employees, and occasional visitors to an area. It is typically determined by the function of the subject retail development, as well as, the location of competing retail facilities, barriers to movement, and distance.

Within the North Oakville East Secondary Plan, the Activity Node in which the site is located, is central to “Neighbourhood 5”. Given the location of other nearby local nodes, the actual area served would be smaller than Neighbourhood 5 given that the population towards the west end of Neighbourhood 5 would be as close or closer to the much larger shopping centre at Dundas and John McKay Boulevard than to the subject site. Similarly, residents towards the southeast portion of Neighbourhood 5, would be closer to the mixed-use node at Dundas and William Cutmore Boulevard than the subject site.

Figure 5-2: Subject Site Hypothetical Trade Area



Source: urbanMetrics inc.

Based on a review of subdivision data, this area would comprise approximately 1,100 single-detached and townhome units with a population of approximately 3,300. This is a very small population to support a commercial development in a suburban area.

In our experience, local serving commercial needs are better met through fewer high quality retail nodes rather than trying to serve small pockets of population with small nodes that can support a very limited range of commercial services.

This is consistent with the Oakville Commercial study which advocated for “Quality over Quantity” and a reduction in the number of commercial locations vs. better quality and located sites.

5.4 Opportunity for a Day Care Facility on the Site

As we understand, from the Community Information Meeting held with regards to the subject development, the local councillors expressed an interest in seeing a day care facility included in the development.

With regards to day care facilities, recent legislative changes in Ontario have had a significant impact on private day care operations, particularly in the context of the Canada-Wide Early Learning and Child Care (CWELCC) program aimed at reducing childcare fees to an average of \$10 per day by 2026. This includes the elimination of subsidies to non-participating families, the loss of wage and operating subsidies, and restrictions on the number of for-profit spaces. Operations opting in to the CWELCC program would now more limited in terms of the rents that they can afford. As a result, stand-alone sites, such as the subject property are much less likely to attract a day care facility than in the past.

In recent years, there has been a trend towards locating day care facilities in schools to reduce the need to shuttle school age children, the convenience to the parents and the ability to provide a more affordable space option. We would note that the Halton District School Board is planning an elementary school, which would likely contain a full day care facility immediately west of the site on Wheat Boom Drive.

In addition, most residential zoning categories in North Oakville, including the Neighbourhood Centre zone in which the site is located, would permit both a day care and a private-home day care facility so that the permission for day care uses would not change, as a result of the applicant’s proposal. A resident of the proposed townhomes on the subject site would, therefore, be permitted to operate a private-home day care, subject to local and provincial regulations.

6.0 Conclusions

- The subject site is situated at the southeast corner of Meadowridge Boulevard and Wheat Boom Drive within the North Oakville East Secondary Plan area, which is currently under development.
- The subject site is 1.09 acres in size. Valery Homes is proposing to develop the site with three separate buildings including a total of 60 stacked townhome units.
- The site is designated as Neighbourhood Centre within the North Oakville East Secondary Plan. This designation would provide for a range of residential and non-residential uses. The intersection of Wheat Boom and Meadowridge is identified in the Secondary Plan as a Neighbourhood Activity Node. Neighbourhood Activity nodes are intended to provide public and other facilities to serve the surrounding neighbourhood. At least one, non- residential building or use is required at the intersection of each activity node.
- Although the requirement for a minimum of one mixed-use or non-residential building only applies to the Activity Node in general and not specifically subject site, the other three corners of the Meadowridge and Wheat Boom intersection are already reserved in the plan of subdivision for townhomes (northeast and southwest corner) and a public park (northwest corner). Consequently, by default the only way for this condition to be met is on the subject site.
- The zoning for the site contains a site-specific provision that the buildings on the site be restricted to:
 - Mixed use building
 - Office building
 - Institutional building
 - Commercial building
 - Commercial/residential building
- As per the planning analysis conducted by MHBC, the proponent's planner, an Official Plan Amendment and a Zoning Amendment would be required to support the proposed stacked townhome development on the subject site.
- In our opinion, the site is poorly located for a commercial use owing to its internal location without exposure or direct access to a major roadway. In our experience, local commercial sites function best when they are situated at the gateways into neighbourhoods with access and exposure to arterial roadways.

- In our opinion, the location of the site would severely limit its ability to function as a commercial shopping centre because Wheat Boom Drive and Meadowridge Boulevard would not carry sufficient traffic to make the site viable for most potential retail and service tenants.
- We would note that there are a number of live-work blocks in north Oakville which are functioning relatively well at the current time. This is largely because of the shortage of retail sites in North Oakville due, at least in part, to planning and design restrictions which have made commercial development prohibitively costly.
- However, we would caution that live-work units are very small and attract a very limited range of commercial uses and are not a replacement for properly designed and located retail sites.
- There is a large local-serving commercial site within walking and cycling distance from the site, and a second local-serving commercial node nearing completion that will be equally accessible to residents near the subject site. From a suburban retail perspective, the surrounding neighbourhoods will be well served by nearby retail facilities at all levels of the retail hierarchy. There are multiple supermarkets a short driving distance away from the site, as well as, a wide range of regional serving retail facilities.
- While live-work units may currently be viable on the subject site owing to the general lack of retail facilities in North Oakville as a whole, they are not necessary to provide adequate retail, and service uses for the nearby population. In the longer term, if commercial uses are developed at gateway locations along Dundas Street, Trafalgar Road and other major roadways, it is likely that the viability of live-work units on interior sites will be diminished, which is a phenomenon witnessed in other municipalities where the function of interior commercial sites has ultimately been usurped by much better located commercial projects along arterial roadways.

Summary of Conclusions with Respect to the Questions Addressed by this Study

Is the Subject Site Suitable for Commercial Uses?

No. As a predominantly commercial site, the subject property would be very disadvantaged by its location internal to the community with no access or visibility from an arterial or major roadways. This would make the site very unattractive to retailers such as reasonably sized grocery/convenience stores, pharmacies, or food service operators who would be relied upon to draw traffic to the centre.

Typically, local shopping centres - which a one-acre site would support – would be located at the gateway to a neighbourhood (i.e. at the intersection of an arterial and collector road), where it would be easily accessible to both passing traffic and persons entering and leaving the neighbourhood. In addition, it would have a high degree of exposure to local residents where it would be a “top of mind” shopping destination. In our opinion, the location of the subject site would not benefit from these dynamics.

Are there Gaps in the Local Commercial Supply and Could the Site Reasonably Fill Them?

There are a wide range of retail and service tenants within a short distance of the subject site at all levels of the retail hierarchy. Within walking and cycling distance is a 70,000 square foot shopping centre anchored by a Shoppers Drug Mart and a TD Bank, with a wide range of other local serving retail and service tenants. A similar distance away will be a new mixed-use development with some 12,000 square feet of local serving space. Within about two kilometres, is a 215,000 square foot shopping node with a Longos supermarket and a Canadian Tire, with many other smaller stores and services. Further east is the Oakville Uptown Core, including a Loblaws supercentre and a Walmart department store. To the west is the Winston Park power centre cluster in Mississauga, both of which are a short drive from the subject site. In addition, Dundas Street is designated as an Urban Core area in the North Oakville Secondary Plan. The Dundas Urban Core designation encourages commercial uses in mixed-use developments at gateway sites into the adjacent neighbourhoods.

In our opinion, there are no current gaps in terms of the supply of retail and service uses available to residents of the neighbourhoods immediately surrounding the site.

While we acknowledge that as the North Oakville East Community builds out over time, and particularly when higher density uses begin to be realized along the Trafalgar Road Urban Core, there will be a need for much more retail than has been developed to date. While a number of live-work blocks have been developed west of Trafalgar Road, these should not be considered suitable replacements for well-designed and located retail projects. Over time, the market for these blocks may be diminished when new retail facilities are developed

What Are the Implications of Not Including Commercial Uses in the Subject Development in Terms of the Availability of Retail Opportunities?

As noted above, the neighbourhoods in the vicinity of the site already have easy and abundant access to retail and service commercial uses at all levels of the retail hierarchy. In addition, it is important to note that the Town of Oakville is in the process of preparing an Official Plan Amendment to address the lack of retail development that will be required as the North Oakville East Secondary Plan builds out.

Appendix A : Terms of Reference

Joshua Creek Block 297

To: Amber Lindsay, Danielle Braemer, Valery Homes

Cc:

From: Rowan Faludi

Date: February 11, 2025

Re: Commercial Study Terms of Reference

The following points summarize the terms of reference we would recommend to complete a commercial study with regards to your Block 297. It follows the requirements for the Terms of Reference prepared by the Town with regards to Retail Market Studies, but has been modified specifically to address the issues related to your site.

Commercial Study Terms of Reference

- An introduction of the study approach and methods, with a review of background, issues, objectives, assumptions and rationale.
- Evaluate the site location, accessibility and size from a commercial market perspective.
- Provide an assessment of the planned function of possible commercial uses on the site.
- Determine the potential market area of potential commercial uses on the site.
- Estimate future population within the market area.
- Identify the existing and potential future commercial facilities serving the study area.

- Prepare conclusions with respect to:
 - The suitability of the site for commercial uses;
 - Gaps in the local commercial supply and whether the site could reasonably fill them;
 - The implications of not including commercial uses in the subject development in terms of the availability of retail opportunities.

Once you have had a chance to review these terms of reference, please do not hesitate to contact me with any questions or changes you feel might be appropriate.