

TOWN OF CALEDON
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ALLOA SECONDARY PLAN

Commercial Impact Study

Caledon, Ontario

Prepared for **Alloa Landowners Group**

June 28, 2024



ALLOA LAND OWNERS GROUP

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June 28, 2024

Mr. Zechariah Bouchard
c/o ALLOA LANDOWNERS GROUP
700 - 10 Kingsbridge Garden Circle
Mississauga, Ontario L5R 3K6

Dear Mr. Bouchard

RE: Alloa Secondary Plan – Commercial Impact Study (Caledon, Ontario)

urbanMetrics inc. is pleased to provide The Alloa Landowners Group with the following Commercial Market Impact Study relating to the Alloa Secondary Plan Area (the “subject site”, “Alloa SPA”) in Caledon, Ontario. The Alloa Landowners Group is preparing a new Secondary Plan to create a dynamic and complete community in south central Caledon. Our study has been undertaken to assess the amount and type of commercial space warranted at this location and whether the subject proposal meets the test requirements established by the Town of Caledon through its terms of reference for commercial studies.

This study has been prepared to reflect the pre-consultation discussions with planning staff at the Town of Caledon and provides a market assessment of whether commercial uses in the Alloa SPA are consistent with local demand patterns that will support a safe and walkable complete community.

It has been a pleasure conducting this study on behalf of the applicant.

Respectfully Submitted,

A handwritten signature in black ink that reads "Rowan Faludi".

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

A handwritten signature in black ink that reads "Daniel Bailey".

Daniel Bailey
Project Manager
urbanMetrics inc.



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1.0 Executive Summary

The Alloa Secondary Plan Area (“Alloa SPA”) is located north of Mayfield Road, east of Heritage Road, south of Old School Road, and west of Chinguacousy Road, in the Town of Caledon. The Alloa SPA is the Primary Study Area in this market analysis, and is currently occupied by a range of institutional, agricultural, rural residential, industrial, and green space uses. The Alloa SPA will have access to the future Highway 413 via multiple exits, as well as regional access provided via Mayfield Road, Chinguacousy Road Heritage Road, Mississauga Road, and Creditview Road.

The Alloa Landowners Group are proposing to establish a new complete community, with residential, commercial, and employment uses, including a full range of housing types and sufficient local retail/service commercial (“retail”) to meet the needs of residents. The proposed land use designations will accommodate 419,500 ft² of local serving retail space, with an additional 168,700 ft² of regional serving space. This amount of retail space is sufficient to support the local retail needs of future residents in the Alloa SPA.

Based on the commercial market evaluation prepared herein, urbanMetrics’ findings and conclusions are summarized as follows:

Policy Alignment

- The prevailing policy context provided by the Province, the Region of Peel, and the Town of Caledon support and encourage the creation of walkable complete communities, through the addition of local-serving retail near residents. The Alloa SPA will support these policy goals by providing a wide range of local-serving food, retail and services options for future residents. Of particular importance are the opportunities for supermarkets and large grocery stores which act as the cornerstone of the commercial component of a complete community.

Summary of Supply and Demand Analysis

- The Alloa SPA is forecast to have a total population of 41,800 including undercount on buildout.
- The Alloa SPA is planned to accommodate 419,500 ft² of local-serving retail space on buildout, with the grocery component of a proposed regional serving general merchandise store also fulfilling an additional 80,000 ft² of local grocery retail need. In total 499,500 ft² of local serving retail need will

be provided for within the Major Commercial and Mixed-Use designations of the Alloa SPA.

- Based on our per capita demand analysis, there will be a need for approximately 500,000 ft² of local-serving retail space on buildout of the Alloa SPA.
- In addition to the above space, will be the potential for additional small scale retail space in the Neighbourhood Area designation which could take the form of ground floor retail in townhouses, corner stores, and service commercial businesses in single-family homes.
- The SPA area is predominantly undeveloped. However, an established commercial infrastructure exists in the adjacent City of Brampton to the south. In addition, the developing Mayfield West community to the east will provide for additional commercial designations. For some residents of Alloa, these areas may still represent convenient shopping destinations owing to their proximity and would provide additional variety beyond which that might be available within the secondary plan area. As a result, the local commercial infrastructure will be augmented by existing and planned commercial facilities in Brampton and Mayfield West.
- In our opinion, the proposed Alloa SPA will provide sufficient local retail space to meet the needs of future residents and provide for the commercial structure necessary to support a complete community, which will encourage active transportation modes and minimize the need for local residents to leave the community for their day-to-day and weekly shopping needs.

Locational Considerations

- The Secondary Plan would create a retail and mixed use corridor along Mayfield Road, which would contain the majority of retail space in the area. This strategy would have the advantage of placing retail uses along a high volume corridor with excellent exposure to passing traffic, thus strengthening this commercial node in terms of serving local residents. The creation of this concentrated corridor would also create a critical mass allowing for a high volume of cross shopping between nearby uses.
- In our experience, when retail uses are too dispersed within a community, it can lead to poor performance and high level of vacancies, particularly for retail sites that are located away from major roadways.

- This clustering of retail uses means that persons living in the north part of the study area would be furthest from the principal local shopping area. However, it is important to recognise that the Alloa area is very compact with well-connected road, transit, and active transportation networks, and that the maximum distance to commercial facilities from any part of the study area would only be about two kilometres, which is well within a reasonable distance for food shopping. It is also important to note that international studies have determined that the median cycle trip in many countries is between about two to three kilometres. So that depending on how well the community can accommodate cycling traffic, the retail uses are well situated to serve bike related shopping trips.
- The distance is also alleviated by the location of a proposed mixed use land use designation on Mississauga Road in the northwestern part of the community, as well as, by opportunities for small scale commercial uses within the Neighbourhood Area land use designation.
- In our opinion, the Secondary Plan provides for a highly functional commercial structure both from a total space and locational perspective, and one that, with supporting pedestrian and cycling infrastructure, will promote active transportation related shopping trips.

2.0 Introduction

2.1 Context and Access

Alloa Secondary Plan Area Context

The Alloa Secondary Plan Area (“Plan Area”, “Alloa SPA”, “Subject Site”) is located north of Mayfield Road, east of Heritage Road, south of Old School Road, and west of Chinguacousy Road (see Figure 2-1), in the Town of Caledon, Ontario. The Plan Area borders the City of Brampton to the south of Mayfield road, and will be bordered on the north and west by Highway 413 in the future (not shown). The Plan Area is approximately 724 hectares (1,790 acres) in size, and is currently occupied by a range of institutional, agricultural, rural residential, industrial, and green space uses. The surrounding lands to the north and east are occupied primarily by agricultural uses, with existing and under development low and medium density residential uses to the south of Mayfield Road, and active development of residential, commercial, and open space uses to the east of Chinguacousy Road in the Mayfield West Secondary Plan Area.

Figure 2-1: Subject Site Context



SOURCE: urbanMetrics Inc, with ESRI basemap Imagery, Alloa Secondary Plan Boundary from GSAI, and Town of Caledon Boundary from Town of Caledon Open Data Portal.

Alloa Study Area Accessibility

The Alloa SPA has direct road access to the south via Mayfield Road to the east via Chinguacousy Road. These roads serve as the primary east-west and north-south access corridors to the Plan Area respectively, and provide access to Brampton, and Caledon. Additional access is also provided to the north by Heritage Road, Mississauga Road, and Creditview Road.

The Plan Area will have excellent connectivity to the planned Highway 413, with highway exits at Mayfield Road, and along the north border of the site and Chinguacousy Road. Highway 413 will provide regional access to the southern edge of Caledon, as well as to Brampton, Mississauga, and Vaughan. This regional mobility will give Alloa SPA residents access to regional shopping centres in the eastern GTA for occasional shopping needs. This has been accounted as outflow in this analysis.

It should be noted that the current Highway 413 plans include a transitway, with a proposed transitway station at Heritage Road and Mayfield Road. In general, residents do not typically use public transit for stand-alone shopping trips for daily needs, and this station is not expected to generate significant inflow or outflow, but may influence local shopping trip patterns within the community.

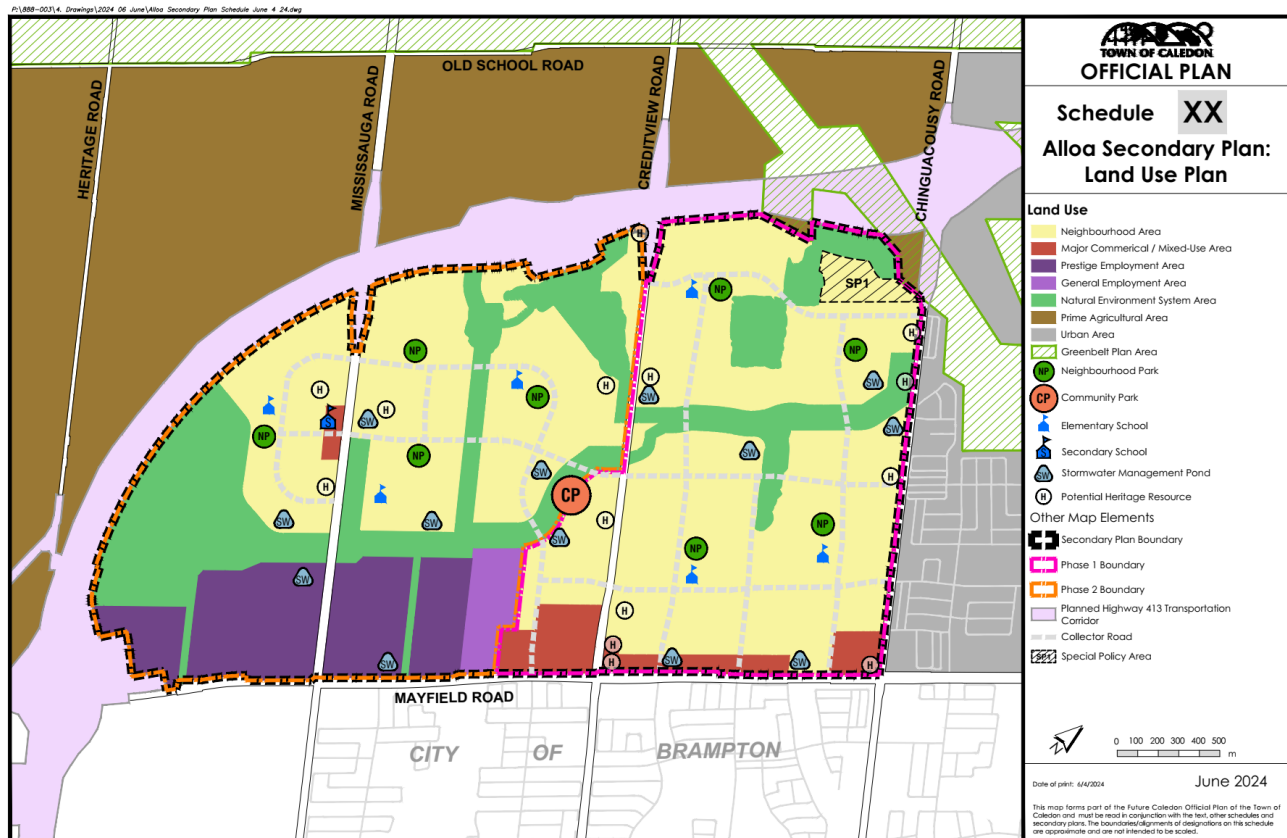
The Caledon Active Transportation Master Plan is still ongoing, however the associated Network Recommendations Map identifies Chinguacousy Road, Creditview Road, Heritage Road, and Old School Road as multi-use paths. There are also a multi-use trail that runs from the east, through the Alloa SPA, and then south into Brampton. As a result the Alloa SPA will likely have pedestrian and cycling connectivity to the east and north. Internal connectivity will be provided via a fine-grained street and trail network. Active transportation is primarily suitable for convenience and daily retail needs, and will generally not draw many customers from outside the Alloa SPA. However, good active transportation within the Alloa SPA will encourage local shopping by area residents.

2.2 Proposed Development

The Alloa Secondary Plan is envisioned to be a mixed-use community with residential, commercial, institutional, green space, and employment use, as shown in Figure 2-2. The plan area is intended to be developed over two east and west phases. The Alloa SPA will be home to over 40,000 residents in detached, semi-detached, townhouse, and apartment units, and support up to 1,500 jobs from just the commercial space. Additional jobs will be generated by the employment lands,

persons working from home, community uses, and other functions necessary to maintaining the community.

Figure 2-2: Proposed Alloa Secondary Plan, June 2024



SOURCE: GSAI. For discussion purposes only.

2.3 Study Purpose

Town staff have indicated the need for this commercial impact study to be as part of the Alloa SPA application. As identified by the Town of Caledon in their Terms of Reference for a Commercial Impact Study, the purpose of this study is:

- “To examine the market demand and potential impacts of the proposed development on the Town’s planned commercial structure.”
- “The results of this Commercial Impact Study will help decision-makers, stakeholders and community members understand current commercial

market conditions and the anticipated impacts of the proposed development.”

3.0 Planning Policy Framework

3.1 Provincial Policy Statement (PPS)

The Provincial Policy Statement encourages land use patterns with a mix of uses to support active transportation and transit, as identified in policies 1.6.7.4 and 1.8.1 a):

- 1.6.7.4 *“A land use pattern, density and mix of uses should be promoted that minimize the length and number of vehicle trips and support current and future use of transit and active transportation.”*
- 1.8.1 a) *“promote the use of active transportation and transit in and between residential, employment (including commercial and industrial) and institutional uses and other areas”*

The Alloa SPA will contain a mix of residential, commercial, employment, and community service uses, all in close proximity to one another. Short trip distances as well as adequate densities are essential to promoting active transportation and transit use, and as a result the proposed Alloa Secondary Plan will support the PPS goals of promoting active transportation and transit use.

3.2 Growth Plan for the Greater Golden Horseshoe, 2020

As identified in policy 2.2.5.15 the 2020 Growth Plan supports the creation of *complete communities* through the integration of retail and service uses with other land uses:

- 2.2.5.15 *“The retail sector will be supported by promoting compact built form and intensification of retail and service uses and areas and encouraging the integration of those uses with other land uses to support the achievement of complete communities.”*

The Alloa SPA will contain a mix of residential, commercial, employment, and community service uses, all in close proximity to one another, and therefore will contribute to the creation of a complete community as promoted through the policies of the Growth Plan.

3.3 Provincial Planning Statement

The Government of Ontario has released a proposed Provincial Planning Statement in 2024, which has not yet been enacted, and will replace the PPS and the Growth

Plan. The Planning Statement encourages planning authorities to support the creation of complete communities, as identified in policy 2.1.6 a):

- 2.1.6 a) *“accommodating an appropriate range and mix of land uses, housing options, transportation options with multimodal access, employment, public service facilities and other institutional uses (including, schools and associated child care facilities, long-term care facilities, places of worship and cemeteries), recreation, parks and open space, and other uses to meet long-term needs”*

The definition of complete communities in the Provincial Planning Statement includes having access full range of local stores and services, among other goals. The Alloa SPA will support the Provincial Planning Statement’s goal of creating complete communities through the provision of sufficient local-serving commercial space to meet the daily needs of residents.

3.4 Region of Peel Official Plan

The Region of Peel’s new official plan was approved by the Minister in November of 2022. This plan directs local municipalities to create complete communities.

As identified in policy 5.4.19.10, local municipalities are directed to plan for complete communities. The Region of Peel OP includes local stores and services in their definition of complete communities.

- 5.4.19.10 *“Direct the local municipalities to incorporate official plan policies to plan for complete communities within Designated Greenfield Areas that create high quality public open spaces with site design and urban design standards that support opportunities for transit, walking and cycling and direct the development of high-quality public realm and compact built form.”*

The Alloa SPA will support the region’s goal of creating complete communities through the provision of sufficient local-serving commercial space to meet the daily needs of residents.

3.5 Future Caledon Draft Official Plan

The Town of Caledon’s current 1978 Official Plan (OP) is being replaced in phases through the ongoing Official Plan Review project. The new Future Caledon OP was approved by council in March 2024, and is in the process of receiving approval

from the Minister of Municipal Affairs and Housing. This draft OP is not yet in force and may be subject to additional changes. Overall, the Future Caledon OP intends for the development of complete communities, with local-serving commercial uses in and adjacent to residential uses. Within employment areas retail uses are intended to directly serve the primary office or industrial use, and as such would not be primarily used by residents from surrounding areas.

The Draft OP identifies the creation of complete communities as a goal in policy 2.3.8:

2.3.8 *“Plan for healthy and complete communities that offer a mix of housing and employment opportunities for all, a range of parks, open spaces and amenities, and the choice to conveniently access shopping and services without a car.”*

Similarly, commercial uses within *the Major Commercial/Mixed-Use Area* designation are intended serve the surrounding communities as shown in policy 22.8 below.

22.8 *“The Major Commercial/Mixed-Use Area designation is intended to apply to areas where higher order retail uses and complementary medium and high density residential uses are located in a mixed-use setting. Major Commercial/Mixed-Use areas are intended to be strategically located destinations where a range of commercial, personal service and professional service uses are located to serve adjacent community areas.”*

In contrast, retail uses in *Prestige Employment* areas is intended to be strictly limited to uses that directly support the primary office and industrial uses. As a result, retail uses in this designation are not expected to primarily serve residents from surrounding areas.

23.7 *“...The range of uses provided for is limited to prestige employment-type uses, and the development standards and criteria in this designation are intended to support consistent, high quality building and site design. The intended uses and large-scale development benefit from access to both major roads and transit routes. Accessory uses and ancillary uses will be strictly controlled and limited to those that support the primary office and industrial uses.”*

Of note, certain types of small-scale commercial uses are also permitted within mixed-use buildings or sites in the *Neighbourhood Area* designation, as identified

in policy 22.7.2 d). Commercial space in the *Neighbourhood Area* of the Alloa SPA has not been assigned a specific GFA value in this study, as there are no specific plans for mixed-use sites within the *Neighbourhood Area*. This type of commercial space generally requires significant on-site population to be present before occupancy, and generally makes up a small portion of total commercial space due to the limited scale and type of uses.

22.7.2 d) *“neighbourhood-scale retail, commercial, personal service and professional service uses that are integrated within mixed-use buildings or on mixed-uses sites”*

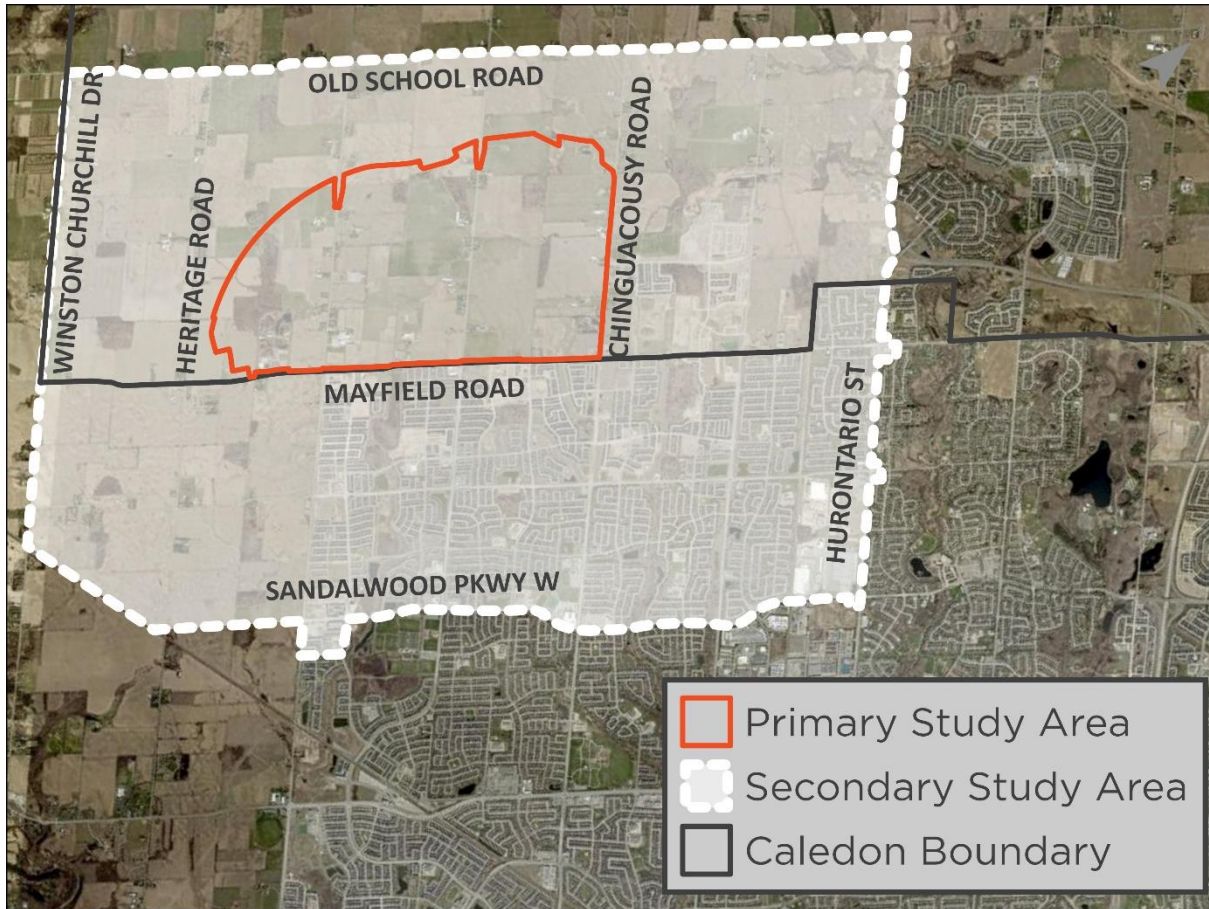
The Alloa Secondary Plan will support the Town’s Official Plan goals of creating complete communities and locating local-serving commercial uses within Major Commercial/Mixed-Use Area designations to serve local residents. The Alloa Secondary Plan will also ensure that commercial spaces within employment areas are not relied on to support the daily commercial needs of local residents.

4.0 Study Area

The Alloa SPA is intended to support the shared Provincial Policy Statement, Growth Plan, Region of Peel Official Plan, and Future Caledon Official Plan goals of creating complete communities, which includes the provision of local retail and service commercial space that is accessible by active transportation where possible. As the Alloa SPA is currently undeveloped greenfield lands and will have a very different unit mix to adjacent development, existing nearby customer travel patterns cannot be used to identify a trade area. In order to reflect the intended complete community character of the Alloa SPA, urbanMetrics has delineated the Alloa SPA as the Primary Study Area as shown in Figure 4-1. The local retail and service commercial needs of future residents should be primarily met within the Alloa SPA, as part of the complete community character of the secondary plan.

In addition to the Primary Study Area, urbanMetrics has delineated a Secondary Study Area to identify retail space that Alloa SPA residents could access by vehicle to augment their local retail and service commercial shopping needs beyond the Alloa SPA, and identify current trends in nearby local retail space. For residents on the southern and eastern edges of the community, these areas may still represent convenient shopping destinations owing to their proximity and would provide additional variety beyond which that might be available within the secondary plan area. This Secondary Study Area represents an approximately 5-minute drive from the centre of the Alloa SPA. The Secondary Study Area generally follows Old School Road to the north, Hurontario Street to the east, Sandalwood Parkway W to the south, and Winston Churchill Road to the west. Commercial uses on the far side of these roads that directly front onto these roads are also included, such as Mount Pleasant Plaza on the south side of Sandalwood Parkway or Mayfield Plaza on the east side of Hurontario Street.

Figure 4-1: Primary and Secondary Study Areas



SOURCE: urbanMetrics Inc., with ESRI basemap imagery.

5.0 Population and Commercial Space Allocations

5.1 Commercial Space

Based on the land uses in the proposed Alloa SPA (see Appendix B), commercial uses are permitted within the following four proposed designations:

- Neighbourhood Area
- Major Commercial/Mixed Use Areas
- Prestige Employment
- General Employment

Within the Neighbourhood Area neighbourhood scale retail within mixed use buildings and sites are permitted. This space would support small scale retail and service establishments primarily serving the day-to-day needs of nearby residents. In addition, this space also offers an opportunity for small business owners to locate their establishments near to where they live. An example of this type of retail is found near the Mount Pleasant GO Station in Brampton

(Figure 6-1). This would represent a relatively small component of the future supply, and would be in addition to the retail space shown on the Secondary Plan.

Likewise, retail uses within Prestige Employment and General Employment areas in the Alloa SPA are not included in this analysis. In the Town of Caledon Draft Official Plan commercial uses within Prestige Employment and General Employment would generally be limited to office uses and ancillary retail and service commercial uses. These are expected to primarily serve employees and local businesses, and not local residents, and as a result are excluded from this analysis. However, there are some uses that have both a commercial and industrial function that serve both businesses and consumers, such as, building supply outlets (e.g. flooring, plumbing,

Figure 5-1: Mixed Use Retail Near Mount Pleasant GO Station in



Photo by urbanMetrics staff.

kitchen cabinetry, electrical, pool, spas), automotive uses (e.g. auto body, specialist repairs, auto parts), as well as other uses (e.g. jewellery making, dressmaking, tailoring, etc.), that tend to locate in employment areas.

Figure 6-2 illustrates an industrial plaza with these types of uses on Healey Road in a General Industrial Designation in Bolton.

Figure 5-2: Quasi Commercial/Industrial Uses in Bolton



Source: Google Maps

To the extent to which these types of uses would be permitted within secondary plan employment areas, they would also augment the commercial supply available locally. In our experience, approximately 10% to 15% of a municipality's commercial inventory is typically found in employment areas, largely through the existence of these quasi-commercial/industrial uses and uses specific to serving the local employment areas.

Parcel specific Gross Floor Areas (GFA) and built forms associated with the Alloa SPA will be primarily be identified through future site plan and building permit processes. However, there are proposed development applications for 12100 Creditview Road. These applications indicate that this site will contain an approximately 168,700 ft² regional serving anchor tenant among other commercial space. It is our understanding that this anchor tenant will likely be a general merchandise retailer. Large general merchandise stores in Canada now often include a significant grocery component. As a result, they tend to fulfill some grocery store/supermarket demand, despite their classification as general merchandise stores. Examples of this type of retailer include Walmart, Costco, Giant Tiger, and Dollarama.

Within the Alloa SPA there is planned to be an estimated 588,300 ft² (54,700 m²) of total commercial space (see Figure 5-3). This is based on a lot area of 12.49 ha with a lot coverage of 22% for Major Commercial lands, and a lot area of 10.87 ha with a lot coverage of 25% for Mixed Use lands. These numbers have been provided to urbanMetrics by GSAI, and in our opinion are conservative assumptions. Of this commercial space, 168,800 ft² (15,700 m²) is expected to be

regional serving, and 471,200 ft² (39,000 m²) is expected to be local-serving space. The regional serving commercial space is based on the anchor tenant component of the application for 12100 Creditview Road. We have also estimated that approximately 80,000 square feet of the Regional Serving Commercial space would include large scale grocery space and would also serve local commercial needs.

As noted above, in addition to this space would be as yet unidentified Neighborhood Commercial Space and the quasi commercial/industrial space that could locate within the local employment lands.

Figure 5-3: Alloa SPA Commercial Site Statistics

Commercial Land Use	AREA		Lot Coverage	GFA (m ²)	GFA (ft ²)
	(ha)	(ac)			
Major Commercial	12.49	30.86	22%	27,500	295,800
Mixed Use	10.87	26.86	25%	27,200	292,500
Total	23.36	57.72	23%	54,700	588,300
Regional Serving Commercial Space				15,700	168,700
Local Serving Commercial Space				39,000	419,500

SOURCE: urbanMetrics Inc., with area, lot coverage, and Major Commercial/Mixed Use GFA provided by GSAI. GFA numbers are rounded to the nearest 100. Numbers may not sum due to rounding.

5.2 Population

Based on the description of land uses in the proposed Alloa SPA (see Appendix B), residential uses are proposed to be permitted in the following two designations

- Neighbourhood Areas
- Major Commercial/Mixed Use Areas

The Alloa SPA is expected to have a total population of 41,800 including undercount on buildout, as shown in Figure 5-4. Of note, for commercial needs studies the population including Census undercount is typically used instead of the raw census population.¹ Other studies such as Development Charges Background Studies typically use the census population. The total population, which better reflects retail needs, was calculated by urbanMetrics using the Town of Caledon

¹ The census population is based on PPU's derived from census data, while the total population adjusts the census to account for individuals missed in the census. This adjustment is based on population estimate data from Statistics Canada.

2021 under coverage rate of 4.4%. The census population and the total population are shown in Figure 5-4.

Figure 5-4: Alloa Secondary Plan Population Site Statistics

Residential Land Uses / Population	AREA		Units Per Hectare	No. of Units	PPU*	Census Pop.	Total Pop.
	(ha)	(ac)					
Low Density Residential (@ 55% Net Res. Area) <i>(Detached and Semi-detached)</i>	119.64	295.6	30	3,589	3.64	13,100	13,600
Medium Density Residential (@ 32.5% Net Res. Area) <i>(Townhouses)</i>	70.70	174.7	60	4,242	3.3	14,000	14,600
Medium - High Density (@ 12.5% Net Res. Area) <i>(Stacked Townhouses, Apartments)</i>	27.19	67.2	150	4,079	2.07	8,400	8,800
Mixed Use <i>(Apartments)</i>	10.87	26.9	200	2,174	2.07	4,500	4,700
Total	228.40	564.4	-	14,083	-	40,000	41,800

SOURCE: urbanMetrics Inc. Land area, units per hectare, number of units, and PPU provided by GSAI. Total population calculated using a 4.4% undercoverage rate based on the 2021 Census Population and 2021 Statistics Canada population estimates for the Town of Caledon. Population numbers are rounded to the nearest 100, and may not sum as a result.

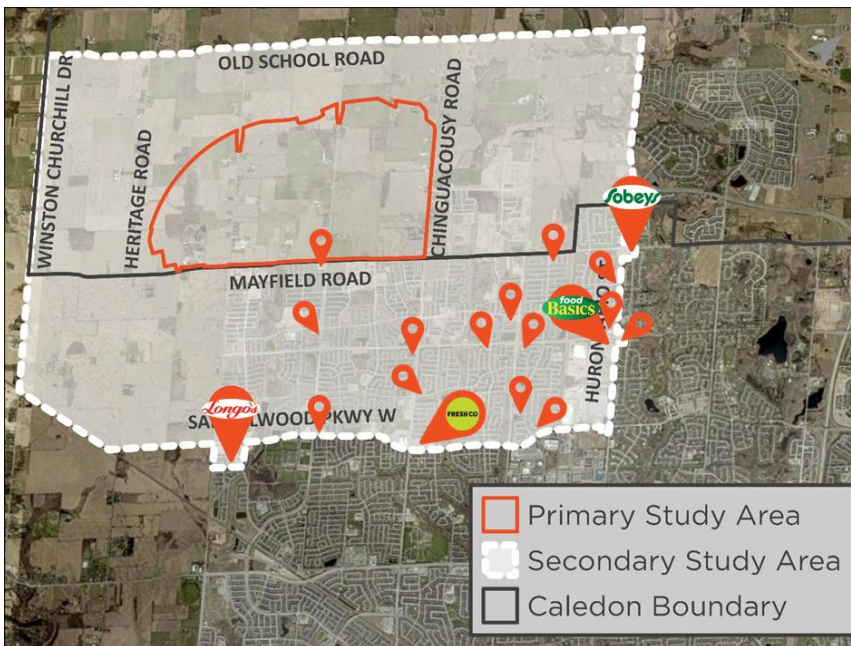
6.0 Existing Supply of Retail and Service Commercial Space

There is currently no existing commercial space within the Primary Study Area (Alloa SPA), as a result of the current rural and agricultural character of the area. There is 647,300 ft² of existing retail/service commercial space within the Secondary Study Area as shown in Figure 6-2. Almost all retail/service-commercial space (91%) in the Secondary Study Area is local-serving, with only 5% belonging to non local-serving categories, and 3% vacant space. The low vacancy rate of 3% indicates high market demand. In general, a vacancy rate between 5% to 7% is considered a balanced retail/service commercial market.

Overall, the most common category of existing retail/service commercial in the Secondary Study Area is services which make up 53% of retail/service commercial space, followed by food store retail which occupies 29% of retail/service commercial space.

In addition to a wide range of other retail and services space, the Secondary Study Area includes four full sized supermarkets, including; Sobeys, Food Basics, Freshco, and Longos. These supermarkets would be conveniently located to serve many study area residents and would provide additional variety for local shoppers. The location of retail plazas/shopping centres in the Secondary Study Area is shown in Figure 6-1, with the location of each of the four supermarkets specifically identified.

Figure 6-1: Supermarkets and Retail Plazas in Secondary Study Area



SOURCE: urbanMetrics Inc.

Figure 6-2: Secondary Study Area Local and Regional Existing Commercial Inventory

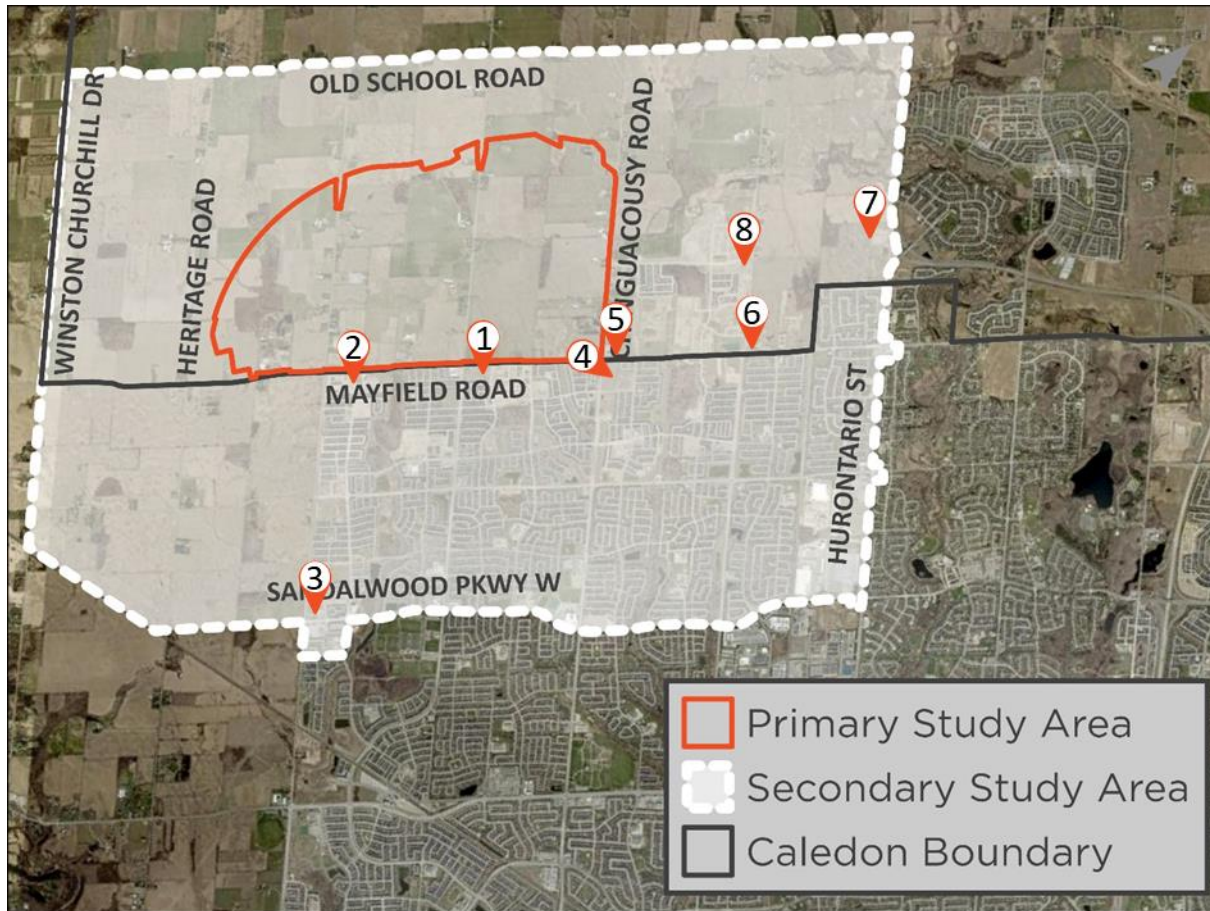
Category	Total (SF)	% of Total Inventory
Beer, Wine, Liquor (BWL)	-	0%
Food Store Retail (FSR)	192,000	29%
Convenience & Specialty Food	34,500	5%
Supermarkets & Grocery	157,500	24%
Non-Food Store Retail (NFSR)	100,100	15%
Apparel and Accessories	2,900	0%
Building and Outdoor Home Supply	-	0%
Furniture, Home Furnishings & Electronics Store	10,500	2%
General Merchandise	17,700	3%
Miscellaneous Retailers	8,200	1%
Pharmacies & Personal Care	59,800	9%
Automotive	1,000	0%
Services	342,200	53%
Food Services & Drinking Places	92,100	14%
Finance, Insurance and Real Estate	31,200	5%
Health Care	77,600	12%
Personal Care	37,700	6%
Business Services ¹	16,000	2%
Other ²	87,600	13%
Vacant	16,600	3%
Grand Total	650,900	100%
Local-Serving Space	594,000	91%
Non Local-Serving Space	40,300	6%

SOURCE: urbanMetrics Inc. Non Local-Serving categories highlighted orange.

In addition to the existing retail/service commercial space, there is an estimated 465,900 ft² of planned commercial space with development applications in the Secondary Study area as shown in Figure 6-3. This excludes space within the Alloa SPA. As shown, the secondary study area is still in the process of adding significant amounts of additional commercial space, even in areas south of Mayfield Road where residential development is largely built out. This is consistent with the

typical pattern of commercial space developing after enough residents have moved into the surrounding area to support the additional local retail.

Figure 6-3: Secondary Study Area Planned Commercial Inventory



Map #	Location	Total (SF)
1	1577 Mayfield Road	125,400
2	550 Veterans Drive	25,200
3	10625 Mississauga Road	17,800
4	Chinguacousy Road & Clockwork Drive	23,500
5	2068 Mayfield Road	61,100
6	2560 Mayfield Road	27,500
7	12290 Hutchison Farm Lane	141,800
8	0 Mclaughlin Road	34,600
Grand Total		456,900

SOURCE: urbanMetrics Inc. Based on development application from the City of Brampton and Town of Caledon. Space within Mayfield West was estimated based on 22% lot coverage of identified commercial parcels.

In addition to the space to be developed within the Secondary Plan Area, there will be some 1.1 million square feet of retail and services space in close proximity to the study area. While the commercial space within the Secondary Plan Area is planned to accommodate the majority of local shopping trips for daily and weekly items, this adjacent space augments the total supply available to study area residents and provides additional variety that may not be available from just the local area.

This neighbouring supply has been considered when undertaking the commercial market demand and space projections in the following section.

7.0 Market Demand and Impact Analysis

The commercial objectives of the Secondary Plan are to ensure that there is a sufficient amount of commercial space to support Alloa as a complete community which will promote active transportation to accommodate shopping trips. For this reason, it is assumed that the majority of space would be oriented towards food, services, and other local retail facilities, rather than larger scale regional retail uses that would draw customers from a wide area across Caledon and surrounding municipalities.

This analysis conducted in this section focuses primarily on local serving space to accommodate the daily and weekly shopping by local residents. This space would tend to locate within the Major Commercial and Mixed Use designations identified in the Secondary Plan, as well as, future Neighbourhood Commercial projects that have yet to be identified.

Commercial sectors that are considered to be local serving in this report are:

- Food Store Retail
 - Convenience & Specialty Food
 - Supermarkets & Grocery
- Beer, Wine, and Liquor
- Non-Food Store Retail
 - Pharmacies & Personal Care Stores
- Services
 - Food Services & Drinking Places
 - Finance, Insurance, & Real Estate
 - Health Care
 - Personal Care
 - Business Services
 - Professional, Scientific and Technical Services
 - Select Civic and Social Organizations
 - Select Office Administrative Services)
 - Other Local Services
 - Cultural, Entertainment and Recreation

- Personal & Household Goods Repair and Maintenance
- Select Educational Services
- Social Services
- Consumer Goods Rental

Within the Primary Study Area (Alloa SPA), there will be a need for 526,100 ft² of retail commercial space on buildout, as shown in Figure 7-1.

In total 499,500 ft² of local serving retail/service commercial need will be accommodated in the Major Commercial and Mixed-Use designations of the Alloa SPA. As previously identified, the Alloa SPA is expected to accommodate 419,500 ft² of local-serving commercial space, with an additional 168,700 ft² of regional serving general merchandise commercial space. As major general merchandise stores often have a significant grocery component, we project that half of the regional general merchandise store will meet the need for approximately 80,000 ft² of grocery store and supermarket space.

Overall, the Alloa SPA is generally expected to meet the local retail/service commercial needs of future residents, with only 26,600 ft² of unmet need. This is considered within a reasonable margin of error. Moreover, it is anticipated that this residual need would more than met through additional small-scale retail facilities across the Neighbourhood Areas.

We would also note that the demand analysis identifies the need for some 13,900 square feet of liquor/beer/wine space. Depending on Provincial policy, this space could also take the form of increased demand for facilities, such as corner stores and food stores, where the sale of alcohol may be permitted in the future.

Figure 7-1: Per Capita Retail Demand

Commercial Needs - Local Retail Categories	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)
Alloa SPA Buildout Population	41,800					
$[(41,800 \times A = B) \times C = D] / (1-E) = F$						
Store Categories						
Food Store Retail	5.0					
Convenience and Speciality Food	1.5	62,700	75%	47,025	10%	52,300
Supermarkets & Grocery	3.5	146,300	75%	109,725	15%	129,100
Beer, Wine Liquor	0.5	20,900	60%	12,540	10%	13,900
Non-Food Store Retail	1.5					
Pharmacies & Personal Care Stores	1.5	62,700	75%	47,025	10%	52,300
Services	13.0					
Food Services & Drinking Places	3.0	125,400	40%	50,160	30%	71,700
Finance, Insurance and Real Estate	1.5	62,700	40%	25,080	20%	31,400
Health Care	1.5	62,700	40%	25,080	20%	31,400
Personal Care	2.0	83,600	75%	62,700	10%	69,700
Office Services ¹	1.0	41,800	40%	16,720	10%	18,600
Other ²	4.0	167,200	30%	50,160	10%	55,700
Total	20.0					526,100

1 Professional, Scientific and Technical Services, Select Civic and Social Organizations, Select Office Administrative Services.

2 Cultural, Entertainment and Recreation, Personal & Household Goods Repair and Maintenance, Select Educational Services, Social Services.

SOURCE: urbanMetrics Inc.

8.0 Summary and Conclusion

The Alloa Secondary Plan Area (“Alloa SPA”) is located north of Mayfield Road, east of Heritage Road, south of Old School Road, and west of Chinguacousy Road, in the Town of Caledon. The Alloa SPA is the Primary Study Area in this market analysis, and is currently occupied by a range of institutional, agricultural, rural residential, industrial, and green space uses. The Alloa SPA will have access to the future Highway 413 via multiple exits, as well as regional access provided via Mayfield Road, Chinguacousy Road, Heritage Road, Mississauga Road, and Creditview Road.

The Alloa Landowners Group are proposing to establish a new complete community, with residential, commercial, and employment uses, including a full range of housing types and sufficient local retail/service commercial (“retail”) to meet the needs of residents. The proposed land use designations will accommodate 419,500 ft² of local serving retail space, with an additional 168,700 ft² of regional serving space. This amount of retail space is sufficient to support the local retail needs of future residents in the Alloa SPA.

Based on the commercial market evaluation prepared herein, urbanMetrics’ findings and conclusions are summarized as follows:

Policy Alignment

- The prevailing policy context provided by the Province, the Region of Peel, and the Town of Caledon support and encourage the creation of walkable complete communities, through the addition of local-serving retail near residents. The Alloa SPA will support these policy goals by providing local-serving retail for future residents.

Summary of Supply and Demand Analysis

- The Alloa SPA is forecast to have a total population of 41,800 including undercount on buildout.
- The Alloa SPA is expected to accommodate 419,500 ft² of local-serving retail space on buildout, with the grocery component of a proposed regional serving general merchandise store also fulfilling an additional 80,000 ft² of local grocery retail need. In total 499,500 ft² of local serving retail need will be provided for within the Major Commercial and Mixed-Use designations of the Alloa SPA.
- Based on our per capita demand analysis, there will be a need for 526,100 ft² of local-serving retail space on buildout of the Alloa SPA.

- Almost all of the local retail demand in the Alloa SPA will be met, with only a very minor shortfall of 26,600 ft² of local serving retail. As the potential for retail space in the Neighbourhood Area designation is not included in the above analysis this shortfall is expected to be easily met in formats such as ground floor retail in townhouses, corner stores, and service commercial businesses in single-family homes.
- The proposed Alloa SPA will provide sufficient local retail space to meet the needs of future residents.

Locational Considerations

- The Secondary Plan would create a retail and mixed use corridor along Mayfield Road, which would contain the majority of retail space in the area. This strategy would have the advantage of placing retail uses along a high volume corridor with excellent exposure to passing traffic, thus strengthening this commercial node in terms of serving local residents. The creation of this concentrated corridor would also create a critical mass allowing for a high volume of cross shopping between nearby uses.
- In our experience, when retail uses are too dispersed within a community, it can lead to poor performance and high level of vacancies, particularly for retail sites that are located away from major roadways.
- This clustering of retail uses means that persons living in the north part of the study area would be furthest from the principal local shopping area. However, it is important to recognise that the Alloa area is very compact with well-connected road, transit, and active transportation networks, and that the maximum distance to commercial facilities from any part of the study area would only be about two kilometres, which is well within a reasonable distance for food shopping. It is also important to note that international studies have determined that the median cycle trip in many countries is between about two to three kilometres. So that depending on how well the community can accommodate cycling traffic, the retail uses are well situated to serve bike related shopping trips.
- The distance is also alleviated by the location of a proposed mixed use land use designation on Mississauga Road in the northwestern part of the community, as well as, by opportunities for small scale commercial uses within the Neighbourhood areas Area land use designation.

- In our opinion, the Secondary Plan provides for a highly functional commercial structure both from a total space and locational perspective, and one that, with supporting pedestrian and cycling infrastructure will promote cycling and pedestrian shopping trips.

9.0 Background Information

Appendix A Aerial Photograph of Subject Lands

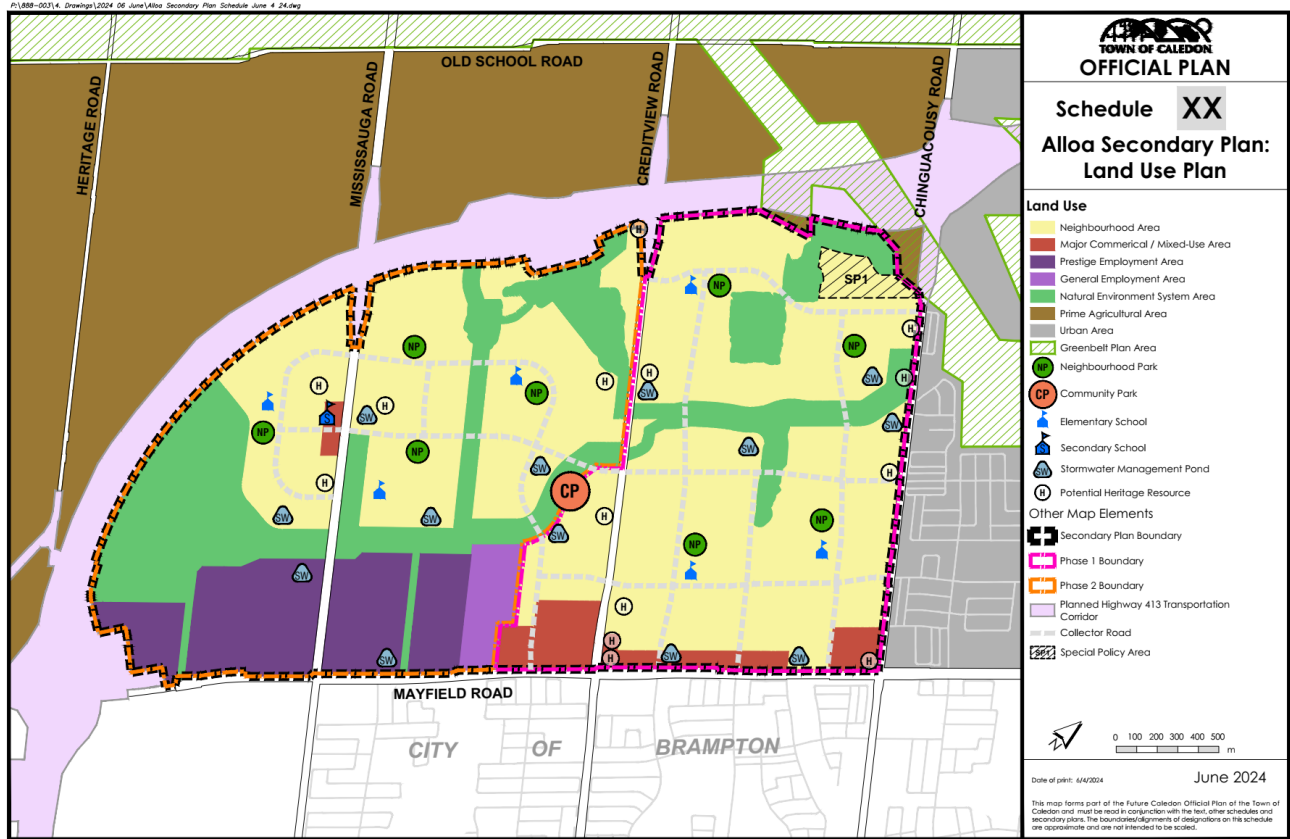
Figure A - 1: Aerial Image of Subject Lands



SOURCE: urbanMetrics Inc., with ESRI basemap.

Appendix B Proposed Development Concept Plan

B 1: Proposed Alloa Secondary Plan Schedule, June 4, 2024



SOURCE: GSAI. For discussion purposes only.

Appendix C Applied Terms of Reference and Scope Details

Terms of Reference: Commercial Impact Study

Purpose:

- To examine the market demand and potential impacts of the proposed development on the Town's planned commercial structure.
- The results of this Commercial Impact Study will help decision-makers, stakeholders and community members understand current commercial market conditions and the anticipated impacts of the proposed development.

Required in Support of:

- Through an Inquiry Meeting or Preliminary (PARC) Meeting, staff will confirm if a Commercial Impact Study is required.
- These studies will be required in support of applications where a change in land use is proposed, such as:
 - Official Plan Amendments (including Secondary Plans and Block Plans)
 - Zoning By-law Amendments (including Temporary Use By-laws)
 - Minor Variances.

which could result in impacts on the commercial hierarchy of the Official Plan, including planned function, the establishment of new and/or removal of commercial lands, changes in planned intensity (maximum and or minimum floor areas), or other changes.

- At the discretion of the Town, these Studies may be required in support of other development applications. This will be confirmed at an Inquiry Meeting or Preliminary (PARC) Meeting.

Prepared By:

- Qualified market consultant or land use planner with expertise in developing and defending Commercial Impact Assessments.

Peer Review and Scoping:

- The Town will require a peer review of this document at the sole cost of the owner/applicant submitting the development application.
- On a project-by-project basis, the Town will identify any possible scoping of the assessment, or alternatively, other considerations to be incorporated into the assessment.



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Terms of Reference: Commercial Impact Study

Content:

- Section 1: Executive Summary
- Section 2: Introduction
 - Site Location and Context: Information on the site (location, property size, existing uses), surrounding land, access, servicing, etc.
 - Description of Proposal: Indicate the proposed development, type of development application and proposed activities and identify a need within the planning horizon of the Official Plan for the proposed use.
 - Site concept plan with phasing of development, if applicable;
 - Proposed gross floor area (GFA);
 - Proposed merchandise category or categories and/or composition of space; and,
 - Known tenant(s), and corresponding square footage/space needs.
 - Purpose: Identify the reason and objectives for the Study, including an explanation of how provincial, regional and municipal planning requirements and other directives will be satisfied.
- Section 2: Supporting Studies/Key Findings
 - Outline relevant supporting studies submitted with the applications for the proposed development and provide a summary of the key findings or outcomes of the assessments.
- Section 3: Planning Policy Framework
 - Review and assess the provincial, regional and municipal policy context and regulatory framework as it applies to the proposed development.
- Section 4: Trade Area
 - Identify a trade area from which the majority of customers of the proposed development would reside.
 - A review of the trade area and surroundings.
 - An evaluation of the site location, size and use, determination of the study area and its form and function.
 - Assess the market competition.
- Section 5: Population and Employment Allocations
 - Identify current population and forecast future population within the trade area and demonstrate how the proposal supports these projections.



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Terms of Reference: Commercial Impact Study

Section 6: Existing Supply of Retail/ Commercial Space

- Quantitative and qualitative analysis of the existing supply of retail/commercial space in Caledon and of similar and competitive space within the surrounding market area. The analysis should be focused on relevant categories to the proposed development.
- Assessment of the role and function, and relative health of commercial areas, shopping centers, and commercial designations.
- Identify and summarize planned and proposed retail/commercial developments in Caledon including location, site size, planning status, and where available, development components and timing, as well as those in the surrounding area that would have an influence on the Caledon market and in particular the proposed development.
 - Planned development includes any undeveloped commercial land of relevance.
- An inventory of retail space and site suitability, with a customer and/or license plate survey (if the vehicles cross municipal boundaries) and an inventory of competitive space

• Section 7: Market Demand and Impact Analysis

- Calculate current and forecast future demand in relevant and corresponding categories to those proposed for development.
- Assess shopping patterns, retail trends, existing market capture rates, and inflow trade, which may include survey research.
- Forecast future market captures and inflow trade with the proposed development in combination with any other planned and/or proposed and approved developments.
- Evaluate the degree of competitive effects and potential impact with the introduction of the proposed development.
- Assess whether or not the proposed development would have a significant negative impact on the planned function of the existing and planned designated commercial areas and shopping centers.

• Section 8: Summary and Conclusion

- Summarize the commercial impacts of the proposed development and provide an opinion on whether or not the development is appropriate.
- Provide recommendations including any potential mitigation to impacts.

• Section 9: Background Information

- Appendix 1: Aerial Photograph - Identifying the parcel of land and surrounding land uses
- Appendix 2: Proposed Development or Concept Plan
- Appendix 3: Applied Terms of Reference and Scope Details
- Appendix 4: Literature Cited
- Appendix 5: Other Data Sources Used



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Terms of Reference: Commercial Impact Study

- Appendix 6: Methodologies and List of People Contacted
- Appendix 7: Curriculum Vitae (CV) of Those Who Prepared the Study

Resources:

- Town of Caledon Official Plan



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Appendix D Literature Cited

Government of Ontario. (2020). *A Place to Grow: Growth Plan for the Greater Golden Horseshoe*.

Government of Ontario. (2020). *Provincial Policy Statement, 2020*.

Ministry of Municipal Affairs and Housing. (2024). *Proposed Provincial Planning Statement, 2024*.

Region of Peel. (2022). *Region of Peel Official Plan*.

Town of Caledon. (2024). *Future Caledon Official Plan*.

Appendix E Other Data Sources Used

Region of Peel. (2024). *Municipal Boundary*. Open Data Shapefile.

GSAI. (2024). *Alloa Secondary Plan Schedule*. DWG File.

GSAI. (2024). *Alloa Secondary Plan Development Statistics*. Excel File.

Appendix F Methodology and List of People Contacted

In preparing this study, urbanMetrics has focused its evaluation on the following five components:

1. Site and Access - An assessment of the Alloa Secondary Plan from a market perspective, taking into account local and regional accessibility, compatibility with surrounding land uses, and available access for potential customers.
2. Land Use Policy Context - An assessment of land use policies that will regulate the type and scale of commercial development on the subject site, and in this portion of Caledon in general including Provincial, Town of Caledon Official Plan policies, and Region of Peel Official Plan policies.
3. Retail Supply - An assessment of the existing and proposed space immediately around the Alloa SPA. This included an inventory of the existing and future supply of retail/service space within the Secondary Study Area.
4. Retail Demand - An assessment of the need for additional retail and service commercial space in the Alloa SPA on buildout was undertaken. This included a per-capita retail demand analysis based on the future population who will reside in the SPA.

Appendix G Curriculum Vitae (CV) of urbanMetrics Staff



Rowan Faludi, MCIP, RPP, CMC, PLE

Partner

Rowan Faludi is a Founding Partner with urbanMetrics. He holds a M.Sc. in Urban and Regional Planning and B.A. in Urban Economic Geography from the University of Toronto.

Rowan specializes in economic, financial and market analysis for urban projects. With over 30 years of urban economic consulting experience, Rowan has undertaken a wide range of assignments across Canada.

Consulting Experience

- | | |
|-----------------------------------|-----------------------------------|
| Economic Impact Analyses | Fiscal Impact Analysis |
| Market and Financial Feasibility | Retail Demand and Municipal |
| Municipal Finance and Development | Commercial Strategies |
| Charges | Sustainable Neighbourhoods |
| Economic Development Strategies | Portfolio/Network Review |
| Business Impact Analysis | Land Acquisition Strategy/Due |
| Tourism Strategies | Diligence |
| Public/Stakeholder Engagement | Litigation Support/Expert Witness |
| Highest and Best Use | |

Asset Experience

- | | |
|--------------------------------------|-------------------------------|
| Retail and Commercial | Employment Lands |
| Housing | Schools/Colleges/Universities |
| Specialty Housing (student, seniors) | Hospitals |
| Employment Lands | Parks/Trails |
| Raw Land | Public Recreational Complexes |
| Office | Waterfront/Harbours/Marinas |
| Hospitals | Highways/Interchanges |

Memberships

- Lambda Alpha, Toronto Simcoe Chapter
- Canadian Institute of Planners
- Ontario Professional Planners Institute
- Institute of Certified Management Consultants
- International Council of Shopping Centres
- Association of Ontario Land Economists
- Centre for the Study of Commercial Activity

Education

- Masters of Science
- Urban Planning and Development
- University of Toronto

- Bachelor of Arts
- Urban Economic Geography
- University of Toronto



Economic Impact Analysis

- **Economic Impact of Canada's Recreational Vehicle Industry**
National Recreational Vehicle Dealers Association of Canada
- **Economic Impact Analysis of Canadian Recreational Boating Industry**
National Marine Manufacturers of Canada
- **Economic Impact Analysis of Various Science North Projects**
Science North
- **Economic and Fiscal Impact of the Great Northern Ontario Roadshow**
Science North
- **Economic and Fiscal Impact of Niagara Attractions**
Niagara Parks Commission
- **Economic Impact Analysis of The University of Ottawa**
University of Ottawa
- **Economic Impact of McMaster University**
McMaster University
- **Economic Impact of the DeGroot School of Business**
McMaster University
- **Economic Impact of Waste Management Sites**
Waste Management
- **Economic Impact of an E-Sports Venue at Exhibition Place**
Overactive Media
- **Economic Impact of Windsor's Tourism Industry**
City of Windsor
- **Economic Impact of Sudbury's Tourism Industry**
Science North
- **Economic Impact of the Hamilton Housing Industry**
Hamilton Homebuilders Association
- **Economic Impact of a Waste to Energy Facility**
Algonquin Waste
- **Economic Impact of a Major Transit Station Development**
Build Toronto
- **Economic Impact of a University in the City of Brampton**
City of Brampton
- **Economic Impact of a New Industrial and Residential Community in Northumberland County, Ontario**
Empire Properties

- **Economic Impact of Development around a Rail/Multi Modal Facility**
Development Consortium
- **Economic Impact of a Central Library Development**
City of Windsor

Other Recent and Active Assignments

- **City of Hamilton, Inclusionary Zoning Housing Feasibility Study**
City of Hamilton
- **Feasibility of a High-Rise Residential Infill Project Downtown Toronto,**
Private Development Group
- **Fiscal Impact Analysis, New Community in Caledon**
Private Developer Group
- **Seniors Housing Strategy**
Town of Bradford-West Gwillimbury
- **Fiscal Impact Analysis Industrial Development Site in Caledon**
Private Developer
- **Feasibility of Residential Redevelopment Sites in Port Credit (Mississauga),**
Private Developer
- **Burlington Municipal Development Corporation Feasibility Study**
City of Burlington
- **St. Catharines Municipal Development Corporation Feasibility Study**
City of St. Catharines
- **Feasibility of a High-Rise Residential Project, Markham Road Scarborough,**
Private Developer
- **Golden Mile Redevelopment Market and Economic Analysis**
City of Toronto
- **Municipal Land Needs Assessment**
City of Sarnia
- **City of Sarnia, Development Area 2 Commercial Market and Policy Study**
City of Sarnia
- **Official Plan Review, Growth Management Strategy**
Town of Collingwood
- **Secondary Plan Study, Growth Management and Fiscal Impact**
Town of Midland
- **Town of Georgina**
- **City of Windsor Commercial Market and Policy Study**



Daniel Bailey

Project Manager

Daniel Bailey is a Project Manager and Business Analyst with urbanMetrics. Daniel brings an understanding of demographic, residential market, and geospatial analysis. During his time at urbanMetrics Daniel has worked with a range of public and private sector clients throughout Ontario on assignments including fiscal and economic impact analysis, as well as market analyses for residential, office, and industrial assets. Daniel is a close follower of municipal land development trends. He brings strong analytical and technical skills to support and inform sound land use planning and municipal policy.

Prior to joining urbanMetrics in 2021, Daniel worked as a researcher at an urban economics and land use research group.

Daniel holds a Bachelor of Science in Biology from the University of Toronto and a Master of Planning in Urban Development from Toronto Metropolitan University. During his graduate degree his research focused on population projections and missing middle housing.

Consulting Experience

Residential Market Analysis
Office Market Analysis
Demographic Analysis
Fiscal and Employment Benefits Analysis

Spatial Analysis
Retail Market Analysis
Land Needs Assessment

Asset Experience

Market Housing
Affordable Housing
Retail/Service Commercial

Industrial
Office
Employment Land
Highways/Interchanges

Education

Master of Planning (MPI)
Urban Development
Toronto Metropolitan University
(formerly Ryerson University)

Bachelor of Science (Hon.)
Biology
University of Toronto



Active and Recent Assignments

- **Hamilton Inclusionary Zoning Market Feasibility Study**
City of Hamilton, ON
- **Square One Rathburn Road Redevelopment Strategy (OPA) – Office Market Study**
Oxford Properties, Mississauga, ON
- **Official Plan Review – Land Needs Budgets**
Town of Wasaga Beach, ON
- **Kleinberg Retail Study – Commercial Needs Study**
Argo Developments
- **Commercial Land Needs Study, Caledonia Ontario**
Micor Developments, ON
- **Second-hand Retail Market Analysis**
Private Retailer, BC
- **Commercial & Residential Market Study**
Baird AE, ON
- **Mixed-Use Fiscal and Employment Impact Study**
DiamondCorp, Toronto, ON
- **Residential Proforma Review**
Private Landowner, Toronto, ON
- **Employment Land Market Study**
Farhi Holdings, ON
- **Residential Market Study**
Farhi Holdings, ON
- **Office Space Market and Employment Study**
Private Developer, Brampton, ON
- **Commercial Needs Assessment Peer Review**
City of Sarnia, ON
- **Cambridge Residential Market Study**
Private Developer, Cambridge, ON
- **Residential Development Proforma Analysis**
Private Landowner, Toronto, ON
- **Point Edward Residential and Seniors Market Demand Analysis**
Private Developer, Point Edward, ON