



OFFICIAL PLAN REVIEW

Commercial Market and Policy Study

Whitchurch-Stouffville, Ontario

Prepared for **Town of Whitchurch-Stouffville**

November 18, 2021



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Executive Summary

Context

- urbanMetrics inc. (“urbanMetrics”) in collaboration with The Planning Partnership (“TPP”) have been retained by the Town of Whitchurch-Stouffville to conduct a Commercial Policy Study to assess the commercial policies and designations of the Town and forecast future market demand for commercial services.
- Whitchurch-Stouffville is currently updating its Official Plan to support growth to 2051, in conjunction with York Region’s ongoing Municipal Comprehensive Review. This reporting will support decision making in Whitchurch-Stouffville throughout this process.
- Whitchurch-Stouffville is a rapidly growing municipality in York Region. It is largely comprised of rural, environmentally protected areas, as well as communities designated to accommodate urban growth. The vast majority of this growth is concentrated in the community of Stouffville, located in the southeast edge of the Town’s boundary, adjacent to Markham.

Key Findings

Growth and Demographics

- Whitchurch-Stouffville is a rapidly growing municipality, outpacing population growth experienced across York Region. **By 2051, the Town projects that the population will more than double, reaching 101,400.** This estimate exceeds preliminary estimates prepared by York Region over the same time period.
- By 2051, the Town projects employment growth to a total of **39,300 jobs** in the community, also exceeding projections prepared by York Region.

Commercial Trends and Survey Results

- **E-commerce continues to represent amongst the most disruptive shifts in the commercial retail / services industry** to date. The COVID-19 pandemic has accelerated this broader trend. Based on survey research, almost 90% of respondents from the Town indicated that they have increased their spending through online channels as a result of the pandemic.
- Mixed-use development featuring ground floor retail and services has become an important part of sustainable planning and should be incorporated into future planning by the Town. However, it has not been universally successful. Planning policies should be tailored to ensure that appropriate retail uses can be accommodated where they are needed.

- **Whitchurch-Stouffville has a diverse range of retailing options**, ranging from a traditional main street retail environment to a big box regional power centre.
- Despite the fact that the Community of Stouffville serves as an important commercial node for local and surrounding residents, the **Town lacks the full breadth of retail outlets and services that would be expected of a municipality of its size**. Survey results indicate that some 45% of residents travel outside of the community to shop on a weekly basis. Population growth and the establishment of a greater critical mass provide the opportunity to address this current shortfall.

Commercial Supply and Demand Analysis

- There is currently **some 1.6 million square feet of retail / service commercial¹ space in Whitchurch-Stouffville**. With a reported vacancy rate of 6.5%, the Town’s commercial environment is considered healthy.
- The Community of **Stouffville accounts for the vast majority—over 85%-- of commercial space in the Town**.
- Based on future population growth combined with the need to add additional space to provide a more balanced commercial structure, it is estimated that the **Town would require approximately 2.5 million square feet of additional space**. This additional space would be divided into four principal areas:
 - Local Serving Retail and Services Space to serve future population growth to be accommodated largely through future Secondary Plans and plans of subdivision (approximately 1,050,000 square feet).
 - Regional Serving Retail Space, which would include filling out the existing Regional Retail Area and the designation of one or two additional sites (approximately 750,000 square feet).
 - Intensification, primarily along Stouffville Road, including the Community Core Area (Downtown), the Western Approach, and the Gateway site (approximately 450,000 Square Feet).
 - Select Limited Retail and Services Space in Industrial Areas and Business Parks, including: specialty building supplies, automotive repair and service, ancillary retail and services, local serving offices, and other uses as appropriate (approximately 250,000 square feet).

¹ A list of all store categories included in retail / service commercial uses is located in Appendix A.

Supply and Demand Reconciliation

- urbanMetrics has estimated **potential known sources of supply of between 700,000 – 800,000 square feet** of commercial space. This includes:
 - Sites under development;
 - Minister’s Zoning Order Lands;
 - Employment Conversion Requests;
 - Gateway Mixed Use Area;
 - Neighbourhood Retail Area;
 - Lincolnville MTSA and,
 - Other vacant commercially designated lands;
 - Remaining capacity in the Regional Retail Area.

The balance of warranted space is unallocated and will require planning approvals in the future, including:

- a) The designation of lands for **Local Serving commercial uses**, either as stand-alone commercial sites or as part of mixed-use developments.
- b) The designation of lands for **Regional commercial uses**. The future population will require some 750,000 square feet of additional commercial space that will serve more than day to day or weekly needs.
- c) Approximately 450,000 square feet has been identified for the **Gateway / Western Approach**, which represent vacant sites, sites under application and estimated intensification potential along Stouffville Road between Highway 48 and the eastern edge of the Community Core Area (Downtown Stouffville).
- d) **Commercial space accommodated on Employment Lands** has been estimated at approximately 10% of the total future required space in the Town based on our experience in other municipalities.

Distribution of Additional Warranted Space Growth (2021-2051 (Sq. Ft. GLA))

Location/Type of Space	Total Demand	Allocated	Unallocated
Local Serving	1,050,000	325,000	725,000
Regional	750,000	70,000	680,000
Gateway/Western Approach/Downtown	450,000	320,000	130,000
Employment Lands and Other	250,000	35,000	215,000
Total Space (Sq. Ft. GLA)	2,500,000	750,000	1,750,000

SOURCE: urbanMetrics inc.

Employment Potential

- The known sources of future commercial space supply noted above would generate between **1,400 and 1,600 employees**.
- The full **2.5 million square feet of future warranted space would accommodate approximately 5,000 new employees in the Town**.

1.0 Introduction

1.1 Context

urbanMetrics inc. (“urbanMetrics”), in collaboration with The Planning Partnership (“TPP”), have been retained by the Town of Whitchurch-Stouffville to conduct a Commercial Policy Study to review and assess the commercial policies and designations of the Town of Whitchurch-Stouffville Official Plan, as well as to forecast any future market demand and opportunity for the Town.

The Town of Whitchurch-Stouffville is currently updating its Official Plan to prepare the municipality to accommodate growth over the 2051 planning horizon. The Town’s review is being undertaken concurrent to York Region’s Municipal Comprehensive Review and Official Plan Update. Direction from the updated Regional Official Plan is required to be reflected in the plans of lower tier municipalities, including Whitchurch-Stouffville.

Additionally, in light of the COVID-19 pandemic and broader trends in real estate development patterns across the Greater Toronto Area, the commercial sector is rapidly evolving. Developing a forward-looking policy framework that incorporates best practice in land use planning will be important to ensure that Whitchurch-Stouffville continues to be a desirable location to live, work and play.

1.2 Purpose of the Commercial Policy Study

Commercial development is a fundamental part of a complete community. Retail and service commercial uses, accommodations and restaurants create agglomerations of activity—like Stouffville’s Community Core—that are both highly utilized by businesses and residents and cherished as gathering places. Retail and service commercial uses and restaurants are also an important element of a community seeking to attract leisure visitors from outside of the community. These facilities are important in establishing the character of the Town. Planning for retail and service commercial uses, accommodations and restaurants is an important municipal activity because there is a strong desire to ensure the maximum commercial choice for residents, businesses, and visitors, while attempting to manage those opportunities to ensure healthy competition.

Whitchurch-Stouffville has a long tradition of providing retail shopping and commercial services to its own residents and to surrounding communities. Over the years, its commercial facilities have evolved and now encompass Downtown Stouffville, the Hoover Park Regional Retail Node, the Western Approach Mixed-Use Area, among other neighbourhood focused retail nodes. Population growth is placing pressure on the Town to continue expanding its commercial sector to better serve residents, workers, and visitors, and build its non-residential tax base.

The purpose of the Commercial Policy Study is to assess the implications of growth on the Town’s commercial areas and to examine commercial land use requirements through to the year 2051. This

comprehensive review will provide guidance for the current Official Plan update process by assessing the adequacy of the existing supply of lands intended to accommodate commercial uses and recommend whether any changes to the land use designations and policies are required to protect the planned function of each commercial area.

This report represents the first phase of the Commercial Market and Study process and provides an understanding of the current and future market for retail and services space in the Town, including an assessment of the amount and types of future retail space required, the most appropriate formats for new space and guidance as to future locations to accommodate the warranted commercial space. The second phase of this study will comprise planning policy recommendations to accommodate future commercial space in conjunction with the broader policies being developed through the Official Plan Review.

See Appendix A for a detailed list of all commercial uses considered in this analysis

1.3 Approach

In preparing this *Commercial Policy Review*, urbanMetrics completed the following work tasks:

- Reviewed background data, including the previous Commercial Policy Study, Official Plan, Secondary Plans, and the Lincolnville Major Transit Station Area Study.
- Completed a commercial inventory of retail and service space in Whitchurch-Stouffville. This included all vacant space.
- Identified future commercial space supply available in Whitchurch-Stouffville, based on development activity, designated and zoned commercial land, unbuilt potential on existing commercial sites, and intensification opportunities.
- Conducted online outreach surveys of Whitchurch-Stouffville residents and businesses. Further telephone interviews were conducted with local landowners and business owners.
- Collected and analyzed mobile analytics data, to understand customer movements and shopping patterns within individual nodes in the Town.
- Analyzed broader commercial and retail trends and commented on potential impacts to the Town of Whitchurch-Stouffville. These trends include online shopping, COVID-19, retail in mixed-use environments, and demographic changes.

- Delineated a trade area, based on the results of our inventory, surveys and mobile analytics data.
- Analyzed the future commercial need in Whitchurch-Stouffville for retail and service-based store categories. This need has been expressed both in terms of square footage of space required, and an estimated overall land area needed to support growth.
- Reconciled future space need against land supply to determine the quantum of land required to support commercial space needs to 2051.
- Estimated overall employment that would be required to support the development of warranted retail space to support population growth throughout Whitchurch-Stouffville.
- Reviewed the existing policy framework in Whitchurch-Stouffville and evaluated its efficacy in terms of strengths, weaknesses, opportunities and threats. Based on this review, we have provided recommendations and commentary with an eye towards improving the policy structure to support more vibrant mixed-use areas, community nodes and future-proofed retail functions.

1.4 Assumptions & Limitations

There are a number of basic and underlying assumptions upon which the validity of the findings presented in this report depend. Based on our considerable and long-term experience in the commercial real estate development and land use planning process, we recognize and appreciate the problems associated with making broad and generalized assumptions about future conditions. Undoubtedly, deviations from historic and current trends will take place in the future, however, basic assumptions are required regarding the possible extent of such deviations.

These basic assumptions are:

- During the forecast period discussed in this report, a reasonable degree of economic stability will prevail in the Province of Ontario, and specifically in the Town of Whitchurch-Stouffville market.
- Further to above, due to the recent and ongoing conditions relating to COVID-19, it is difficult at this time to accurately determine the potential longer-term impacts of the pandemic on future economic conditions, investment patterns, shopping habits, among various other factors that will directly influence commercial market conditions in Whitchurch-Stouffville and across Ontario. In reviewing this report, it is important to note that a significant portion of the background supporting data and statistics relied upon—as well as the resulting analyses, professional observations, and research findings—have been developed in the months during the COVID-19 pandemic in Canada. As such, the information presented herein reflects the

latest available research on relevant historical patterns and best practices. Given the inevitable longer-term planning horizon of the recommendations included in this report, our analysis therefore assumes that the local commercial environment will more or less return to pre-pandemic conditions in due course.

- Estimates of future population and employment growth in the Town of Whitchurch-Stouffville are assumed to be sufficiently accurate for the purposes of this analysis.
- The official statistical sources utilized in this report (based largely on Statistics Canada, Province of Ontario and Town of Whitchurch-Stouffville data, which have been footnoted where utilized) are considered sufficiently accurate for the purposes of this analysis.

If, for any reason, major changes occur that could influence the basic assumptions stated above—including ongoing monitoring of any future changes resulting from the COVID-19 pandemic—the findings contained in this report should be reviewed in light of such changed conditions and revised if necessary.

2.0 Municipal Profile

Key Findings

- Whitchurch-Stouffville is a **geographically large, rural municipality** within the Greater Toronto Area. Most of the population is clustered in the community of Stouffville, with some small clusters in settlement areas throughout the community.
- The Town is **well served by GO Transit service**, with two stations located in Whitchurch-Stouffville. GO service provides a direct connection to Union Station in Downtown Toronto.
- Whitchurch-Stouffville is served **by Highway 404 to the west of the municipality**. This major regional highway provides north-south access from Downtown Toronto, through York Region and Lake Simcoe.
- The Town is situated in the market shadow of larger municipalities, including the City of Markham to the south, and to the east of Richmond Hill and Newmarket. Residents of Whitchurch-Stouffville must travel to each of these communities to access some regional services, and notably many higher order retail facilities, such as enclosed shopping centres and retail chains not available locally.

The Town of Whitchurch-Stouffville is part of the Greater Toronto and Hamilton Area (GTHA), and is located in York Region, one of the fastest growing areas in Canada. The municipality's total land area amounts to an estimated 20,622 hectares (50,958 acres) and is generally bordered by Highway 404 to the west, Davis Drive to the north, York Durham Line to the east, and the City of Markham's municipal border (200 metres north of 19th Avenue) to the south.

The Town has a fragmented urban form that is comprised of several distinct communities scattered throughout the agricultural and environmental countryside. Stouffville is the Town's largest urban area, followed by the communities of Ballantrae / Musselman's Lake, Vandorf, Gormley, and Bloomington, among others. Agriculture remains a dominant land use, which is supported by large areas of prime agricultural lands located throughout the Town.

The municipal boundary is detailed in Figure 2-1.

Figure 2-1: Town of Whitchurch-Stouffville

SOURCE: urbanMetrics inc.

2.1 Locational Context

As noted, the Town of Whitchurch-Stouffville is located in the mid-eastern area of York Region. The following identifies some of the municipalities and features surrounding Whitchurch-Stouffville:

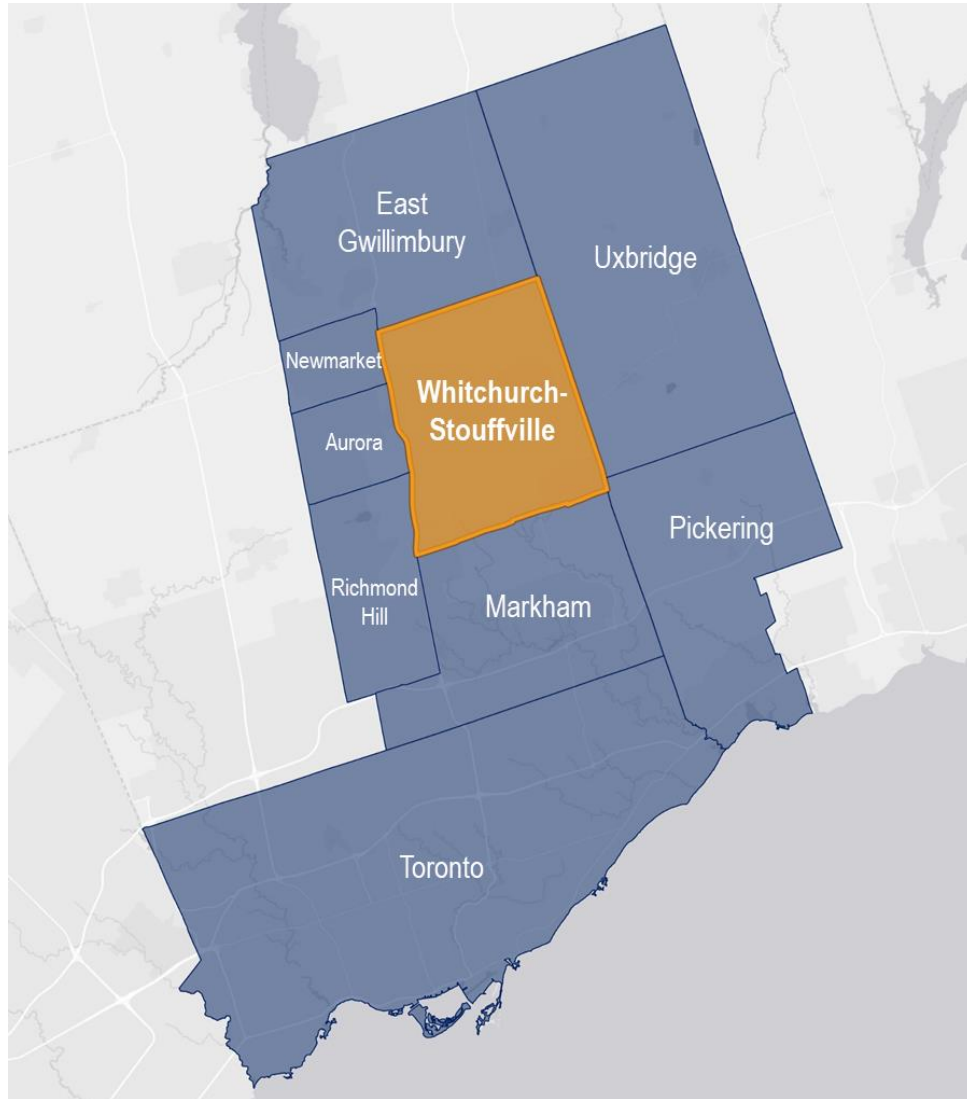
- **West** – The municipalities of Richmond Hill, Aurora, and Newmarket are all located immediately west of Whitchurch-Stouffville. All these municipalities have considerably larger populations than Whitchurch-Stouffville and maintain their own wholesome range of commercial facilities and regional retailers. Richmond Hill and Newmarket contain enclosed shopping centres and many retail stores and services not available in Whitchurch-Stouffville. Aurora contains a significant regional retail node at Bayview Avenue and Wellington Road, which likely serves Whitchurch-Stouffville residents living in Vandorf and other northern hamlets.

Highway 404 functions as the boundary between Whitchurch-Stouffville and the adjacent municipalities to the west. Highway 404 is a major highway that runs north-south through York Region and connects the southern edge of Georgina to Downtown Toronto by way of the Don Valley Parkway. This important route connects Stouffville to the 400-series highway network, which extends through Southern and Eastern Ontario.

- **North** – There are very few population centres located to the north of Whitchurch-Stouffville. The Town of East Gwillimbury’s rural countryside is located immediately north of the Town, however the major population centres are located west of Highway 404. Mt. Albert, a small urban centre in East Gwillimbury, is centred within the rural area and offers a small range of retail/service commercial facilities. Residents of Mt. Albert would contribute minimal expenditure inflow into Whitchurch-Stouffville as they are served by East Gwillimbury’s and Newmarket’s existing regional retail nodes.
- **East** – The Town of Uxbridge is approximately 15 kilometres to the east of the Town. With major retailers including Wal-Mart, Canadian Tire, and Zehrs, Uxbridge provides a similar range of services to Whitchurch-Stouffville, and likely competes for inflow visitation for residents who live between the municipalities. As such, Whitchurch-Stouffville potentially functions as a commercial node for the more immediate eastern rural area, and likely draws inflow from closer small communities, including Goodwood and Claremont. The municipality of Port Perry, some 28 kilometres east of Whitchurch-Stouffville, serves a smaller regional function, primarily for cottage-country traffic.
- **South** – The City of Markham is located immediately south of Whitchurch-Stouffville. As the largest city in York Region, Markham provides regional services that draw visitors from across the GTHA and Southern Ontario. In addition to Markville Mall regional shopping centre, Markham contains a wide range of large scale retail outlets and an extensive range of specialty retailers, restaurants and services serving a number of large ethnic markets in the area. Whitchurch-Stouffville residents travel to Markham for a portion of their regional retail needs. Further south is the City of Toronto, connected to Whitchurch-Stouffville by Highway 404 / Don Valley Parkway and a number of regional roads.

Whitchurch-Stouffville’s location and surrounding area is illustrated in Figure 2-2.

Figure 2-2: Whitchurch-Stouffville's Surrounding Area



SOURCE: urbanMetrics inc.

2.2 Access and Amenities

As a growing municipality in York Region, Whitchurch-Stouffville offers a wide range of residential, commercial, institutional, and recreational amenities; and has continued to evolve into a balanced community for residents and visitors.

The Town of Whitchurch-Stouffville possesses the follow key locational characteristics:

- Transportation Access:** Whitchurch-Stouffville is primarily accessed by way of Highway 404, which connects to the City of Markham and City of Toronto to the south, and the Town of Georgina to the north. The Town is bisected by two railway lines: the Canadian National Railway's primary freight corridor that runs through Vandonf, and a GO Transit line that hosts the "Stouffville Line". There are two GO Stations located in Whitchurch-Stouffville, one of which is situated in downtown Stouffville and the line's terminus, Lincolnville Station, which is in the northeast corner of Stouffville. Additional public transit in Whitchurch-Stouffville is operated by York Region Transit. There is currently one bus transit route (Route 9) that runs throughout Stouffville and connects to Markham-Stouffville Hospital to the south. For the most part, however, Whitchurch-Stouffville is an auto-oriented community.
- Local Commercial Amenities:** Whitchurch-Stouffville has a range of commercial nodes with a diverse collection of retail / service commercial offerings. Most notably, Stouffville's historic downtown contains an eclectic mix of restaurants, services, galleries, and boutique shops. The Town also contains the Hoover Park Regional Retail node that includes large format retailers such as Wal-Mart, Canadian Tire, Marks, Winners, and Staples, among others.
- Access to Institutional Amenities:** The Town is served by Markham-Stouffville Hospital. The main hospital is located approximately 10 kilometers south of Stouffville and is connected by public transportation. Residents living in the northern communities of Whitchurch-Stouffville are in close proximity to Southlake Regional Health Centre in Newmarket. The Town does not have a post-secondary institution, however it is home to multiple elementary and secondary schools, as well as community centers and the Whitchurch-Stouffville Museum.
- Outdoor Recreation Amenities:** The vast agricultural landscape of Whitchurch-Stouffville has attracted a variety of land intensive recreation opportunities. Attractions such as tree-trekking, horseback riding, golf courses, and sports facilities have established Whitchurch-Stouffville as a family-friendly destination for residents and visitors.

3.0 Commercial Policy Framework

Key Findings

- Land use planning in Whitchurch-Stouffville must be consistent with provincial and regional policy guidance. This includes the Provincial Policy Statement, the Growth Plan for the Greater Golden Horseshoe, and York Region Official Plan.
- A significant portion of the **lands in Whitchurch-Stouffville are protected, either located within the Greenbelt or the Oak Ridges Moraine**. These protections limit development to select growth areas within the Town.
- Various secondary plans in Whitchurch-Stouffville provide specific policy direction for each settlement area in the Town. **The vast majority of residential and commercial growth is expected to be accommodated within or adjacent to the community of Stouffville**. Some limited degree of development is supported in other secondary plan areas. Specifically, industrial growth is contemplated within the Gormley Secondary Plan Area, adjacent to Highway 404.

The following section provides an overview of the relevant Provincial, Regional, and local policies which apply to commercial land planning in the Town of Whitchurch-Stouffville. The policies discussed in this section frame the scope of the analysis and policy directions presented throughout this study.

3.1 Provincial Policy Context

Provincial policy states that accommodating an appropriate range and mix of employment uses including commercial is important for creating a healthy and livable community. Commercial land uses need to occur within settlement areas and should be supported by public transit and active transportation connections. In addition, the retail sector will be supported by promoting compact built form and intensification, encouraging the integration of those uses with other land uses to support the achievement of complete communities.

Three key documents that frame the discussion around commercial lands are the Provincial Policy Statement, the Growth Plan for the Greater Golden Horseshoe, the Greenbelt Plan. Policies set out in these documents are intended to ensure that provincial land use planning interests are protected and to provide high-level policy direction for municipalities.

Provincial Policy Statement

The Provincial Policy Statement, 2014 (PPS) provides policy direction on matters of provincial interest relating to land use planning and regulating the development and use of land. The PPS is issued under the authority of the Planning Act and came into effect on April 30, 2014. Under Section 3 of the Planning Act, local planning decisions “shall be consistent with” the Provincial Policy Statement and shall “conform” to provincial plans (Planning Act, R.S.O 1990, P.13 s. 3).

Section 1 of the PPS outlines policies on “Building Strong Healthy Communities.” This section promotes strong, livable, and healthy communities and requires that municipalities:

- Provide the appropriate mix and range of employment, including commercial;
- Promote economic development and competitiveness;
- Encourage compact, cost-effective development patterns; and,
- Ensure that necessary infrastructure is made available.

The PPS also contains broader policies on employment including commercial employment. The PPS requires that municipalities promote economic development and competitiveness by encouraging compact, mixed-use development that incorporates compatible employment uses to support livable communities (PPS, s. 1.3.1 c). The PPS also requires that long-term economic prosperity be supported by maintaining and enhancing the vitality and viability of downtowns and main streets (PPS, s.1.7.1 c).

Provincial Growth Plan for the Greater Golden Horseshoe

The Growth Plan for the Greater Golden Horseshoe (Growth Plan) builds upon the foundation of the PPS, with the distinction that the PPS is applicable to the entire Province of Ontario, whereas the Growth Plan is only applicable to the defined Greater Golden Horseshoe.

The current Growth Plan (2020) provides a framework for implementing Ontario’s vision for building stronger, prosperous communities by managing growth in this region. It established the long-term framework for where and how the region will grow, while recognizing the realities facing our cities and smaller communities and acknowledging what governments can and cannot influence. It also demonstrated leadership for improving the ways in which our cities, suburbs, towns, and villages will grow over the long-term.

Relevant aspects of the Growth Plan for this study are summarized below:

- Population and employment growth are to be accommodated by reducing dependence on the automobile through the development of compact, mixed-use, transit-supportive, pedestrian-friendly urban environments.

- Retail and office uses will be directed to locations that support active transportation and have existing or planned transit. (2.2.5.3)
- 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. (2.2.5.15)

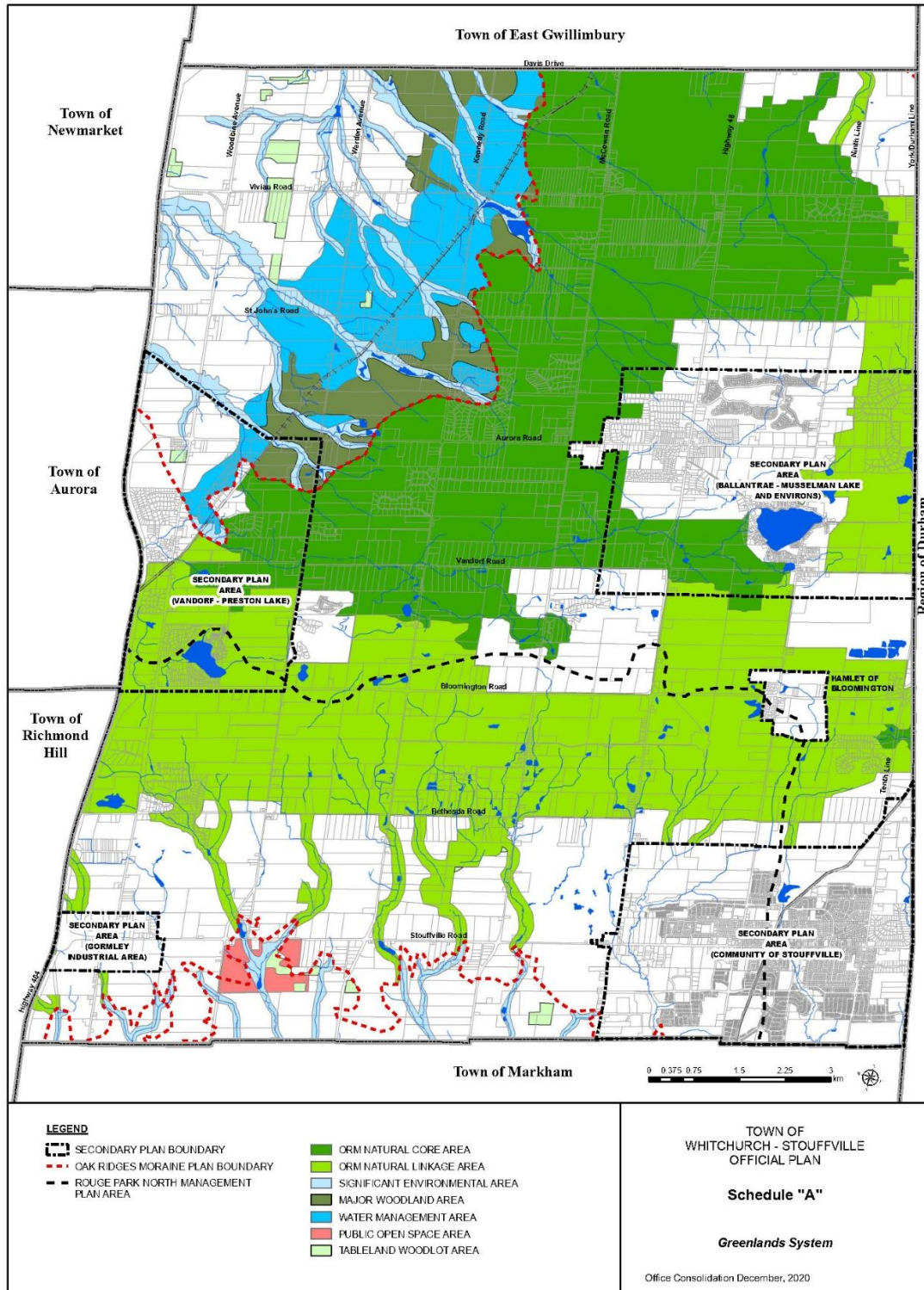
The Growth Plan includes policies for managing growth in the region, which includes minimum population and employment forecasts for applicable upper- and single-tier municipalities. As outlined in Schedule 3 of the Growth Plan, York Region is anticipated to grow to approximately 2.02 million residents and 990,000 jobs by 2051. The share of this future growth that will be located in the Town of Whitchurch-Stouffville is subject to a Municipal Comprehensive Review which is currently being undertaken by York Region, discussed in Section 4.0 of this report.

Greenbelt Plan

The Growth Plan provides the framework for where and how urban growth should occur in the Greater Golden Horseshoe. The Greenbelt Plan was established to provide a parallel framework for environmental management and protection in the same general area as the Growth Plan and is important to note as it applies to the environment, although there are no explicit commercial land policies. The Greenbelt Plan includes the protection of lands designated under the Niagara Escarpment Plan and Oak Ridges Moraine Plan and allows for the protection and management of prime agricultural and specialty crop lands across the Greater Golden Horseshoe.

A significant portion of lands within the Town of Whitchurch-Stouffville are subject to the policies of the Greenbelt Plan. Figure 3-1 below shows Schedule “A” of Whitchurch-Stouffville’s Official Plan. This figure shows the limits of the protected countryside Greenbelt Area in the Town. Lands in the protected countryside are subject to the entirety of the Greenbelt Plan.

Figure 3-1: Town of Whitchurch-Stouffville Greenlands System Map



SOURCE: Schedule "A" of Town of Whitchurch-Stouffville Official Plan, December 2020 Consolidation.

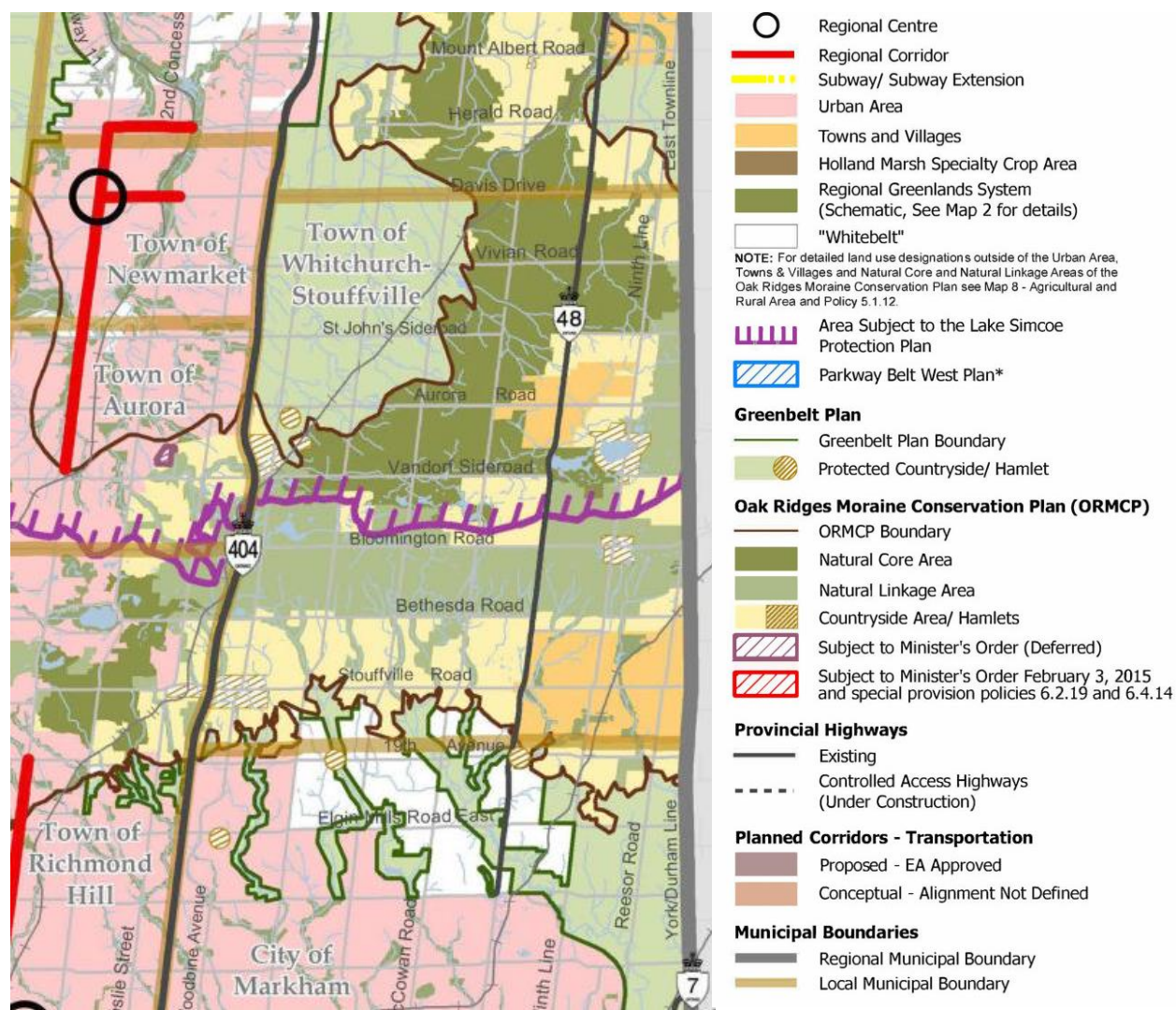
3.2 Regional Policy Context

York Region Official Plan

York Region is currently undertaking a Municipal Comprehensive Review, an input process to updating the Regional Official Plan. This review involves revisiting population and employment projections, understanding the current supply of land in the Region, and reviewing Official Plan policies. The previous Official Plan was developed in 2010 and provides an overarching framework to guide growth and development over a thirty-year horizon. The ongoing updates to the Official Plan will provide renewed direction to 2051.

The Official Plan further considers other Provincial policies, particularly as it relates to protected natural areas. The Oak Ridges Moraine Conservation Plan and Greenbelt Plan in particular provide limitations on developable land areas. As shown in Figure 3-2 below, much of Whitchurch-Stouffville is comprised of protected land areas. The Town of Stouffville as well as Ballantrae are the two geographies identified as “Towns or Villages”, with other portions of lands surrounding them delineated as countryside areas. Generally, these settlement areas have been identified as options to accommodate the vast majority of growth allocated to the Town.

Figure 3-2: York Regional Structure (Select Areas)



SOURCE: urbanMetrics inc., based on select portions of Map 1 of the 2019 Consolidated York Region Official Plan.

The Official Plan update also provides population and employment forecasts for each municipality in York Region. These forecasts inform what amount of growth Whitchurch-Stouffville needs to plan to support, and initiate discussions on where and in what form that growth is accommodated, within the permitted areas, as discussed previously. Section 4.0 of this report provides more context on York Region population and employment growth projections.

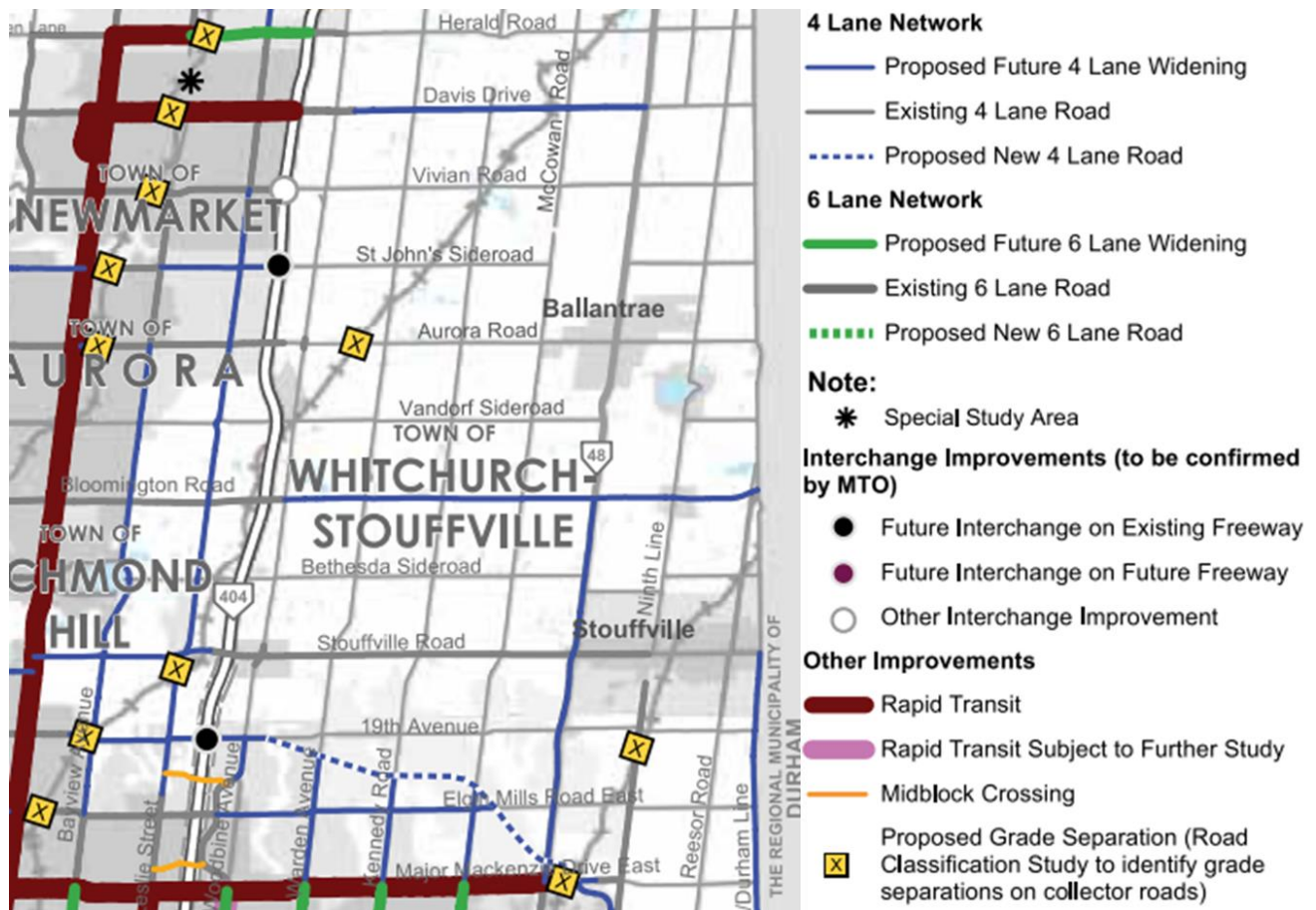
York Region Transportation Master Plan

In conjunction with the Official Plan update, York Region is also updating the 2016 Transportation Master Plan. This planning document provides the long-term vision for York Region's transportation

network, considering current and evolving need to support populations, communities and economic growth. As the population of York Region continues to grow and the economy continues to evolve, it is important to contemplate investments that ensure people and goods are able to move efficiently throughout the municipality, the Region and beyond.

As shown in Figure 3-3, Whitchurch-Stouffville is planned to be served by modest improvements to the existing road network in place. Lane expansions to Highway 48 and to Highway 40, as well as select grade separation investments will enhance access into and around the Town. However, as of the 2016 plan, a significant addition of roadway capacity is not planned for the Town of Whitchurch-Stouffville.

Figure 3-3: Proposed 2041 Road Network



SOURCE: urbanMetrics inc., based on select portion of the Proposed 2041 Road Network map from the 2016 Transportation Master Plan.

Figure 3-4 below shows the proposed 2041 transit network in the Transportation Master Plan. As shown, Whitchurch-Stouffville is proposed to continue to be supported by rush hour service at its two GO Transit stations. The Town is planned to realize expanded bus-transit connections, generally focused around connecting Ballantrae and Stouffville to transit nodes adjacent to Highway 404, and other population centres including Markham.

Figure 3-4: Proposed 2041 Transit Network



SOURCE: urbanMetrics inc., based on select portion of the Proposed 2041 Transit Network map from the 2016 Transportation Master Plan.

3.3 Local Policy Context

Town of Whitchurch-Stouffville Official Plan

The Whitchurch-Stouffville Official Plan provides general guidance around land use designations and development patterns across the Town. The purpose of an Official Plan is to provide a broader vision of the Town, and policy direction to inform decision making by public and private actors regarding growth and development.

The Official Plan was approved by council in 2000 and has been amended several times since. The Official Plan is in conformity with a range of Provincial and Regional planning policy documents, including the Provincial Policy Statement, York Region Official Plan, and the Oak Ridges Moraine Conservation Plan. The Official Plan informs local zoning by-laws, as well as local Secondary Planning exercises, which provide more detailed guidance around development of specific neighbourhoods, commercial nodes or areas.

The Whitchurch-Stouffville Official Plan defers much direction regarding commercial uses to local Secondary Plans applicable to defined settlement areas in the community. Recognizing the diversity of each community in Whitchurch-Stouffville, as well as a large, rural setting, establishing a municipal-wide policy guidance surrounding commercial functions is not necessarily effective. These planning directions are provided for in more detail in Secondary Planning policies, to be discussed in the following sections of this report.

Section 4.1.4 of the Official Plan does provide some direction regarding rural commercial functions outside of the Secondary Plan Areas. The Official Plan supports the expansion and addition of new rural commercial functions across designated areas, with the caveat that these areas serve the surrounding rural / environment / agricultural areas, and / or utilize the products of those areas. As such, outside of the Secondary Plan Areas, regional-serving commercial nodes are not contemplated within the Town. Further direction regarding other traditional retail / service commercial functions is generally provided for within the Secondary Plan documents.

Community of Stouffville Secondary Plan

The Stouffville Secondary Plan provides general guidance and direction for land use policies, growth and character of the community of Stouffville. The plan emphasizes balancing Stouffville's rural, small town character with the needs of a growing municipality that provides a range of services to immediate and surrounding residents. As the largest population centre in the Town, the community of Stouffville is the preferred location of the majority of local and regional retail-service commercial needs for Town residents.

The Stouffville Secondary Plan recognizes a range of general commercial areas in the community, including the following:

- **Community Core Area** – Generally understood to be the “Downtown” area of Stouffville, emphasis in this area is placed on unique commercial uses, as well as a range of residential and community functions. Increasing medium and high density, as well as community functions are accommodated in this area, centred around the presence of the GO Station.
- **Western Approach Area** – The Western Approach is planned to develop as a mixed-use corridor, that provides for larger scale residential, commercial and employment opportunities which may not necessarily be accommodated in the Community Core Area.
- **Neighbourhood Retail Area** – A small node in the northeastern portion of Stouffville, this mixed-use area is planned to provide for a range of day to day services and goods to surrounding residents. Outside of this node, these goods may not necessarily be easily accessible for residents of this part of Stouffville.
- **Regional Retail Area** – This node is located on Highway 48, south of Hoover Park Drive, and serves a broad, regional population. Major retail functions are permitted in this area, so long as they do not undermine or hinder the function of other commercial areas in Stouffville.

Ballantrae-Musselman Lake and Environs Secondary Plan

The Ballantrae-Musselman Lake and Environs Secondary Plan Area recognizes Ballantrae and Musselman Lake, which are a settlement area and hamlet area as identified in the *Oak Ridges Moraine Conservation Plan*. The small settlements, and their natural context makes the focus of this Secondary Planning Area of environmental conservation and sustainability. Any new development that occurs in this area is planned to be focused in the Ballantrae Settlement Area. Policy 11.4.6.2 permits “limited additional commercial and institutional uses...” Further direction across other areas in the Secondary Plan Area provide similar guidance, directing limited commercial development in the Secondary Plan Area.

Official Plan Amendment 136 was prepared to update the Secondary Plan. It is currently before the Ontario Land Tribunal. As proposed, the plan contains language supporting some additional opportunities for commercial and medium density mixed uses, particularly concentrated along Highway 48. Section 11.4.10.ii notes that permitted uses include “limited convenience and service commercial uses including food stores, convenience stores, personal service uses, restaurants, offices and coffee shops.”

Vandorf-Preston Lake Secondary Plan

The Vandorf-Preston Lake Secondary Plan provides guidance around planning for the communities of Vandorf and Preston Lake, within Whitchurch-Stouffville. The overarching vision for Vandorf is as a “village”, which may include small scale commercial functions, in addition to recreational and institutional facilities to support local resident and visitors. Alternatively, Preston Lake is planned to be maintained as a low-density residential lake community.

Gormley Industrial Area Secondary Plan

The Gormley Industrial Area Secondary Plan provides guidance to growth at an existing employment / commercial hub adjacent to Highway 400. This Secondary Plan functions as a “gateway” to Whitchurch-Stouffville, and benefits from efficient access to regional highway routes. The primary focus of the Plan Area is on the addition of dry industrial uses to support employment opportunities for Whitchurch-Stouffville residents. Additional commercial land uses are limited to developments that would support the needs of employees within the Gormley Industrial Area, as well as the limited local residential population.

Other Studies

Whitchurch-Stouffville Economic Development Strategy (2021)

The Town of Whitchurch-Stouffville has undertaken an update to the Economic Development Strategy in 2021. The purpose of this strategy is to update previous direction and develop guidance for ensuring the Town continues to remain a competitive and desirable place to locate, expand and operate a business. In light of shifts in the global and local economies, as a result of COVID-19, changing consumer preferences and technological innovation, such strategies are important to ensure economic competitiveness.

Reporting prepared by external consultants have identified several key industry sectors and strategic recommendations for Whitchurch-Stouffville. These recommendations provide insight into the future employment composition in the community, and subsequently nature of lands which may be required to maintain a competitive positioning across the Greater Toronto Area.

This ongoing reporting process has identified a series of findings which have particular relevance to the Commercial Land Review. These include:

- Priority fields for investment / employment growth in Whitchurch-Stouffville include:
 - **IT / Professional Services** – including niche opportunities for computer programmers and interactive media developers, financial technologies and services, and civic / social organizations;

- **Renewable energy and clean technologies** – niche opportunities for utility systems construction, scientific research and development services and waste management and remediation services;
- **Advanced / small scale manufacturing** – computer and electronic product manufacturing; bio-fabrications and medical devices, fixtures and furniture making;
- **Food and beverage processing** – craft and specialty foods, breweries and wineries, meat and dairy manufacturing.

Several other key takeaways were identified which will help inform the Commercial Policy Direction. These include capitalizing on the Town’s locational proximity to the GTA and major transportation corridors, supporting and enriching Downtown Stouffville as a ‘Centre City’, supporting entrepreneurship and home-based businesses, and building on arts, culture and tourism as an economic driver.

Transportation Master Plan (2017)

In 2017, Whitchurch-Stouffville prepared a Transportation Master Plan (“TMP”) to provide a blueprint that informs future investments, direction and goals as it relates to the movement of goods and people throughout the community. The Transportation Master Plan is in alignment with Provincial, Regional and Municipal policy guidance, including the Provincial Policy Statement and York and Whitchurch-Stouffville’s Official Plans. The Transportation Master Plan is currently being updated, in tandem with the broader Official Plan Review process.

The TMP identifies a “multi-modal” approach as the preferred direction for Whitchurch-Stouffville. The recommended strategy promotes environmental sustainability, and community health at its core. Investments such as a complete street strategy are suggested, to improve safety and roadway functionality for a range of users, as well as creating stronger active commercial frontages. Additionally, investing in a multi-modal transportation network, and ensuring that network is aligned with the land use bylaw is also recommended as a way to enhance accessibility to places to live, work and shop. These investments provide clarity and appropriate transportation infrastructure for all users.

Highway 48 Visioning Exercise

The Town of Whitchurch-Stouffville is working collaboratively with a broader consulting team to develop a strategic land use vision for the Highway 48 corridor through the community. The project is intended to provide guidance around preferred uses along the corridor and Study Area, ensure that transportation patterns are aligned with the identified uses, and analyze the role of the corridor within broader residential and non-residential patterns and targets for Whitchurch-Stouffville. As a result of recent provincially issued Minister’s Zoning Orders on lands adjacent to the corridor, the Study has been rescoped to incorporate the newly granted land use approvals.

Lincolnville Major Transit Station Area Land Use Study

urbanMetrics, as part of a broader consultant team, was retained by the Town to prepare a Land Use Study for the Lincolnville MTSA. The study identified a preferred development concept based on market research, best practices and creating a transit-supportive community centred around the GO Station. This preferred concept plan includes a range of medium and high-density mixed-use designations, with commercial space provided to generally serve the needs of local residents. A draft report has been publicly released and public feedback is being collected prior to council consideration.

4.0 Growth Patterns

Key Findings

- Whitchurch-Stouffville has a current (2021) population of approximately 51,100. By **2051, the Town projects that Whitchurch-Stouffville will almost double in population, reaching 101,400.** This estimate exceeds the draft forecasts prepared by the Region of 92,900 by 2051.
- **In recent years, Whitchurch-Stouffville has outpaced growth across York Region,** growing at an average annualized rate of 8.8% between 2006 and 2016, faster than the 2.3% across the Region.
- **By 2051, the Town of Whitchurch-Stouffville forecasts a total of 39,300 jobs,** exceeding York Region's draft forecast of 31,900 positions. Based on Census data, all employment growth in Whitchurch-Stouffville since 2006 has been in service-producing sectors, whereas goods-producing professions have seen effectively no change.
- The Town of Whitchurch-Stouffville has clusters of employment in several sectors that may impact commercial land planning, including real estate rental and leasing, professional, scientific and technical services, and arts, entertainment and recreation.

Developing an understanding of current population and employment trends in the Town of Whitchurch-Stouffville provides insights into market opportunities and future conditions. It forms the basis of more extensive land use planning that will guide development in Whitchurch-Stouffville for the foreseeable future.

4.1 Population Trends

Historic Growth

Figure 4-1 outlines the historic population growth in the Town of Whitchurch-Stouffville. As shown, the Town's population has increased from 25,200 in 2006 to 47,300 in 2016, representing an average annual growth rate of 8.8%. This represents rapid growth that significantly outpaced the Region as a whole. For comparison purposes, York Region's population grew by some 212,100 persons over the 2006-2016 period, translating to an annualized rate of 2.3%. The growth which occurred between 2006 and 2016 represented just over 10% of the overall growth in the Region.

Figure 4-1: Historical Population Growth (2006-2016), York Region and Whitchurch-Stouffville

	2006		2011		2016	2006-2016 Growth
York Region	933,900		1,066,600		1,146,000	212,100
Annual Growth		26,540		15,880		21,210
Annual Growth Rate		2.8%		1.5%		2.3%
Town of Whitchurch-Stouffville	25,500		38,900		47,300	21,800
Annual Growth		2,680		1,680		2,180
Annual Growth Rate		10.5%		4.3%		8.5%

SOURCE: urbanMetrics inc., based on the 2006, 2011, and 2016 Census of Canada.

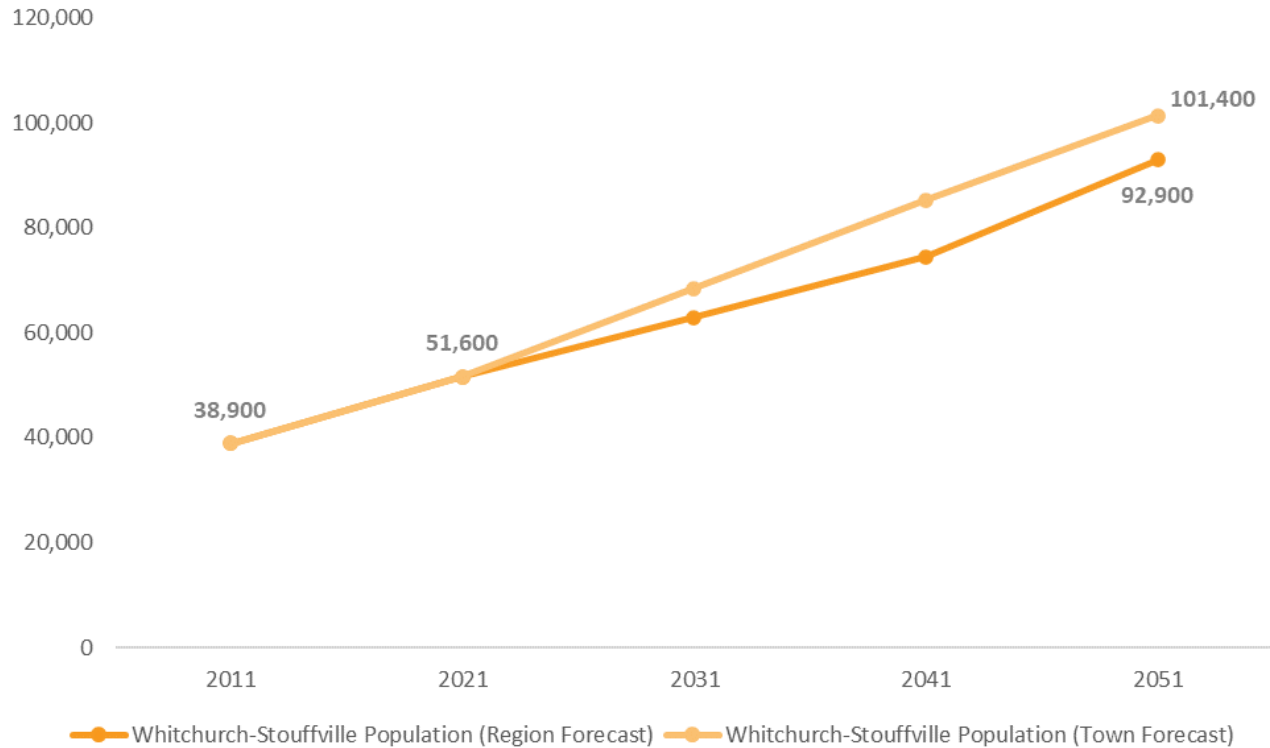
NOTE: Values have been adjusted for undercoverage.

Current and Forecast Population Growth

The Growth Plan requires York Region to plan to accommodate a forecast population of 2.02 million people and 990,000 jobs to 2051. Through the Region's ongoing MCR process, and based on assumptions related to demographics, market trends, land supply, and local policy, the Region's draft 2051 Growth Forecasts anticipate that Whitchurch-Stouffville will grow to 92,900 persons by 2051.

It is the Town's perspective that these forecasts are moderately conservative in light of increased growth and intensification pressures the Town is currently experiencing and anticipated over the long term. Expected intensification and redevelopment pressure in the Gateway and Western Approach Mixed Use Area, Lincolnville GO MTSA, Stouffville GO MTSA, recent employment land conversions along Highway 48, and the recent issuance of two Minister's Zoning Orders for development in Stouffville's Whitebelt provide rationale for growth that exceeds the regional forecasts. Based on staff analysis and the capacity of these areas, the Town expects to grow to a population of approximately 101,400 persons by 2051. This represents an increase of some 50,300 persons between 2021-2051, at an average annual growth rate of 3.3%. Figure 4-2 illustrates the two growth forecast scenarios.

It is important to note that the Growth Plan forecasts to 2051 at the Regional level are minimums, and not targets. As such, we have applied the Town's preferred population growth to 101,400 persons by 2051 as the primary input to the commercial land needs analysis.

Figure 4-2: Whitchurch-Stouffville Forecast Population Scenarios (2051)

SOURCE: urbanMetrics inc., based on Draft 2051 Growth Forecasts Reports issued by the Region of York and the Town of Whitchurch-Stouffville.

4.2 Employment

Whitchurch-Stouffville Employment Trends

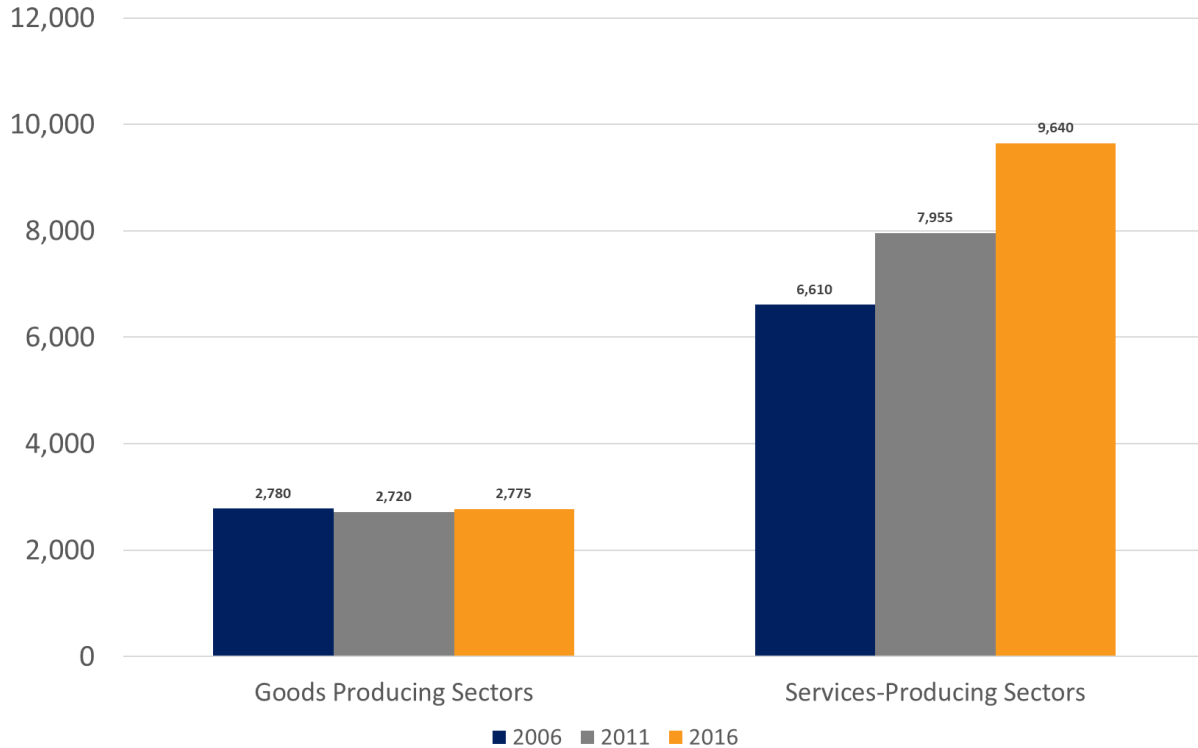
Whitchurch-Stouffville is a diverse municipality, comprised of rural, agricultural, industrial and protected environmental lands, as well as rapidly growing urban settlements. As a result of proximity to major employment nodes in York Region and Toronto, the Town has also traditionally functioned as a bedroom community as residents commuted to other municipalities for work.

The Town provides important regional services, particularly supporting local and surrounding residents with retail goods and personal care services. Additionally, as a regional service centre, Stouffville contains important services that support a large geographic area, particularly retail and service commercial functions.

Figure 4-3 outlines the change in jobs located in the Town of Whitchurch-Stouffville between the 2006 and 2016 Census, as reported by Place of Work data. As shown, Whitchurch-Stouffville has a strong services-producing economy that has seen healthy growth between 2006 and 2016. This sector includes industries such as retail trade, professional services, healthcare, finance and insurance, arts and entertainment, and food services, among others. It is important to note that the majority of these industries tend to locate in retail/service commercial space. Overall, it is evident that Whitchurch-Stouffville functions as a robust population-oriented employment hub that caters to local residents and visitors.

Figure 4-3 additionally highlights that Whitchurch-Stouffville has a smaller producing economy. Goods-producing sectors – such as manufacturing and utilities – are prominent users of employment areas. The sector’s stagnant growth between 2006 and 2016 likely indicates a mixture of limited demand for employment land by traditional users, as well as limited availability of strategically located, serviced employment lands. This has potential implications on the utilization of employment lands in the future as land-intensive services-producing industries (gyms, recreation facilities, rental companies) continue to grow and require scarce, large sites that can accommodate substantial commercial buildings.

Figure 4-3: Total Jobs Located in Whitchurch-Stouffville by Sector, 2006-2016



SOURCE: urbanMetrics inc., based on 2006, 2011, and 2016 Census of Canada

Location Quotient Analysis

To better understand employment patterns in Whitchurch-Stouffville, urbanMetrics has prepared a Location Quotient (“LQ”) analysis. Location Quotients provide a snapshot of the underlying employment base and representation across a range of sectors within a local economy when compared to a broader geography. In this case, employment in Whitchurch-Stouffville is being compared to Ontario averages.

This form of analysis provides insight into relative economic clusters in various industry sectors. Economic clusters are important anchors for employment and investment in a given geography, and generate spillover benefits that impact a range of supporting services.

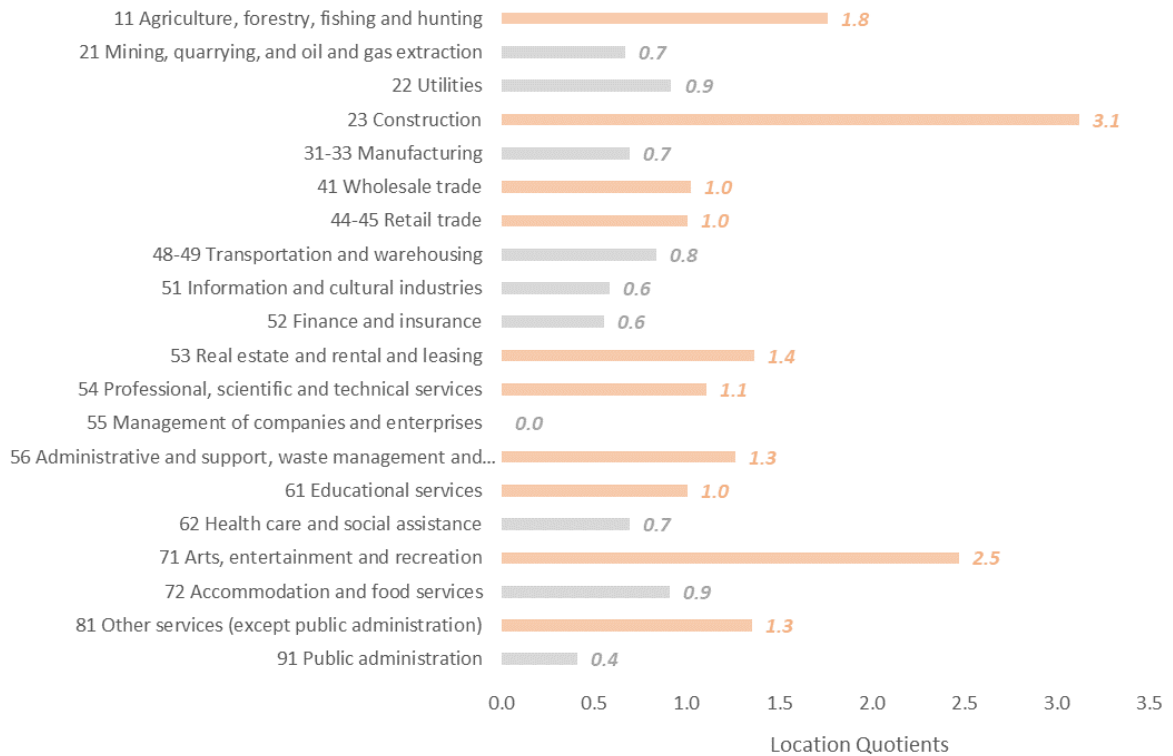
LQ analyses are useful in understanding a local economy, areas of specialization and concentration. It also allows for further investigation into potential growth opportunities, and strategic development to enhance competitiveness or appeal to select sectors (e.g. targeted investments, or allocation of resources, etc.).

Figure 4-4 below illustrates the results of the analysis for various NAICS categories within Whitchurch-Stouffville. For the purposes of this exercise, municipalities with an LQ result that is greater than 1.0 exhibit a stronger clustering of a given employment category than the provincial average. As shown the Town of Whitchurch-Stouffville has economic concentrations in a range of industry sectors, in addition to lower proportionate levels of employment in others.

The findings suggest that the Town has a clear cluster of local employment in construction and agriculture. Additionally, significant “white collar” clusters can be found in real estate, professional scientific and technical services, and arts, entertainment and recreation.

The findings suggest that Whitchurch-Stouffville has a diversified economy that contains several areas of relative specialization.

Figure 4-4: Whitchurch-Stouffville Location Quotient Analysis

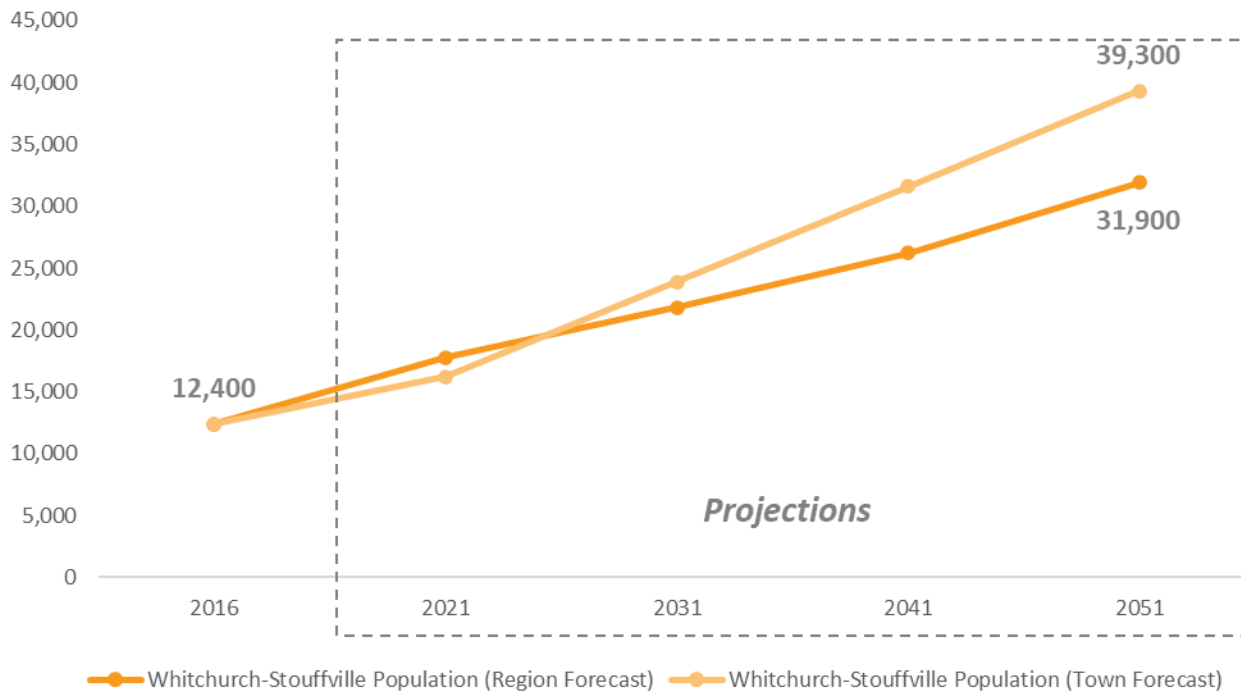


SOURCE: urbanMetrics inc., based on Statistics Canada Place of Work data (2016).

Forecast Employment Growth

As noted previously, the Growth Plan requires York Region to plan to accommodate some 990,000 jobs by 2051. The Region's ongoing MCR process currently contemplates a total of 31,900 of those positions being supported within Whitchurch-Stouffville, accounting for 3.2% of the total York Region forecast.

Similar to the population projections, Town Staff have determined that the employment forecasts are conservative, and do not necessarily account for recent changes and intensification pressures the Town is currently experiencing and expecting to continue to occur over the long-term. Based on the analysis of staff, the Town expects to support upwards of 39,300 jobs by 2051, an increase of some 7,400 over the York Region projections. Figure 4-5 below illustrates the difference in assumed growth between the two projections.

Figure 4-5: Whitchurch-Stouffville Forecast Employment Scenarios (2051)

SOURCE: urbanMetrics inc., based on Draft 2051 Growth Forecasts Reports issued by the Region of York and the Town of Whitchurch-Stouffville.

4.3 Planning for Growth in Whitchurch-Stouffville

The Town of Whitchurch-Stouffville, in collaboration with Regional and Provincial partners, has identified lands in which future growth is expected to be accommodated. The following provides brief commentary regarding the locations of these planned growth areas. Further discussion regarding these areas and their potential capacities to accommodate commercial growth is included in Section 9.0.

Residential Growth Areas

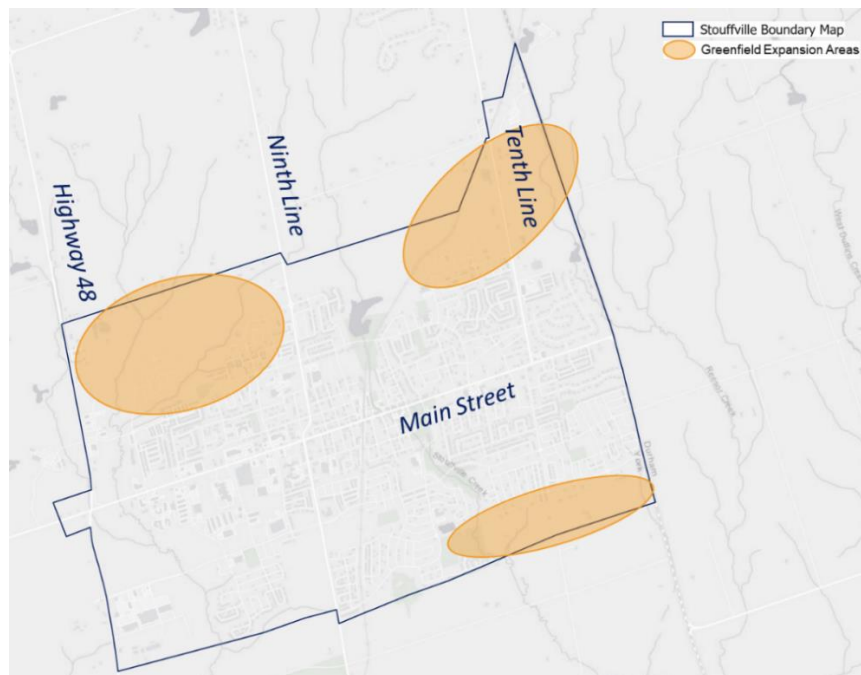
As illustrated in Section 4.1 above, Whitchurch-Stouffville is planned to accommodate a significant amount of population growth over the 2051 planning horizon. There are a variety of lands capable of accommodating anticipated population growth, ranging from undeveloped agricultural lands, to

intensification opportunities along established nodes and corridors. The following provides an introduction to lands with potential to accommodate this growth, with a particular focus on Stouffville, the community likely to accommodate the majority of growth over the period either within the existing urban boundary or on adjacent greenfield and greenfield expansion lands. The location of these potential growth areas is relevant to this Commercial Policy Review, as a local customer base is one important factor for determining the location of retail uses. It is important to recognize that the actual location and format for new growth in the Town will be finalized through the Region's and Town's Official Plan Review Process. However, an understanding of where and how much land is available to accommodate future residential growth provides a strong direction for planning for the future commercial structure of the Town.

The following provides a brief overview of select areas planned to accommodate future residential growth in Whitchurch-Stouffville.

- **Greenfield Lands** – Within the Stouffville Secondary Plan, there remain a substantial portion of undeveloped greenfield lands, designated to accommodate residential growth. These lands are clustered on the northern edge of Stouffville, generally highlighted in Figure 4-6 below. Currently, these lands are agricultural in nature, however it is expected that—as demand warrants—they will be developed to meet anticipated growth. The Lincolnville Major Transit Station Area is also considered a greenfield land area.

Figure 4-6: Residential Greenfield Expansion Areas in Stouffville

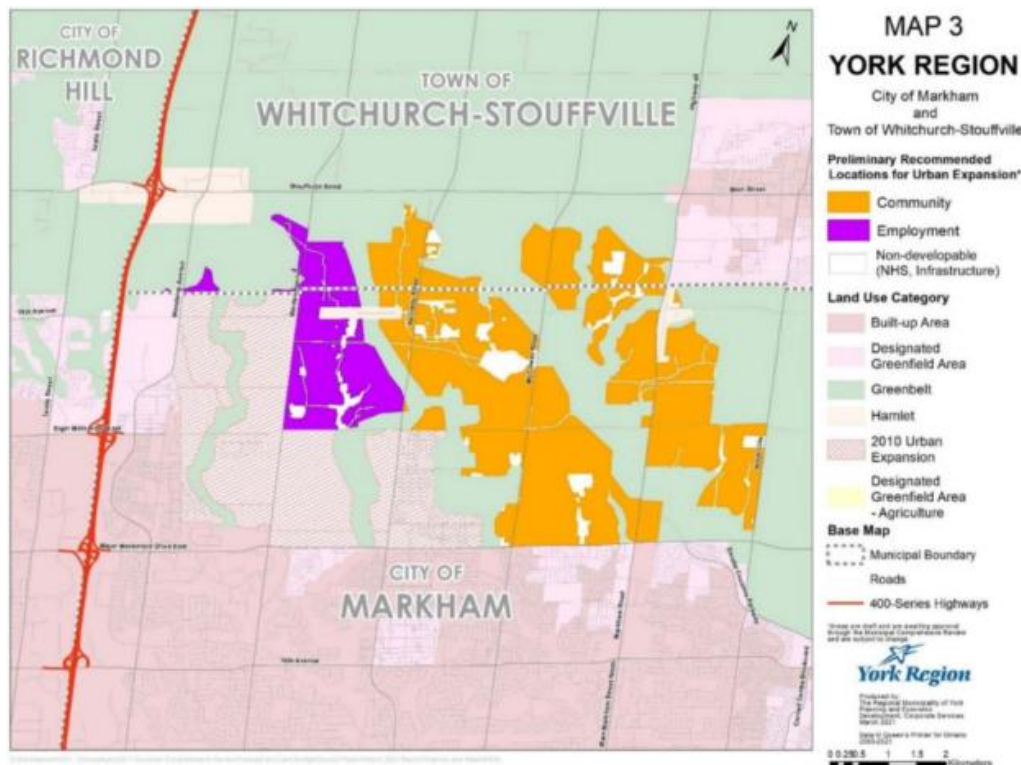


SOURCE: urbanMetrics inc. For illustrative purposes only.

Likewise, a smaller portion of lands within the Ballantrae-Musselman Lake and Vandorf-Preston Lake Secondary Plans are planned to accommodate additional residential greenfield development.

- Whitebelt Lands** – Whitebelt lands represent lands outside of defined Provincial Settlement Areas, but are unprotected by either the Greenbelt or Oak Ridges Moraine. As such, these agricultural lands represent appropriate areas to accommodate additional growth, if necessary to support population and / or employment growth. York Region, in collaboration with the Town of Whitchurch-Stouffville has identified an area of Whitebelt lands deemed appropriate for inclusion in the settlement boundary. These lands are located adjacent to Markham, and in reasonable proximity to Highway 404. As shown in Figure 4-7 below, these lands are located on the Highway 48 entrance to Stouffville and include potential areas to accommodate both residential and employment-based uses. In total, some 375 hectares of land have been identified, with 95 acres proposed to accommodate employment uses.

Figure 4-7: Proposed Whitebelt Expansion Lands



SOURCE: York Region Planning and Economic Development Branch.

- **Mixed Use Intensification** – Over time, it is anticipated that—primarily within Stouffville—property parcels in Downtown Stouffville and along primary corridors could be intensified to support additional population, and commercial functions. Intensification at appropriate locations and densities would serve to accommodate more residents and commercial spaces within the community’s existing built form. This ultimately makes more efficient use of limited available land resources, in addition to reducing requirements for additional municipal infrastructure spending to accommodate growth. As per the Growth Plan, a minimum of 50% of all residential growth to 2051 in York Region must be accommodated within the built boundary, which would mainly occur through intensification. The intensification rate specifically proposed for Whitchurch-Stouffville is 24%, below the region-wide target. The principal locations where residential intensification *could* occur in the Town include the following areas:
 - Downtown Stouffville Community Core Area;
 - Western Approach Commercial Corridor;
 - Gateway Mixed Use Area; and,
 - Regional Retail Area.

Other areas where a nominal amount of intensification could occur would be in the communities outside Stouffville and in existing neighbourhoods through the creation of secondary suites.

Employment Growth Areas

Likewise, employment growth will be accommodated in a variety of different contexts and locations throughout Whitchurch-Stouffville. The following introduces the locations in which employment growth may be allocated.

- **Available Employment Lands** – Vacant designated lands located particularly in the Stouffville, Gormley and Vandorf-Preston Lake Secondary Plan area are sites that could accommodate additional employment-based functions.
- **Work from Home** – It is important to note from the outset that work from home (“WFH”) employment accounts for a small subset of the working population, who ultimately do not utilize commercial space. WFH employment is almost exclusively comprised of office-based positions. Furthermore, enhanced digital connectivity, and familiarity brought forward as a result of the COVID-19 pandemic will increase familiarity with WFH moving forward. Although this may not necessarily translate to higher rates of exclusive home-based employment, it is still likely to comprise a small portion of overall positions. As a generally rural municipality at the edge of the Greater Toronto Area, Whitchurch-Stouffville exhibits

relatively high WFH rates, compared to regional benchmarks. According to 2016 Place of Work Census data, some 18.3% of overall employment in the Town was conducted at a place of residence. In some office-based employment categories (professional services, finance etc.), this figure reached almost 50%.

- **Intensification Opportunities:** Similar to residential development, it is our expectation that over time, in Stouffville primarily, there are likely to be opportunities to intensify developed parcels of land with additional employment and / or residential functions. These opportunities are likely clustered in similar areas to residential intensification areas previously identified, and include:
 - Downtown Stouffville Community Core Area;
 - Western Approach Commercial Corridor;
 - Lincolnville Major Transit Station Area;
 - Gateway Mixed Use Area; and,
 - Regional Retail Area.

4.4 How does Population & Employment Growth Impact Demand for Commercial Lands?

Population and employment growth directly impact the need for commercial lands. Generally, as the population grows, the demand for retail / service commercial development also increases to service the needs of the local community (subject to available services within the surrounding market area). In some cases, such as tourism centres and regional service centres, commercial uses can be supported by non-local populations. However, as Whitchurch-Stouffville is surrounded by larger regional centres and does not contain significant tourism attractions, commercial development is more locally serving in nature and is intended to support the Town's growing population and employment base.

Population-related development, such as retail commercial, personal services, and institutional uses; represents a significant market that offers countless analogous options to consumers. It is logical to assume that individuals are more likely to choose a service such as a dentist or a hair salon based on its proximity to their home or workplace. As such, these types of retail/service commercial uses are frequently attracted to locations convenient to local residents and typically mirror the geographic distribution of residential populations. By locating within or adjacent to existing and future population

areas, commercial sectors contribute to the urban fabric of a diverse, mixed-use community that can be easily accessed by walking, cycling, transit, or driving.

5.0 Commercial Trends

Key Findings

- Commercial real estate has always evolved in response to consumer preferences, technological innovation and new methods of working, marketing and serving customers, as well as, through planning policies. **Online shopping and digitization represents amongst the most disruptive shifts in commercial development to date.**
- Whitchurch-Stouffville is an important commercial node that **primarily provides primarily day-to-day and weekly shopping opportunities to a small regional area.** Although not immune, businesses in Whitchurch-Stouffville have not experienced the significant store closures, bankruptcies, and space adjustments that have been witnessed in many primary and secondary regional centres throughout Southern Ontario as a result of the pandemic.
- **Whitchurch-Stouffville displays a clear hierarchy of retailing,** with a mixture of traditional pedestrian oriented commercial streets, auto-focused corridors, and big box power centres. In recent years, local planning policy has promoted intensification of these corridors, primarily with residential functions with commercial uses at grade. Intensification and the introduction incorporating future commercial development into mixed use nodes will likely be further articulated as part of the Town's on-going Official Plan Review process.
- **Service-based commercial functions continue to be in high demand,** as consumers increasingly seek out services and experiences that cannot be replicated digitally. This segment will likely be a source of growth and stability in the Town's commercial offerings. Likewise, traditional goods retailers will increasingly explore opportunities to augment their retail goods with unique experiences or services that draw customers to a physical store presence.
- **The COVID-19 pandemic has increased adoption of e-commerce, however the ultimate extent of e-commerce's penetration into bricks and mortar retail sales remains to be seen.** COVID-19 has also—largely by necessity—increased adoption of service options like curbside pickup, take out, or pre-packaged meal services. Whether these are short-term trends or evolve into longer term patterns that impact store layout and design are unknown.

Prior to the COVID-19 global pandemic, the bricks and mortar retail industry was undergoing substantial change. The true impacts of the pandemic on the retail sector are yet to be fully understood, however it has undoubtedly

accelerated longer-term trends, presented new challenges, and created new opportunities within the industry.

The retail sector has always found itself in a constant state of evolution and change. From traditional main street retail environments to enclosed shopping malls to automobile-oriented power centres, retail has—in many ways—reflected broader societal trends and preferences. Currently, an increasingly globalized, technologically connected planet has resulted in the localization of products and brands from across the world, accessible as an increasing proportion of purchases are being made through e-commerce.

Traditionally, these trends have been drawn out over a period of years, as a function of broader technological or market externalities. However, the sudden emergence of the COVID-19 pandemic and resulting restrictions, lockdowns and social shock have upended this pattern. Consumers and retailers alike rapidly advanced measures or initiatives to ensure goods and services continued to be accessible. It remains to be seen how these decisions and impacts fall out over a longer-term horizon, however, the immediate shorter-term implications have been significant.

It is important to note that not all retail has been impacted evenly. Major retail clusters such as Whitchurch-Stouffville’s Hoover Park and Western Approach are important local and regional service centres that provide a complement of essential goods and services to the local community. Groceries, pharmacies, home building supply, and healthcare services are all critical amenities. Opportunity and stability in these areas form an expected source of demand moving forward.

Other retail sectors, including department stores, clothing, and books, continue to face headwinds and challenging growth prospects as a result of the COVID-19 pandemic. Likewise, discretionary services including entertainment, restaurants and personal care largely require in-person interaction to function and tend to prioritize locations in pedestrian-friendly, main street environments. Mandated closures and capacity limits to fight COVID-19 has created additional pressure on small businesses, which are primarily concentrated within Stouffville’s historic downtown. These businesses have experienced similar pressure to national chains, including capacity restrictions, closures, and increased costs that require flexibility and perseverance; however, the consequences have been worse. Small businesses are less financially resilient to closures, typically have less sophisticated e-commerce shops, and have smaller footprints that can only support 2 to 3 consumers due to capacity restrictions. However, a notable upswing in community support and redirection of spending at local businesses has been observed. This support has helped many small businesses survive through the pandemic and has demonstrated the community value of these businesses. Maintaining this culture of “supporting local” represents a significant opportunity moving forward from the pandemic.

The following sections provide a commentary and analysis of current trends in the retail sector, which have Province-wide impacts, and direct impacts on Whitchurch-Stouffville.

5.1 E-Commerce

The rise of e-commerce has led to a profound shift in shopping patterns over the last ten years.

The ability to shop from home, compare prices, and have goods delivered the next day has significant appeal to consumers. In broad terms, the convenience of shopping online has come directly at the expense of traditional brick and mortar retailers as individuals and households have redirected portions of their overall spending to these channels, particularly in the case of selected retail merchandise categories.

Prior to the COVID-19 pandemic, e-commerce was steadily penetrating various traditional market segments. As shown in Figure 5-1, online shopping was most widely accepted for goods that are material products that are not customizable, do not benefit from substitution/testing, and are relatively easy to ship.

Figure 5-1: E-Commerce Penetration Across Retail Categories

Widespread E-Commerce Acceptance	Increasing E-Commerce Acceptance	Slow E-Commerce Acceptance
Electronics	Custom Clothing	Food & Grocery
Books/Music/Toys	Eyewear	Large Furniture Items
Clothing (Basics)	Prepared Foods	Major Purchases (Automobiles)
Household Furnishings	Health & Personal Care Products	
Tickets/Event Sales		

SOURCE: urbanMetrics inc.

The impact of online shopping on the brick-and-mortar sector is still not fully understood. There remains a lack of reliable data with which to evaluate the magnitude of current online shopping activities. Additionally, there is a “grey area” in terms of what expenditures are included as online shopping (i.e., if a product was purchased through an online portal but picked up in a store as part of “curbside pickup” offerings, for example). Traditional retail market demand analyses focus exclusively on market demand for physical retail spaces. Typically, these studies are reliant on Retail Trade data

from Statistics Canada. Based on our own latest correspondence with Statistics Canada, the extent to which self-reported sales data by major retailers incorporates online purchases through omni-channel networks remains largely unknown.

It remains to be seen if, over time, the impact of COVID-19 will result in a permanent shift in shopping patterns, or a shift borne out of necessity and not necessarily consumer preference.

Although e-commerce continues its rise across store categories, particularly exacerbated by the COVID-19 pandemic, it remains our view that it will not entirely replace in-person shopping experiences for all store types. Large segments of the population view shopping for goods as an enjoyable, social event. It is our expectation that e-commerce will continue to account for an increasing share of overall consumer expenditures, however, that share will “max” out at a certain point. Throughout that process, there will be a reorganization of brick-and-mortar shopping, as retailers respond to their individual situations. Some retailers will remain unaffected by e-commerce and continue to operate locations per usual. Others may see a significant reduction in their physical space presence, as online shopping replaces the need for a widespread on-the-ground presence. Others will draw a harmonious balance, operating selected retail locations that serve as a place for physical browsing, entertainment and gathering (i.e., “experiential retailing”), as well as flagship “showroom” type functions; all of which augment a robust online presence.

Recognizing the limitations identified above, Figure 5-2 demonstrates the impact that the COVID-19 pandemic has had on recorded e-commerce sales in Canada in recent months. As shown, for the period prior to the pandemic, online sales were estimated to account for less than 5% of overall activity². However, as of April 2020, the figure spiked to 11% of the total. Through to the end of the year and into 2021, e-commerce sales remain at elevated rates, at least relative to historic patterns. These early findings demonstrate that the pandemic has increased familiarity and comfort with e-commerce as a viable and widely accepted—if not essential—way to procure a range of merchandise.

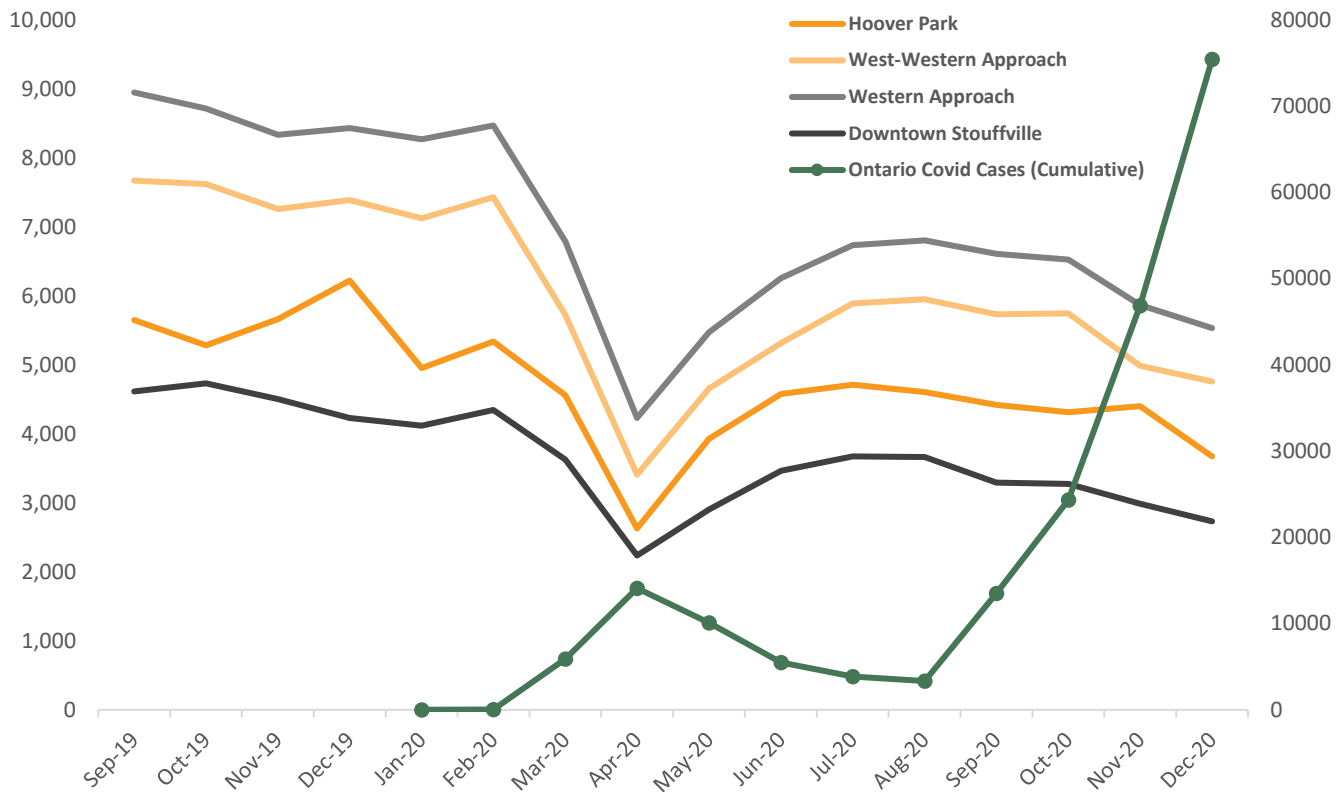
² As calculated using Statistics Canada Retail Trade data, which excludes “pure play” online retailers such as Amazon.

Figure 5-2: Retail E-Commerce Sales as a Percentage of Total Retail Sales 2019-2021



SOURCE: urbanMetrics inc., based on Table 20-10-0072-1 prepared by Statistics Canada.

Statistic Canada’s findings are in line with recent mobile data analysis conducted in the Town of Whitchurch-Stouffville. Figure 5-3 outlines approximate monthly visitor counts at five prominent retail nodes in the Town. As assumed, all retail nodes experienced a significant drop in visitors during the initial peak of the COVID-19 pandemic. Consumers rushed to adopt online purchasing and curbside pickup/delivery options for essential goods. However, after daily case counts dropped and society returned to an adjusted version of “normal” in mid-to-late 2019, monthly visitor counts to physical retail nodes have never returned to pre-pandemic levels. This potentially is due to a respite from, but not resolution of the COVID-19 pandemic, as well as consumers adapting to e-commerce and an overall increased acceptance of this form of shopping.

Figure 5-3: Monthly Visitor Counts at Whitchurch-Stouffville Retail Nodes

SOURCE: urbanMetrics inc.

5.2 Mixed-use Development

The rapid rise of housing prices combined with Provincial and Local planning policies has led to a significant increase in mixed-use projects with varying degrees of success.

As residential land values continue to rise, developer interest in stand-alone retail projects has waned. Local policies fueled by the Provincial Growth Plan have attempted to address the need for commercial space to serve existing and future residents by requiring that non-residential space be integrated into residential projects.

Many municipalities have required that high-rise residential projects incorporate ground floor and / or street related retail space. In medium density neighbourhoods, many municipalities have adopted policies requiring live-work units and retail space integrated into townhome and low-rise apartment projects at strategic locations.

These policies have produced varying results. While there are some excellent examples of mixed-commercial-residential projects, many mixed-use developments have been constructed with minimal thought towards creating functional retail spaces that meet the needs of local residents and create a vibrant street. Often these policies result in commercial units that are very small; difficult to re-demise; obstructed by construction columns needed to support the residential units above; lack necessary access for delivery vehicles and trash collection; are without necessary utilities and ventilation to support food and food service operations; and lack customer parking in close proximity to unit entrances.

In addition to these issues, the ownership of the commercial units also represents a challenge to a condominium developer who is seeking to divest themselves of the property once the residential units are sold. Often, developers sell off individual commercial units to individual persons or businesses, which negates the possibility of developing an overall leasing plan for the commercial area or adding exclusivity clauses in the leases sought by potential commercial tenants. These issues arise due to a variety of factors:

- Lack of developer expertise with mixed-use projects;
- Lack of municipal planning and building staff experience with mixed-use projects;
- The additional development time and complexities required to pre-lease and design ground floor retail units for specific tenants;
- The high-value of residential development which allows developers to effectively “write-off” the costs of ground floor commercial space;
- Planning policies that do not provide for adequate on-street parking and delivery vehicle access to support ground floor retail units;
- Lack of consistency in commercial zoning provisions for mixed-use projects in similar locations;
- Challenges with respect to demising and repurposing commercial units at the base of residential towers; and
- Challenges with respect to accommodating the joint needs of residential buildings and commercial tenants.

As a result, the array of tenants available to acquire mixed-use commercial units can be extremely limited and these spaces can suffer from elevated vacancy rates, duplicate tenant types, and a preponderance of personal services, health related services and offices that are not dependent on regular deliveries and trash collection, ventilation for cooking, large refrigeration units, large unit footprints and nearby parking.

Where large scale mixed-use projects are most successful, they typically involve detailed discussions and commitments by major retail tenants, prior to the detailed design of the overall project. Often the retail component is retained by the developer or sold off on-block to an experienced retail owner. For example, 1100 King West near Toronto’s Liberty Village was developed as a mixed residential-retail project by Capreit and First Capital. The building was developed as a residential rental project, with the developers retaining ownership of the retail component, which includes a Canadian Tire, a Longos supermarket, a Shoppers Drug Mart, Winners, and Petsmart, among other retail and service tenants. The project was able to effectively integrate badly needed large scale retailers into a high-rise residential neighbourhood with minimal land available for commercial uses.

Figure 5-4: 1100 King Street West



SOURCE: First Capital REIT.

A less successful example of integrating retail space into a mixed-use project is found at 9471 Yonge Street in south Richmond Hill, where approximately 20 small similar sized retail units were developed at the base of a residential building. The building opened in 2017 and about half of the commercial units are still vacant. Where occupied, tenants are limited almost exclusively to services and offices. The vacant units are being offered for sale or rent.

Figure 5-5: 9741 Yonge Street, Richmond Hill

SOURCE: R. Faludi

5.3 Retail Segmentation

Prior to COVID-19, the retail market was growing increasingly segmented, as retailers continue to evaluate their physical store operations.

The ongoing closure and financial challenges of traditional anchor retailers (The Bay, Target, Sears, Zellers etc.) has had widespread implications on major regional centres that previously relied upon these as major drivers of visitation and foot traffic. These traditional anchors have refocused on prominent locations in large urban centres, often at the expense of more local serving locations. Likewise, retailers such as The Source, Winners, and Staples have become more selective in opening new locations, however continue to expand.

The continued success of big-box and large format retailers such as Wal-Mart, Costco, Real Canadian Superstore or Canadian Tire has resulted in these establishments becoming effective “one-stop shop” destinations. By offering goods such as groceries, electronics, and home furnishings, many of these retailers serve a range of needs. As such retailers of this nature have created a significant overlap between what were formerly distinct store categories. This has resulted in retail nodes frequently competing for the same customers, and also for the same individual store tenants. Furthermore, the volume and scale at which these large merchandisers are able to purchase goods results in cost

savings for consumers. These cost savings typically cannot be matched by retailers operating within more narrowly defined segments.

As such, a typology has emerged amongst rural and suburban service centres, whereby the regional-serving retailers are very similar across each centre. For example, Wal-Mart, Canadian Tire, and major banner grocery stores are reasonably common anchors in these municipalities. Furthermore, due to the broadened merchandising at these businesses, these retailers increasingly meet the majority of rural and suburban visitors' needs. These include apparel, pharmacy, select retail goods, and alcohol.

Alternatively, service-based sectors remain an essential—if not growing—component of local commercial offerings.

As big box retailers continue to challenge traditionally distinct retail categories, the service sector remains relatively immune from these structural factors. Pre-pandemic, consumer preferences and expenditure patterns have shifted to increased spending on experiences, events, and entertainment. Furthermore, demographic and technological changes have resulted in opportunities for businesses to provide an increasing range of services to an aging population, or as a means of serving a younger cohort that is driven by experiences, rather than products.

5.4 Changes in Brick-and-Mortar Retail Space

While e-commerce represents a growing disruption of the retail industry, the brick-and-mortar store will not be completely eliminated. Many consumers continue to go to physical stores for purchasing advice, to socialize, and for physically testing products.

Non-Traditional Retail Experiences

In smaller municipalities like Whitchurch-Stouffville, retail stores along concentrated main streets represent community gathering spaces where people connect, events are held, and unique retail offerings can be experienced.

Physical stores will take on new and non-traditional roles as retailers adopt multi-channel retailing and balance the utility of their stores while still capturing online sales. An emerging trend, accelerated by the COVID-19 pandemic, is the way retailers and restaurants are adapting their space into new types of contemporary services. This diversification of uses serves to create a unique experience that differentiates them from e-commerce offerings and increases the ability of the retail store to be productive at various “off-peak” times of day and week.

For example, some traditional clothing retailers have reimagined their spaces to contain retail goods, but also barber shops, coffee shops and lounging space. Other retailers will act as ‘pick-up’ destinations for goods ordered online, maintaining minimal inventory for sample purposes in-store. Pop up shop collaborations see foods, drinks, or events being held at retailers. Retailers are reconceptualizing their spaces as sites of social interaction, which can drive visitation, and ultimately, revenues.

An increased focus on local, non-traditional experiences in the retail market will be an important factor for Whitchurch-Stouffville. Focusing on creating unique entertainment, social and cultural experiences, forming partnerships with and between local businesses and expanding the local and regional draw of the municipality will be core elements in driving creative employment growth for small businesses, and expanding the Town’s regional draw.

Repurposing Department Stores

The ongoing challenges of select department store banners, enclosed malls that are not super-regional nodes, and some big box stores has been widely recognized for years. This year alone, multiple struggling department store chains filed for bankruptcy, including J.C. Penney and Neiman Marcus. In Canada, many malls across Canada continue to face challenges leasing large anchor units that were previously tenanted by Zellers, Sears, and Target. In some cases, these large units have been subdivided into smaller, more manageable spaces that could be reasonably leased to a larger range of prospective tenants.

Amazon has been a major disrupter of the mall and department store industry, which has only been compounded by the increase of online shopping throughout the COVID-19 pandemic. Innovative property management operators in the United States are now working with Amazon to transform the vacant anchor department stores into regional Amazon distribution hubs.

Similarly, independent retailers have taken initiative to transform their own vacant brick-and-mortar stores. Macy’s recently repurposed some stores in the United States into fulfillment centres where they process online orders and returns. These urban distribution centres could provide crucial last-mile connections for e-commerce companies and would be strategically warehoused with common products frequently purchased by residents in the surrounding area. Alternatively, The Bay has partnered with WeWork to occupy an underutilized portion of its retail space in Downtown Toronto as co-working space.

Pop-up Retailing

Pop-up retailing is an ongoing trend where short term leases are made available to upstart retailers. Particularly in urban settings, these spaces are common in public spaces, such as parks, squares, and pedestrian streets – typically in areas with a lot of pedestrian traffic. It is also used to occupy vacant

storefronts with a myriad of uses, including pop-up restaurants, shared kitchens, maker spaces, arts and cultural activities, and health clinics. Pop up retail formats provide an opportunity for local entrepreneurs to experiment and test a product, without the long-term financial commitment that typically comes with a more formalized lease structure.

In 2020, Cornerhouse Restaurant in Whitchurch-Stouffville opened up “Pop-Up Shoppe” next door with the intention of attracting short-term and temporary rental for pop-up retailing opportunities. Recent retailers that have rented the space include Parkwood Plank farmhouse décor and a local apparel retailer.

Digital Platforms Reducing Need for Space

The emergence of digital delivery apps—such as UberEats, DoorDash, and Skip the Dishes—have dramatically changed the restaurant and fast-food industry. Many chains are reducing the size of their seating area as a growing number of customers are picking up or having food delivered to their homes. Additionally, the proliferation of delivery apps could potentially reduce the need for on-site customer parking. However, restaurants are required to provide dedicated parking and pick-up spaces for delivery drivers and bicyclists.

Since the beginning of the COVID-19 pandemic, the growth in the delivery economy has led to the significant increase in delivery worker employment. These positions are generally referred to as “gig employment” – jobs which are typically done for large companies by independent contractors or temporary workers. Generally, these positions do not provide for fixed hours, hourly incomes or defined health benefits, and are a demand-driven service. Food delivery, ride-sharing and other convenience services represent among the largest shares in this employment segment.

Recently, Instacart reported it was hiring 300,000 new gig workers in the USA and Canada. The share of gig workers among all workers in Canada rose from 5.5% in 2005 to about 8.2% in 2016. Statistics Canada estimates that the growth is largely attributed to push factors such as declining employment prospects during the 2008/2009 recession. It is anticipated that a similar trend will occur in the aftermath of the COVID-19 pandemic as it has facilitated the expansion of online platforms and crowdsourcing marketplaces which has potentially led to an overall increase of the gig economy.

Curbside Pick-Up

This is an emerging trend that has been significantly accelerated and normalized by the COVID-19 pandemic. Courier companies, Canada Post, retailers (e.g. Loblaws, Wal-Mart, Home Depot), and shopping centre (e.g. Penguin Pick-up) are increasingly providing centralized pick up areas for pre-ordered goods.

Simultaneously, major retailers and smaller companies are expanding their pick-up and delivery capacities. Contactless shopping will soon be considered the new normal as retailers look to other industries that offer similar services. A wide range of retailers have already adopted digital reservation systems for consumers to book dedicated shopping and pick-up appointments.

Condominium and apartment buildings are responding in different ways using concierge services and package rooms. Ultimately the use of technologies, such as electronic locks, video surveillance, and drone deliveries may result in direct delivery to individual units.

5.5 International Expansions

Commercial retail growth has most recently been driven by international expansions and by need-based businesses.

Recently, the retail goods sector has been driven by international retailers expanding into the Canadian market. These retailers span large- and small-scale clothing and goods providers (Nordstrom, Uniqlo, Muji, Sak's Fifth Avenue), online-first businesses establishing a complementary physical presence (Warby Parker, Casper) to fast food restaurants (Chick-Fil-A, Jollibee).

The initial demand for space from these retailers is almost exclusively concentrated in luxury malls and main street corridors in Canada's largest cities. It is unlikely that these new entrants will—in the short or medium term—significantly impact demand for space in municipalities like Whitchurch-Stouffville. Over time, there may demand from some businesses adopting a cross-Canada strategy, or for restaurants building a national network with an extensive presence. As such, it is highly unlikely that Nordstrom, or Warby Parker would establish a presence in Whitchurch-Stouffville, however is conceivable that fast food retailers could expand to the Town.

5.6 Intensification of Power Centres

Across the GTA there are many examples of power centres, strip centres and enclosed malls that have been intensified with new residential development. In most cases where older and often faltering plazas are undergoing intensification, the amount of retail space decreases and the focus of the retail is reduced to more local serving stores. For example, the Humbertown shopping centre in Etobicoke was a traditional auto-oriented strip plaza. It is currently being constructed with a similarly local-serving retail base and intensified to include a residential component.

In the case of successful malls – e.g. Bayview Village or Yorkdale, intensification results in both the addition of residential uses and an increase in retail space. It is also true that successful power centres in intensification areas, such as the Vaughan Metropolitan Centre or Golden Mile often resist early

intensification owing to the strength of their revenue streams and the cost of terminating anchor leases. Moving forward, however, it is our expectation that these landowners will continue to look at opportunities to intensify large, automobile-oriented retail centres with residential, or office-based uses, particularly as lease terms end, or are renegotiated.

5.7 Shift in Consumer Spending

COVID-19 has caused the most significant disruption in consumer spending that has been recorded in recent years and has profoundly altered how people spend their discretionary income.

Before the pandemic, North Americans spent more money dining out than in grocery stores. But as restaurants closed and stay-at-home orders commenced, restaurant spending dropped about 60%, with the sharpest declines in fine-dining, lunch, and late-night food. While lockdowns have subsided in many regions, social distancing practices have curbed the hospitality industry from fully recovering. Restrictions on indoor dining and limitations on restaurant and/or patio capacity has discouraged large crowds and made restaurants awkward, more expensive, and less fun.

Even before the pandemic, restaurant chains were closing and reducing the size of outlets to accommodate pickup and delivery services, such as UberEats and Skip the Dishes. Meanwhile, data compiled by the New York Times reported that grocery sales experienced a surge in demand and were up nearly 80% from the previous year. The strongest sectors within grocery spending include meal kits and online grocers such as Instacart. Additional pockets of retail resiliency include alcohol stores, home improvement stores and entertainment media including video streaming and gaming.

More locally, the “Canadian Retail Sales Update: November 2020”, highlighted that Canadian households aligned with global trends and spent disproportionately at furniture, appliance, and building and garden materials retailers. Interestingly, the biggest change in consumer spending was in the cannabis sector – which has seen growth of 138.4% since 2019.

6.0 Resident & Business Survey

Key Findings

- The project team prepared and disseminated online surveys to residents and businesses within Whitchurch-Stouffville. Additionally, two public meetings were held to collect stakeholder views on commercial development in the community.
- The results of the engagement provided a qualitative view of opportunities and challenges facing Whitchurch-Stouffville. Quantitative feedback provided direct input into areas of our analysis, including the retail market analysis.
- There is **clear differentiation in function between Whitchurch-Stouffville’s commercial nodes** (i.e. Hoover Park, Downtown Stouffville, Western Approach). Moving forward, there is almost **equivalent desire amongst respondents to support additional shopping centre space as well as space in main street retail format**.
- Respondents report making frequent trips outside of the community for shopping or dining, with **almost 50% reporting leaving Whitchurch-Stouffville once a week or more**. This is most commonly to frequent Warehouse Membership Clubs, Clothing, Shoes, Accessories and Specialty Foods stores.
- **E-Commerce penetration has increased among Whitchurch-Stouffville residents**. In select store categories, it now comprises a significant amount of overall expenditures.

urbanMetrics—in collaboration with Town of Whitchurch-Stouffville staff—have prepared and disseminated surveys to residents and businesses located in Whitchurch-Stouffville. These surveys were hosted through an online platform and were open for responses for approximately two months. In addition, two stakeholder engagement sessions were held in September 2021. These sessions included a blend of open-ended discussion, and online, quantitative polling.

The purpose of the surveys was to develop an on the ground understanding of the community’s perspective on the commercial environment in Whitchurch-Stouffville. This includes information pertaining to the current adequacy, format and nature of retail goods and services available to residents, as well as the business environment for owners. Additionally, responses pertaining to spending patterns, online shopping and expenditures made within and outside of Whitchurch-Stouffville were utilized as inputs into our retail market analysis, presented in Section 10.0. The following provides an overview of the findings of the resident and business surveys, respectively.

See Appendix B for results of Stakeholder Consultation Sessions

6.1 Resident Survey

Overview

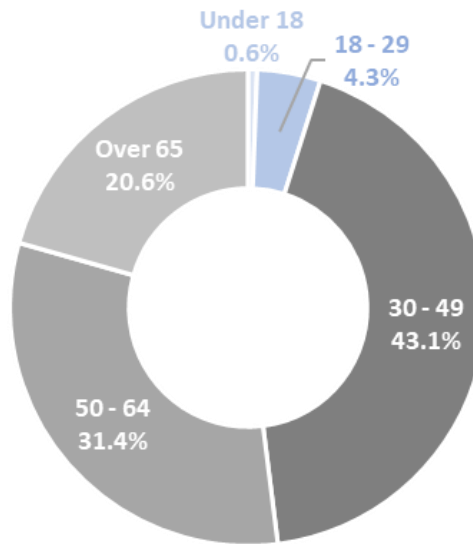
The survey of residents collected responses from residents of the Town of Whitchurch-Stouffville, as well as those from surrounding areas who visit the Town. The survey explored a variety of topics, relating, but not limited to:

- Demographic profile of respondents;
- Employment status;
- Purpose of visits to Whitchurch-Stouffville;
- Travel patterns to Whitchurch-Stouffville nodes (Downtown Whitchurch-Stouffville, Western Approach, Hoover Park);
- Satisfaction with retail/service offerings in Whitchurch-Stouffville;
- Online expenditure patterns; and
- Expenditures made in Whitchurch-Stouffville versus those made in other municipalities.

The following section of the report provides a brief overview of some notable findings and key takeaways from this online survey research program, whereas the full and detailed responses to each question have been provided in the appendices at the end of this document.

Demographics

Figure 6-1 below illustrates the reported age range of responses received through the survey. As shown, responses came from a diversity of ages throughout Whitchurch-Stouffville.

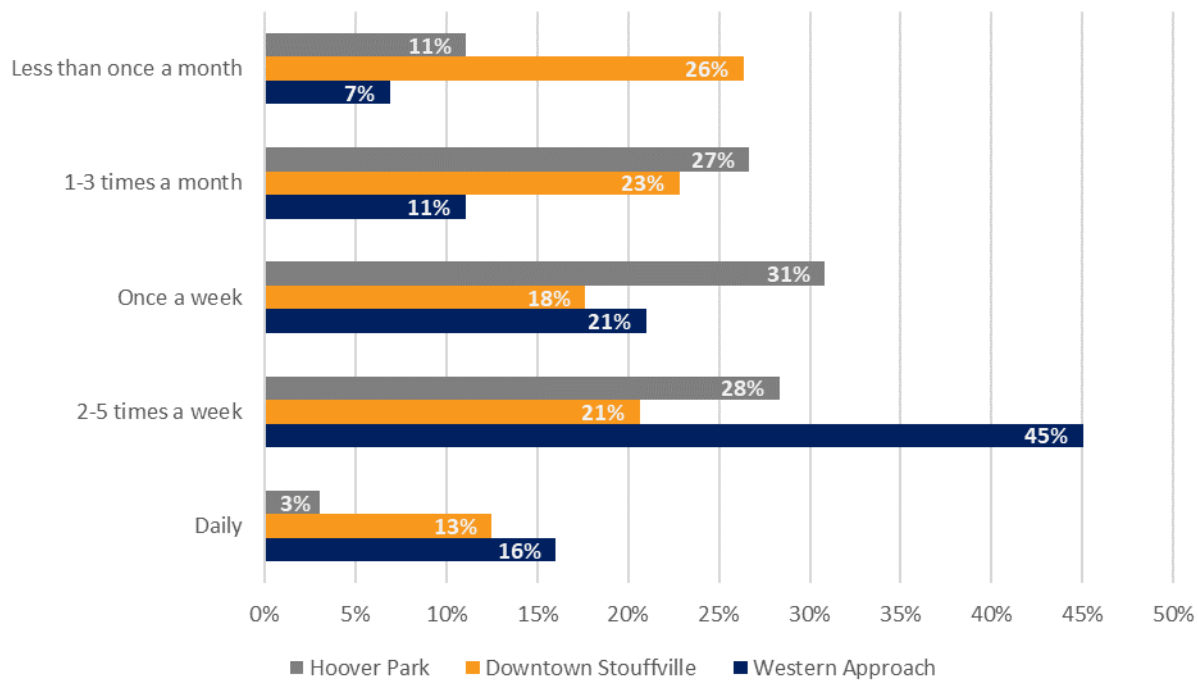
Figure 6-1: Age Range of Survey Responses

SOURCE: urbanMetrics inc.

Figure 6-2 demonstrates the frequency with which respondents visited select nodes in Whitchurch-Stouffville, including Downtown Stouffville, the Western Approach Corridor, and Hoover Park shopping node. As shown, visitation patterns to each node differ significantly. Downtown Stouffville does not appear to exhibit a predominant frequency of visitation. Rather, residents report widely differing frequencies, likely dependent on location of employment or residence. There is clear opportunity in Downtown Stouffville to increase visitation frequencies, by drawing more employment, residences, or day to day retail businesses.

Alternatively, the Hoover Park node effectively does not receive visits from residents on a daily basis. Rather, the majority of visitation (~85%) falls within a less than daily frequency, but greater than once a month. This finding is consistent with the nature of retailers located at this node, which are primarily comprised of big box retailers which serve as destinations for larger shopping trips. The majority of visitation to the Western Approach (~80%) occurs with daily or multiple per week visits. This is not surprising, given the concentration of the Town's supermarkets along the corridor.

Figure 6-2: Visitation Frequency to Select Nodes



SOURCE: urbanMetrics inc.

Figure 6-3 below demonstrates respondents' primary purpose for visiting each surveyed node. As shown, there is significant variation in visitation purpose observed across each node. Downtown Stouffville serves a more diverse user base than the other nodes and draws visitors for a broad number of reasons. In particular, restaurants are the single largest driver of visitation to the Downtown, with shopping and personal services following. The Downtown is also the only node to drawing users to GO Transit facilities—obviously owing to the presence of the Stouffville GO Station. This likely results in some small spin-off expenditures at surrounding food establishments and convenience-based retailers.

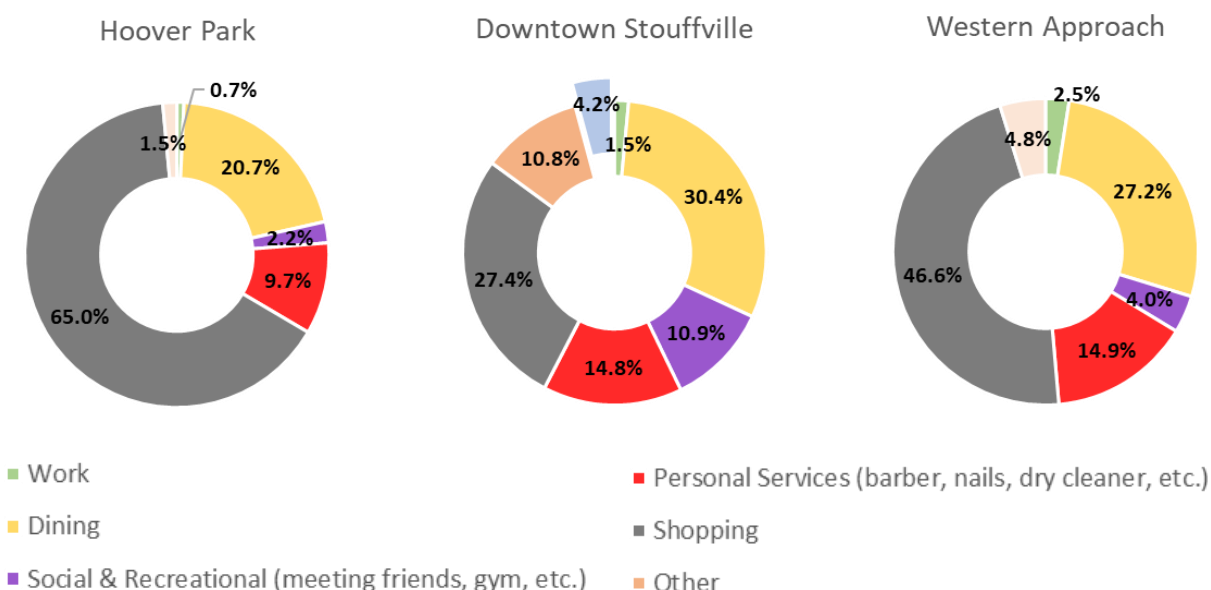
Alternatively, both the Western Approach and Hoover Park nodes are primarily shopping destinations, with 46.6% and 65.0% of responses identifying shopping as the primary purpose of visitation. The Hoover Park node in particular is overwhelmingly seen as a shopping destination, with some additional visitation for dining and recreation.

The results of the table in Figure 6-3 demonstrate that each commercial node in Stouffville fulfills a distinct function within the broader commercial hierarchy. Downtown Stouffville functions as a major commercial hub for shopping and restaurants and services, but also draws visitors for social and recreational purposes and to access GO transit. Alternatively, the Hoover Park node is primarily

viewed as a location to shop, with some secondary dining and personal care services as well. Hoover Park is not strongly identified with any functions outside of these three commercial activities. Lastly, the Western Approach represents a “middle ground” between Downtown Stouffville and Hoover Park. The Western Approach serves as an important destination for shopping, personal goods and restaurants, but is also viewed as a location for work, recreation / meeting friends and other activities.

Moving forward, opportunities will be explored to both reinforce the primary functions of each node, but also to understand policy approaches that ensure each area’s planned function is sustainable and resilient in the face of ongoing evolution within the commercial sector.

Figure 6-3: Primary Purposes for Visiting Select Nodes



SOURCE: urbanMetrics inc.

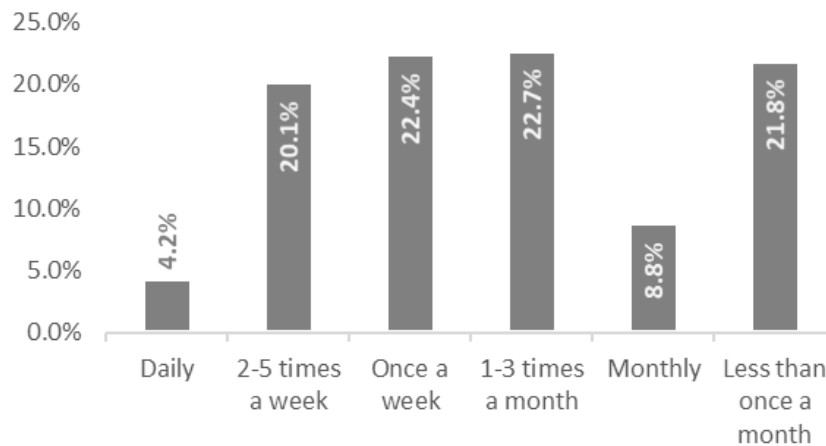
NOTE: Respondents were asked to select up to 3 reasons at each node.

Local Shopping Patterns

A series of questions were also asked to develop insight into locals’ shopping behaviours, including understanding situations in which residents leave Whitchurch-Stouffville for goods and services. It is important to note that the questioning asked respondents to think about their spending behaviours pre-pandemic. Although these activities may continue be altered as a result of the pandemic, it is our view that there will be a general, long-term return to pre-pandemic patterns and behaviours.

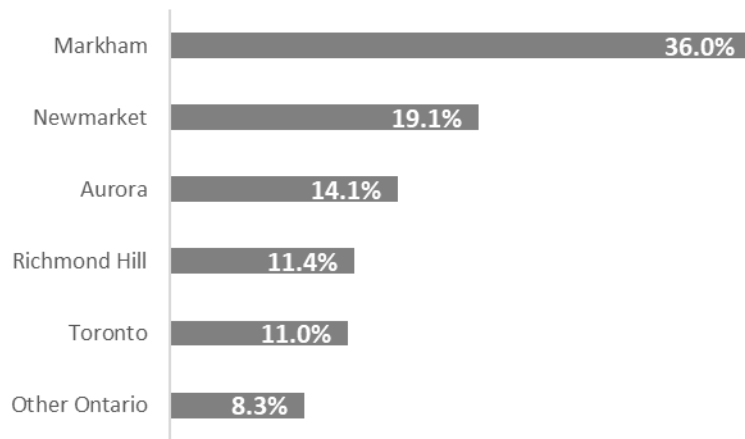
Figure 6-4 below illustrates frequency with which Whitchurch-Stouffville residents would shop or dine outside of town. As shown, a significant portion (almost 50%) of respondents travel outside of Whitchurch-Stouffville at least once a week with the purpose of spending money on retail goods or dining at restaurants. In particular, frequent expenditures of this nature may be able to be recaptured over time as the Town’s commercial offerings grow and mature.

Figure 6-4: Frequency of Shopping or Dining Outside Whitchurch-Stouffville



SOURCE: urbanMetrics inc.

Figure 6-5 shows the primary locations that Whitchurch-Stouffville residents travel to when they shop or dine outside of the Town. As shown, the City of Markham, as well as other adjacent municipalities in York Region comprise the majority of visitation from Whitchurch-Stouffville residents. These larger municipalities generally have a selection of regional serving, or specialty retailers that are not currently available in Whitchurch-Stouffville (e.g. Costco, Home Depot, Apple, Lululemon, etc.). Interestingly, only 11.0% of respondents listed the City of Toronto as a primary destination for visitation.

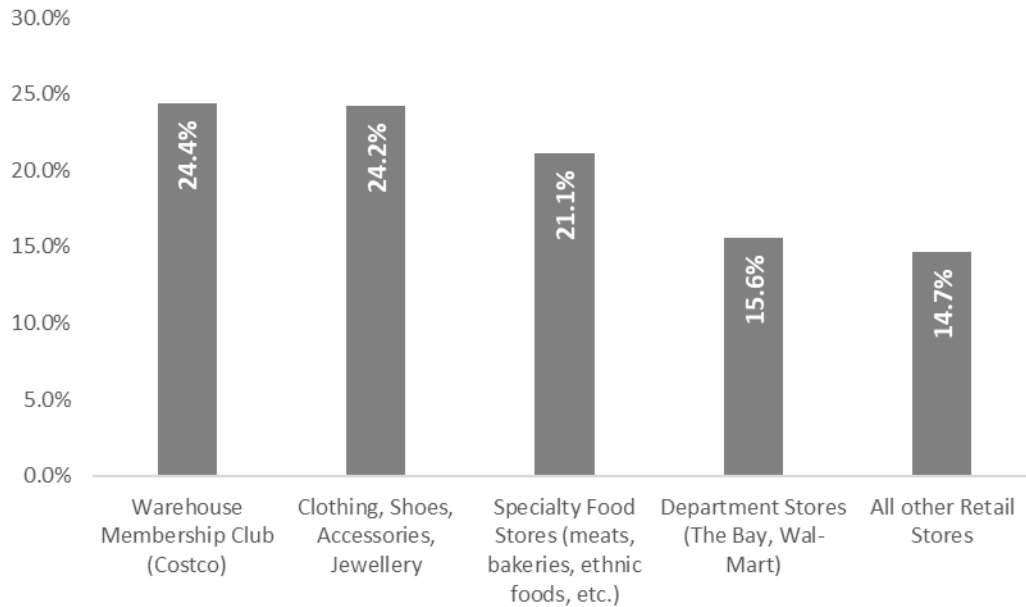
Figure 6-5: Primary Destination when shopping outside Whitchurch-Stouffville

SOURCE: urbanMetrics inc.

NOTE: Respondents were asked to select up to two destinations.

Figure 6-6 illustrates the retail categories that respondents more frequently cited as destinations when shopping outside of Whitchurch-Stouffville. Unsurprisingly, Warehouse Membership Clubs (i.e. Costco) were the most commonly cited destination. Given that there is not a Costco location in Whitchurch-Stouffville, it obviously represents complete outflow from the local market area. Additionally, clothing, shoes and accessories, and specialty foods were noted. Given changes in the structure of the apparel sector, it is unlikely that—outside of select local boutiques—Whitchurch – Stouffville emerges as a destination for apparel retailers. However, specialty foods represents one store category in which there is substantial opportunity to recapture local expenditures.

Figure 6-6: Store Categories typically visited when shopping outside Whitchurch-Stouffville



SOURCE: urbanMetrics inc.

NOTE: Respondents were permitted to select all choices that apply.

Lastly, the survey asked respondents about their preferred format / location to see additional commercial uses added to Whitchurch-Stouffville. Figure 6-7 shows a fairly even split between adding space in automobile-oriented shopping nodes like Hoover Park, or commercial main street environments, like Main Street in Downtown Stouffville. Clearly, there is a desire amongst the community to accommodate both retail forms as Whitchurch-Stouffville continues to grow. Developing planning policy that supports this community direction and creates an environment conducive to a variety of commercial formats will be an important outcome of this work.

Figure 6-7: Preferred Format / Location of Additional Commercial Space in Whitchurch-Stouffville

SOURCE: urbanMetrics inc.

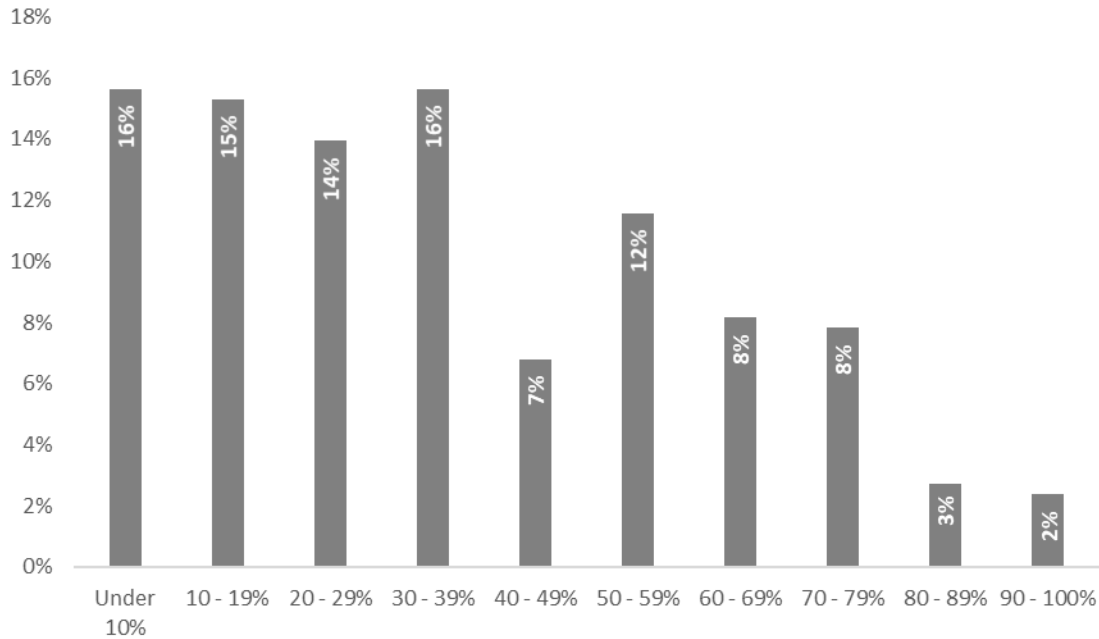
NOTE: Respondents were asked to select all choices that apply.

Online Shopping

E-Commerce has rapidly emerged as one of the most disruptive innovations to revolutionize the retail industry, particularly bricks and mortar retail. As previously discussed in Section 5.0, the ultimate extent to which e-commerce penetrates the retail segment will be understood over time. To supplement Statistics Canada data collected and utilized as input to our analysis, we have surveyed community residents on their e-commerce patterns. The following illustrates a brief selection of the findings of this analysis. Additional category-specific expenditure patterns derived from the survey have been incorporated as inputs into our retail market demand analysis.

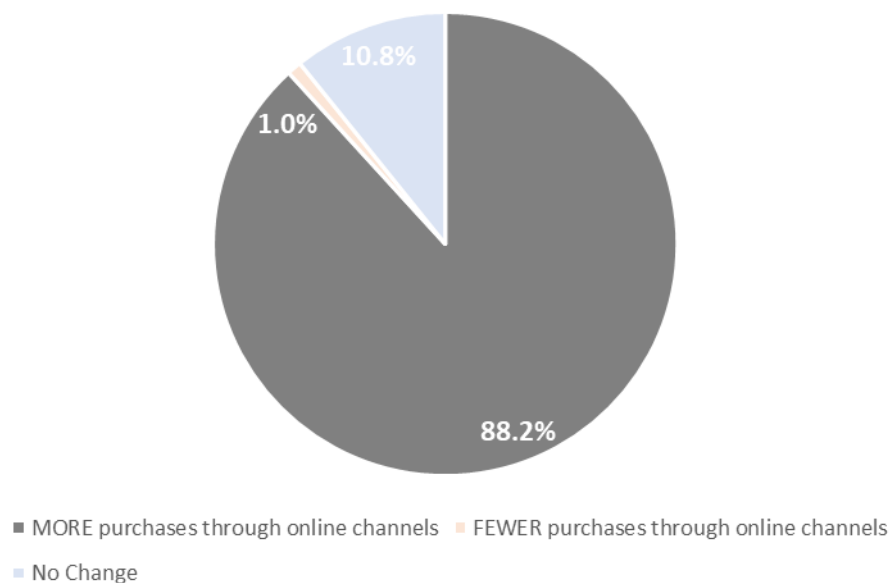
Figure 6-8 shows residents responses regarding their online spending habits prior to the pandemic. As shown, the majority of respondents generally estimated that between 10 – 39% of their overall spending was made through e-commerce platforms. These responses obviously vary significantly by store category, as expenditures on groceries are—in aggregate—generally made through at bricks and mortar facilities, in comparison to spending on books or media. It is important to note that the figure shown below includes digital only platforms (e.g. Amazon, eBay), as well as omni-channels that maintain both a physical and online sales presence (e.g. the online stores of Canadian Tire, Wal-Mart, etc.).

Figure 6-8: Estimated Percentage of Retail Spending Through Online Channels - Pre Pandemic



SOURCE: urbanMetrics inc.

Figure 6-9 below shows that the overwhelming majority of respondents have increased their online spending as a result of the COVID-19 pandemic. This finding is consistent with expected results, influenced by concerns regarding safety as well as government mandated closures and restrictions on capacities. Moving forward, it will be important to monitor how online spending changes as these restrictions loosen, and in a post-pandemic environment. It remains to be seen whether the pandemic has facilitated a fundamental shift towards increased e-commerce across all store categories, or if it represents a shorter-term spike driven by immediate need. Although longer-term it is widely expected that e-commerce will continue to penetrate bricks and mortar, and continue to grow market share, the extent to which the pandemic has accelerated that trend is not yet known.

Figure 6-9: Change in Online Spending Behaviour through COVID-19

SOURCE: urbanMetrics inc.

6.2 Business Survey

Overview

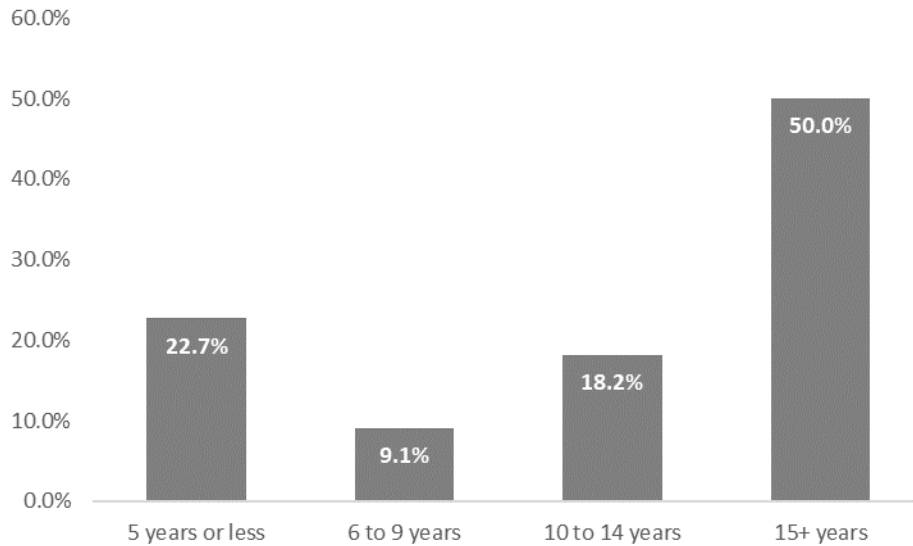
The survey of businesses collected responses from active entrepreneurs operating within the Town of Whitchurch-Stouffville. The survey explored a variety of topics, relating, but not limited to:

- Nature of the business;
- Size of the business;
- Customer draw;
- Business performance; and
- Future growth prospects.

The following section provides a brief overview of some notable findings and key takeaways from this online survey research program. The full and detailed responses to each question have been provided in the appendices at the end of this document.

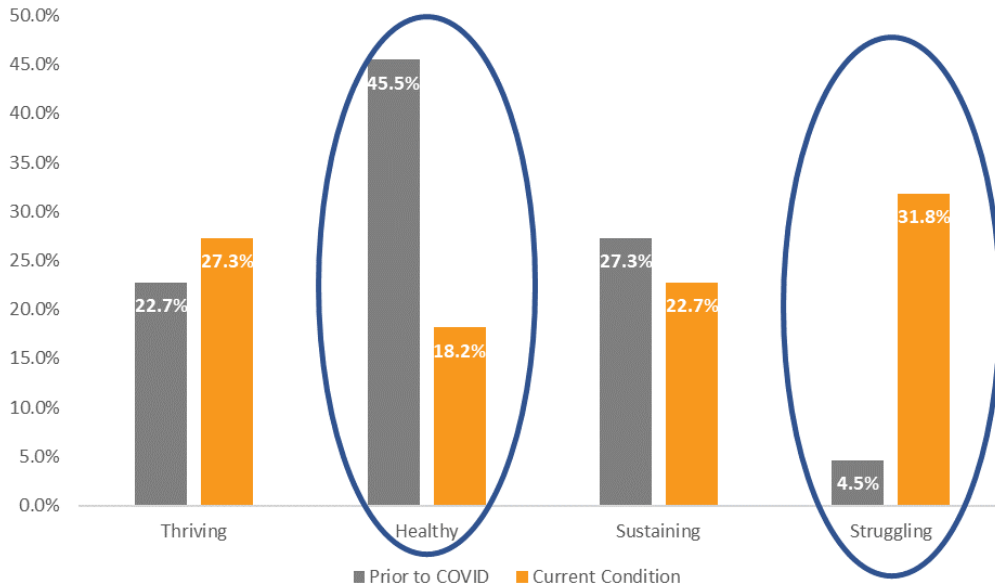
Figure 6-10 below illustrates the duration of time each business respondent reported operating in the Whitchurch-Stouffville market. As shown, the responses received were generated from businesses with long-standing activity in the local market, with half reporting operating for over fifteen years.

Figure 6-10: Length of Time Operating in Whitchurch-Stouffville



SOURCE: urbanMetrics inc.

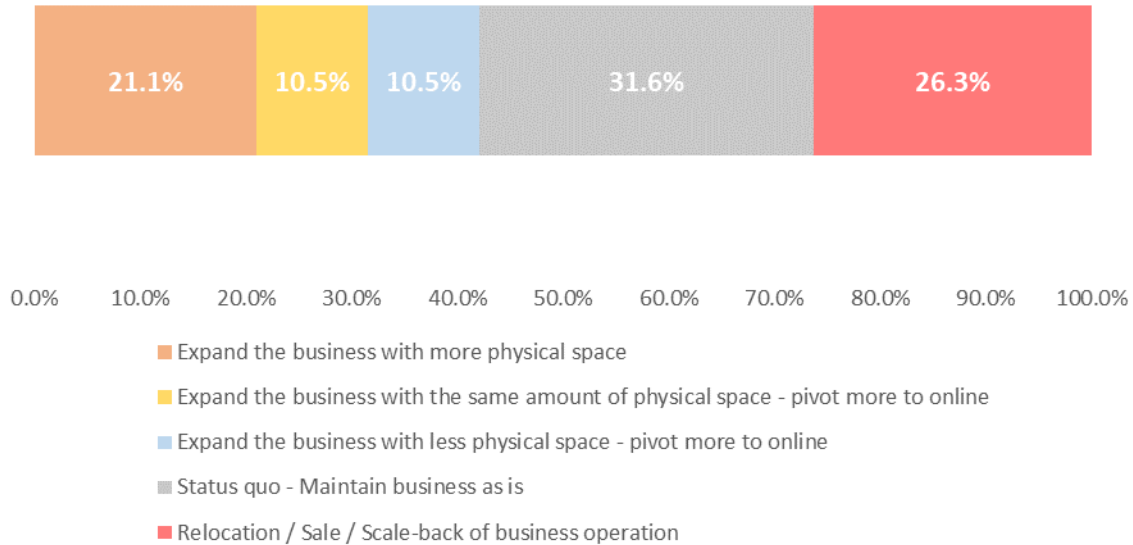
Figure 6-11 below demonstrates responses to business performance prior to, and during the COVID-19 pandemic. As shown, pre-pandemic, almost 70% of respondents indicated that their business activity was either “Thriving” or “Healthy.” Alternatively, over one year into COVID, the results indicate a significant change, with over half of all responses suggesting that business is “Struggling” or “Sustaining.” Interestingly, the number of responses that suggested business was “Thriving” increased slightly over the course of the pandemic. Although the overall sentiment across business owners trended negative as a result of COVID-19, it is important to note that select businesses have actually reported growth over the period.

Figure 6-11: Business Performance Prior to and One Year into COVID-19

SOURCE: urbanMetrics inc.

Figure 6-12 below illustrates responses to how business owners' view the next 3-years of operation. As shown, responses are split, with roughly 21.1% of respondents planning to secure a larger physical footprint to support expanded operations in Whitchurch-Stouffville. Alternatively, a slight majority—some 42.1%—anticipated growth, or status quo conditions, with no required expansion of physical space. Lastly, 36.8% of business owners anticipate a reduction in the amount of commercial space required, either through a strategic pivot towards an expanded online presence, or the closure, sale, or reduction of operations in Whitchurch-Stouffville.

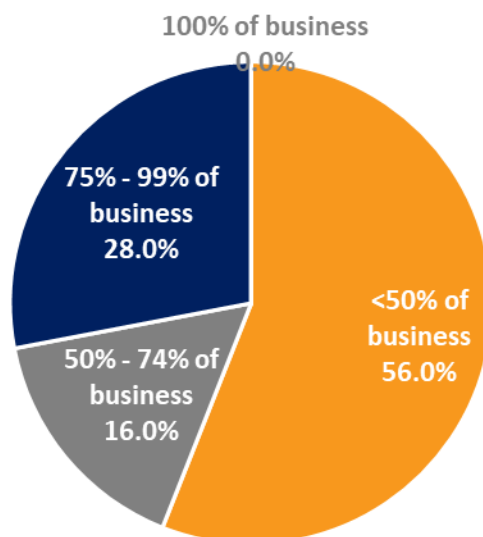
Figure 6-12: Planned Business Activity (Next three years)



SOURCE: urbanMetrics inc.

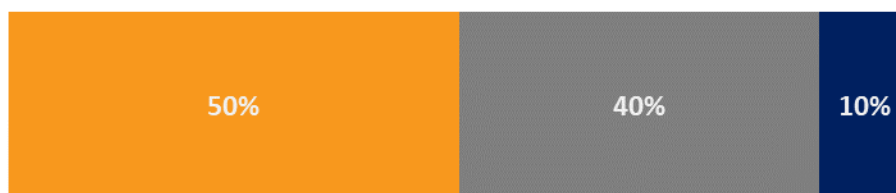
Lastly, the survey asked businesses a series of questions about their customer base and online presence. This information provided some insight into the extent to which business owners perceive their activity being drawn from local customers or surrounding residents. This—in conjunction with data collected from the customer surveys and mobile analytics data—serves as input to the commercial demand analysis presented in Section 10.0.

Figure 6-13 illustrates the proportion of businesses sales that are dependent on local (i.e. Whitchurch-Stouffville) customers. As shown, interestingly, a majority of respondents reported that less than 50% of their business activity was locally derived. This could be a function of several factors. Namely, within the GTA, Whitchurch-Stouffville’s overall population and employment total is relatively limited. As such, small inflows from other surrounding municipalities could account for a significant portion of overall visitation. Alternatively, as a generally rural municipality, Whitchurch-Stouffville businesses may be able to support land-intensive activities (heavy equipment storage, aggregate sales etc.) that are not feasible in denser parts of the Region. These services would draw customers from a large geography that extends across the Greater Toronto Area.

Figure 6-13: Proportion of Business Activity Dependent on Local (Whitchurch-Stouffville) Customers

SOURCE: urbanMetrics inc.

Lastly, the survey asked businesses if they maintained an e-commerce and associated delivery platform. As shown in Figure 6-14, 50% of businesses do maintain this platform, with an additional 10% in the process of establishing an online presence. Over time, it is our expectation that local businesses will increasingly rely on a robust e-commerce presence to augment bricks and mortar sales, and to attract new customers.

Figure 6-14: Proportion of Local Businesses with an E-Commerce Platform

■ Yes ■ No ■ Underway / In Progress

SOURCE: urbanMetrics inc.

7.0 Trade Area Delineation

Key Findings

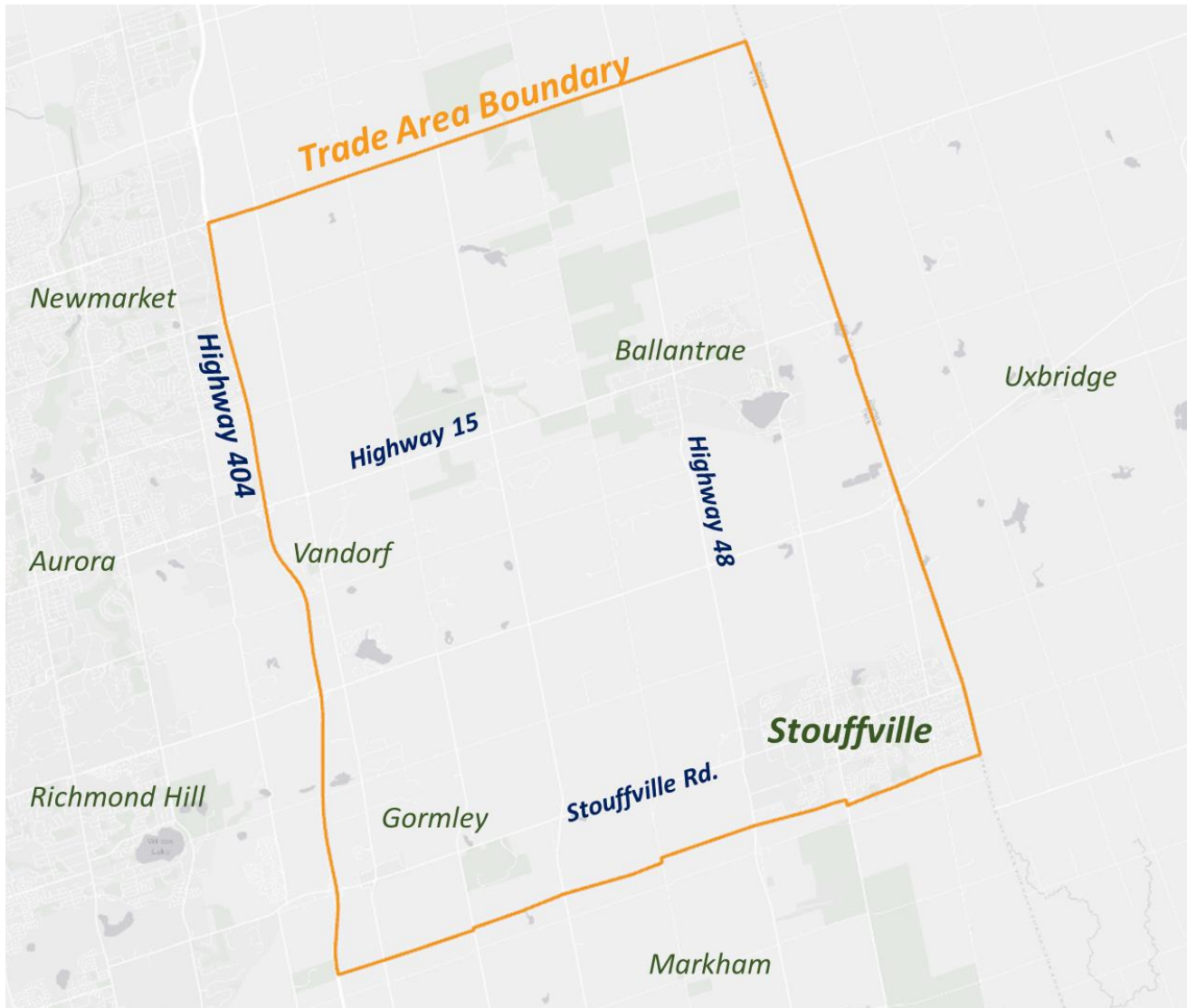
- A trade area represents the **geographic extent from which the majority of customers are drawn from** for a given retailer, commercial node or community. For Whitchurch-Stouffville, it effectively represents the Town's primary customer base.
- It is our assessment that the **municipal boundary of Whitchurch-Stouffville represents the Town's Trade Area**. This assessment is based on existing transportation connections, the businesses located in Town, as well as the results of a mobile analytics data survey at select nodes throughout the community.
- Whitchurch-Stouffville will **further generate some inflow sales support** from customers living outside of the Town, including individuals who work in the Town but reside elsewhere, visitors, and people passing through.
- Likewise, **Whitchurch-Stouffville residents travel outside of the community to access a range of regional-serving or specialty retailers** which are only available in larger, surrounding municipalities.

7.1 Trade Area Delineation

A Trade Area represents the geographic extent from which the majority of shoppers and associated customer expenditure supports are derived for a given retailer, commercial node or community. As such, the Trade Area identified herein is intended to capture the surrounding population which is most likely to shop for goods and services within the Town. In effect, it identifies the Town's core customer base.

For the purposes of this retail market analysis, we have used the municipal boundary of the Town of Whitchurch-Stouffville as the Trade Area. Remaining market support would reflect occasional expenditures of customers living outside the Trade Area (i.e., inflow). These customers could include visitors, non-permanent residents, the traveling public and/or individuals who work in or near the Trade Area but reside elsewhere. Figure 7-1 below illustrates the delineated boundary of the Trade Area.

Figure 7-1: Trade Area Map



SOURCE: urbanMetrics inc., based on GIS Mapping.

The delineation of the Trade Area was based on a number of factors, including:

- The existing market influence of competitive retail/service commercial facilities located near The Town of Whitchurch-Stouffville.
- Distance and travel times to the area from various locations in the municipality.
- Local and regional access characteristics of the area.

- The location of natural and human-made barriers which could restrict the movement of customers to and from the area.
- The findings of our mobile analytics customer origins survey (provided in the following section).

Customer Origins (Mobile Analytics)

In addition to the traditional distance and competitive framework-based factors outlined above, urbanMetrics has partnered with a mobile analytics data provider to develop an understanding of the travel behaviours of residents. The results of this analysis have been utilized to support the delineation of a data-driven, market-tested Trade Area that most accurately captures the true drawing power and customer support to commercial facilities in Whitchurch-Stouffville.

For the purposes of this analysis, urbanMetrics worked collaboratively with Town of Whitchurch-Stouffville staff to determine a number of pre-defined target geographies to consider as part of the evaluation. These geographies were intended to capture patterns in several different municipalities, as well as shopping districts comprising different retailers and retail formats within those jurisdictions. These geographies were surveyed individually and consolidated as a total to understand how each individual geography relates to broader averages. The geographies surveyed include:

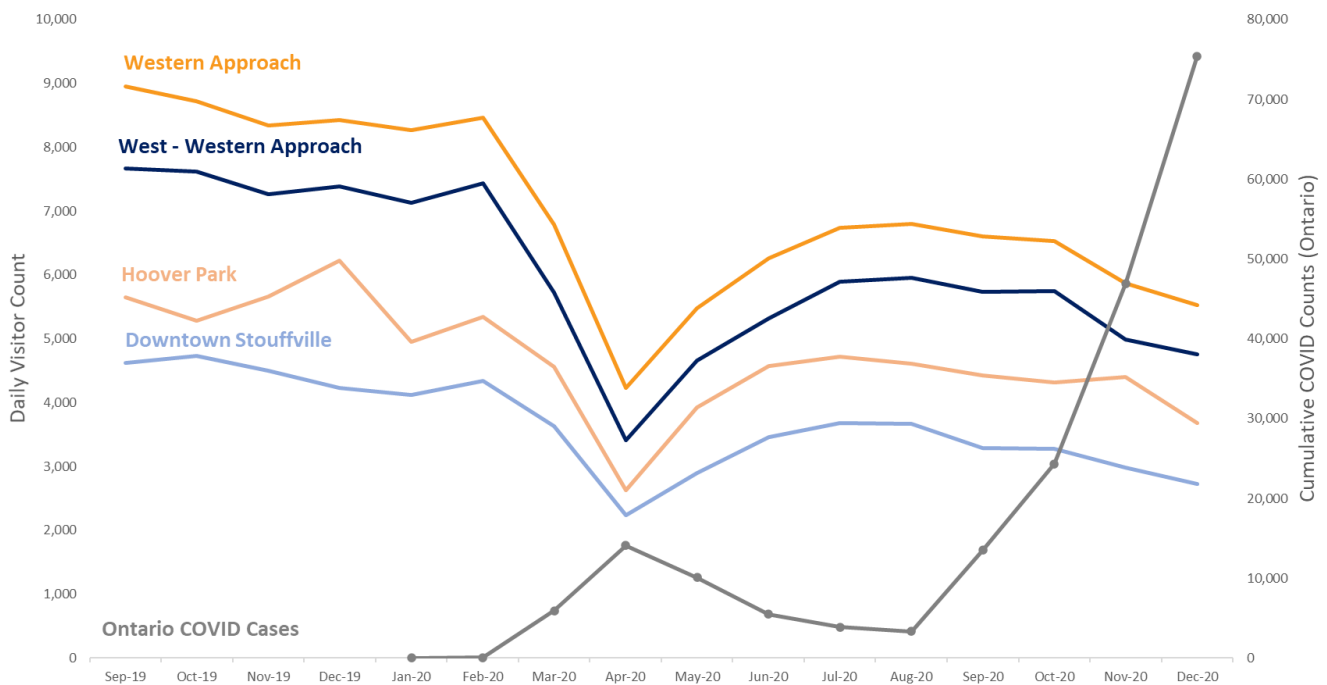
- **Hoover Park Regional Retail Node**
- **Western Approach (Ringwood Drive to Sandiford Drive)**
- **Western Approach (Sandiford Drive to 9th Line)**
- **Downtown Stouffville (Community Core)**

See Appendix C for surveyed geographies

Mobile analytics data captures a representative segment or sample of total visitation to a given geography. This capture is based on a range of mobile applications installed on individual devices. Therein, the figures presented below are reported in percentage terms, as they represent a reasonable approximation as to the macro-level geographic origin of visitors, but do not present a comprehensive view of overall visitation in absolute volume terms. Unless otherwise noted, data collected represents full year 2019 and 2020 visitation patterns.

Figure 7-2 below illustrates visitation³ to each surveyed node, between September of 2019 and the end of 2020. As shown, visitation plummeted at the onset of the COVID-19 pandemic, as commercial traffic dropped in response to uncertainty and fear as a result of the initial pandemic spread. Over time, as health authorities provided further guidance, and understanding of COVID-19 improved, visitation gradually recovered. However, as shown, exponential growth in case counts towards the end of 2020 did result in a further decline in overall visitation.

Figure 7-2: Total Visitation Trends by Node and COVID Case Count



SOURCE: urbanMetrics inc., based on mobile analytics data, and Ontario Ministry of Health COVID-19 case data.

NOTE: Visitation counts are a representative sample and do not necessarily represent total estimated visitation to a given node.

The data shown clearly indicates that the COVID-19 pandemic has had a dramatic impact on overall visitation to Stouffville's commercial nodes. Although visitation has recovered somewhat since the lowest points of 2020, it had not recovered to pre-pandemic levels by the end of 2020. It is our assumption that Canada's ongoing vaccination rollout, and the anticipated lifting of public health

³ Visitation figures are a representative sample of overall visitation and are not reflective of total visitor counts to a given location.

restrictions will re-instill confidence in consumer sentiment and increase visitation to these nodes—particularly for discretionary purchases.

However, the long-term impact of COVID-19 remains to be seen. Although we anticipate a return to close to pre-pandemic levels, an increase in societal acceptance and usage of e-commerce and differing commuting and working patterns may have differing impacts on commercial visitation to these nodes. Monitoring these patterns longer term will be important in understanding how, and if, retailing at Stouffville’s nodes has changed in a post-COVID environment.

Figure 7-3 below illustrates visitation patterns to each surveyed node by place of residence in 2020. As shown, across all geographies, some 61% of responses collected were from residents of Whitchurch-Stouffville. That ratio was the highest in Downtown Stouffville (66%), and lowest at Hoover Park (55%). This likely is a result of the regional-serving uses at Hoover Park, which generally would attract customers from a broader study area.

As shown, after locals, residents of the City of Markham represent the second highest visitation, representing some 15% of the total. This ranges from 25% of the total at Hoover Park, to only 9% in Downtown Stouffville. Similar to above, the regional serving uses located at Hoover Park draw consumers from a broader Trade Area, whereas Downtown Stouffville serves a more localized population.

Figure 7-3: Visitation Patterns by Municipality and Node, 2020

2020 Visitor Origin	Hoover Park	West-Western Approach	Western Approach	Downtown Stouffville	Total - All Geographies
Whitchurch Stouffville	55%	60%	63%	66%	61%
City of Markham	25%	13%	12%	9%	15%
City of Toronto	4%	6%	5%	5%	5%
Other York Region	7%	11%	9%	7%	9%
Durham Region	6%	6%	3%	10%	6%
Other	3%	4%	8%	3%	5%
Total	100%	100%	100%	100%	100%

SOURCE: urbanMetrics inc., based on mobile analytics data.

NOTE: Data shown represents full year 2020.

Figure 7-4 below demonstrates visitation patterns from 2019, prior to the COVID-19 pandemic. As shown, the corresponding figures do not show a significant differentiation in source municipality for each node identified. The results indicate a marginal reduction in visitation from the City of Markham,

showing 12% in 2019, versus 15% in 2020. Minimal difference was observed across the other geographies identified.

Figure 7-4: Visitation Patterns by Municipality and Node, 2019

2019 Visitor Origin	Hoover Park	West-Western Approach	Western Approach	Downtown Stouffville	Total - All Geographies
Whitchurch Stouffville	55%	58%	63%	64%	60%
Markham	20%	10%	9%	8%	12%
City of Toronto	5%	8%	6%	6%	6%
Other York Region	7%	11%	8%	7%	9%
Durham Region	7%	7%	6%	10%	7%
Other	6%	7%	8%	5%	7%
Total	100%	100%	100%	100%	100%

SOURCE: urbanMetrics inc., based on mobile analytics data.

NOTE: Data shown represents full year 2019.

Moving forward, we anticipate the commercial nodes of Whitchurch-Stouffville to continue to derive the majority of the customer base locally (i.e. from Whitchurch-Stouffville residents). A small portion of visitation is expected to be generated from residents of Markham, as well as other inflow visitors from other parts of York and Durham Regions, and the broader Greater Toronto Area. As the northern edge of Markham continues to build out and additional retail / service commercial uses are added, it is possible that Markham residents will comprise a smaller proportion of visitation to Whitchurch-Stouffville in the future.

Opportunities may exist to enhance cross shopping amongst non-local visitors to other nodes throughout the community. As identified in both 2019 and 2020 data, Hoover Park draws a notably higher proportion of non-local residents, when compared to Downtown Stouffville. Opportunities and initiatives that support cross shopping could provide an important customer boost to Downtown Stouffville.

8.0 Commercial Inventory

Key Findings

- urbanMetrics has identified a total of **almost 1.6 million square feet of commercial retail / service space** across Whitchurch-Stouffville. The results of the inventory indicate a fairly standard proportion of commercial retail functions across the Town.
- The community of **Stouffville accounts for the vast majority (over 85%) of retail / service commercial functions in the Town**. In addition to serving residents across the Town, Stouffville provides a regional function for nearby residents of northern Markham and areas of Uxbridge.
- With an overall vacancy rate of 6.5%, the Town has a **relatively healthy commercial retail market**.
- Previous commercial inventories completed in the community of Stouffville allow for tracking change in this portion of the Town over time. **Since 2005 there has been a marginal decline in the per capita service level for commercial space in Stouffville**. The current service level represents a slightly lower than expected service level, given that the commercial facilities in Stouffville serve the entire Town and a small regional area.
- On a space per person basis, Whitchurch-Stouffville has a lower amount of retail and services space than other comparable sized communities in Ontario. This has resulted in considerable expenditure outflow from the Town on a regular basis. With an almost doubling of the population anticipated over the next 30 years, we would expect this imbalance to be improved to allow for reduced need to travel outside of the Town to shop and obtain services.

8.1 Commercial Inventory

An analysis of existing competitive retail/service commercial facilities is essential to understanding the roles and functions that existing stores and services in Whitchurch-Stouffville currently fulfill for local residents and visitors, as well as the potential competitive influences which could affect the market opportunity available for additional retail/service commercial space. The following discussion provides a general overview of the existing and planned commercial space in Whitchurch-Stouffville.

An inventory of retail/service commercial space was conducted in Whitchurch-Stouffville by urbanMetrics in Spring of 2021. Our inventory included all beer, wine and liquor (BWL), food store retail (FSR), non-food store retail (NFSR), and service commercial facilities. Based on the North American Industrial Classification System (NAICS), FSR, NFSR and Service store types include the following:

- **FSR (Food Store Retail):**
 - Supermarkets and Grocery Stores.
 - Convenience and Specialty Food Stores – including meat markets, fish and seafood markets, fruit and vegetable markets, baked goods, confectionary, and nut stores.
- **BWL (Beverage Stores):**
 - Wine, beer, and liquor stores.
- **NFSR (Non-Food Store Retail):**
 - Building and Outdoor Home Supply Stores – includes home improvement centres, hardware stores, paint and wallpaper stores, nursery/garden centres, and a wide range of building material and supply stores.
 - Pharmacies and Personal Care Stores – includes drug stores, optical stores, health equipment stores, nutrition, and cosmetic stores.
 - General Merchandise Stores – includes department stores (i.e. The Bay or Wal-Mart), Canadian Tire, Costco, dollar stores and variety stores.
 - Clothing and Accessories Stores – including jewellery and luggage/leather goods stores.
 - Furniture, Home Furnishings and Electronics Stores – including appliances, computer, camera, and photographic supply stores.
 - Miscellaneous Store Retailers – including other durable/semi-durable stores such as sporting goods, toy, hobby, book, florist, office supply, fabric/wool, gift stores, pet, and pet supply, used merchandise stores, and cannabis stores.
- **Commercial Services:**
 - Food Services & Drinking Places – including full- and limited-service restaurants and bars.
 - Personal Care – including hair salons, spas, dry cleaning, pet care, among others.
 - Professional, Scientific, and Technical Services – including law offices, accountants, architects, management consulting, marketing, and other specialized design services.
 - Finance, Real Estate, and Insurance – including banks, insurance agencies, real estate brokers.
 - Health Care – including doctors, dentists, chiropractors, diagnostic laboratories, mental health centres, and other health practitioners.
 - Cultural, Entertainment, and Recreation – including amusement arcades, fitness, recreational sports centres, movie theatres, among others recreation facilities.
 - Social Services – including individual/family services, child services, and day care.
 - Selected Civic, Social, Educational, and other Administrative Services.

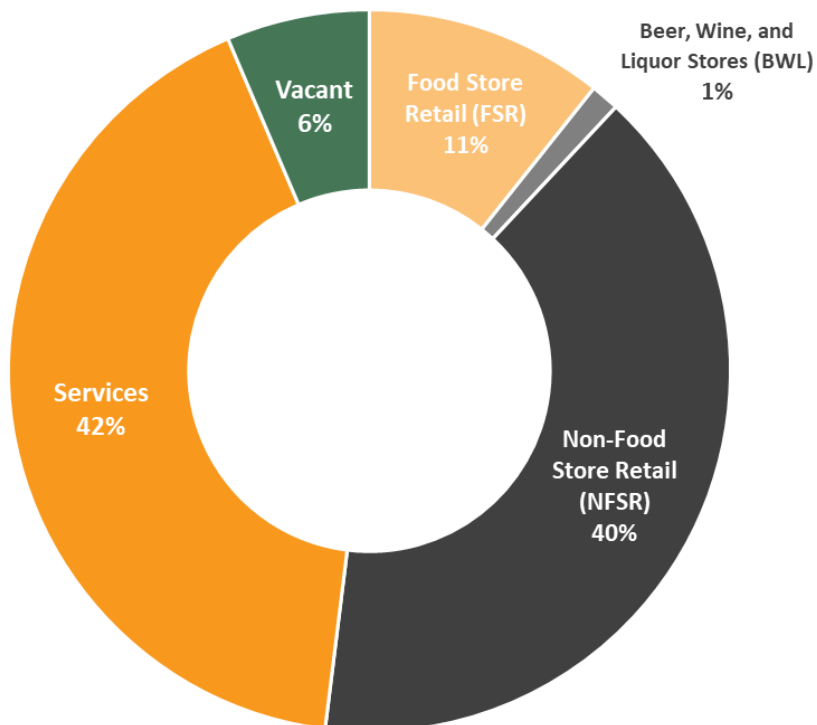
- Personal & Household Goods Repair – including automotive, electronics, furniture, footwear, jewellery, and household goods repair.
- Consumer Goods Rental – including electronics, equipment, clothing, and video rentals.
- Transportation Services – including the post office and other transportation services.

As illustrated in Figure 8-1, Whitchurch-Stouffville contains nearly 1.6 million square feet of retail/service commercial space.

Of this total, 11% is comprised of FSR facilities (166,600 square feet), 1% is comprised of BWL facilities (19,900 square feet), 40% is comprised of NFSR facilities (625,400 square feet), and 42% is comprised of services (625,400 square feet).

At the time of our inventory, the overall vacancy rate in Whitchurch-Stouffville was estimated at 6%, which is indicative of a healthy market that is at equilibrium. This being said, “Ballantrae Gates” located at 5292 Aurora Road, which accounts for a considerable portion of the Town’s vacant space, is a recently constructed 34,000 square foot retail plaza. While several of the units were vacant at the time of the inventory, urbanMetrics observed signs on each unit indicating the future tenant and upcoming opening day. As a result, the existing commercial vacancy rate is moderately overstated and may fall below a healthy rate when these units are opened. This potentially indicates that residents may be under-served in terms of access to retail/service commercial uses, and that additional space could be supported in the local market area.

Figure 8-1: Total Commercial Inventory by Store Type



SOURCE: urbanMetrics inc.

Figure 8-2 outlines the existing space found within Whitchurch-Stouffville by detailed store category.

Figure 8-2: Summary of Commercial Inventory, Town of Whitchurch-Stouffville (March 2021)

Store Type <i>(all referenced in square feet: gross leaseable area)</i>	Community of Stouffville	Gormley	Ballantrae - Musselman	Vandorf - Preston Lake	Remainder of Town	TOTAL
Food Store Retail (FSR)	150,700	2,500	7,800	3,000	2,600	166,600
Supermarkets & Grocery	121,800	0	2,700	0	0	124,500
Convenience & Specialty Food	28,900	2,500	5,100	3,000	2,600	42,100
Beer, Wine, and Liquor Stores (BWL)	19,900	0	0	0	0	19,900
Beverage Stores	19,900	0	0	0	0	19,900
Non-Food Store Retail (NFSR)	556,500	16,600	3,300	4,200	44,800	625,400
Apparel and Accessories	57,200	1,000	0	0	0	58,200
Automotive	11,000	0	0	4,200	4,600	19,800
Building and Outdoor Home Supply	25,200	1,800	0	0	28,700	55,700
Furniture, Home Furnishings & Electronics Store	45,000	0	0	0	10,700	55,700
General Merchandise	262,800	0	0	0	0	262,800
Miscellaneous Retailers	98,700	13,800	1,300	0	800	114,600
Pharmacies & Personal Care	56,600	0	2,000	0	0	58,600
Services	519,100	55,200	35,400	6,000	9,700	625,400
Consumer Goods Rental	1,600	21,100	0	0	5,800	28,500
Cultural, Entertainment & Recreation	38,700	19,700	0	0	0	58,400
Finance	40,800	0	0	0	0	40,800
Food Services & Drinking Places	137,900	6,300	18,300	3,300	0	165,800
Health Care	99,200	0	3,500	0	0	102,700
Insurance and Real Estate	30,700	0	2,000	0	0	32,700
Personal & Household Goods Repair/Maintenance	4,100	0	2,400	1,200	0	7,700
Personal Care	47,100	0	3,200	0	0	50,300
Professional, Scientific & Technical Services	39,500	6,100	1,000	0	0	46,600
Selected Civic & Social Organizations	8,400	0	0	0	0	8,400
Selected Educational Services	37,200	0	0	1,500	0	38,700
Selected Office Administrative Services	7,700	0	0	0	3,900	11,600
Social Services	19,600	0	5,000	0	0	24,600
Transportation	6,600	2,000	0	0	0	8,600
Vacant	70,500	0	24,100	0	5,400	100,000
TOTAL	1,316,700	74,300	70,600	13,200	62,500	1,537,300

SOURCE: urbanMetrics inc., based on an in-person commercial inventory conducted in March 2021.

8.2 Stouffville Commercial Nodes

Approximately 1.3 million square feet, or 85% of Whitchurch-Stouffville's total commercial space, is located in the Community of Stouffville. Stouffville functions as the primary commercial centre within the Whitchurch-Stouffville due to its historic downtown and the presence of many large-format retailers and national/international chain stores, including Wal-Mart Supercentre, Canadian Tire,

Home Hardware, Staples, Winners, as well as multiple grocery stores including Longo's, Metro, and No Frills.

The inventory distinguished between various nodes of retail activity within Stouffville. The commercial nodes serve differing commercial functions for the community and are generally consistent with nodes identified in previous commercial studies completed for the Town.

- **Node 1 – Community Core** – includes Stouffville's historic downtown and adjacent retail sections along Main Street. This node is consistent with the "Commercial Core" boundaries as defined in the Official Plan Schedule F1 – Community Core Area which generally includes retail/service commercial facilities located along Main Street. The Stouffville GO Station is a prominent anchor within this retail node. This area can be characterized by a mix of commercial, office, and residential uses, including a number of restaurants, entertainment, and services. The area also includes many converted residential dwellings that function as retail/service commercial space.
- **Node 2 – Western Approach** – includes the majority of retail/service commercial space located along both sides of Main Street generally between Baker Hill Boulevard/Ringwood Drive and 9th Line (Official Plan Schedule F2: Western Approach Area). The node is primarily designated for Mixed Use Commercial and features a large number of strip retail plazas, standalone retail pads, and major restaurant chains. This node contains the only three major supermarkets located in Whitchurch-Stouffville (Metro, Longo's, and No Frills).⁴
- **Node 3 – Hoover Park Regional Retail** – includes the only Regional Commercial District in Whitchurch-Stouffville which is situated at the corner of Highway 48 and Hoover Park Drive. This node includes major large-format retailers including Wal-Mart Supercentre, Canadian Tire, Dollarama, Winners, and Staples, among others. Major restaurant chains including Tim Hortons, Boston Pizza, and A&W are located here. This node also includes a small retail plaza that contains food establishments, personal services, and clinics.
- **Node 4 – Innovator Avenue** – includes retail/service commercial space located in the proximity of Innovator Avenue south of the Western Approach node. This area is generally designated "Business Park Area" and contains many flexible-light industrial buildings that are occupied by a range of commercial tenants. The majority of the retail/service commercial tenants located in this node include recreation / entertainment uses, educational services, athletic clubs, automotive stores, health clinics, professional services, and other miscellaneous users.

⁴ Although Wal-Mart sells a selection of grocery-based products, the North American Industry Classification System classifies Wal-Mart is classified as a Department Store.

- **Node 5 – Remainder of Stouffville** – includes retail / service commercial facilities scattered throughout the remainder of Stouffville, which have not already been accounted for as part of the other nodes. Included as part of this node is the small cluster of retail facilities located at the intersection of Tenth Line and Main Street.

The five separate commercial nodes which were identified within Stouffville, are indicated in Figure 8-3.

Figure 8-3: Commercial Nodes in Community of Stouffville



SOURCE: urbanMetrics inc.

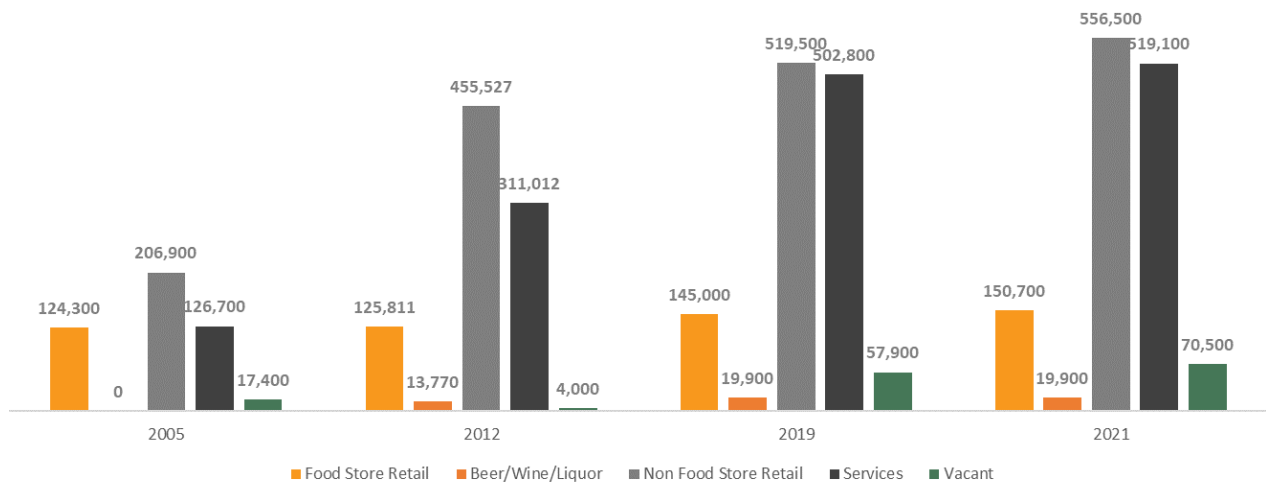
8.3 Comparison with Historic Inventories

Multiple commercial inventories have been completed in the Community of Stouffville between 2005 and 2021. As a result, we are able to compare the changes in retail/service commercial space *within the community of Stouffville* over the past 16 years.

Figure 8-4 outlines the increase in total retail/service commercial space by store category between 2005 and 2021. Overall, Stouffville has added some 840,000 square feet of retail/service commercial space between the period, representing an average annual increase in space of some 52,500 square feet.

The significant increase in space between 2005 and 2012 is due to the construction of many large format retailers in the Hoover Park Regional Retail node. The largest growth in commercial space has been in services, which is reasonable for a locally serving community like Stouffville. It is important to note the stagnant growth in Food Store Retail, which has not kept pace with population growth and the increases in other types of commercial space.

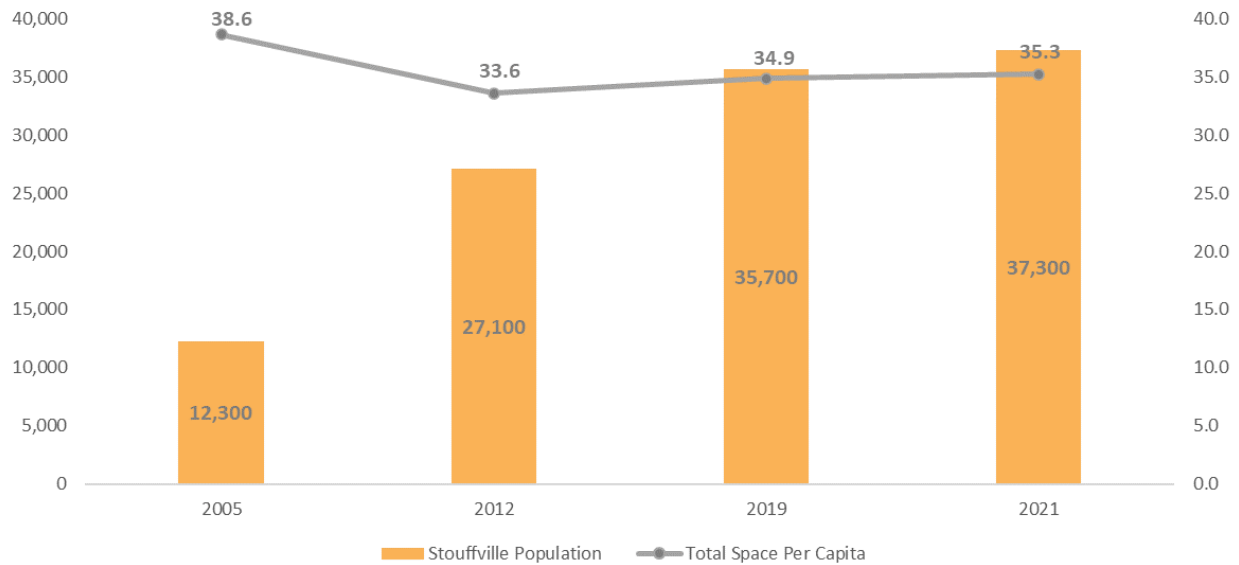
Figure 8-4: Historical Commercial Inventories of Stouffville, 2005-2021



SOURCE: urbanMetrics inc.

Figure 8-5 shows the increase in Stouffville's population from an estimated 12,300 persons in 2005 to 37,300 in 2021, as well as the change in total commercial space per capita. This demonstrates that this increase in commercial space has generally not kept pace with Stouffville's population growth, which has resulted in the commercial space per capita decreasing from 38.6 square feet in 2005 to 35.3 square feet in 2021. Given that the commercial facilities in Stouffville serve the broader Town, as well as a small regional population, the current per capita space ratios fall lower than would be expected for a community with this function. As Whitchurch-Stouffville continue to grow in population, one would anticipate a greater complement of local and regional serving commercial uses.

Figure 8-5: Change in Population and Commercial Space Per Capita, Stouffville



SOURCE: urbanMetrics inc.

Population figures are based on Census data. 2005 and 2012 figures assume straight-line growth in inter-census years. 2019 and 2021 figures derived based on CMHC housing completions data. Figures have been adjusted for undercount and rounded to the nearest 100.

8.4 Space Per Resident

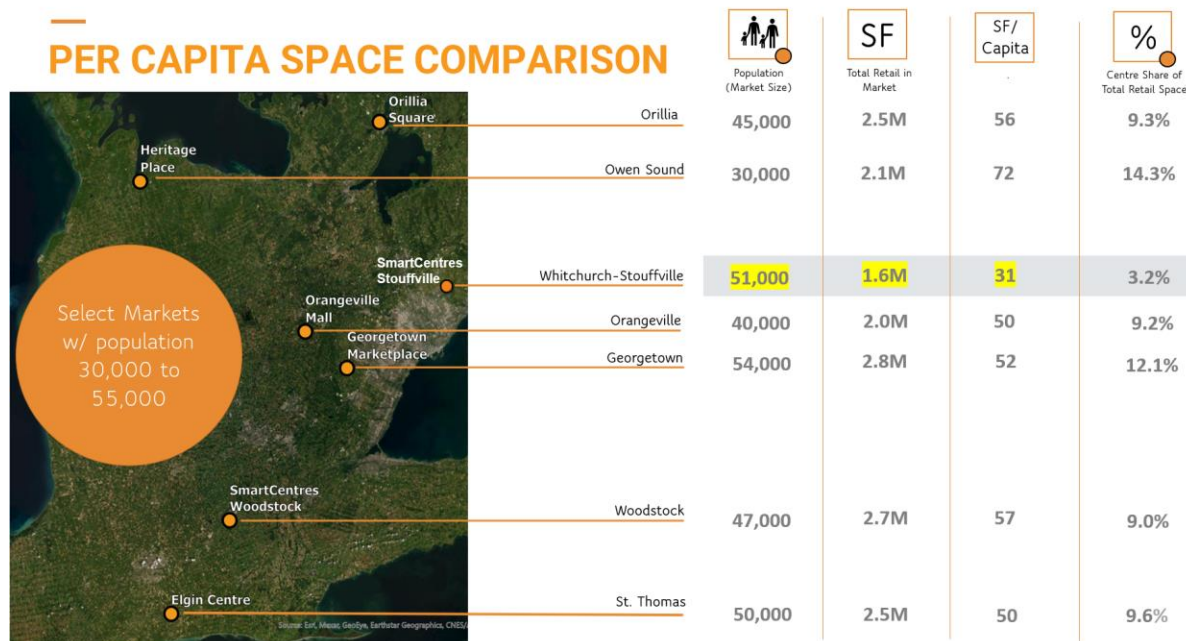
Figure 8-6 provides an analysis of the per capita retail and services space in Whitchurch-Stouffville compared to other similar sized communities in Ontario. This analysis is an effective way of gaining an understanding of how well serviced a municipality is in terms of the availability of retail space and commercial services, such as hair salons, restaurants, banks, cinemas, dry cleaners, street-front offices, and other similar services. Excluded from this analysis is most space in purpose built office buildings.

It is recognized that the amount of space in a municipality is directly related to the size of its population base, but is also influenced by other factors, particularly the extent to which it is relied upon by persons living in nearby communities, as well as, the extent to which local residents must travel outside of their municipality to access goods and services not available locally.

In Figure 8-6, we have compared Whitchurch-Stouffville with five other Ontario municipalities ranging in size from 30,000 (Owen Sound) to 54,000 (Georgetown in Halton Hills). As noted by this figure, Whitchurch-Stouffville has a much lower space per person ratio than any of the comparable sized municipalities, suggesting that it has a shortage of retail space given its size. This reflects the results

of the survey showing considerable expenditure outflow from Whitchurch-Stouffville. Being situated adjacent to a number of larger municipalities with significant retail concentrations also impacts the amount of space currently existing in the Town. However, with an almost doubling of the population projected over the next 30 years, it is expected that Whitchurch-Stouffville will become more self sufficient. This would be due to a larger critical mass able to support a greater variety of goods and services coupled with planning policies geared towards creating complete communities, with a better home-work-shopping balance.

Figure 8-6: Retail and Services Space Per Resident



SOURCE: urbanMetrics inc.

8.5 Summary of Commercial Space in Whitchurch-Stouffville

Currently, the Town of Whitchurch-Stouffville contains approximately 1.6 million square feet of commercial space spread across a range of geographies, nodes, and built forms. The largest concentration of commercial space, approximately 1.3 million square feet, is located within the Community of Stouffville. Our analysis over time has indicated that commercial space within Stouffville has not kept pace with population growth as there is less commercial space per capita than in the past.

There is approximately 100,000 square feet of vacant space across the Town of Whitchurch-Stouffville, which represents a vacancy rate of 6.5%. Some 70,000 square feet of this space is found within the community of Stouffville itself. This vacancy rate is moderately overstated and will decrease when recently constructed units are occupied. This potentially indicates that residents may be slightly under-served in terms of access to retail/service commercial uses, and that additional space could be supported in the local market area.

9.0 Commercial Supply Analysis

Key Findings

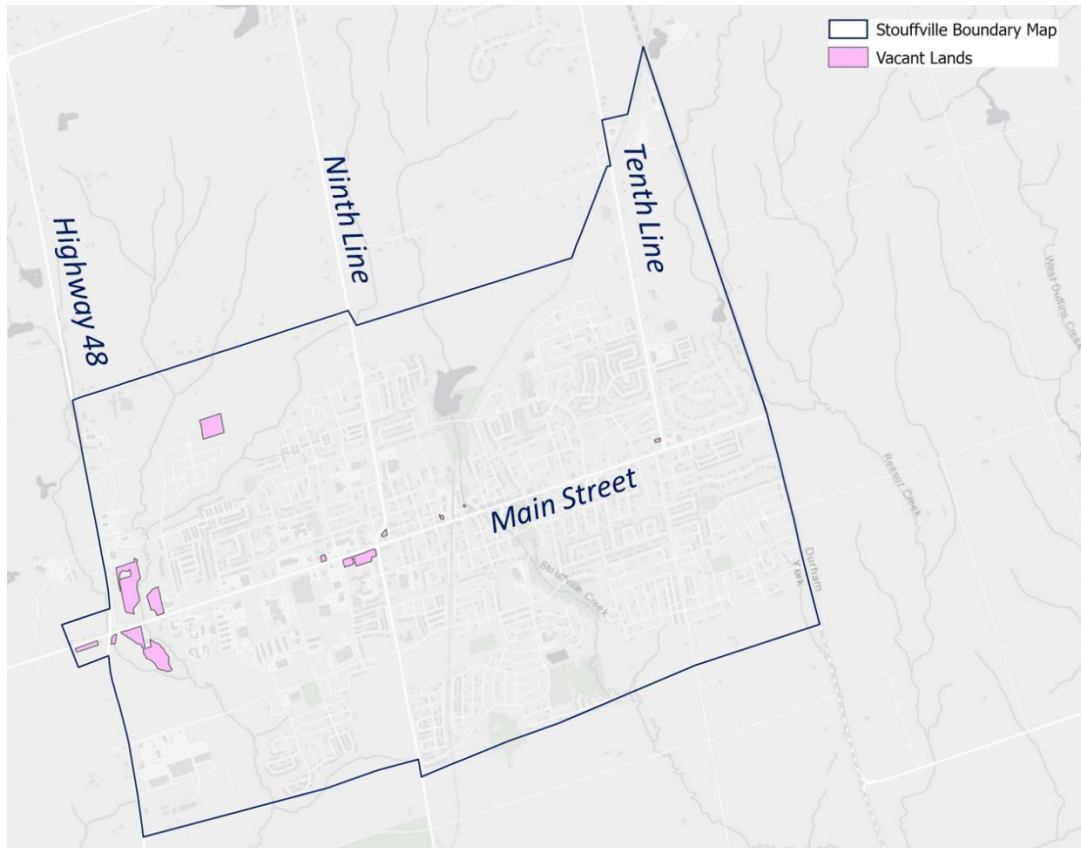
- There are **a total of some 63 acres of vacant commercial land across Whitchurch-Stouffville**. These lands differ substantially in terms of designation, and planned function. In total, some 34 acres of that land is located in the community of Stouffville.
- A total of **approximately 164,000 square feet of commercial space has been proposed or is actively under construction** in Whitchurch-Stouffville. This space represents additional supply being introduced to the market, that will help meet current, and anticipated future need.
- The project team has identified a **range of different areas planned to accommodate varying amounts and types of commercial development across Whitchurch-Stouffville**. These areas include greenfield lands, Whitebelt expansion areas, and intensification opportunities. The majority of commercial space is anticipated to be located near the community of Stouffville, the primary population and employment cluster in the Town.

To gain an understanding of Whitchurch-Stouffville’s commercial supply, we have examined vacant designated commercial land, unbuilt potential on existing commercial sites, infill and intensification opportunities, potential commercial components in future subdivisions and development areas, and active commercial developments. This section provides a summary and description of potential areas that could accommodate new commercial space that will be required to serve the Town’s existing and future residents.

9.1 Vacant Commercial Land

Figure 9-2 summarizes the vacant development sites that can accommodate commercial uses within Whitchurch-Stouffville by community, designation, and type. As shown, there are 63.17 acres of vacant commercial land.

The vacant land includes a variety of designations across the varying communities/secondary planning areas. The majority of the vacant commercial land is designated as “Gateway Mixed-Use Area” in the Community of Stouffville and “ORM Mixed Use Area” in the Vandorf-Preston Lake Secondary Plan. It is important to note that—for the purposes of accommodating commercial uses—the “ORM Mixed Use Area” permits “small scale commercial and institutional uses, including offices” (*Official Plan 13.6.8.2 ii*). As such, despite a relatively significant land area, the 19.87 hectares of land identified are unlikely to support a significant cluster of commercial space. Figure 9-1 below demonstrates the location of vacant lands in the community of Stouffville.

Figure 9-1: Vacant Commercial Lands in Stouffville

SOURCE: urbanMetrics inc., based on data provided by the Town of Whitchurch-Stouffville. For illustrative purposes only.
 NOTE: Only includes lands that are not subject to active or proposed development activity.

Our analysis revealed that only 4 of the 25 parcels are greater than 5 acres. The majority of parcels are smaller than 4 acres and represent infill opportunities. Over 50 acres of vacant commercial land, approximately 82% of the total, are located in areas designated “Mixed Use”. These areas are intended to function as thriving urban areas that permit a range of uses including medium/high density residential, retail/service commercial, office, and institutional, among others. The commercial potential in these areas would not be characterized by traditional retail plaza or standalone retail pads, and rather would represent a component of broader mixed-use intensification projects that combine office and residential uses.

It is further important to note that a portion of this vacant land supply—particularly at the western edge of Stouffville—is located within existing planning areas. Some 20.3 acres of identified vacant land in Stouffville is located within either the Gateway Mixed Use Study Area (completed in 2018), or the ongoing Markham Stouffville Highway 48 Corridor Visioning Exercise. The land use plan and associated densities for these lands have been established, or are in the process of being determined

through these planning processes. The remaining 13.6 acres of vacant land are not included as part of more detailed planning processes, and represent underutilized opportunities to increase the supply of commercial space in the community.

Figure 9-2: Vacant Commercial Land in Whitchurch-Stouffville

	Stouffville	Gormley	Ballantrae-Musselman	Vandorf-Preston Lake	Total (ac)
Community Area	-	-	4.67	-	4.67
Core Area- Main Street	0.22	-	-	-	0.22
Gateway Mixed Use Area	20.31	-	-	-	20.31
General Commercial	-	1.31	-	-	1.31
Mixed Use Area	-	-	-	3.38	3.38
ORM Mixed Use Area	-	-	-	19.87	19.87
Western Approach - Mixed Use Area	7.94	-	-	-	7.94
Activity Node	5.48	-	-	-	5.48
Total Vacant Commercial Land (ac)	33.95	1.31	4.67	23.25	63.17

SOURCE: urbanMetrics inc., based on data provided by the Town of Whitchurch-Stouffville.

9.2 Proposed Commercial Space

urbanMetrics has identified proposed commercial space included as part of active development applications in the Town of Whitchurch-Stouffville. This information was found on the Town's interactive Development Activity Map. Through this, we have identified eight (8) active developments with a commercial component within the Town.

Figure 9-3 summarizes the potential commercial floor area that could be developed in the Town by type of project. In total, there is approximately 164,000 square feet of commercial space currently in various stages of the development pipeline and under construction. This total has been incorporated into our commercial needs analysis.

The majority of proposed commercial space is located within mixed-use residential developments in Stouffville's downtown; however, the largest commercial project (containing some 97,300 square feet) is located in Stouffville's Mixed-Use Gateway Area. Based on our review of the various project site plans, the proposed commercial space will be spread among small retail units that are suitable for services and boutique retailers. It is our understanding that none of the projects are proposing enough commercial space to accommodate a supermarket or other large-format retailer.

Figure 9-3: Proposed Commercial Space in Active Development Applications

No.	Geography	Address	Status	Development Description	Commercial GFA (sq.ft.)
1	Gormley	7 Brillinger Industrial Pl	Under Review	Corporate Office & Accessory Retail	6,800
2	Gormley	12379 Woodbine Ave	Under Review	Multi-Unit Retail Building	27,100
3	Stouffville	5185-5226 Stouffville Rd	Under Review	Mixed-Use Plaza	97,300
4	Stouffville	5531 Main Street	Proposed	Condo w/ Ground Floor Retail	8,800
5	Stouffville	5676 Main Street	Under Review	Rental w/ Ground Floor Retail	2,000
6	Stouffville	5917 Main Street	Under Review	Condo w/ Ground Floor Retail	4,200
7	Stouffville	6162 Main Street	Under Construction	Condo w/ Ground Floor Retail	5,100
8	Stouffville	6424 Main Street	Under Review	Condo w/ Ground Floor Retail	12,700
					164,000

SOURCE: urbanMetrics inc., based on the Town of Whitchurch-Stouffville Development Activity Map.

9.3 Future Commercial Development Areas

In addition to designated vacant commercial lots and active development applications, we have also reviewed future development areas where significant commercial uses could be accommodated, under the current planning framework. These include proposed commercial designations within future subdivisions, unbuilt potential on existing commercial sites, and infill and intensification opportunities.

The following section identifies several different areas within which additional retail / service commercial uses are currently planned to be accommodated within Whitchurch-Stouffville. These areas range from lands explicitly zoned and designated to accommodate commercial functions, to those where commercial uses may be secondary to other development forms.

Gateway Mixed Use Area

The Gateway Mixed Use Area is identified in the Stouffville Secondary Plan Schedule F2A. As shown, the mixed-use area is comprised of several parcels, generally around the intersection of Highway 48 and Stouffville Road, at the western entrance to the Stouffville settlement area. The intent of the Gateway Mixed Use Area is to establish a unique entrance and identity to Stouffville, through the development of mixed-use buildings or adaptive reuse of existing heritage structures for commercial retail, institutional or office purposes.

Per the current planning policies in place at the Western Approach Area, it is our understanding that there is 2.7 hectares of developable land area within this node identified for mixed-use development. Based on analysis prepared by Watson & Associates Consultants, a total of 5,100 square metres, or almost 55,000 square feet of retail commercial development potential has been identified in the Western Gateway node, with an additional 55,000 square feet assumed to be office space.⁵

Figure 9-4: Gateway Mixed Use Area



SOURCE: urbanMetrics inc., based on select portions of Stouffville Secondary Plan Schedule F2A.

Neighbourhood Retail Area

A Neighbourhood Retail Area has been delineated in the northeastern edge of Stouffville’s built boundary. The primary clusters of retail uses in Stouffville are generally located in the western, or central part of the community. As such, the Neighbourhood Retail Area designation has been defined to provide accessible services to residents on the other end of the Town.

Per section 12.7.22.4 of the Official Plan, the Neighbourhood Retail Area is planned to comprise a number of commercial and residential buildings containing stand alone and multi-tenant users. The 2.3 hectare (5.7 acre) retail component of the designation must contain between 4,500 – 8,360 square metres (48,000 – 90,000 square feet) of commercial gross floor area. It is our understanding that a large residential development is being proposed adjacent to this Neighbourhood Retail node, consisting of some 327 residential units, comprised of single, semi-detached and townhome dwellings.

Industrial or Business Park Commercial Functions

Per section 12.7.12, the Business Park Area designation supports a range of light industrial and office-based uses. Select permitted uses include the following:

- Light industrial, including warehousing;
- Commercial recreation;
- Entertainment;
- Education and training;
- Business services;
- Accessory restaurant.

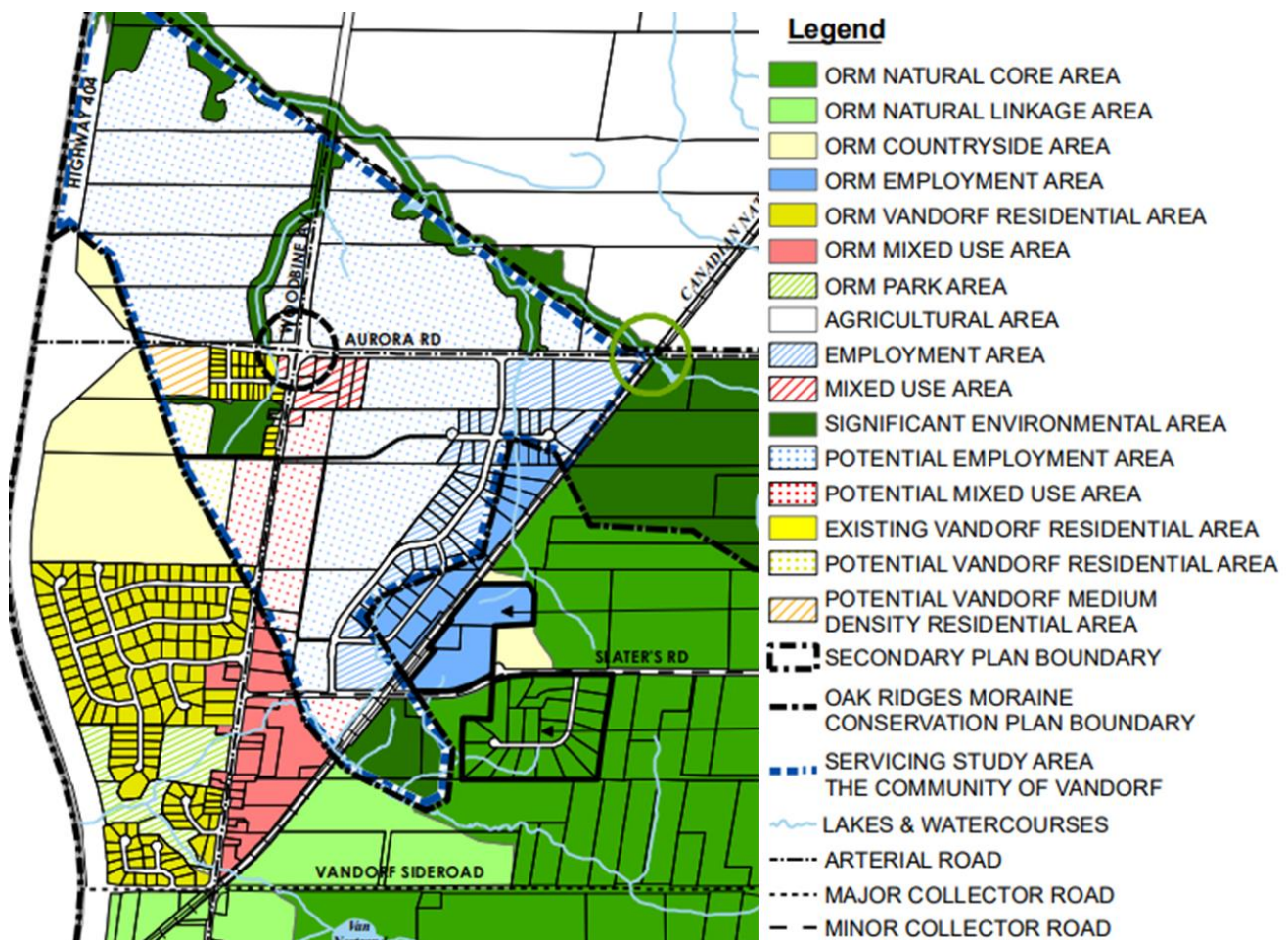
This designation supports select retail / commercial functions and may ultimately attract modest supply of commercial space. Particular tenants could include personal fitness, brewery / taproom, goods rental, or skills training, in addition to ancillary restaurant or café functions.

Likewise, the Industrial Area designation permits a similar—albeit more limited—range of uses, intended to support light industrial, general industrial and office-based uses. Although generally not permitted in the Industrial Area designation, Section 12.7.13.4 of the Official Plan permits retail sales for products that are produced and / or assembled on the premises, subject to select conditions. Although retail commercial space is certainly not the focus of the Industrial Area designation, it is likely that a modest supply of commercial functions could locate in these areas.

Vandorf Secondary Plan Mixed Use Area

The Vandorf Secondary Plan Mixed Use Areas are located to the southeast of the intersection of Aurora Road and Woodbine Avenue, as shown in Figure 9-5. Modest development is permitted in these areas, including low and medium density residential uses, and small scale commercial and institutional uses. As such, these areas could accommodate modest amounts of local serving commercial retail and service space. Given the surrounding land uses and context, this may take the form of convenience food services, or restaurant / fast food establishments.

Figure 9-5: Vandorf Preston Lake Secondary Plan



SOURCE: urbanMetrics inc., based on select portions of Vandorf Preston Lake Secondary Plan Schedule G.

Lincolnville Major Transit Station Area

The Town of Whitchurch-Stouffville is developing planning guidance and policy in support of an Official Plan Amendment to permit transit-supportive densities and land uses around the Lincolnville GO Transit Station. This proactive planning envisions a significant increase in residential and non-residential density surrounding the station.

Per reporting previously prepared by urbanMetrics as input to the land use plan, a preliminary total of between 39,900 and 50,300 square feet of local serving retail and service commercial space was recommended for the MTSA, based on anticipated population and employment. The commercial uses anticipated in the MTSA would be local serving in nature—primarily deriving sales support from future residents in the surrounding MTSA, as well as other users of the GO Transit node.

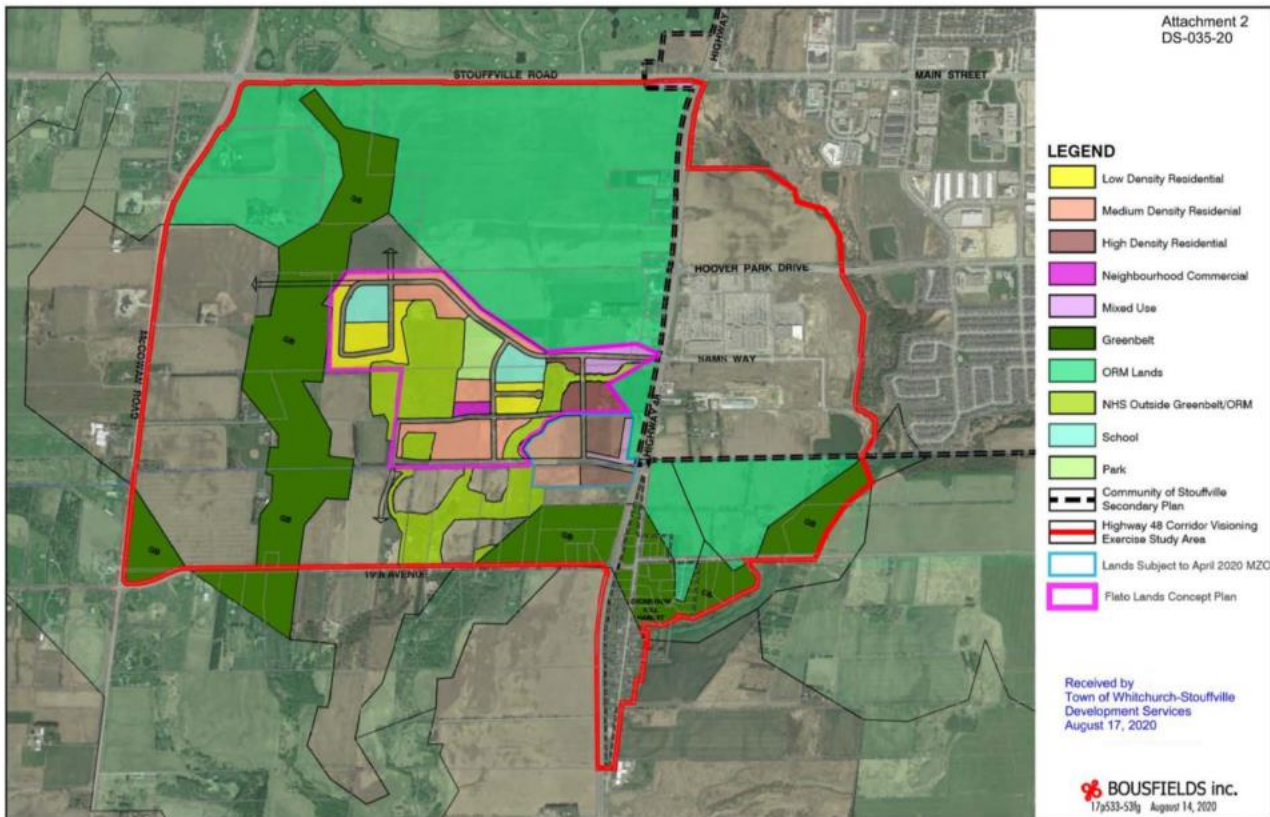
Minister's Zoning Orders

Under the Planning Act, a Minister's Zoning Order ("MZO") is a Provincial policy tool available to the Minister of Municipal Affairs and Housing, that allows the Minister the authority to designate or re-designate a parcel of land, at their discretion. The mechanism can be utilized for several reasons, including overruling municipal bylaws, fast tracking development, or responding to emergency situations.

In Whitchurch-Stouffville, the Provincial Government has—with the endorsement of municipal council—recently issued two MZOs to provide fast-tracked permits to support primarily residential development on lands adjacent to Highway 48, south of Main Street, shown in Figure 9-6. A portion of these lands are located within the Highway 48 Visioning Study, currently being undertaken by the Town of Whitchurch-Stouffville. Additionally, a portion of the lands that fall under these permissions are located within the City of Markham.

Whitchurch-Stouffville is working collaboratively with a consulting team to develop an updated vision for development of this node. As a result of the issuance of Minister's Zoning Orders to lands located to the west of the Gateway Mixed Use Area, land use planning in this area has been rescoped, in an effort to ensure that the vision for these lands adequately respond to the new conditions.

Figure 9-6: Minister's Zoning Order Locations



SOURCE: Bousfields inc., prepared August 2020.

The two proposals contemplate 1,964 and 507 residential units respectively, with some retail / service commercial use contemplated. Per planning documents submitted as part of each respective MZO application, it is our understanding that the planned function of the commercial and mixed-use designations in these areas would be neighbourhood serving in nature, intended to primarily support the proposed residential developments on each site.

Whitebelt Lands

Whitebelt lands are lands located outside of urban settlement areas, that are not identified as protected by environmental considerations (e.g. Oak Ridges Moraine, Greenbelt, etc.). Generally, these lands are agricultural or open space, and are identified as appropriate areas to accommodate additional population or employment growth.

Based on reporting released in April 2021 by York Region, the Town of Whitchurch-Stouffville has a total of 375 hectares of Whitebelt lands. Based on anticipated population and employment growth anticipated to 2051, all of these lands are proposed to be required to accommodate urban expansion.

Figure 9-7 below demonstrates the proposed general allocation of use for the expansion lands. As shown, the majority of these lands would be dedicated to community land, with the primary function of accommodating residential and supportive employment (e.g. community serving) growth. Based on the recent MZO approvals granted by the Province of Ontario, proposed concepts on just over 50 hectares of community land have been granted permissions, largely to provide residential-focused communities, with some mixed-use and neighbourhood serving commercial space.

Figure 9-7: Preliminary Urban Expansion in Whitchurch-Stouffville

Whitebelt Lands	Land Area (ha)
Available Lands	375
Proposed Urban Expansion	375
<i>Allocated to Community Land</i>	<i>280</i>
<i>Allocated to Employment Land</i>	<i>95</i>
Approved MZOs on Community Lands	
Flato May 2020 MZO	9.4
Flato October 2020 MZO	44.0
Net Proposed Urban Expansion Lands	
Community Land	226.6
Employment Land	95

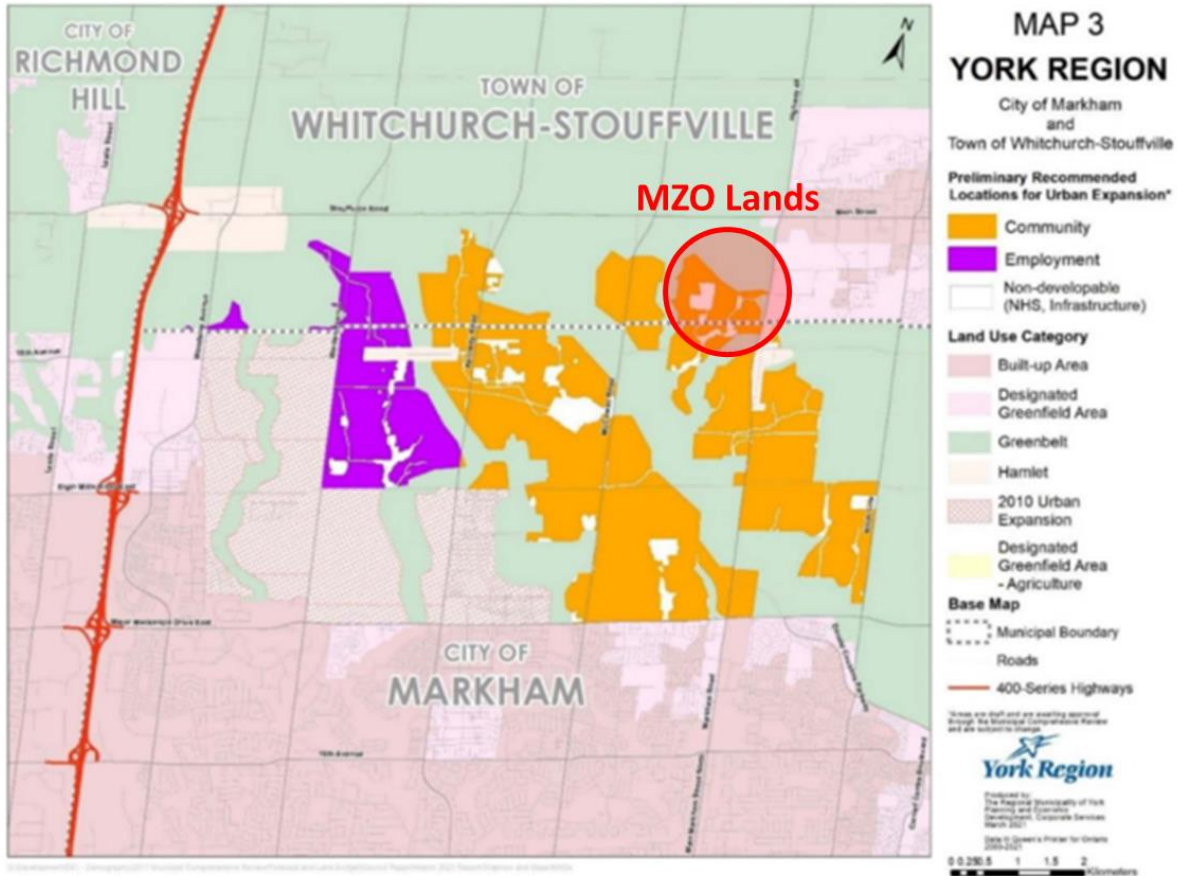
SOURCE: urbanMetrics inc., based on York Region's Planning and Economic Development Branch.

As shown previously in Figure 4-7, and in the map provided below, the proposed Whitebelt Expansion lands in Whitchurch-Stouffville are generally located to the west of the Stouffville settlement area, to the south of Stouffville Road. As shown, lands planned for employment-based uses are generally located towards the western edge of the municipality, closest to the Gormley settlement, as well as Highway 404. Given the nature of the surrounding land uses within Gormley, as well as proximity to Highway 404, the lands represent a preferred area for industrial uses within the Whitebelt lands.

It is additionally important to recognize that the lands proposed to be added in urban expansion are physically more oriented towards the City of Markham than with Stouffville. As illustrated, each of the community and employment land areas are contiguous with expansions proposed within the City of Markham, but represent distinct "islands" of development in Whitchurch-Stouffville, separated by environmentally protected areas. Furthermore, as the proposed developable land areas do not provide direct frontage onto Stouffville Road, visibility and accessibility into these areas from the east-west axis is suboptimal.

As a result, close coordination with the City of Markham will be imperative in ensuring that the urban expansion lands are developed in a manner that supports the outlined growth targets, and also ensures an adequate level of commercial services for residents in Whitchurch-Stouffville.

Figure 9-8: Proposed Whitebelt Expansion Lands



SOURCE: urbanMetrics inc., based on York Region Planning and Economic Development Branch.

NOTE: MZO area delineation is for reference only.

Other Settlement Area and Rural Growth

Additional commercial growth may occur in areas outside of the Town of Stouffville. For example, the Ballantrae Secondary Plan Area permits some limited commercial development. The proposed update to the plan contemplates additional permissions for commercial and mixed-use residential uses, particularly concentrated along Highway 48. Given the general growth patterns in the surrounding area, as well as likely scale of development which may be contemplated, development in this node may support a small supply of additional commercial space.

Similarly, it is possible that additional commercial development could be contemplated along other major transportation routes in Whitchurch-Stouffville, including Highway 14, Highway 15 or Highway 48. Although these areas are unlikely to realize significant commercial development activity, some small-scale additions of commercial space may be accommodated in these areas.

Intensification Opportunities

In addition to the development lands identified previously, we have further identified built up areas in Whitchurch-Stouffville which are planned to support intensification, which could include the addition of commercial space. In some contexts, this intensification may be of existing commercial nodes. It is important to note that—based on recent trends in the Greater Toronto Area—the intensification of existing retail sites frequently results in a net loss of retail space, as these spaces are reimagined to better serve the community.

The Town’s current intensification target is upwards of 10-15% to 2031. It is important to note that as part of its Municipal Comprehensive Review, York Region has proposed a draft intensification target of 24% to support growth in Whitchurch-Stouffville to 2051.

Community Core Area

Whitchurch-Stouffville’s Community Core Area is the Town’s downtown and serves as the primary focal point for the community. The area is planned to continue to serve the Town with a range of commercial uses, in addition to employment and residential development. Intensification, particularly of residential uses, is directed to the Community Core Area. As this area continues to evolve as Whitchurch-Stouffville’s central node, additional fine-grain commercial space is likely to occur within the existing built-up area.

Western Approach Area

The Western Approach Area includes lands along Main Street, immediately west of the Community Core Area, extending west of Ringwood Drive. The Western Approach Area is currently comprised primarily of suburban, large format retail commercial uses. The Western Approach Area is planned to develop as a mixed-use corridor, which will complement the downtown node as a secondary focal point for the community. It is intended to intensify with medium density residential, commercial and employment uses.

It is important to note that intensification of individual properties along this corridor may ultimately result in a net reduction in commercial space, subject to market demand and development economics. However, this area is planned to continue to accommodate larger format, regional serving retailers which may not necessary be appropriate in the fine-grain retail spaces in the Community Core Area. Furthermore, although there are some vacant properties within this node, the Western

Approach is not anticipated to account for a significant amount of additional commercial floor area in Stouffville.

Regional Retail Area

Whitchurch-Stouffville's Regional Retail Area is currently comprised of approximately 357,000 square feet of commercial space, containing retailers including Wal-Mart, Sportchek and Canadian Tire. Full buildout of the node contemplates upwards of 426,000 square feet of commercial space, which could result in the addition of approximately 69,000 square feet.

Employment Conversion Areas

Additional intensification opportunities may emerge as part of employment land conversions occurring throughout Stouffville, particularly focused along Hoover Park Drive. Two employment area conversion requests were approved by the Region in October 2020, as part of its ongoing Municipal Comprehensive Review.

It is our understanding—per recent development proposal activity—that SmartCentres and Calloway REIT are proposing the conversion of lands to the immediate east of the node from employment lands to allow for the establishment of a mixed use “Innovation Hub.” Additionally, intensification and development of additional retail space within the Regional Retail Area is proposed to be in the form of mixed-use development, including office, residential and hotel-based uses. The vision outlined for this area contemplates a range of uses, including commercial retail, office, hotel, light industrial, residential and seniors residences. Subject to the outcome of the application, this site could have a significant impact on the importance of the Regional Retail Node, and the overall quantum of commercial space being contemplated at this broader precinct.

Furthermore, the Town of Whitchurch-Stouffville endorsed the Zhawd Corporation's (Corebridge) conversion request for the property located at the northeast corner of Highway 48 and Hoover Park Drive. The 66.7-acre site contemplates mixed use development comprised of office, institutional, retail and residential space. Per preliminary conceptual plans, the vision outlined contemplates some 400,000 square feet of regional office space, as well as almost 120,000 of retail / service commercial space.

As both plans evolve, it is important to note that council has directed staff to require that approximately 400 square feet of non-residential space should be provided for every dwelling unit contemplated.

9.4 Characteristics of Commercial Supply

As identified previously, the Town of Whitchurch-Stouffville has a range of different lands and areas capable of supporting future commercial growth. The existing and planned lands vary substantially in

size, anticipated built form and service area. The table below provides a brief summary of these factors. This analysis will position each designated area in terms of capacity to support commercial growth, as well as the nature of the growth expected.

This analysis provides an important foundation for understanding the capacity and service level of existing and planned commercial lands in Whitchurch-Stouffville. The commercial demand analysis provided in the following section will identify the amount of commercial space required to serve anticipated growth to 2051, which is then compared against available supply. These steps will inform the land use policy in Whitchurch-Stouffville's Official Plan Review, to ensure that there is sufficient commercial supply planned to adequately serve the community.

Area or Designation	Current Function	Planned Function	Assumed Service Area	Future Space Potential
Gateway Mixed Use Area	Agricultural / vacant	Mixed use gateway to Stouffville. Residential, institutional, commercial contemplated	Stouffville, with some broader inflow beyond	55,000 square feet retail 55,000 square feet office
Neighbourhood Retail Area	Open space	Commercial and residential	Eastern / Northern portion of Stouffville, some inflow from surrounding rural areas	48,000 – 90,000 square feet
Industrial / Business Park Commercial	Light industrial / office functions	Light industrial, office and potential commercial	Town of Whitchurch-Stouffville with modest inflow	Limited
Vandorf Secondary Plan Mixed Use Area	Open space / light industrial	Low / medium density residential, small scale commercial or institutional	Vandorf and some inflow from surrounding rural areas	Limited
Lincolnville MTSA	GO Station, parking, light industrial, open space / agricultural	Medium / high density residential and commercial	Localized, serving surrounding residents and GO Transit users	40,000 – 50,000 square feet of retail and service commercial space

Whitebelt Lands	Open space, agricultural land	Residential, employment, commercial	Regional and neighbourhood serving	Significant
Minister's Zoning Orders	Open space, agricultural	Low / medium density residential, some commercial	Town of Whitchurch-Stouffville	Modest
Other Settlement Areas / Rural Growth	NA	NA	NA	Limited
Community Core Area	Pedestrian-focused main street, consisting of commercial retail, residential and institutional uses	Medium / high density residential and non-residential	Town of Whitchurch-Stouffville with modest inflow expected	Modest
Western Approach	Auto-oriented main street, primarily comprised of commercial retail	Mixed use corridor containing residential, employment and commercial uses	Town of Whitchurch-Stouffville, with modest inflow expected	Modest
Regional Retail	Auto-oriented, big box retail, comprised of national and international banners	Retail / Service commercial focused node, with ancillary institutional, employment and residential functions	Town of Whitchurch-Stouffville, as well as adjacent areas of York Region	Modest
Employment Conversion Areas	Traditional industrial functions or open space	Unknown, potentially mixed use residential developments containing retail at base	Likely the Town of Whitchurch-Stouffville	Modest

10.0 Commercial Demand Analysis

Key Findings

- Based on population growth, an **additional 2.5 million square feet of commercial space will be required by 2051 to achieve a balanced service level for Whitchurch-Stouffville residents.**
- **Whitchurch-Stouffville is currently underserved in terms of commercial space per capita, based on comparable municipalities throughout southern Ontario.**
- Given the community's proximity to major population, employment and commercial centres, including Markham and Richmond Hill, **there is a significant outflow of expenditure to surrounding municipalities. There are opportunities to recapture portions of this outflow as Whitchurch-Stouffville's commercial offerings expand.**

Using a number of statistical inputs, including per capita income estimates, population projections and commercial inventory data, we have evaluated demand characteristics for several key commercial categories. Using a combination of traditional expenditure-based retail market analysis techniques as well as a supplementary per capita space ratio assessment, we have forecasted demand for the following categories:

- Food Store Retail (**FSR**);
- Non-Food Store Retail (**NFSR**); and,
- Selected **Services**.

10.1 Expenditure Potential

The following section details the estimated retail expenditures of Whitchurch-Stouffville residents by major retail store category, based on per capita expenditure and population estimates. This expenditure analysis has served as the basis for more detailed market demand calculations presented herein; particularly for the FSR and NFSR store categories for which reliable Statistics Canada Retail Trade data are available.

Current Per Capita Expenditures

Based on Statistics Canada Retail Trade data, average per capita retail expenditures in Ontario have been estimated for 2020, which represents the latest full-year period for which Retail Trade data are

currently available.⁶ Allocations by individual store category have also been determined, consistent with the key commercial categories identified above for consideration as part of our analysis.

A regression equation has also been applied, as developed by urbanMetrics utilizing Statistics Canada Household Survey data for Ontario residents by income quartile. The use of the regression equations recognizes that spending by store category can vary based on income levels.

Forecast Per Capita Expenditures

In addition to our calculation of base year (2020) expenditures, per above, the detailed analytical tables provided in the appendix include a summary of our per capita retail expenditures of local residents for the 2051 planning horizon. It should be noted that these estimates represent only the expenditure potential of local Whitchurch-Stouffville residents, and do not include purchases made by persons residing outside of the community (i.e., “inflow”), which have been accounted for separately.

An average annual growth rate, excluding inflation, has also been applied to the base year per capita expenditures.

Retail Expenditure Potential

Based on our estimates of current and future per capita retail expenditures, the total expenditures of local residents have been calculated by multiplying the average per capita retail expenditure by the projected population for each unique geography over the forecast period.

For the Town of Whitchurch-Stouffville, total retail expenditures have been estimated at some \$510.8 million in 2021; increasing to \$1,144.5 million by 2051. This represents a spending growth of approximately \$633.7 million over this period, which will undoubtedly require a significant amount of new and / or higher performing retail facilities to support the significant level of growth anticipated across Whitchurch-Stouffville in the coming years.

The existing base year distributions for expenditures in 2021 are urbanMetrics’ estimates based on our review of the provincial expenditure data. Distributions for all future periods have been held constant based on these existing provincial averages.

See Appendix D for detailed calculations

⁶ Recognizing the potential impacts of COVID-19 on expenditure patterns in 2020, urbanMetrics reviewed any deviations in expenditure patterns between 2019 and 2020. It is our assessment that spending patterns—in aggregate—were not drastically differentiated from those experienced in 2019, prior to the pandemic.

The expenditure calculations presented in our analysis reflect the spending of local Whitchurch-Stouffville residents in all FSR and NFSR categories, whether located within the Town or elsewhere. The portion of these expenditures made in stores located outside the Town are referred to as “outflow”. Local retail facilities will also obtain sales from persons residing outside of Whitchurch-Stouffville, such as visitors, tourists and local employees living outside this area. Expenditures by non-local residents at stores located in Whitchurch-Stouffville are termed inflow. We have recognized both outflow and inflow in the market demand analysis, as presented in the following sections of this report.

10.2 Demand Assessment

Retail Demand Analysis (Expenditure Approach)

Relying on a number of statistical inputs, including: the Town of Whitchurch-Stouffville’s population forecasts; average per capita income levels of Study Area residents; the results of our customer origins surveys; and Retail Trade data from Statistics Canada, we have carried out a retail market demand analysis in order to identify the future potential available to existing and proposed developments in the Study Area. As noted earlier, we have undertaken this analysis to focus specifically on: FSR (Food Store Retail), NFSR (Building and Outdoor Home Supply; General Merchandise; Apparel & Accessories; Furniture, Home Furnishings & Electronics; Other Miscellaneous Retail; Pharmacies & Personal Care Stores). Based on availability of data, we have also evaluated the demand for Food Services & Drinking Places using an expenditure-based approach.

The general approach utilized in undertaking this assignment is consistent with the basic methodology outlined in Section 1.3 for this type of expenditure-based retail demand analysis. Generally speaking, these calculations are intended to provide a general measure of the future market potential available across the various store categories identified, based on anticipated growth in available retail expenditures from the local residential population, as well as some marginal adjustments to current market capture rates as the area continues to respond to the introduction of the various proposed new commercial facilities identified in Whitchurch-Stouffville.

Based primarily on the significant new growth in population expected in Whitchurch-Stouffville, a substantial amount of new FSR, NFSR and Food Services space will be warranted over the next 30 years. Specifically, we estimate that there could be potential to introduce a number of new food stores in addition to a range of supplementary local-serving retail facilities and convenience-oriented stores, collectively amounting to upwards of 300,000 square feet by 2051. Based on standard supermarket floor plates, this *could* result in the addition of upwards of six or seven supermarkets in Whitchurch-Stouffville, in addition to other specialty goods retailers.

We further note that our analysis suggests a demand for between over 1.1 million square feet of Non-Food Store Retail, and 350,000 square feet of Food Service & Drinking space by 2051.

We further note at this stage that we believe several aspects of our analysis are conservative, given our corresponding adjustments for e-commerce and due to holding constant most of the base-year market conditions and assumptions shown. Based on this conservatism, most of the future potential demonstrated by our analysis is predominantly a function of the residual potential available through simple growth in population. Moreover, all existing stores are assumed to continue operating and functioning at current sales per square foot performance levels, as articulated in our base-year calculations.

See Appendix D for detailed calculations

Services Demand Analysis (Per Capita Approach)

To evaluate the current supply of and future need for local-serving services space within Whitchurch-Stouffville (including restaurants and other services/entertainment-based commercial facilities) we have undertaken a slightly different per capita space ratio analysis, which relies on many of the same or similar inputs as the expenditure-based analysis outlined above. However, this method requires a slightly different focus and relies on the following central analytical assumptions:

- The portion of Study Area residents' space requirements that are likely to be made or met directly with the Study Area; and,
- The amount of space that is likely to be supported from inflow expenditures from persons residing outside of the Study Area, including those visiting but not living in the area.

The detailed per capita space analysis presented in the appendix at the end of this document provides a high-level indication as to the amount of commercial space required to serve the identified Study Area population for selected Services categories. For the purposes of this analysis, two distinct periods have been considered based on a constant set of underlying assumptions:

- Based on the estimated base year population and supply of existing commercial space in the Study Area. This analysis provides an indication of current gaps and/or over-supply of space in the commercial offerings of the Study Area (i.e., shortfall vs. surplus).
- Based on the Whitchurch-Stouffville forecast population for the Study Area at 2051, consistent with our population analysis presented earlier in this report. Per capita space requirements have been applied to the forecasted growth to 2051 to provide an estimate of the potential future demand within the Study Area and to identify opportunities to meet that demand.

Our per capita analysis is intended to supplement the core retail analysis presented earlier in this section of the report and is specifically targeted at evaluating growth in service-based sectors for which Retail Trade Data is unavailable. The key findings that emerged from the analysis are as follows:

- **As of the base year of 2021, the Study Area appears to be underserved from a market perspective**, showing a shortage of commercial space in several Services sub-categories. This likely indicates that Whitchurch-Stouffville residents are travelling outside of the Town in order to access services which are available in surrounding municipalities, including Markham, Richmond Hill and Aurora. This outflow is likely a result of two general factors. First, is that Whitchurch-Stouffville does not currently offer a comprehensive complement of services, comparable to larger, more regional serving municipalities. Second, a significant portion of Whitchurch-Stouffville residents commute outside of the Town for work. Generally, a substantial portion of services are accessed during working hours, particularly financial services, select personal care services.

As Whitchurch-Stouffville continues to grow as a population and employment centre, it is expected that the Town's service offerings will expand to support the anticipated population and employment forecasted over the planning horizon. However, given the significant employment and commercial offerings in surrounding municipalities, it is likely that Whitchurch-Stouffville residents will continue to rely—in part—on commercial businesses outside of the Town.

- Notwithstanding these base year conditions, significant population growth forecast for the Study Area anticipated to 2051 will result in a need for a major expansion in service-based commercial space to meet the day-to-day needs of Whitchurch-Stouffville. Based on the results of our per capita space ratio analysis, the level of population growth anticipated by 2051 in the Study Area translates to an increased need of some 640,000 square feet of space by 2051. It is important to note that this estimate takes into consideration the existing amount of space located within the Study Area.

See Appendix D and Appendix E for detailed calculations

Warranted Space Summary

As highlighted in Figure 10-1 below, a total of some 2,500,000 square feet of new FSR, NFSR, BWL and Services space could be warranted in Whitchurch-Stouffville between 2021 and 2051. These estimates are based on the combined warranted space analyses presented above for both our expenditure-based (retail) and per capita space ratio (services) analyses.

Adding this space to the existing total of some 1.5 million square feet would elevate the space per resident in Whitchurch-Stouffville from 31 to 40 square feet per capita. This is still below the space available in other comparable sized communities. However, this ratio recognizes both the impact of increased internet shopping behaviour, as well as the greater attraction of Stouffville as a retail destination with a larger overall internal market base.

This quantum of space represents a significant amount of new demand that will be accommodated in a range of formats, sizes and locations throughout Whitchurch-Stouffville, which has been discussed in the following sections.

Figure 10-1: Warranted Space Summary

2021 - 2051 Demand	
Food Store Retail	337,800 sq. ft.
Non-Food Store Retail	1,162,200 sq. ft.
Restaurants and Fast Food	359,700 sq. ft.
Health and Personal Services	137,800 sq. ft.
Other Services	503,900 sq. ft.
Total Retail + Services Space Warranted	2,501,400 sq. ft.

SOURCE: urbanMetrics inc.

Beer, Wine and Liquor has been included in the Food Store Retail category.

The Official Plan Review will determine broader land use policies with regards to the future structure of the Town. As such, many of the details with regards to the format and location for future space requirements will be addressed through this larger planning exercise. However, in order to provide direction for the new Official Plan, we have divided future commercial land use requirements into four general categories:

- **Local Serving Space** – Lands that will be required to serve a localized population’s weekly and day-to-day shopping needs. The vast majority of this space would comprise food stores and services, together with a selection of local serving non-food retail outlets, such as pharmacies and health related outlets, small scale general merchandise outlets (i.e. dollar stores), and some specialty retailers seeking a neighbourhood scale setting.
- **Regional and Large-Scale Retail** – These sites would require a highly accessible location with opportunities for larger store footprints. These would include approximately 60% of non-food

store retail space requirements and would accommodate large scale retailers such as home improvement stores, furniture and appliance stores and large general merchandise outlets, as well as a large share of fashion and other specialty non-food retail outlets.

- **Downtown Stouffville, the Western Approach, and the Gateway lands** – These sites would accommodate predominantly small-scale local retailers, some specialty retailers and services. These would be developed on the remaining vacant sites along Stouffville Road, as well as through intensification of existing developed sites. For the most part, available development and redevelopment sites are relatively small scale, which would limit the type of retail and service tenants that could be accommodated in these areas.
- **Employment Lands and Miscellaneous locations** – Based on our past experience approximately 5% to 15% of a community's commercial inventory is contained in employment areas. This would include: ancillary retail and services space such as restaurants and fast food outlets; specialty building supply outlets, such as flooring, plumbing, electrical and pool dealers; some local serving office space; and some recreation/community uses, such as, paintball games, fitness and sports clubs, social clubs, automotive uses, and banks.

The extent to which these uses occur in employment areas and business parks depends on the planning permissions in each area. In addition to employment areas, a small amount of retail space can be found in non-traditional locations, such as agri-businesses and home-based businesses. While planning policies should take opportunities to support these businesses into consideration, in terms of the total quantum of commercial space required to serve future residents this space is considered negligible.

Figure 10-2 provides a summary of how the future warranted space is distributed over each of these four areas:

Figure 10-2: Warranted Space by Type

Location	Space (SF)	Rationale	Locational Considerations
Local Serving Retail Space	1,050,000	Based on a review of the warranted space by store categories. Includes, food store retail, services and a limited selection of non-food store retail.	Should be strongly related to new residential neighbourhoods and high-rise apartments. New supermarkets should strive to be located within 2 kilometres of approximately 10,000 persons. Designated Growth Areas, sites will be determined through Secondary Plan process
Regional Retail	750,000	Based on a review of warranted space by store category. Includes predominantly non-food store retail and a limited range of services.	Should be located on major arterial roads, preferably at a major intersection. Could be divided into two sites.
Downtown, Gateway and Western Approach	450,000	Based on a review of available sites, current applications and intensification potential. Includes predominantly local serving retail, services and some small-scale specialty non-food retail.	Stouffville Road, including Downtown, Gateway, and Western Approach areas of Stouffville.
Commercial Uses on Employment Lands	250,000	Represents 10% of total warranted space. Includes specialty building supplies, select automotive, and selected local services offices, food services and other services.	Will be regulated by land use permissions in future industrial areas.
Total	2,500,000		

SOURCE: urbanMetrics inc.

Other Considerations

The analysis presented above is predicated on a series of assumptions and conditions. If these conditions were to change, the amount of commercial space required to support the local market area could rise or fall accordingly. The following represent some of those conditions:

- The population of Whitchurch-Stouffville will grow to approximately 101,400 by 2051, adding almost 50,000 new residents.
- Whitchurch-Stouffville is currently not a significant tourism market. Particularly, commercial services located in the Town of Stouffville or surrounding rural communities do not generate a significant portion of their sales revenues from tourism-generated visits. The inflow shares utilized above assume that Whitchurch-Stouffville's tourism draw will not meaningfully change over the planning horizon.

- As previously discussed, we have utilized a per capita service level approach to anticipate future demand for services (e.g. personal care, restaurants, medical, etc.) in Whitchurch-Stouffville. Unlike the retail goods segment, services are far less vulnerable to online shopping, or consolidation. As such, these sectors have not seen a decline in per capita service levels as has been experienced by retail goods. For the purposes of our analysis, we have held constant the service levels utilized in our base year 2021 analysis, assuming that levels for service-based functions will not decline over the period.
- Whitchurch-Stouffville functions as a major commercial node that primarily draws its customers from a relatively local trading area. As such, the Town is generally less exposed to significant store closures and bankruptcies that have impacted the retail segment in recent years. Restructurings from organizations like Gap, Zellers, Sears, Forever21 and Pier 1 Imports have not resulted in contraction of supply of retailers in the community. Unlike major retail nodes in larger centres, the Town does not have a significant supply of these regional retailers. As such, it is our view that the Town is less vulnerable to the broader uncertainty and transition occurring within the retail segment. Although the Town is likely to experience some friction related to the broader challenges facing bricks and mortar retailing, it is not as exposed to this volatility.

11.0 Reconciling Commercial Supply and Demand

Key Findings

- The results of our analysis indicate that Whitchurch-Stouffville does not currently have sufficient designated commercial land supply to support anticipated need to 2051.
- Based on known and anticipated sources of commercial supply, **a shortfall of 1,750,000 square feet of commercial space has been identified.**
- The shortfall in space would need to be accommodated from a number of sources:
 - Designation of local serving retail sites as part of future Secondary Plans and plans of subdivision;
 - Intensification, primarily within the Community of Stouffville;
 - Designation of one or two Regional Commercial sites; and,
 - Zoning and Official Plan policies permitting certain selected limited commercial uses within employment areas and business parks which may include: specialty building supplies, automotive repair and service, ancillary commercial space, local serving offices, and others as appropriate.
- **Approximately 680,000 square feet of unallocated space should support regional serving retailers,** including large-format outlets and specialty non-food retailers. This space would serve residents of the entire Town and beyond. Based on a review of the urban expansion opportunities in the Town and Whitebelt, there are limited available options that would be suitable for this format of space in Whitchurch-Stouffville.

The following section provides an analysis and commentary of where anticipated demand could be accommodated within the community of Whitchurch-Stouffville. This section includes a mixture of known, quantifiable space figures (e.g. square footage targets identified by policy), urbanMetrics' estimates or ranges (e.g. estimates based on land areas or future population), or high-level commentary.

11.1 Reconciliation

Based on the various sources of commercial supply opportunity identified in Section 9.0, as well as the overall demand estimate calculated in Section 10.0, the following outlines a process of reconciling known supply sources against overall anticipated demand. The project team has approached this

process methodically, based on a 2-step process, informed by the availability of inputting information, or “certainty” around the amount of commercial supply which could be brought forward:

Consider known, quantifiable sources of commercial supply

The sources of commercial supply identified in this step have been identified, either as part of existing development applications, direction in planning policy, or previously secured approvals. Although plans may deviate from the numbers presented as part of this reporting, the order of magnitude quantity of supply contemplated on these sites is effectively known and unlikely to significantly change.

Commentary on Additional Supply Sources

In select circumstances, there are sources of likely additionally supply of commercial space which cannot necessarily be estimated with a reasonable degree of confidence. These primarily include opportunities to redevelop and intensify existing underutilized properties (primarily in Downtown Stouffville, along the Western Approach corridor, or the employment land conversions). It is likely that these will account for a source of additional commercial supply. However, redevelopment or conversion potential is subject to the interest and direction of individual property owners. The ultimate net additional supply which could be generated from those lands cannot necessarily be estimated, as there are a range of factors which ultimately limit the ability to determine the underlying yield over the 2051 horizon.

Identification of Shortfall / Surplus and Policy Options

Based on the reconciliation prepared above, a quantified figure assessing the overall results of the reconciliation process will be determined. Additionally, it will be important to understand the quantum of shortfall / surplus reported, and whether there is likely sufficient capacity to make up that shortfall in lands identified in the previous step. The extent of the difference, and opportunity from intensification, employment conversions and rural growth to create a balanced environment is an important step that will ultimately inform the policy recommendations.

The following represents the supply-demand reconciliation process undertaken to determine overall capacity to support growth to 2051.

Anticipated Demand

As identified in Section 10.0, the results of our commercial demand analysis suggest that achieving an appropriate service level for the

Town of Whitchurch-Stouffville will require the addition of some 2.5 million square feet of commercial space by 2051.

This analysis will identify the capacity within the Town of Whitchurch-Stouffville to accommodate and support the overall space anticipated required to achieve a balanced commercial environment.

Estimated Supply

Based on the analysis presented in Section 9.0, urbanMetrics has identified a known, or quantified commercial supply from a range of sources. These sources were identified based on known development activity, established local policy frameworks, and remaining land available to support existing approved development. Although the supply from these sources could change over time as a result of updated policy direction, market demand or development market dynamics, it was determined that these sources reflected a reasonably accurate representation of potential supply. The following potential sources of supply were considered in this analysis:

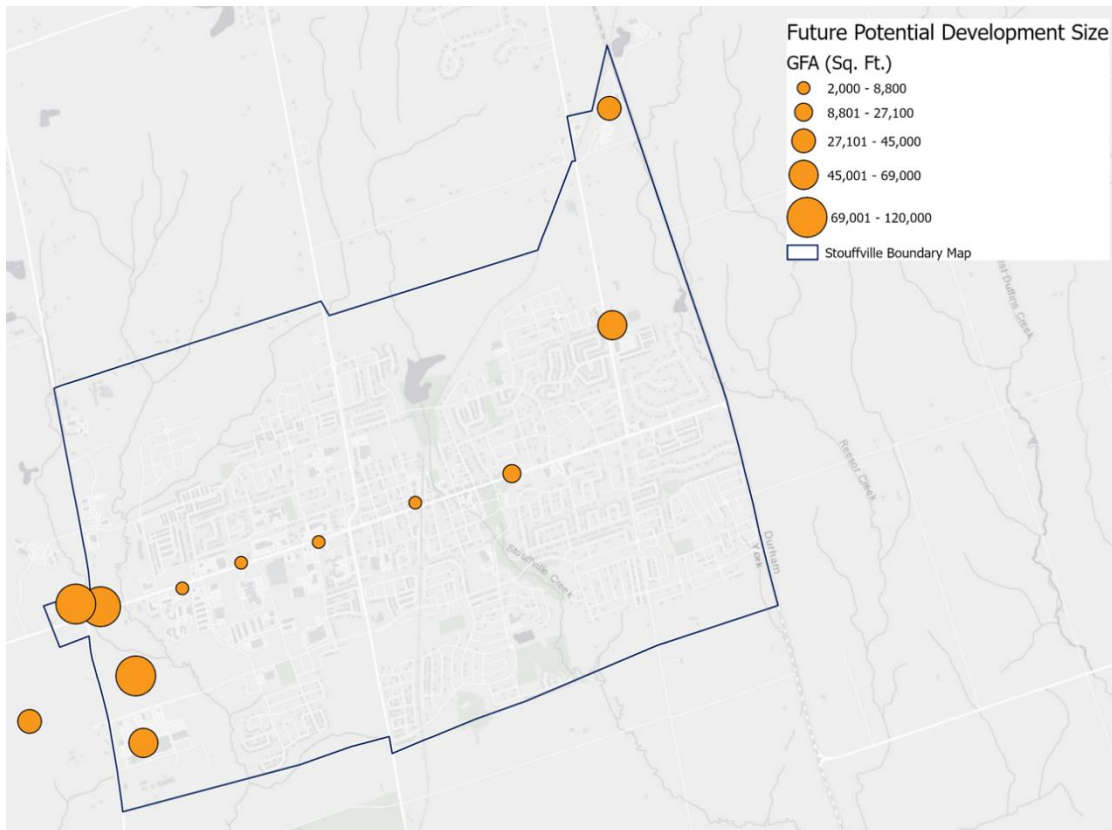
- Under construction and proposed development activity;
- Vacant commercially designated lands;
- Minister's Zoning Order Lands;
- Approved Employment Conversion Requests;
- Gateway Mixed Use Area;
- Neighbourhood Retail Area;
- Lincolnville MTSA and,
- Remaining Regional Retail supply.

In total, urbanMetrics has identified a potential supply in the range of 700,000 – 800,000 square feet of commercial space which could be generated from these sources.

Distribution of Future Space by Location and Format

Figure 11-1 shows geographically where known commercial development is planned to occur in the community of Stouffville.⁷

Figure 11-1: Location of Known Development Activity Anticipated in Stouffville



SOURCE: urbanMetrics inc., for illustrative purposes only.

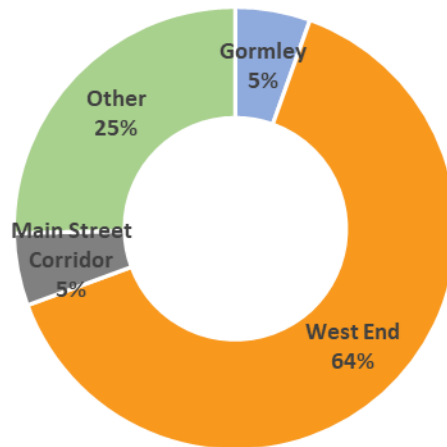
Based on the scale of known development activity identified of between 700,000 and 800,000 square feet of capacity, Figure 11-2 below illustrates the general location of that capacity throughout Whitchurch-Stouffville. As shown, the majority—some 64%—of the identified future commercial capacity is located generally in the West End of Stouffville.

Based on the results demonstrated below, the west end of Stouffville will undoubtedly continue to function as the community's largest and primary commercial cluster. It is likely that it will continue to serve as a draw for prospective regional-serving, large format tenants in the community. It will be

⁷ Includes active or known development applications as well as areas identified by planning policy.

important that municipal staff promote policy that reinforces the importance of this commercial node, while ensuring that it evolves into a more vibrant mixed-use area.

Figure 11-2: Location of Anticipated Future Supply of Commercial Space

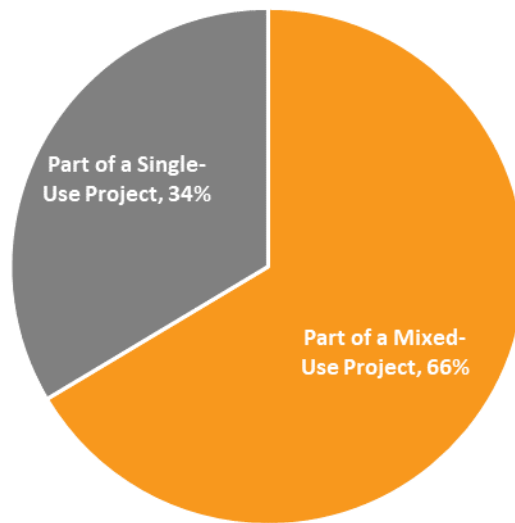


SOURCE: urbanMetrics inc.

NOTE: Figure only considers commercial space which has a reasonably known supply (i.e. through activity or anticipated development activity, policy direction etc.). Additional space will likely be developed throughout Whitchurch-Stouffville, particularly in intensification opportunities, employment conversations, rural communities and Whitebelt designated lands.

Figure 11-3 below illustrates the breakdown of forthcoming commercial projects, based on their general known, or expected format. Single-use projects are generally understood to be stand-alone retail plazas or nodes, typically one or two-storeys, and containing a significant supply of surface parking. For the purposes of this analysis, mixed-use projects are understood to contain retail / service commercial space on the ground and / or second floor of a broader development that integrates residential, large format office, or other uses.

As shown in the figure, two-thirds of anticipated supply in Whitchurch-Stouffville is anticipated to be in a mixed-use form. It is also worth noting that a significant portion of additional sources of supply that were previously identified (intensification sites, downtown development etc.) would likely be in a mixed-use format as well.

Figure 11-3: Forthcoming Commercial Development by Format

SOURCE: urbanMetrics inc.

Breakdown represents urbanMetrics' understanding of the anticipated form of development, informed by the nature of the proposals, as well as broader policy direction pertaining to each site or area.

Additional Sources of Supply

In addition to the known, estimated supply identified above, there are a number of additional, incremental opportunities to support increased commercial space in Whitchurch-Stouffville. Due to the incremental, and generally piecemeal development opportunities on these lands, estimating a potential yield of commercial space is generally inappropriate. Ultimately, the development of these lands will be dependent on market dynamics, individual owner preferences and localized market trends. The following areas could represent additional opportunities for commercial land to be accommodated in Whitchurch-Stouffville:

- Commercial development in industrial / business park lands;
- Vandorf Secondary Plan Mixed Use Area;
- Growth in rural / other settlement areas;
- Incremental intensification in the Community Core Designation (Downtown);
- Incremental intensification in the Western Approach; and
- Approved Employment Conversions.

Altogether, these sources are likely to account for a modest supply of net new commercial space to be provided in Whitchurch-Stouffville over time. As incremental land intensification and redevelopment occurs, it is anticipated that modest increases in commercial supply will be accommodated on ground level, or second floors of mixed-use buildings. Likewise, over time, it is likely that individual property owners may lease traditionally industrial properties to lighter industrial / commercial users, such as breweries, fitness facilities or other services. Additional growth may occur in rural areas, as landowners may seek to redevelop properties with commercial uses. Generally, it is our expectation that the primary audience for those areas would be local-serving in nature.

All told, commercial supply generated from this category is expected to account for a modest amount of net new supply in Whitchurch-Stouffville. This source of supply is not anticipated to be sufficient to establish equilibrium in Whitchurch-Stouffville.

Reconciliation

Based on the foregoing analysis, urbanMetrics has identified a shortfall of supply to accommodate anticipated demand for commercial space in Whitchurch-Stouffville to 2051. It is estimated that the Town has a **shortfall in planned supply that falls in the range of 1.7 to 1.8 million square feet over the period.**

Figure 11-4 provides a summary of the warranted additional commercial space between 2021 and 2051 by type and location of space. “Allocated Space” refers to the proportion of space that has an identified location within the Town based on the following categories:

- Under construction and proposed development activity;
- Vacant commercially designated lands;
- Minister’s Zoning Order Lands;
- Approved Employment Conversion Requests;
- Gateway Mixed Use Area;
- Neighbourhood Retail Area;
- Lincolnville MTSA and,
- Remaining Regional Retail supply.

These categories amount to some 700,000 – 800,000 square feet. The balance of warranted space is unallocated and will require planning approvals in the future, including:

- a) **The designation of lands for local serving commercial uses, either as stand-alone commercial sites or as part of mixed-use developments.** The majority of these approvals would occur

through future secondary plans and plans of subdivision. Typically, these sites would include space ranging from 10,000 to approximately 100,000 square feet and be located on locations strategic to future residential communities, such as gateway sites, important crossroads, or key activity nodes.

- b) **The designation of lands for regional commercial uses.** The future population will require some 750,000 square feet of additional commercial space that will serve more than day to day or weekly needs. Currently the lack of space in this category drives a large number of residents outside of the Town to shop on a regular basis. This space will be needed to support future population growth and to minimize the need for Whitchurch-Stouffville residents to leave the Town in order to shop and obtain services.

At present, there is only approximately 80,000 square feet of expansion lands remaining on the Hoover Park Regional Retail Area. The remaining 680,000 square feet of space, which could take the form of one or two single purpose or mixed-use sites, should be situated on a major arterial roadway or preferable at the intersection of two major arterials. Highway 48 in the vicinity of the existing Regional Retail Area would be ideal for all or a portion of this space, given its centrality to existing and future population growth; the importance of Highway 48 as a major transportation corridor; the existing commercial emphasis of the area; and its location in proximity to the Highway 48/Stouffville Road intersection.

The challenge of this location from a planning perspective is that lands to the west of the Regional Retail Area are subject to a Minister's Zoning Order and are predominantly focused towards residential development. Lands surrounding the Regional Retail Area are currently designated for Industrial and Business Park uses but are subject to proposals for residential and mixed-use development.

In general, other lands suitable for regional commercial type uses in the Town are difficult to identify owing to the awkward shape of Whitebelt lands, which are disjointed, poorly connected to the existing Whitchurch-Stouffville population and are not connected by a major east-west arterial road.

An alternative location would be at the southern edge of the Town's boundary with Markham, on McCowan or Kennedy Roads. These areas have been identified by York Region for potential Community Area expansion. This identification should be undertaken in conjunction with the City of Markham, which could provide for a similar land use designation to the immediate south on lands fronting on 19th Avenue.

Several examples of this cross-jurisdictional approach exist. In Waterloo Region, the Boardwalk shopping centre extends over a kilometre along Ira Needles Boulevard. The shopping centre is divided between the Cities of Kitchener and Waterloo. Although not a single shopping centre,

there is a major regional retail corridor extending between Davis Drive and Green Lane on Yonge Street, which is divided between Newmarket and East Gwillimbury.

- c) **Space identified for the Gateway / Western Approach** lands represent vacant sites, sites under application and estimated intensification potential along Stouffville Road between Highway 48 and the eastern edge of the Community Core Area (Downtown Stouffville).
- d) **Commercial space accommodated within Employment lands** has been estimated at approximately 10% of the total future required space in the Town, based on our experience in other municipalities. This space would represent commercial uses that would be suited to an industrial area or business park, including: specialty building supply outlets (e.g. plumbing, electrical, flooring, pool/spas); automotive and related parts and repair; accessory commercial uses (e.g. food services and other services); local serving offices (e.g. real estate, accounting, financial etc.); and, other miscellaneous uses (e.g. social clubs, sports and leisure instruction, indoor recreation uses, etc.). The exact uses permitted would depend on the designation and the specific land use permissions provided for in the Official Plan and Zoning By-law.

Figure 11-4: Distribution of Warranted Space Growth (2021-2051)

Location/Type of Space	Total Demand	Allocated	Unallocated
Local Serving	1,050,000	325,000	725,000
Regional	750,000	70,000	680,000
Gateway/Western Approach/Downtown	450,000	320,000	130,000
Employment Lands and Other	250,000	35,000	215,000
Total Space (Sq. Ft. GLA)	2,500,000	750,000	1,750,000

SOURCE: urbanMetrics inc.

11.2 Potential Commercial Employment

Using industry standard assumptions, urbanMetrics has evaluated the overall *potential* employment which could be generated based on projected growth to 2051. This has been illustrated in Figure 11-5 below. These include the estimated employment based on the available supply capacity within Whitchurch-Stouffville to accommodate growth, as well as the overall employment which would be supported by expenditures made by Whitchurch-Stouffville residents both inside and outside the Town.

As shown in Figure 11-5, the known capacity of commercial space that could support development in Town could support between 1,400 and 1,600 jobs. Alternatively, the overall demand generated by Whitchurch-Stouffville residents' expenditures could support upwards of 5,000 positions.

Figure 11-5: Estimated Commercial Employment Potential

Based on Available Supply	Square Footage	Employment Estimate
Low Scenario	700,000 square feet	1,400
High Scenario	800,000 square feet	1,600
Based on Overall Demand		
Space Required	2,501,400 square feet	5,000

SOURCE: urbanMetrics inc.

Figures rounded to the nearest 100.

Based on an applied employment density factor of 500 square feet per employee, sourced from Watson & Associates
Town of Whitchurch-Stouffville 2018 Development Charges Background Study.

12.0 Conclusion

Based on the analysis prepared as part of this reporting, Whitchurch-Stouffville will require approximately 2.5 million square feet of additional commercial space by 2051. **A shortfall of approximately 1.75 million square feet** of designated commercial space has been identified.

Our analysis has identified a potential supply of between 700,000 – 800,000 square feet of commercial space which could support future growth. This space has been identified from several sources:

- Under construction and proposed development activity;
- Vacant commercially designated lands;
- Minister’s Zoning Order Lands;
- Approved Employment Conversion Requests;
- Gateway Mixed Use Area;
- Neighbourhood Retail Area;
- Lincolnville MTSA and,
- Remaining Regional Retail supply.

Further, incremental demand is likely to be met through additional sources. However, altogether these sources are likely to account for a modest supply of additional, net new commercial space to be added to Whitchurch-Stouffville. These sources include:

- Commercial development in industrial / business park lands;
- Vandorf Secondary Plan Mixed Use Area;
- Growth in rural / other settlement areas;
- Incremental intensification in the Community Core Designation (Downtown);
- Incremental intensification in the Western Approach; and
- Approved Employment Conversions.

Altogether, approximately 1.75 million square feet of warranted space is unallocated and will require planning approvals in the future. This includes:

- The designation of lands for **local serving commercial uses**, either as stand-alone commercial sites or as part of mixed-use developments;
- The designation of lands for **regional commercial uses**;
- Space identified for the **Gateway / Western Approach**; and
- Commercial space accommodated within **Employment Lands**.

Appendix A North American Industry Classification System

Figure B-1: Retail Store Types, Based on North American Industry Classification System (NAICS)

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

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

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

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

Appendix B Stakeholder Engagement Results

The following slides show the combined results of two stakeholder engagement sessions held in September of 2021.



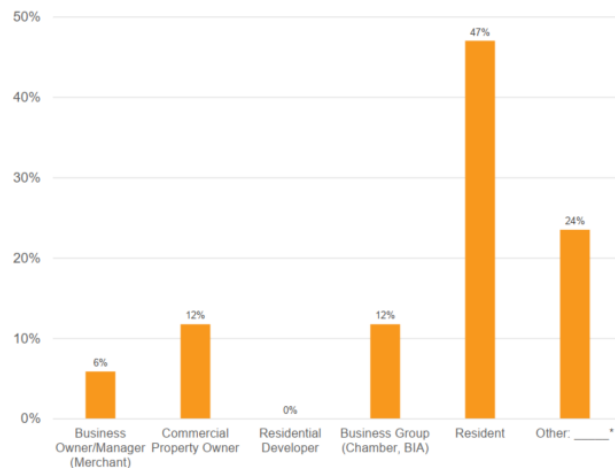
Which of the following best describes your interest in commercial policies in the Town of Whitchurch-Stouffville?

- A. Business Owner/Manager (Merchant)
- B. Commercial Property Owner
- C. Residential Developer
- D. Business Group (Chamber, BIA)
- E. Resident

F. Other: _____ *

* Tell us in the **chat** feature.

Elected official, real estate consultant, regional staff.

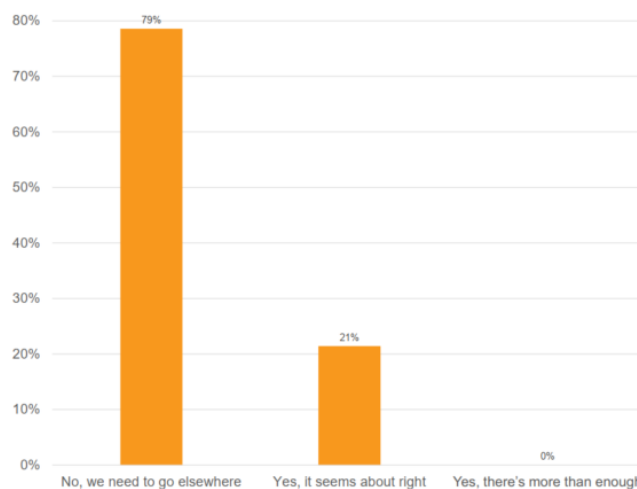


23



Do you think TWS has “enough” retail space to serve the needs of the community?

- A. **No**, we need to go elsewhere to shop
- B. **Yes**, it seems about right
- C. **Yes**, there’s more than enough



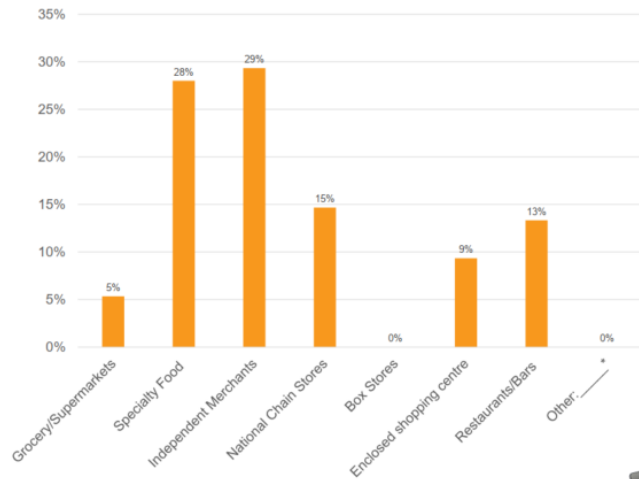
24



What is missing from Stouffville's retail landscape? (rank your top three)

- A. Grocery/Supermarkets
- B. Specialty Food
- C. Independent Merchants
- D. National Chain Stores
- E. Box Stores
- F. Enclosed shopping centre
- G. Restaurants/Bars
- H. Other: _____*

* Tell us in the **chat** feature
Unique Destination retailer(s)



25

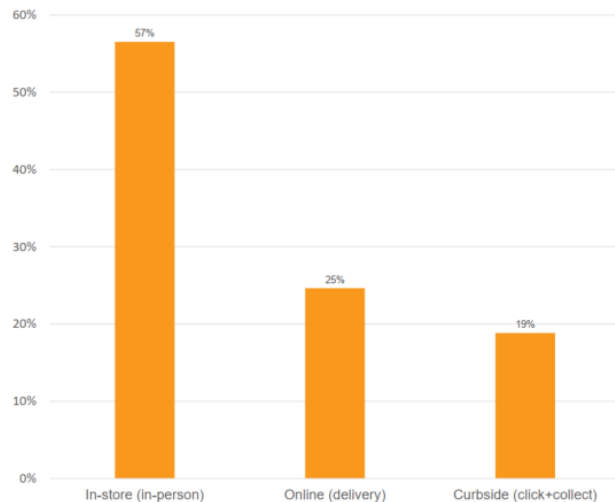


After COVID, what will be your preferred shopping method? (rank order)



FOOD & GROCERIES

- A. In-store (in-person)
- B. Online (delivery)
- C. Curbside (click+collect)



26

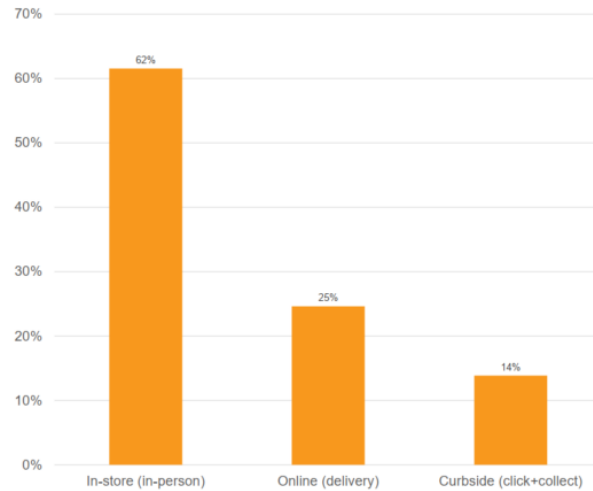


After COVID, what will be your preferred shopping method?



CONSUMER GOODS

- A. In-store (in-person)
- B. Online (delivery)
- C. Curbside (click+collect)

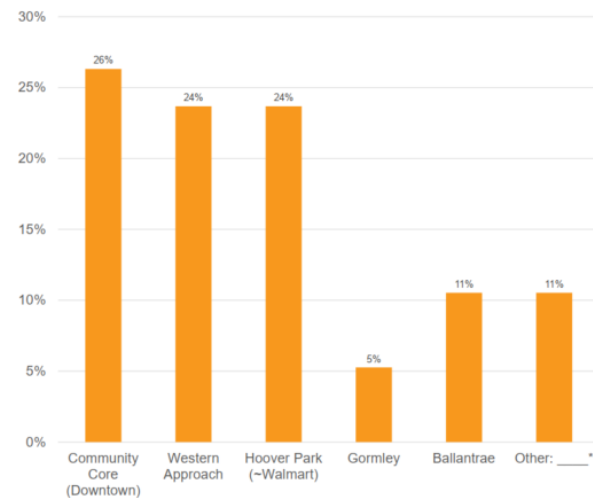


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Where would you most like to see new retail space added? (select top 3)

- A. Community Core (Downtown)
- B. Western Approach
- C. Hoover Park (~Walmart)
- D. Gormley
- E. Ballantrae
- F. Other: _____*



* Tell us in the **chat** feature
No detail provided



28

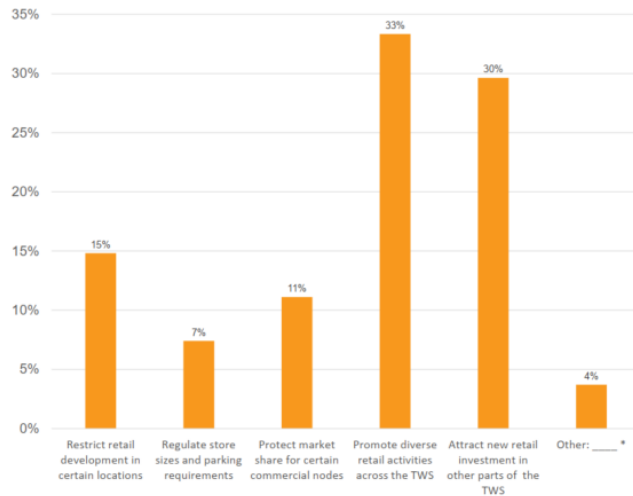


What would you like to see in terms of Official Plan commercial policies? (select two)

The OP should have policies that:

- A. **Restrict** retail development in certain locations
- B. **Regulate** store sizes and parking requirements
- C. **Protect** market share for certain commercial nodes
- D. **Promote** diverse retail activities across the TWS
- E. **Attract** new retail investment in other parts of the TWS
- F. Other: _____ *

* Tell us in the **chat** feature
No detail provided



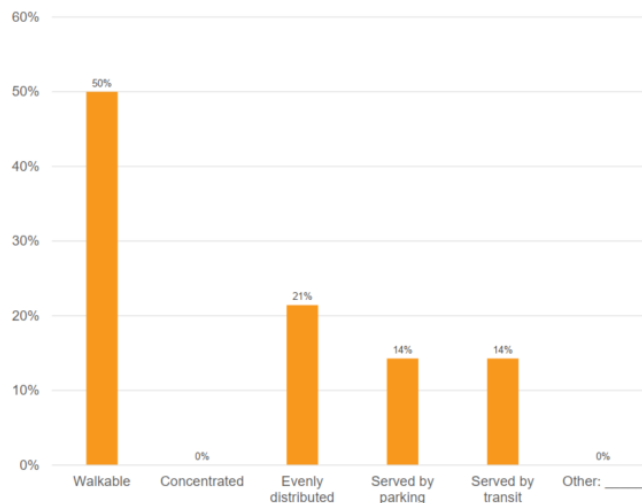
29



From a policy perspective, what is most important when it comes to planning future retail in TWS?

Retail that is ...

- A. Walkable
- B. Concentrated
- C. Evenly distributed
- D. Served by parking
- E. Served by transit
- F. Other: _____



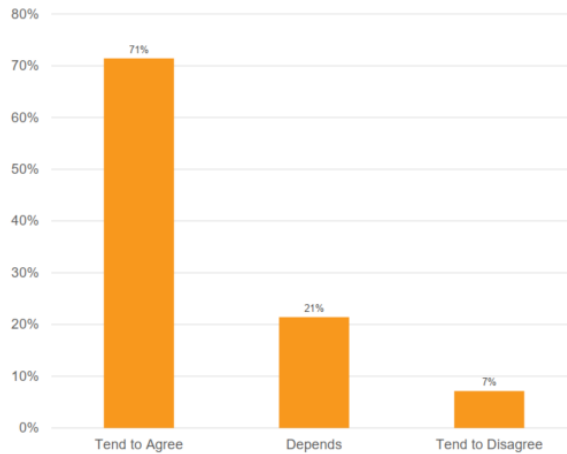
30





Should new mid-rise/hi-rise residential include retail uses at grade if they are in nodes/corridors where commercial uses are permitted?

- A. Tend to Agree
- B. Depends
- C. Tend to Disagree



31

What we heard:

In terms of retail and commercial policy: what **concerns** or **issues** would you like to see addressed or implemented in the Official Plan update?

Focus on <i>strollability</i> in the downtown	Reconstruction of the downtown core - as planned (2022-23) - will include curbless and flexible urban design and accessibility features	Parking will be an increasing challenge in the central part of Stouffville	Downtown needs more “boutique” and “destination” type retail and services
75% of all new dwelling units should be situated within 800 metres (a 10-minute walk) of a range of stores and services	Mix use is the best way to go. Ideally, people live right beside the amenities the use, including retail	Hoover park should have more <i>urban</i> density added.	The Hoover Park node needs to have more mixed use built in. More <i>fun</i> features need to be added
The Hoover Park node should be more integrated into the trail network	TWS needs policies to better regulate the location of Cannabis stores.	Patio space is always welcome and a great way to animate commercial nodes	Inspiration for Stouffville: Guelph, Bloor West Village, Newmarket, Stratford, Unionville, Kingston

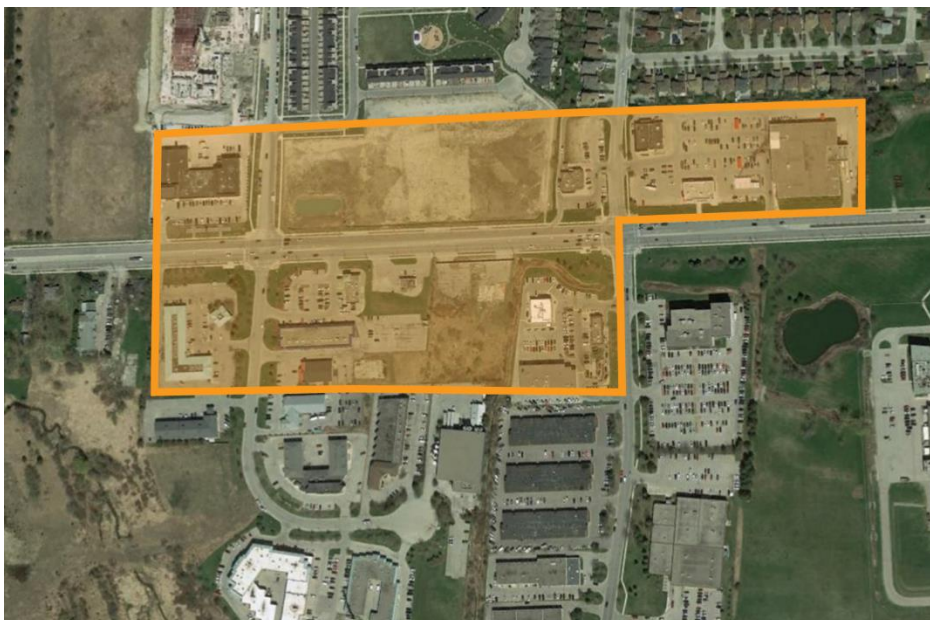
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Appendix C Mobile Analytics' Survey Geographies

Hoover Park Regional Retail Node



Western Approach (Ringwood Drive to Sandiford Drive)



Western Approach (Sandiford Drive to 9th Line)



Downtown Stouffville (Community Core)



Appendix D Retail Trade Expenditure Data

2021 Dollars	2021	
Province of Ontario		
Food Store Retail (FSR)	\$ 2,777	29.7%
Supermarket & Grocery	\$ 2,374	25.4%
Other Specialty Food	\$ 404	4.3%
Selected Non-Food Store Retail (NFSR)	\$ 6,570	70.3%
Building & Outdoor Home Supply	\$ 1,039	11.1%
General Merchandise	\$ 2,021	21.6%
Apparel & Accessories	\$ 665	7.1%
Furniture, Home Furnishings & Electronics	\$ 855	9.1%
Other Miscellaneous Retail	\$ 713	7.6%
Health & Personal Care	\$ 1,277	13.7%
Total Retail Expenditures ¹	\$ 9,347	100%

2021 Dollars	2021	2051
Primary Area		
Per Capita Retail Expenditures ²	\$ 9,997	\$ 11,287
Population ³	51,100	101,400
TOTAL RETAIL EXPENDITURE POTENTIAL (\$Millions)	\$ 510.8	\$ 1,144.5
Food Store Retail (%) ⁴	29.7%	29.7%
Supermarket & Grocery (%)	25.4%	25.4%
Other Specialty Food (%)	4.3%	4.3%
Non-Food Store Retail (%) ⁴	70.3%	70.3%
Building & Outdoor Home Supply (%)	11.1%	11.1%
General Merchandise (%)	21.6%	21.6%
Apparel & Accessories (%)	7.1%	7.1%
Furniture, Home Furnishings & Electronics (%)	9.1%	9.1%
Other Miscellaneous Retail (%)	7.6%	7.6%
Health & Personal Care (%)	13.7%	13.7%
TOTAL	100.0%	100.0%
Food Store Retail (\$Millions)	\$ 151.8	\$ 340.1
Supermarket (\$Millions)	\$ 129.7	\$ 290.6
Other Food (\$Millions)	\$ 22.1	\$ 49.4
Non-Food Store Retail (\$Millions)	\$ 359.0	\$ 804.4
Building & Outdoor Home Supply (\$Millions)	\$ 56.8	\$ 127.2
General Merchandise (\$Millions)	\$ 110.4	\$ 247.4
Apparel & Accessories (\$Millions)	\$ 36.4	\$ 81.5
Furniture, Home Furnishings & Electronics (\$Millions)	\$ 46.7	\$ 104.7
Other Miscellaneous Retail (\$Millions)	\$ 39.0	\$ 87.4
Health & Personal Care (\$Millions)	\$ 69.8	\$ 156.3
TOTAL (\$Millions)	\$ 510.8	\$ 1,144.5

TOTAL TRADE AREA

TOTAL RETAIL EXPENDITURES	\$ 510.8	\$ 1,144.5
Food Store Retail (\$Millions)	\$ 151.8	\$ 340.1
Supermarket (\$Millions)	\$ 129.7	\$ 290.6
Other Food (\$Millions)	\$ 22.1	\$ 49.4
Non Food Store Retail (\$Millions)	\$ 359.0	\$ 804.4
Building & Outdoor Home Supply (\$Millions)	\$ 56.8	\$ 127.2
General Merchandise (\$Millions)	\$ 110.4	\$ 247.4
Apparel & Accessories (\$Millions)	\$ 36.4	\$ 81.5
Furniture, Home Furnishings & Electronics (\$Millions)	\$ 46.7	\$ 104.7
Other Miscellaneous Retail (\$Millions)	\$ 39.0	\$ 87.4
Health and Personal Care (\$Millions)	\$ 69.8	\$ 156.3

Cumulative Growth in Expenditures:

TOTAL RETAIL EXPENDITURES	\$ 633.7
Food Store Retail (\$Millions)	\$ 188.3
Supermarket (\$Millions)	\$ 160.9
Other Food (\$Millions)	\$ 27.4
Non-Food Store Retail (\$Millions)	\$ 445.4
Building & Outdoor Home Supply (\$Millions)	\$ 70.4
General Merchandise (\$Millions)	\$ 137.0
Apparel & Accessories (\$Millions)	\$ 45.1
Furniture, Home Furnishings & Electronics (\$Millions)	\$ 58.0
Other Miscellaneous Retail (\$Millions)	\$ 48.4
Health and Personal Care (\$Millions)	\$ 86.5

¹ The base year percentage distributions are urbanMetrics' estimates based on our review of the provincial distributions.

SOURCE: urbanMetrics inc.

Appendix E Per Capita Space Needs

Figure 12-1: Select Per Capita Services Space Need

Commercial Needs - Retail/Service Category	Typical Space Per Capita (Sq Ft)	Total Space Required by Residents (Sq Ft)	Target Capture	Space Required (Sq Ft)	Inflow	Total Warranted Space (Sq Ft)	Less: Existing Space	Total Net New Space Required								
Population (2051)	101,400	A	=	B	x	C	=	D	x	E	=	F	-	G	=	H
Services																
Cultural, Entertainment & Recreation	2.5	253,500	60.0%	152,100	20.0%	190,100	58,400	131,700								
Finance, Insurance & Real Estate	2.0	202,800	70.0%	141,960	20.0%	177,500	73,500	104,000								
Business Services	1.5	152,100	70.0%	106,470	20.0%	133,100	58,200	74,900								
Health Care	1.5	152,100	70.0%	106,470	20.0%	133,100	102,700	30,400								
Personal Care	2.0	202,800	70.0%	141,960	10.0%	157,700	50,300	107,400								
Other ²	5.5	557,700	50.0%	278,850	10.0%	309,800	116,500	193,300								

NOTE: Food Services was excluded from this analysis.