

**Commercial Needs and Impact Assessment
Upper West Side Secondary Plan
City of Hamilton**

Prepared For: Upper West Side Landowners Group

November 2023

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Executive Summary

This study is one of several technical studies that provide information and input to the formulation of the Upper West Side Secondary Plan (“UWS Secondary Plan”) in the City of Hamilton. The Upper West Side Landowners Group owns land within the UWS Secondary Plan land area located between the built-up area of the City of Hamilton to the north and the John C. Monroe Hamilton International Airport to the south.

The UWS Secondary Plan area includes lands recently added within the City of Hamilton Urban Boundary through the Ministers’ approval of Official Plan Amendment 167 (“OPA 167”). The UWS Secondary Plan process was initiated by the Upper West Side Landowner Group to facilitate a comprehensive and complete community development. The UWS Secondary Plan is envisioned to be developed as a complete community with a mix of low, medium, and high-density residential units, retail, service, commercial, institutional, employment, and recreational space, as well as protected natural heritage features.

Development of the Upper West Side community requires adoption of a Secondary Plan and the submission of several technical studies, among other requirements. This study provides a Commercial Needs and Impact Assessment and identifies the amount, type, role and function of retail and service commercial space appropriate to serve the future population of the UWS Secondary Plan. The findings of this Commercial Needs and Impact Assessment are summarized as follows.

In summary, neighbourhood and local convenience retail and service commercial space is appropriate to serve the needs of the UWS Secondary Plan local community. The retail commercial space will also serve employees of the Airport Employment Growth District (“AEGD”). The retail commercial space is recommended to be accommodated within the Garth Street mixed use corridor and other areas within the UWS Secondary Plan.

The size and scale of the retail commercial space will serve the needs of the local community and employees within the AEGD. There would be an appropriate distribution of retail commercial services in the Upper West Side neighbourhood to meet the day-to-day and weekly shopping needs of residents. This is consistent with the policy 4.1.4 of the Urban Hamilton Official Plan.

Based on the findings of the market assessment, the type, amount, and role and function of the retail commercial space would not have a negative impact on the urban structure or planned function of existing and designated Commercial and Mixed Use areas, Urban Nodes, or Urban Corridors of Hamilton.

1.0 Introduction

This study provides a Commercial Needs and Impact Assessment and identifies the amount, type, role and function of retail and service commercial space appropriate to serve the Upper West Side Secondary Plan (“UWS Secondary Plan”).

1.1 Background

The Upper West Side Landowners Group owns land within the UWS Secondary Plan area located between the built-up area of the City of Hamilton to the north and the John C. Monroe Hamilton International Airport to the south.

The UWS Secondary Plan area includes lands recently added within the City of Hamilton Urban Boundary through the Ministers’ approval of Official Plan Amendment 167 (“OPA 167”). The UWS Secondary Plan process was initiated by the Upper West Side Landowner Group to facilitate a comprehensive and complete community development. The UWS Secondary Plan is envisioned to be developed as a complete community with a mix of low, medium, and high-density residential units, retail, service, commercial, institutional, employment, and recreational space, as well as protected natural heritage features.

Development of the Upper West Side community requires adoption of a Secondary Plan and the submission of several technical studies, among other requirements. This study provides a Commercial Needs and Impact Assessment and identifies the amount, type, role and function of retail and service commercial space appropriate to serve the future population of the UWS Secondary Plan.

1.2 Study Purpose

This Commercial Needs and Impact Assessment is one of several technical studies which provide information and input to the formulation of the UWS Secondary Plan and will guide development of the Upper West Side community.

This study responds to the City of Hamilton’s request for and the components of a Commercial Needs and Impact Assessment for the UWS Secondary Plan application.

The study provides an assessment of the amount, type, role and function of retail and service commercial space (also referred to as “retail commercial” space) appropriate to serve the future population of the UWS Secondary Plan area. An estimate of the retail commercial jobs created within the UWS Secondary Plan is provided. As well, recommendations are provided for a distribution of retail commercial space appropriate for the UWS Secondary Plan.

The market assessment accounts for the development vision of the UWS Secondary Plan, the location and access, existing supply of retail commercial space, shopping patterns, retail trends, and the build-out population of the Secondary Plan, among other market related items.

Although not required for this study and the formulation of a Secondary Plan, reference was made to the Urban Hamilton Official Plan (“UHOP”) policies regarding applications for retail or service commercial developments exceeding 5,000 sq.m. (approximately 54,000 sq.ft.) and the requirement for a Commercial Needs and Impact Assessment (UHOP Chapter E, Section 4.2.11).

The UHOP Chapter F Implementation Section 3.2.7.1 directs that Official Plan Amendment and/or Zoning By-law Amendment applications require submission of a Commercial Needs and Impact Assessment which demonstrates that:

...there shall be no negative impact on the planned function of existing and designated Commercial and Mixed Use areas or on the planned function of the Urban Nodes and Urban Corridors.

Section 3.2.7.2 identifies the criteria and components of a Commercial Needs and Impact Assessment for those site specific development applications.

This Commercial Needs and Impact Assessment provides input to and was carried out for municipal planning purposes and input to the formation of the UWS Secondary Plan. The market analysis is focused on retail and service commercial space and uses that typically characterize and occupy lands that permit retail and service commercial space.

This study addresses retail commercial market related components of the Commercial Needs and Impact Assessment. Land use policy and planning related items are addressed separately by Corbett Land Strategies Inc.

1.3 Study Approach

The retail commercial market assessment carried out and summarized in this report includes the following.

- An assessment of the UWS Secondary Plan area location, access, local, and surrounding context;
- Assessment of the existing and planned supply of retail commercial space in the market area;
- Assessment of market need and opportunity for an amount, type, role and function, and distribution of retail and service commercial space appropriate to serve the UWS Secondary Plan community; and,
- Review of location criteria for the type of retail commercial space appropriate for the Upper West Side community and Secondary Plan.

Based on this market assessment, findings and conclusions are provided regarding the retail commercial component appropriate for the UWS Secondary Plan.

This report incorporates standard and accepted methodologies for conducting retail and service commercial market needs analyses for municipal planning purposes. The existing and future market and economic conditions, population and growth forecasts provided in this report are based on available data, best estimates, and forecasts. If significant market and/or economic changes occur which influence the basic assumptions and analysis provided in this report, then if necessary, the analysis, findings, and conclusions should be revisited.

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2.0 Upper West Side Location and Development Vision

This section includes a description of the UWS Secondary Plan area location and surrounding context. A review of the development vision is also provided.

2.1 Location and Surrounding Context

The UWS Secondary Plan area lands are located between the built-up area of the City of Hamilton to the north and the John C. Monroe Hamilton International Airport to the south.

The UWS Secondary Plan area extends from Twenty Road West to the north, Upper James Street to the east, Dickenson Road to the south, and Glancaster Road to the west as illustrated below.

Figure 2.1: Upper West Side Secondary Plan Location and Surrounding Context



Source: Google Earth base map with overlay information provided by Ward Land Economics Inc.

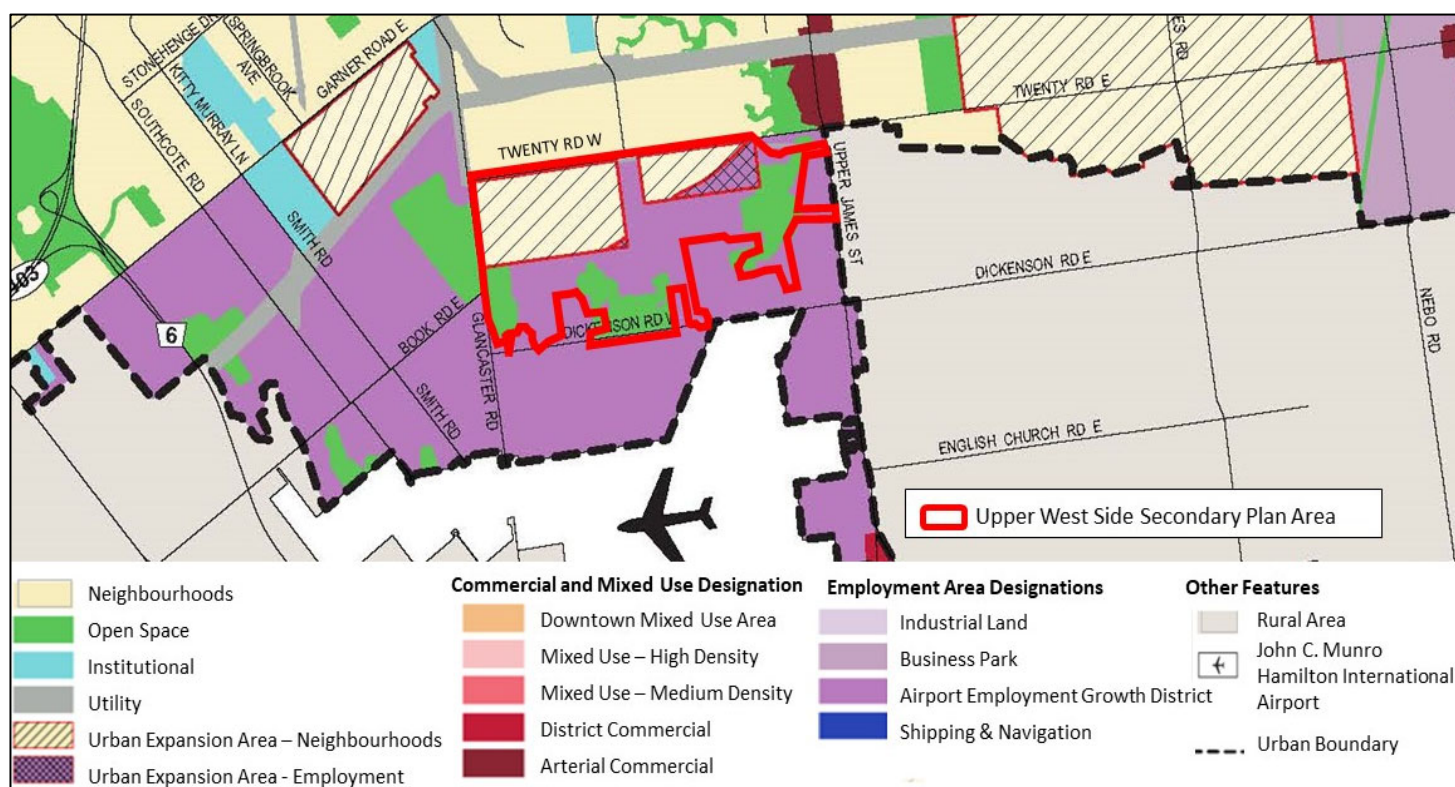
Garth Street is a main north-south Collector road which connects with Lincoln M. Alexander Parkway, a major transportation corridor for commuters throughout the

city. The Garth Street extension will run south of Twenty Road West to Dickenson Road. The Garth Street extension is planned as a Minor Arterial road with transit and active transportation connections throughout the UWS Secondary Plan and beyond. The Garth Street extension will provide an important link between the Lincoln M. Alexander Parkway and the John C. Munro Hamilton International Airport.

Twenty Road West is a main east-west Collector which connects with Upper James Street, a Major Arterial road to the east of the UWS Secondary Plan and Glancaster Road, a Minor Arterial road to the west of the Secondary Plan. Dickenson Road to the south is also a Minor Arterial road.

The UWS Secondary Plan area land is surrounded by a mix of uses including: residential, employment, commercial, agricultural, open space, and further south is the International Airport as illustrated below.

Figure 2.2: Upper West Side Secondary Plan Location and Surrounding Land Use Context



Source: Base map excerpt sourced from the Urban Hamilton Official Plan Schedule E-1 Urban Land Use Designations (2023), with overlay information provided by Ward Land Economics Inc.

- To the north of the UWS Secondary Plan area is a Hydro Corridor, Twenty Road West, and a residential area which is characterized by single family, townhouse dwellings, and adult lifestyle communities.
- To the east is a mix of uses including commercial and residential uses along Upper James Street, and agricultural lands further east.
- To the south is a mix of rural detached housing along Dickenson Road West, and existing and planned employment uses within the Airport Employment Growth District Secondary Plan (“AEGD Secondary Plan”). Further south is the John C. Munroe Airport.
- To the west is a mix of rural detached housing along Glancaster Road and employment lands within the AEGD Secondary Plan.

As illustrated on Figure 2.2 on the previous page and the UHOP Schedule E-1 Urban Land Use Designations (June 2023), the UWS Secondary Plan area lands are designated; Urban Expansion Area – Neighbourhoods, Urban Expansion Area – Employment Area, Airport Employment Growth District (“AEGD”) Secondary Plan, and Open Space.

2.2 UWS Secondary Plan Development Vision

The UWS Secondary Plan is envisioned to be developed as a complete, and sustainable community which is well-designed, well-serviced, connected, and attractive. The vision is to provide a community with a mix of uses and densities that allow for the efficient use of land.

The Secondary Plan is envisioned to be developed as a compact, urban community with a mix of densities, built forms, and land uses to support the needs of residents among other goals. The complete community is intended to create pedestrian oriented places and developments that are transit supportive and promote active transportation.

The UWS Secondary Plan is envisioned to provide a mix of low, medium, and high-density residential, retail, service, commercial, institutional, employment, parks and recreational space, as well as protected natural heritage features.

Mixed use development is envisioned at strategic locations within the UWS Secondary Plan area with a focus on the Garth Street extension corridor. A mixed use corridor is envisioned along the Garth Street extension which is to be

the focus for the community including retail and community services that serve daily needs of residents. The retail commercial space will also serve employees of the Airport Employment Growth District (“AEGD”).

The mix of uses and amenities envisioned along Garth Street are intended to function as a main street and focal point of the Upper West Side community. The Garth Street mixed use area is envisioned to function as a primary gathering place and community core attracting residents and employees from the Upper West Side community and surrounding areas.

Development of the approximately 283 hectare (approximately 700 acre) UWS Secondary Plan area is envisioned to accommodate approximately 7,000 to 13,000 residential units and approximately 16,000 to 32,000 residents at full build-out within a mix of low, medium, and high-density housing (numbers are rounded). Approximately 9,000 to 17,000 jobs are anticipated to be generated within the Secondary Plan area. Jobs would be accommodated within Mixed Use, Institutional, Medium and High Density Residential areas.

3.0 Retail Commercial Context and Supply of Space

The following provides a review of the existing supply and function of retail commercial space in the market area as well as planned and proposed retail developments. The review provides input to the retail and service commercial market need and impact assessment for the UWS Secondary Plan.

3.1 Retail Commercial Context and Supply of Space

The City of Hamilton has a full structure of retail commercial space including regional, district, neighbourhood, and convenience shopping centres and space.

Most of the retail commercial space is located within Nodes and Corridors and within Commercial and Mixed Use Designations. Convenience Commercial is permitted in Neighbourhoods and Urban Expansion Area - Neighbourhoods designations.

The UHOP “Schedule E Urban Structure” illustrates the city’s urban structure elements (reproduced in Appendix A). Retail commercial space is primarily accommodated within:

- Nodes (Downtown Urban Growth Centre, Sub-Regional Service, and Community); and,
- Corridors (Primary and Secondary).

Urban Nodes: Section 2.3 of the UHOP directs that “*Urban Nodes are intended to provide for a broad range and mix of uses in an area of higher density and activity than surrounding Neighbourhoods.*” Urban Nodes are designed and planned to provide a recognized sense of place to adjacent neighbourhoods.

Urban Corridors: Section 2.4 of the UHOP directs that “*Corridors have traditionally included a mix of uses providing locations for businesses and housing as well as physical and social focal points for the adjacent neighbourhoods.*” Urban Corridors are described as having a mixed use function for business and housing. The commercial spines provide stores and services that cater primarily to the weekly and daily needs of residents within the surrounding neighbourhoods. (Section 2.4.6).

The Commercial and Mixed Use designations are described in the UHOP and illustrated on “Schedule E-1 Urban Land Use Designation”. Most of the retail commercial space is located within Commercial and Mixed Use designations.

Commercial and Mixed Use designations include:

- Downtown Mixed Use Area
- Mixed Use – High Density
- District Commercial
- Arterial Commercial

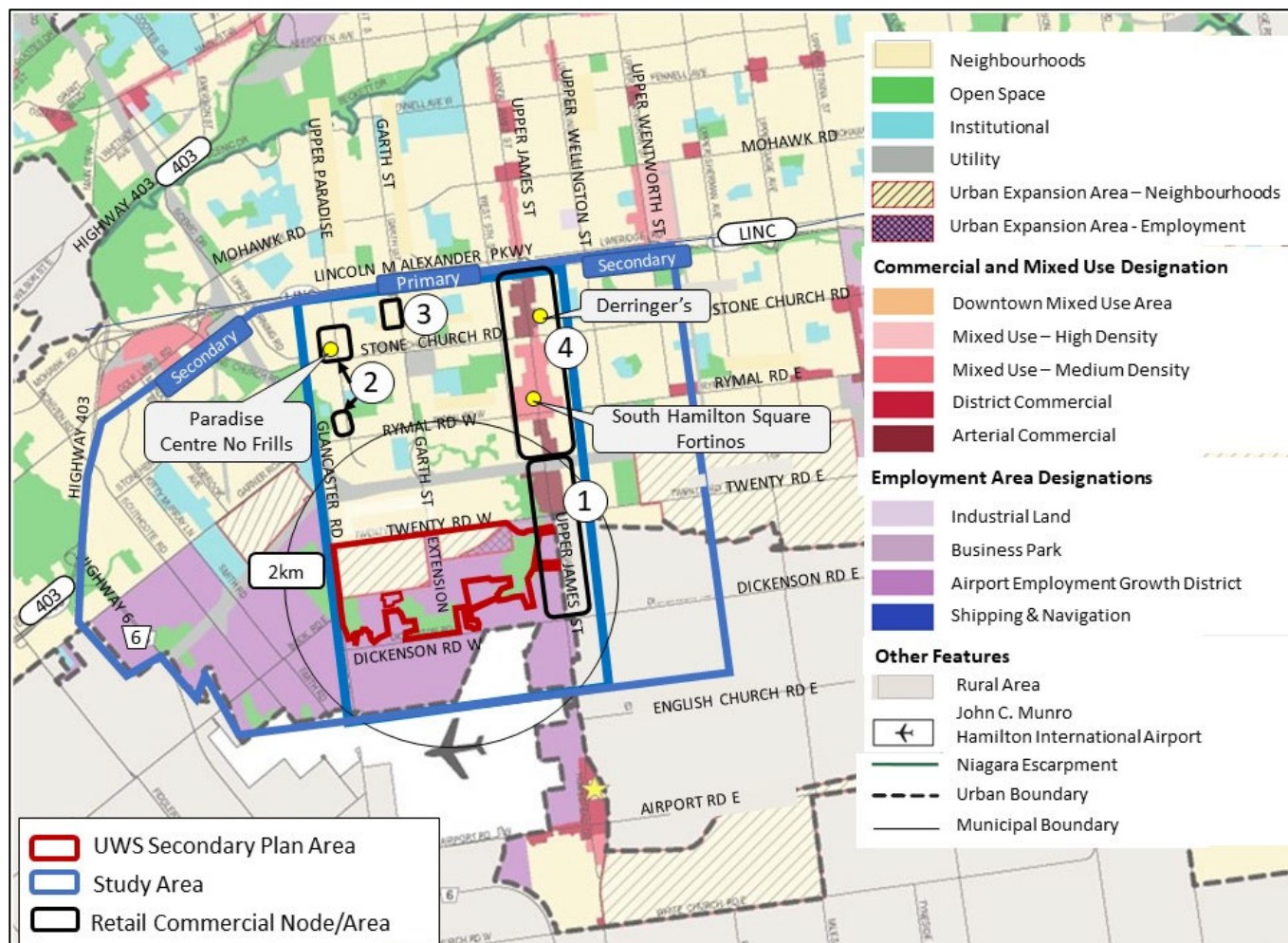
Local commercial uses are permitted within Medium and High Density Residential designations and ancillary service commercial uses are permitted within Employment areas.

3.2 Study Area Supply of Retail Commercial Space

A measured inventory of retail commercial space was carried out in the market area or “Study Area” including food stores, non food stores, other retail space, services, and vacant space as detailed in Appendix A and summarized in this section. The retail commercial inventory was carried out with a focus on the Primary Study Area.

The UHOP “Schedule E-1 Urban Land Use Designations” illustrates the city’s land use designations and commercial structure. Figure 3.1 on the following page illustrates the UWS Secondary Plan location within the commercial context supply and distribution of retail commercial space in the Study Area.

Figure 3.1: Supply and Distribution of Retail Commercial Space in the Study Area



Base map excerpt sourced from the UHOP Schedule E-1 Urban Land Use Designations (2023) with overlay information provided by Ward Land Economics Inc.

The Study Area encompasses an area which extends approximately 2 to 4 km from the UWS Secondary Plan area.

- The **Primary Study Area** (or “Primary Area”) extends north from the airport and the southern boundary of the AEGD Secondary Plan, to Glancaster Road to the west, Lincoln M. Alexander Parkway to the north, and Upper James Street North to the east.
- The **Secondary Study Area** (or “Secondary Area”) encompasses an area west of the Primary Area to Southcote Road and the AEGD Secondary Plan western boundary (the Secondary West Area) and east from the Primary Area to the west side of Upper Wentworth Street (the Secondary East Area).

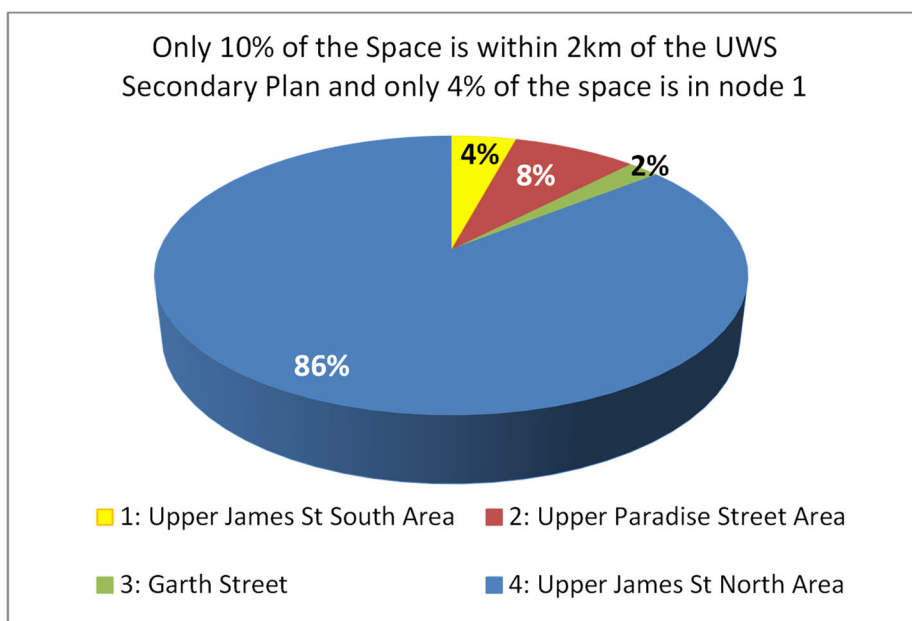
The inventory is grouped into various commercial areas and nodes as illustrated and summarized below.

Table 3.1: Supply and Distribution of Retail Commercial Space in the Primary Study Area (in sq.ft.)

	Upper James Street South Area	Upper Paradise Street Area	Garth Street	Upper James Street North Area	Total
<i>node/area</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	
Food Store Space	300	34,600	3,200	78,600	116,700
Non Food Store Space	12,500	16,600	15,000	351,400	395,500
Total Food and Non Food Store Space	12,800	51,200	18,200	430,000	512,200
Other Retail	0	1,000	0	55,500	56,500
Services	44,000	54,100	10,400	615,100	723,600
Total Occupied Space	56,800	106,300	28,600	1,100,600	1,292,300
Vacant Space	0	2,100	0	40,900	43,000
Total (in sq.ft.)	56,800	108,400	28,600	1,141,500	1,335,300
Distribution of Space	4%	8%	2%	86%	100%

Source: Inventory carried out under the direction of Ward Land Economics Inc. in June 2021. Includes auto dealership space.

Chart 3.1: Distribution of Retail Commercial Space in the Primary Study Area

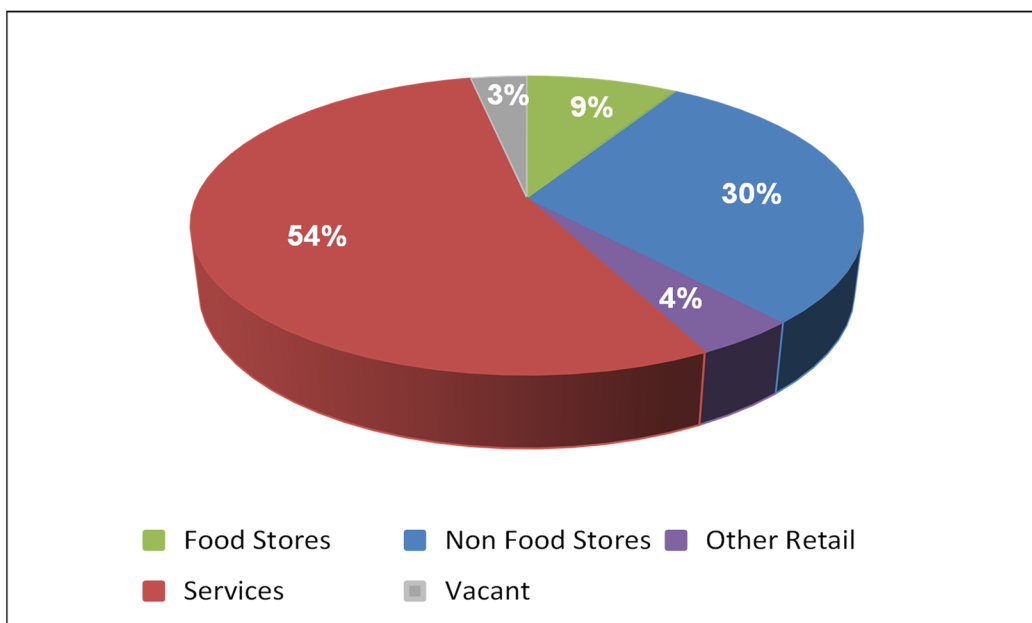


The lack of retail commercial space near UWS Secondary Plan and the distribution of space within the market area illustrates need and support for retail commercial space in the UWS Secondary Plan area.

Only 10% of the retail commercial space in the Study Area is located within a 2km radius of the UWS Secondary Plan of which only 4% is located within the Upper James Street South Area (node 1).

- The Study Area has approximately 1,365,500 sq.ft. of retail commercial space of which most, approximately 1,335,300 sq.ft. is located within the Primary Study Area (also referred to as the “Primary Area”).
- Most (approximately 86% or 1,141,500 sq.ft.) of the Primary Area retail commercial space is located within the Upper James Street North Area primarily north of Rymal Road (node 4).
- Over half (54%) of the Primary Area retail commercial space is service space and less than half (43%) is retail space.
- Food stores compose only approximately 9% of the retail commercial space in the Primary Area of which approximately 6% is supermarket space.
- Vacancy is low at only 3%. Low vacancies illustrate need, demand, and market support for additional retail commercial space. Vacancies within the range of approximately 5-7% represent a balanced market.

Chart 3:2: Distribution of the Type of Retail Commercial Space in the Primary Study Area



The Upper James Street South Area (node 1) which is located within 2km of the UWS Secondary Plan accounts for only 4% of the retail commercial space in the Primary Study Area. Most (70%) of the space is composed of auto dealerships and auto repair services. The area does not have a supermarket or grocery store.

- The Upper James Street South Area (node 1) located east of the UWS Secondary Plan and south of the Utility corridor, has approximately 56,800 sq.ft. or only 4% of the Primary Area retail commercial space. Approximately a fifth (22% or 12,800 sq.ft.) of the retail commercial space is retail and over three-quarters (78% or 44,000 sq.ft.) is service space. Most (70% or 40,000 sq.ft.) of the space is composed of auto dealerships and auto repair services.
- The retail commercial space includes a convenience store within a gas station, two automobile dealerships, auto repair, garden centre, veterinary clinic, and an auto rental service.
- There are no supermarkets or grocery stores in node 1.
- There are no retail commercial vacancies in the node.
- The retail commercial space is located within a Primary Corridor along Upper James Street South as illustrated on the UHOP Schedule E Urban Structure Elements (reproduced in Appendix A).
- The retail commercial space occupies Arterial Commercial and Airport Employment designated land along the Upper James Street Primary Corridor (see Figure 3.1 and Appendix A). The space is characterized by land extensive uses which cater to the traveling or drive-by consumer reflective of the planned function of the Arterial Commercial designation. The ancillary convenience space reflects use permissions within the Airport Employment designation.
- A small office building is located at the northwest corner of Garth Street and Twenty Road. The building does not have retail or personal service uses.

The Upper Paradise Street Area (node 2) has a No Frills supermarket and a Rexall Drugstore both of which anchor the Upper Paradise Centre.

- The Upper Paradise Street Area (node 2) has approximately 108,400 sq.ft. or 8% of the Primary Area retail commercial space. Approximately half (48% or 52,200 sq.ft.) is retail space and half (50% or 54,100 sq.ft.) is service space.
- Most of the space in node 2 is located within the Upper Paradise Centre at Upper Paradise Street and Stone Church Road. The plaza is anchored by a No Frills supermarket and Rexall Drugstore along with other retail stores, restaurants, and personal services.
- Vacancy in node 2 is very low at less than 2%.
- None of the retail commercial space is located within a Node or Corridor as illustrated on the UHOP Schedule E Urban Structure Elements.
- The retail commercial space occupies Neighbourhoods designated lands which permits Local Commercial uses. The retail commercial space is reflective of the planned function of Local Commercial space which primarily serves the weekly and daily needs of residents within the surrounding neighbourhood.

Garth Street (node 3) has a Shoppers Drug Mart anchored plaza located just south of the Lincoln M. Alexander Parkway. There are no supermarkets or grocery stores in node 3.

- Garth Street (node 3) has 28,600 sq.ft. or approximately 2% of the Primary Area retail commercial space. Almost two-thirds (64% or 18,200 sq.ft.) is retail and approximately a third (36% or 10,400 sq.ft.) is service space.
- All of the retail commercial space in node 3 is located within a small plaza on Garth Street just south of Lincoln M. Alexander Parkway. The plaza is anchored by a Shoppers Drug Mart and has a convenience store, restaurants, and service uses.
- There are no supermarkets or grocery stores in node 3.
- There are no vacancies in the node.

- None of the retail commercial space is located within a Node or Corridor as illustrated on the UHOP Schedule E Urban Structure Elements.
- The retail commercial space occupies Neighbourhoods designated lands which permits Local Commercial uses. The retail commercial space in node 3 is reflective of the planned function of Local Commercial space which primarily serves the weekly and daily needs of residents within the surrounding neighbourhood.

The Upper Paradise Street North Area (node 4) accommodates most of the retail commercial space in the Primary Study Area including South Hamilton Square, Fortinos and Derringers supermarkets, other retail stores, restaurants, personal services, and several car dealerships.

- The Upper Paradise Street North Area (node 4) has most (approximately 86% or 1,141,500 sq.ft.) of the retail commercial space in the Primary Study Area. Less than half (43% or 485,500 sq.ft.) of the space is retail and more than half (54% or 615,100 sq.ft.) is service space.
- Node 4 has a range of retail commercial space including food stores, drug stores, general merchandise, furniture stores, other non food stores, automobile dealerships, restaurants, and service uses. South Hamilton Square, the largest shopping centre in the Study Area, is anchored by a Fortinos and has clothing stores, general merchandise stores, home furnishings, restaurants, and services.
- The Fortinos and Derringers supermarkets represent approximately 6% of the retail commercial space in node 4.
- Automobile dealerships represent a fifth (20%) of the space in node 4.
- Vacancy is low at less than 4%.
- Most of the retail commercial space in node 4 occupies Mixed Use – Medium Density designated land within the Community Node at Upper James Street and Rymal Road. The retail commercial space contributes to the planned function of the Mixed Use - Medium Density designation and the Community Node which is to provide a people place where people can work and live with a full range and mix of uses and commercial areas which serve the surrounding community or series of neighbourhoods.

- The balance of space in node 4 occupies Arterial Commercial designated land along the Upper James Street Primary Corridor south of Rymal Road and north of Stone Church Road. The retail commercial space includes land extensive uses including several auto dealerships, auto repair shops, and fast food restaurants, among other uses which cater to the traveling or drive-by consumer. This is reflective of the planned function of the Arterial Commercial designation.
- The retail commercial space along Upper James Street contributes to the planned function of the Primary Corridor which is to serve as a community focal point which accommodates higher density and mixed uses, and commercial spines including retail and commercial uses that serve weekly and daily needs of residents within the surrounding neighbourhoods.

Secondary Study Area

The Secondary Study Area has a limited amount of retail commercial space including a small convenience plaza.

The Secondary Study Area East has a small convenience oriented plaza located on the west side of Upper Wentworth Street, south of the Lincoln M. Alexander Parkway at the northeastern edge of the Study Area. The approximately 10,000 sq.ft. plaza has a convenience store, nail and hair salons, a doctors' office, and two restaurants.

Retail commercial space in the Secondary Study Area West is located along Garner Road primarily east of Southcote Road. Within the area is a farmers' market specialty food store, pool supply store, auto repair, restaurant, and a gas station which together total approximately 20,000 sq.ft.

3.3 Surrounding Areas

A range of retail commercial space is located outside the Study Area. The location, size, role, and function differentiate the shopping centres and areas from the proposed Site retail commercial development.

The community of Mount Hope is located to the south outside of the Study Area and to the east of the airport. The retail commercial space in Mount Hope is characterized by local serving retail, restaurants, and personal service uses. The space is accommodated within the District Commercial designated land along Airport Road

West, Upper James Street, and Homestead Drive. Upper James Street is identified as a Primary Corridor on the UHOP Schedule E Urban Structure.

The largest shopping centres to the west, north, and east outside of the Study Area include the following:

- Meadowlands Power Centre is a non-enclosed shopping centre located at Highway 403 and the Lincoln M. Alexander Parkway in Ancaster. Meadowlands is anchored by a Costco and Home Depot and has a range of stores and services. A Sobeys supermarket is located on adjacent lands. The shopping centre area is located within a Community Node as illustrated on UHOP Schedule E Urban Structure. The Community Node is characterized by large format and regional serving stores which along with its location, size, role and function differentiates it from the type of retail commercial space envisioned for the UWS Secondary Plan.
- Lime Ridge Mall is an enclosed regional serving shopping centre located at Upper Wentworth Street, north of the Lincoln M. Alexander Parkway. The mall is anchored by The Bay, Old Navy, H&M, and Urban Behaviour. A Fortinos supermarket is located adjacent to the north of the mall. The shopping centre area is located within a Community Node as illustrated on UHOP Schedule E Urban Structure. The mall is characterized by fashion oriented stores which along with its location, size, role and function differentiates it from the type of retail commercial space envisioned for the UWS Secondary Plan.
- Various shopping centres and plaza are located north of Lincoln M. Alexander Parkway along Mohawk Road in the Hamilton Centre area. The centres and plazas include supermarkets, retail stores, and service uses serving the Hamilton Centre area.
- Rymal Square Shopping Centre located at the northeast quadrant of Upper Wentworth Street and Rymal Road is anchored by Food Basics supermarket. Other tenants include a Rexall Drugstore, other non food stores, restaurants, and services.

3.4 Planned and Proposed Retail Developments

There are no vacant or undeveloped designated Commercial sites in the Study Area of the size or context that could appropriately accommodate the retail commercial space needed to appropriately serve the day-to-day and weekly needs of the UWS Secondary Plan area residents.

The following summarizes information regarding planned and proposed retail commercial developments in the Study Area. The information was provided by the City of Hamilton and interactive mapping of development applications, in-field inspections, Google Maps, and web sites. The following provides a summary of the planned and proposed retail commercial development information.

- Some small scale convenience oriented retail commercial space is planned and proposed within the Primary Study Area including within mixed use and higher density residential developments. The retail commercial space is not of the size or context that could appropriately accommodate the amount and format of the retail commercial space envisioned for the UWS Secondary Plan.
- There is some undeveloped/vacant Arterial Commercial designated land in the Study Area along Upper James Street. The designation permits a different range and type of retail commercial space than that envisioned for the UWS Secondary Plan.
- There are two larger sized vacant retail stores in the Primary Study Area located on Upper James Street (node 4). The two vacancies account for most, approximately 80% or 35,000 sq.ft. of the vacant retail commercial space in the Primary Study Area. The balance of the vacant retail commercial space is composed of small unit sized stores, most of which are also located along Upper James Street (node 4).

There are no vacant shopping centres or vacant/undeveloped Commercial designated sites in the Study Area of a size or market context that could appropriately accommodate the envisioned retail commercial space required to serve the UWS Secondary Plan area residents.

Surrounding Outside the Study Area

The community of Mount Hope to the south and outside of the Study Area has opportunity for District Commercial development over the long term. No specific development plans are available at this time and some of the lands are currently occupied by residential uses. The Mount Hope Secondary Plan Section 5.4.4.1 informs that the District Commercial lands are intended to serve existing and future residents of the Mount Hope Secondary Plan area, the surrounding rural area, Hamilton Airport, and the Airport Industrial-Business Park. A range of retail and service commercial uses are permitted. The Mount Hope Secondary Plan

recognizes that redevelopment of existing residential lots on District Commercial designated land is expected to occur over a relatively lengthy period of time.

The Rymal Square Shopping Centre located at the northeast quadrant of Upper Wentworth Street and Rymal Road to the east and outside the Study Area, has a planned future Phase 2 expansion of 40,000 sq.ft. Timing of the expansion is unknown.

4.0 Commercial Need and Impact Assessment

The section provides an assessment of the amount, type, role and function of retail and service commercial space appropriate to serve the future population of the UWS Secondary Plan area. Recommendations are provided for a distribution of retail commercial space appropriate for the UWS Secondary Plan.

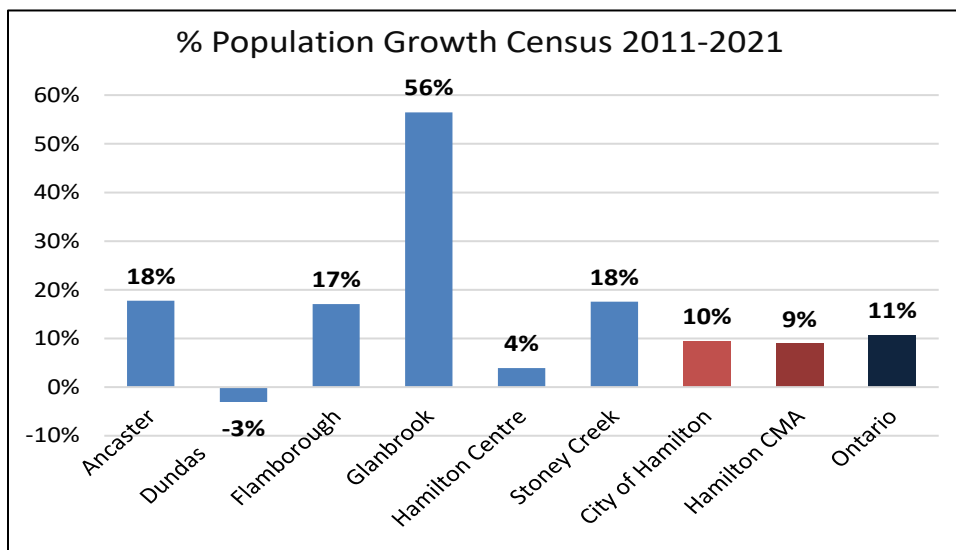
The market assessment accounts for the development vision of the UWS Secondary Plan, the location and access, existing supply of retail commercial space, shopping patterns, retail trends, and the build-out population of the Secondary Plan, among other market related items.

4.1 Market Area Population

The UWS Secondary Plan is located adjacent to an existing and growing residential area. Population growth in the market area has been above the City and Provincial averages. Population growth generates need and support for existing and new retail commercial space.

The UWS Secondary Plan was recently included within the urban boundary of Hamilton and was previously in the Glanbrook area of the city. Glanbrook is the highest growth community area of the city. Population in Glanbrook increased by 56% from 2011 to 2021 (most recent Census data) as illustrated below.

Chart 4.1: Census 2011-2021 Population Growth by Area



Source: Statistics Canada Census data and City of Hamilton data summarized by Ward Land Economics Inc.

The growth in Glankbrook was over five times higher than the City of Hamilton average of 10% and the provincial average of 11%.

Ancaster is also a high growth area. Ancaster's population increased by 18% from Census 2011-2021, almost double the city's average and higher than the provincial average.

4.2 Customer Origin

As input to the market analysis and the assessment of shopping patterns and market draw, customer origin data were reviewed at various locations in the Study Area as summarized below and detailed in Appendix B. Reference was also made to other customer origin and consumer surveys previously carried out in Hamilton.

The customer origin data illustrate that supermarket anchored shopping centres function as focal points for surrounding residential areas.

The customer origin surveys illustrate supermarkets and supermarket anchored shopping centres primarily serve residents within the nearby market area. Most of customers of the supermarkets and supermarket anchored shopping centres originate from the surrounding market area and the balance of customers originate from beyond. The data and surveys illustrate that supermarket anchored shopping centres function as focal points for the surrounding residential areas.

Customer origin data illustrate that retail commercial space within the UWS Secondary Plan would primarily serve the convenience, daily and weekly shopping needs of residents of the Secondary Plan as well as employees and residents within the surrounding neighbourhoods.

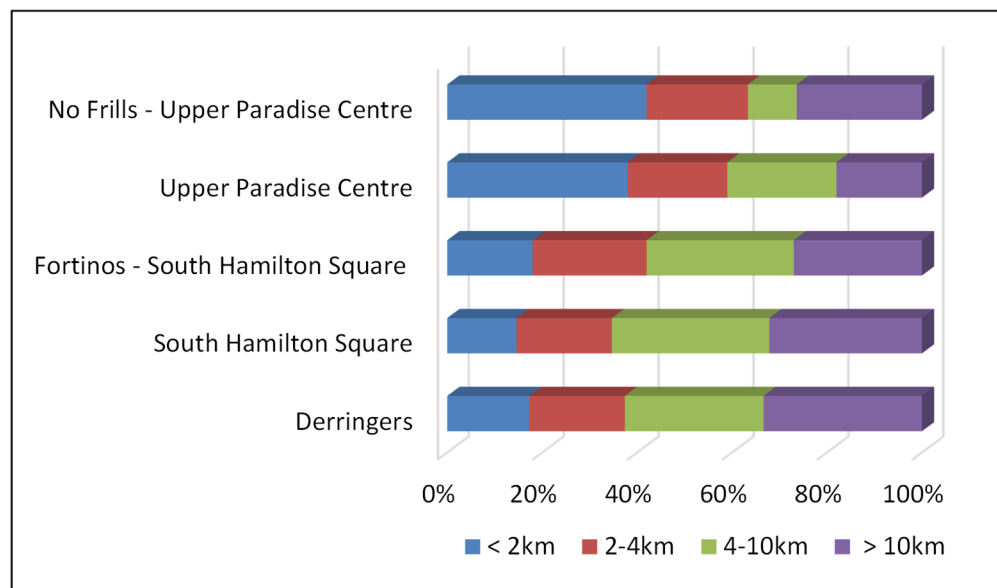
The customer origin data illustrate that the No Frills supermarket and Upper Paradise Centre (anchored by No Frills) are more local serving than the Fortinos supermarket, South Hamilton Square Shopping Centre (anchored by Fortinos), and the Derringers supermarket as illustrated on Chart 4.2.

- No Frills and the Upper Paradise Centre draw the majority of customers (63% and 59% respectively) from within 4km of their locations and over a third (37% and 41% respectively) of customers from beyond 4km.
- Fortinos, South Hamilton Square Shopping Centre, and Derringers draw less than half and just over a third (42%, 34%, and 37% respectively) of

their customers from within 4km of their locations and more than half to almost two-thirds (58%, 66% and 63% respectively) from beyond 4km.

The customer origin data illustrate that the UWS Secondary Plan retail commercial space would primarily serve the convenience, daily and weekly shopping needs of residents of the Secondary Plan as well as employees and residents within the surrounding neighbourhoods.

Chart 4.2: Customer Origin by Distance Band



Source: UrberMedia/Near data July 15, 2020 to July 15 2021, summarized by Ward Land Economics Inc.

The data illustrate that the Secondary Plan retail commercial areas would help serve customers within the Upper West Side community as well as the convenience amenity needs of employees within the AEGD Secondary Plan as well as the daily and weekly shopping needs residents within the surrounding neighbourhoods, and visitors and travellers to the area.

4.3 Retail Commercial Needs Assessment

Based on the market analysis, neighbourhood and convenience oriented retail and service commercial space of approximately 200,000-300,000 sq.ft. is appropriate to serve the UWS Secondary Plan community.

There are several market indicators which demonstrate that neighbourhood commercial and local convenience-oriented retail and service commercial space is appropriate to serve residents of the Secondary Plan community.

The following provides a forecast of market support and opportunity for retail and service commercial space in the UWS Secondary Plan. The amount of retail and service commercial space opportunity forecast is based on several market inputs and indicators.

Table 4.1 provides a forecast of market support and opportunity for retail and service commercial space appropriate to serve the build-out population of the Secondary Plan. The market forecast accounts for various retail and service commercial categories including; food store space, non-food store space, and services.

In addition to the location, context, the supply of retail commercial space, and retail trends, the planned population of the Secondary Plan is a key determinant that drives need/demand and opportunity for retail commercial space. The amount of retail and service commercial space opportunity forecast for the UWS Secondary Plan is based on a build-out population of approximately 32,000 residents.

Table 4.1 provides a forecast of retail and service commercial space opportunity for the Secondary Plan based on a square foot per capita range. The range provides some flexibility for planning purposes and accounts for market and leasing/tenanting variations.

The market analysis was carried out for long-term planning purposes and provides a forecast of retail commercial market opportunity appropriate to serve the build-out population of the UWS Secondary Plan.

Table 4.1: UWS Secondary Plan Retail and Service Commercial Space Opportunity

				Build-Out
UWS Secondary Plan Population (Rounded)				32,000
	Sq.Ft. Per Capita Retail Commercial Space	Secondary Plan Area Target Capture	Estimate of Inflow	Estimate of Retail Commercial Space Opportunity in the Secondary Plan at Build- Out (sq.ft. GLA)
Food Store				
Supermarket & Grocery	3.0 - 4.0	@ 66.6%	@ 15.0%	75,000 - 100,000
Specialty Food	1.5 - 2.0	@ 50.0%	@ 15.0%	28,000 - 38,000
Total Food Store	4.5 - 6.0			103,000 - 138,000
Non-Food Store				
General Merchandise	3.0 - 4.5	@ 10.0%	@ 15.0%	11,000 - 17,000
Health and Personal Care Stores	1.0 - 1.5	@ 50.0%	@ 15.0%	19,000 - 28,000
Home Improvement Related	1.5 - 2.5	@ 10.0%	@ 15.0%	6,000 - 9,000
Other Non-Food Store Space	3.0 - 10.0	@ 15.0%	@ 15.0%	17,000 - 56,000
Total Non-Food Store	8.5 - 18.5			53,000 - 110,000
Other Commercial and Services				
Beer, Liquor and Wine	0.5 - 1.0	@ 15.0%	@ 15.0%	3,000 - 6,000
Restaurant and Fast Food	3.5 - 4.0	@ 15.0%	@ 15.0%	20,000 - 23,000
Personal Services	2.0 - 2.5	@ 15.0%	@ 15.0%	11,000 - 14,000
Financial & Other Professional Services	1.0 - 2.0	@ 15.0%	@ 15.0%	6,000 - 11,000
Medical Services	1.5 - 2.0	@ 15.0%	@ 15.0%	8,000 - 11,000
Other Services	3.5 - 4.0	@ 15.0%	@ 15.0%	20,000 - 23,000
Total Other Commercial and Services	12.0 - 15.5			68,000 - 88,000
Total Estimated Retail Commercial Opportunity (in sq.ft. rounded)	25.0 - 40.0			200,000 - 300,000

The amount of retail commercial space support generated by residents of the UWS Secondary Plan is partially available to support stores and services in the Secondary Plan and partially directed to stores and services elsewhere.

The portion or “market capture” is primarily a function of consumer shopping patterns for various types of goods and services, transportation and access routes, and the supply of retail commercial space within and influencing the market area. Market support is also derived from people who live elsewhere but will shop at stores and services in the UWS Secondary Plan such as neighbouring residents, employees, and pass-by traffic. This source of trade, called “inflow,” is added to the market support.

Table 4.1 illustrates the amount and type of retail commercial space opportunity available to serve the planned population of the Secondary Plan. The analysis illustrates that there is opportunity for approximately 200,000-300,000¹ sq.ft. (rounded) of retail commercial space in the Secondary Plan composed of the following.

- Approximately 100,000-140,000 sq.ft. (rounded) of food store space. The food store space could take the form of a supermarket/grocery store or stores, and/or smaller scale specialty food store space.
- Approximately 50,000-110,000 sq.ft. of non-food retail space which could include a health and personal care, pharmacy, pet store, etc.; and,
- Approximately 70,000-90,000 sq.ft. of services. Service space could include a range of uses such as: restaurants, personal services, bank/financial, medical/dental, other professional office, daycare, entertainment, other service, and commercial space.

The market analysis indicates that the retail commercial space appropriate to serve the Secondary Plan would be neighbourhood, local, and convenience serving rather than large district or regional serving. The amount and type of retail commercial space opportunity would help serve the daily, weekly, and convenience-oriented shopping needs of the UWS Secondary Plan residents. It is estimated that approximately 500 to 700 retail commercial jobs would be created within the UWS Secondary Plan.

4.4 Market Impact Assessment

The amount, type, role and function of the retail commercial space supported and envisioned for the UWS Secondary Plan would be differentiated from that of Commercial locations elsewhere in the surrounding market area.

The Arterial Commercial areas along Upper James Street are characterized by automobile dealerships and commercial uses that cater to the traveling or drive-by consumer and provide for land extensive retail stores which require outdoor storage. The type of uses, role, and function of the Arterial Commercial areas differentiate them from the retail commercial space envisioned within the UWS Secondary Plan. The retail commercial space within the Secondary Plan would

¹ Numbers are rounded in this section.

not impact the planned function of the Arterial Commercial areas along Upper James Street.

The Mixed Use - Medium Density designated lands along Upper James Street and the Community Node at Rymal Road and Corridor permit a full range of retail, service commercial, entertainment, and residential uses at a moderate scale. The amount of existing retail commercial space, the composition and mix of uses, the role and function of the Mixed Use - Medium Density area, and the primary market which it serves differentiates the area and the Community Node from that of the retail commercial space envisioned within the UWS Secondary Plan. The retail commercial space within the Secondary Plan would not impact the planned function of the Mixed Use - Medium Density designated lands along Upper James Street and the Community Node at Rymal Road.

The analysis illustrates there is ample market support and opportunity for the amount, type, role and function of retail commercial space within the UWS Secondary Plan. Market support is primarily generated by the population within the Secondary Plan. Therefore, the function of the Local Commercial space on Neighbourhoods designated lands in the Primary Study Area would not be negatively impacted by retail commercial development in the Secondary Plan area.

Based on the market assessment, the amount, type, role and function of retail commercial space in the UWS Secondary Plan area including supermarket/grocery store space, other food stores, non food stores, and a range of services and other commercial space would not have a negative impact on the urban structure or planned function of existing and designated Commercial and Mixed Use areas, Urban Nodes, or Urban Corridors.

4.5 Retail Commercial Trends

Retailing and the form and format of retail commercial centres is continually changing and evolving. Important retail commercial trends considered in establishing appropriate neighbourhood and local convenience and service-oriented retail commercial forms and formats for the UWS Secondary Plan include the following.

- Neighbourhood plazas and areas primarily serve local and weekly shopping needs of surrounding area residents. Neighbourhood plazas and areas serve local neighbourhoods and function as focal points of community areas.

Food stores, health and personal care, convenience-oriented stores, and services such as health and beauty, medical, dental, restaurants, financial, daycare, among other service oriented uses will continue to be important components of neighbourhood shopping plazas areas serving day-to-day and weekly convenience needs of surrounding area residents.

- Local convenience retail commercial plazas and areas primarily serve convenience needs of adjacent residential areas. Local convenience retail commercial areas typically accommodate small-scale retailers, specialty stores, pharmacies, restaurants, and service establishments and are easily and conveniently accessible to the adjacent residential areas for which they are intended to serve.
- Neighbourhood and convenience commercial uses and areas are important components of mixed use areas which can also include community related uses such as daycares, community group facilities, and office spaces.
- Internet shopping and e-commerce is an on-going trend however certain categories have been influenced more by internet shopping than others. Local convenience and service uses such as food stores, health and beauty/drug stores, hair and beauty salons, restaurants, medical, dental, and other professional offices, fitness centres, daycare, tailors, dry cleaners, among other services are not directly influenced by internet shopping.

The market analysis accounts for the continuing importance of providing neighbourhood and local convenience-oriented stores and services to residents and which will help serve weekly, day-to-day, and convenience shopping and service needs of residents of the Secondary Plan.

There is need and opportunity for various types of retail and service commercial space serving the UWS Secondary Plan area ranging from convenience and local serving facilities and to neighbourhood serving facilities. Mixed Use designated lands within the UWS Secondary Plan are envisioned to accommodate a range of uses including residential, institutional, retail, service, and commercial uses.

To accommodate retail commercial space in the UWS Secondary Plan, there is a need and opportunity to create locations to accommodate the neighbourhood oriented and local convenience serving retail commercial space.

4.6 Retail Commercial Location Criteria and Recommended Distribution

There is opportunity for neighbourhood oriented and smaller local convenience commercial space to serve the residents of the UWS Secondary Plan. This type of space and commercial centre functions as a focal point composed of neighbourhood serving stores and/or plazas, small-scale, convenience, and service-oriented retail commercial uses. The type of retail commercial space functions to serve the weekly, day-to-day, and convenience shopping and service needs of area residents.

The retail commercial space could be accommodated within the context of a single land use or within a mixed use area, corridor, node, or core. The mix of uses could include residential, institutional, recreation, and commercial and could be accommodated within a variety of formats.

The following provides a summary of locational criteria and characteristics which assist in determining appropriate locations for the retail commercial space.

Locational criteria for neighbourhood serving retail commercial locations typically include the following:

- Prominent corridor, core, and/or intersection with good access and visibility;
- Access to major arterial roads, located fronting onto and/or at intersections of local, arterial, and/or collector roads;
- Access to public transportation and pedestrian traffic;
- Centrally located in a neighbourhood/community with excellent access to population within a surrounding area; and,
- Located as a single land use or within a mixed use location, corridor, node, or core.

Locational criteria for smaller scale local convenience retail commercial locations typically include the following:

- Within residential neighbourhoods and/or at the ground level of Medium Density and High Density Residential;
- Located fronting onto and/or at intersections of local, arterial, and/or collector roads;
- Access to public transportation and pedestrian traffic;
- Easily accessible within walking distance of nearby residential areas; and,
- Located as a single land use or within a mixed use location, corridor, node, or core.

Recommended locations to accommodate retail commercial space within the UWS Secondary Plan include:

- The Garth Street mixed use corridor. Retail commercial space could be clustered within a location, plaza, shopping centre, or distributed throughout the corridor. Gateway locations at Garth Street and Twenty Road, and Garth Street and Dickenson Road provide strategic opportunities for retail commercial space.
- Other areas throughout the Secondary Plan which will be easily accessible for residents of the community including areas in the northwest, southwest, southeast, and northeast. Retail commercial space could be accommodated on the ground floor of Medium Density and High Density Residential or a freestanding convenience oriented developments.

Retail commercial space within the UWS Secondary Plan would meet the day-to-day and weekly shopping needs of the Secondary Plan area residents and in turn would maintain an appropriate distribution of retail and commercial services in each neighbourhood. This is consistent with the Urban Hamilton Official Plan policy direction.

The UHOP informs of the goal to maintain an appropriate distribution of retail commercial services in each neighbourhood. Chapter E Urban Designations, Section 4.1.4 informs that a policy goal of Commercial and Mixed Use designations is to (among others):

Maintain an appropriate distribution of retail and commercial services in each neighbourhood in order to meet the day-to-day and weekly shopping needs of residents and in locations which are highly accessible by active transportation, and transit, as well as the automobile.

The addition of retail commercial space within the UWS Secondary Plan would maintain an appropriate distribution of retail commercial space within each neighbourhood to meet the day-to-day and weekly shopping needs of residents. The retail commercial space would also serve employees of the AEGD and residents of surrounding community areas.

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Appendix A

Retail Commercial Inventory

A measured inventory of food stores, non food stores, service, and vacant space was carried out in the Study Area in June 2021 under the direction of Ward Land Economics Inc. The inventory of space includes the following.

Food stores include: supermarkets and grocery stores, convenience stores, bulk food, bakeries, candy/nut stores, green grocers, meat markets, fish and seafood markets, delicatessens, cheese stores, coffee/tea shops, and other specialty food stores.

Non food stores include: department stores, home and auto supply including tires, batteries, accessories, other general merchandise stores, health and personal care stores¹, clothing and clothing accessories, electronics and appliance stores, furniture and home furnishings stores, building material, garden equipment and supplies, sporting goods, hobbies, book stores, and other miscellaneous store retailers.

Other retail includes: second hand merchandise, liquor/beer/wine stores, and other miscellaneous retailers.

Service space includes: restaurants, personal services, financial, medical, other professional services and offices, other services, entertainment, fitness, and automobile dealerships.

The retail and service commercial classification category details are provided on the following pages.

Figure A-1 following, illustrates the location and distribution of retail commercial areas and nodes, followed by summary tables of the existing space in the Primary Study Area.

¹ “Health and personal care stores” include: pharmacies and drug stores, health and nutrition stores, optical stores, cosmetic and beauty stores, etc. (see details on the next page).

Commercial Needs and Impact Assessment
Upper West Side Secondary Plan – Hamilton

RETAIL AND SERVICE COMMERCIAL SPACE CLASSIFICATION

NAICS 2017	STORE TYPE	NAICS 2017	STORE TYPE
FOOD STORES		NON-FOOD STORE RETAIL: HEALTH AND PERSONAL CARE STORES	
44511	Supermarket & Other Grocery	44611	Pharmacies and Drug Stores
44512	Convenience Stores	44612	Cosmetics, Beauty Supplies
44521	Meat Markets	44612	Perfume Stores
44522	Fish and Seafood Markets	44613	Optical Goods Stores
44523	Fruit and Vegetable Markets	446191	Food (Health) Supplement Stores
445291	Bakery	446199	Other Health and Personal Care Stores
445292	Candy/Nut		
445299	Other Specialty Food Stores	NON-FOOD STORE RETAIL: BUILDING AND OUTDOOR HOME SUPPLIES	
NON-FOOD STORE RETAIL: GENERAL MERCHANDISE STORES		44411	Home Improvement Centres
45211	Department Stores	44412	Paint and Wallpaper Stores
45291	Warehouse Clubs and Superstores	44413	Hardware Stores
452999	All Other General Merchandise Stores (catalogue, general merchandise, variety, dollar store)	44419	Kitchen Cabinets, Glass, Ceramic, Plumbing, etc
452991	Home and Auto Supplies Stores	44421	Outdoor Power Equipment Stores
44131	Automotive Parts and Accessories Stores	44422	Nursery and Garden Centres
44132	Tire Dealers	NON-FOOD STORE RETAIL: MISCELLANEOUS STORE RETAILERS	
NON-FOOD STORE RETAIL: CLOTHING AND CLOTHING ACCESSORIES STORES		45111	Sporting Goods Stores (excl. athletic shoe retailing)
44811	Men's Clothing Stores	45112	Hobby, Toy and Game Stores
44812	Women's Clothing Stores	45113	Sewing, Knitting, Upholstery, Fabric
44813	Children's and Infants' Clothing Stores	45114	Musical Instrument and Supplies Stores
44814	Family Clothing Stores	451310	Book Stores and News Dealers
44815	Costume, Hats, Leather, Umbrella, Other	45311	Florists
44821	Shoe Stores	45321	Office Supplies and Stationery Stores
44831	Jewellery Stores	45322	Gift, Novelty and Souvenir Stores
44832	Luggage and Leather Goods Stores	45331	Antiques
448191	Fur Stores	45331	Used Merchandise Stores
448199	Athletic, Bridal, Jeans, Lingerie, Swim, Other	45391	Pet and Pet Supplies Stores
NON-FOOD STORE RETAIL: FURNITURE, HOME FURNISHINGS, ELECTRONICS		45392	Art Dealers
44211	Furniture Stores	453992	Beer and Wine-Making Supplies Stores
44221	Floor Coverings Stores	453999	Artists' Supplies, Party, Tobacco
442291	Draperies/Blinds		Other Miscellaneous Retailers
442292	Print and Picture Frame Stores		
442298	Bedding, China, Housewares, Lamps, Linen, Mirrors		
443143	Appliance, Television, and Other Electronics		
443143	Cellular Phone Stores		
443143	Vacuum Cleaner Stores		
443144	Computer and Software Stores		
443145	Camera and Photographic Supplies Stores		
443146	Audio and Video Recording Stores		

(1) Statistics Canada, North American Industry Classification System, Canada, 2017

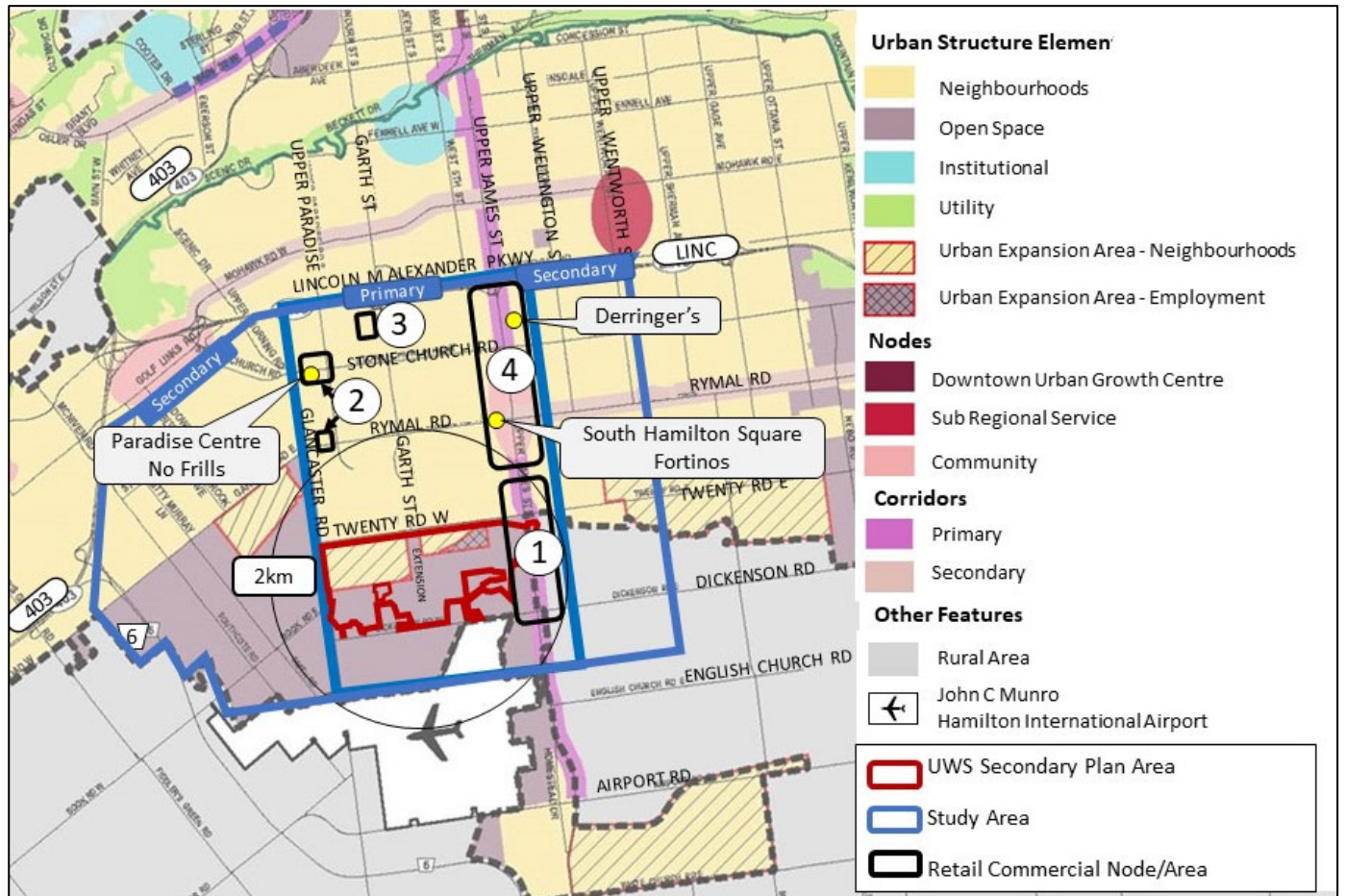
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RETAIL STORE AND SERVICE CLASSIFICATION BY TYPE

NAICS 2017	STORE TYPE	NAICS 2017	STORE TYPE
LIQUOR / BEER / WINE		FINANCIAL AND REAL ESTATE SERVICES	
44531	Liquor	52211	Banking
44531	Beer	52213	Local Credit Unions
44531	Wine (not wine making)	53131	Real Estate
OTHER RETAIL: MISCELLANEOUS		52421	Insurance Agencies and Brokerages
453999	Auctioneering, with own facilities	5231	Brokerage
453999	Hot-tubs and whirlpools	54121	Accounting, Tax Preparation, Bookkeeping and Payroll Services
453999	Numismatic Supplies (coin)	MEDICAL, DENTAL, HEALTH, LEGAL SERVICES	
453999	Philatelic Supplies (stamps)	62111	Offices of Physicians
45393	Mobile Home Dealers	62121	Offices of Dentists
453992	Beer and Wine-Making Supplies Stores	62131	Offices of Chiropractors
453999	Other Retail (misc.)	62132	Offices of Optometrists
SERVICES:		621	Other Health Care Services
FOOD SERVICES AND DRINKING PLACES		5411	Legal Services
722511	Full-Service Restaurants (licenced)	SERVICES: OTHER	
	Full-Service Restaurants (not licenced)	51213	Cinemas/ Film Festivals/ Theatres
72232	Fast Food	71312	Amusement Arcade
722512	Coffee Shops, Doughnuts	71394	Fitness and Recreational Sports Centres
	Specialty Coffee	71395	Bowling, Billiards
PERSONAL SERVICES		49111	Postal Service, Courier
81211	Hair Care and Aesthetic Services	51912	Library
81231	Coin-Operated Laundries and Dry Cleaners	81111	Automotive Repair and Maintenance
81232	Dry Cleaning and Laundry Services (except Coin-Operated)	811412	Appliance Repair and Maintenance
81291	Pet Care (except Veterinary) Services	81219	Health/Tanning Salon
81292	Photo Finishing Services	44111	New Car Dealers
81299	Other Personal Services	44112	Used Car Dealers
56151	Travel Agencies		Public Administration
			Other Office
			Other Services

(1) Statistics Canada, North American Industry Classification System, Canada, 2017

Figure A-1: Supply and Distribution of Retail Commercial Space in the Study Area
Urban Structure Elements Base Map



Base map sourced from UHOP Schedule E Urban Structure Elements (2023), with overlay information provided by Ward Land Economics Inc.

Table A-1: Primary Study Area Retail and Service Commercial Space (in sq.ft.)

	Upper James Street South Area	Upper Paradise Street Area	Garth Street	Upper James Street North Area	Total Primary Area
<i>Node/Area</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	
Supermarket and Grocery Stores	0	20,000	0	63,100	83,100
Other Food Stores	300	14,600	3,200	15,500	33,600
Total Food Store Space	300	34,600	3,200	78,600	116,700
General Merchandise Stores	0	0	0	16,700	16,700
Health and Personal Care Stores	0	10,800	15,000	40,100	65,900
Clothing and Accessories	0	1,600	0	103,100	104,700
Electronics and Appliances	0	1,300	0	29,400	30,700
Furniture and Home Furnishings	0	0	0	124,600	124,600
Home Improvement	12,500	1,600	0	5,000	19,100
Other Non Food Stores	0	1,300	0	32,500	33,800
Total Non Food Store Space	12,500	16,600	15,000	351,400	395,500
Total Retail	12,800	51,200	18,200	430,000	512,200
Second Hand Merchandise	0	0	0	26,500	26,500
Liquor / Beer / Wine	0	0	0	19,600	19,600
Miscellaneous	0	1,000	0	9,400	10,400
Total Other Retail	0	1,000	0	55,500	56,500
Food Services and Drinking Places	0	24,300	6,800	161,400	192,500
Repair and Maintenance Services	10,000	4,000	0	15,000	29,000
Personal Services and Laundry	0	9,900	1,800	8,500	20,200
Financial Services	0	0	0	21,400	21,400
Medical Services	0	10,900	1,800	34,300	47,000
Other Professional Services	0	0	0	16,900	16,900
Other Services	4,000	5,000	0	44,400	53,400
Entertainment and Fitness	0	0	0	82,200	82,200
Automotive Dealerships	30,000	0	0	231,000	261,000
Total Services	44,000	54,100	10,400	615,100	723,600
Total Occupied Space (in sq.ft.)	56,800	106,300	28,600	1,100,600	1,292,300
Vacant Space	0	2,100	0	40,900	43,000
Total (in sq.ft.)	56,800	108,400	28,600	1,141,500	1,335,300

Inventory carried out under the direction of Ward Land Economics Inc. June, 2021. Includes auto dealerships.

Table A-2: Primary Study Area Retail and Service Commercial Space - Distribution of Type of Space Within Each Node

	Node 1: Upper James Street South Area	Node 2: Upper Paradise Street Area	Node 3: Garth Street	Node 4: Upper James Street North Area	Total
<i>Node/Area</i>	1	2	3	4	
Supermarket and Grocery Stores	0.0%	18.5%	0.0%	5.5%	6.2%
Other Food Stores	0.5%	13.5%	11.2%	1.4%	2.5%
Total Food Store Space	0.5%	31.9%	11.2%	6.9%	8.7%
General Merchandise Stores	0.0%	0.0%	0.0%	1.5%	1.3%
Health and Personal Care Stores	0.0%	10.0%	52.4%	3.5%	4.9%
Clothing and Accessories	0.0%	1.5%	0.0%	9.0%	7.8%
Electronics and Appliances	0.0%	1.2%	0.0%	2.6%	2.3%
Furniture and Home Furnishings	0.0%	0.0%	0.0%	10.9%	9.3%
Home Improvement	22.0%	1.5%	0.0%	0.4%	1.4%
Other Non Food Stores	0.0%	1.2%	0.0%	2.8%	2.5%
Total Non Food Store Space	22.0%	15.3%	52.4%	30.8%	29.6%
Total Retail	22.5%	47.2%	63.6%	37.7%	38.4%
Second Hand Merchandise	0.0%	0.0%	0.0%	2.3%	2.0%
Liquor / Beer / Wine	0.0%	0.0%	0.0%	1.7%	1.5%
Miscellaneous	0.0%	0.9%	0.0%	0.8%	0.8%
Total Other Retail	0.0%	0.9%	0.0%	4.9%	4.2%
Food Services and Drinking Places	0.0%	22.4%	23.8%	14.1%	14.4%
Repair and Maintenance Services	17.6%	3.7%	0.0%	1.3%	2.2%
Personal Services and Laundry	0.0%	9.1%	6.3%	0.7%	1.5%
Financial Services	0.0%	0.0%	0.0%	1.9%	1.6%
Medical Services	0.0%	10.1%	6.3%	3.0%	3.5%
Other Professional Services	0.0%	0.0%	0.0%	1.5%	1.3%
Other Services	7.0%	4.6%	0.0%	3.9%	4.0%
Entertainment and Fitness	0.0%	0.0%	0.0%	7.2%	6.2%
Automotive Dealerships	52.8%	0.0%	0.0%	20.2%	19.5%
Total Services	77.5%	49.9%	36.4%	53.9%	54.2%
Total Occupied Space	100.0%	98.1%	100.0%	96.4%	96.8%
Vacant Space	0.0%	1.9%	0.0%	3.6%	3.2%
Total Measured Space	100.0%	100.0%	100.0%	100.0%	100.0%

Table A-3: Primary Study Area Retail and Service Commercial Space - Distribution of Space by Category

	Node 1: Upper James Street South Area	Node 2: Upper Paradise Street	Node 3: Garth Street	Node 4: Upper James Street North Area	Total
<i>Node/Area</i>	1	2	3	4	
Supermarket and Grocery Stores	0.0%	24.1%	0.0%	75.9%	100.0%
Other Food Stores	0.9%	43.5%	9.5%	46.1%	100.0%
Total Food Store Space	0.3%	29.6%	2.7%	67.4%	100.0%
General Merchandise Stores	0.0%	0.0%	0.0%	100.0%	100.0%
Health and Personal Care Stores	0.0%	16.4%	22.8%	60.8%	100.0%
Clothing and Accessories	0.0%	1.5%	0.0%	98.5%	100.0%
Electronics and Appliances	0.0%	4.2%	0.0%	95.8%	100.0%
Furniture and Home Furnishings	0.0%	0.0%	0.0%	100.0%	100.0%
Home Improvement	65.4%	8.4%	0.0%	26.2%	100.0%
Other Non Food Stores	0.0%	3.8%	0.0%	96.2%	100.0%
Total Non Food Store Space	3.2%	4.2%	3.8%	88.8%	100.0%
Total Retail	2.5%	10.0%	3.6%	84.0%	100.0%
Second Hand Merchandise	0.0%	0.0%	0.0%	100.0%	100.0%
Liquor / Beer / Wine	0.0%	0.0%	0.0%	100.0%	100.0%
Miscellaneous	0.0%	9.6%	0.0%	90.4%	100.0%
Total Other Retail	0.0%	1.8%	0.0%	98.2%	100.0%
Food Services and Drinking Places	0.0%	12.6%	3.5%	83.8%	100.0%
Repair and Maintenance Services	34.5%	13.8%	0.0%	51.7%	100.0%
Personal Services and Laundry	0.0%	49.0%	8.9%	42.1%	100.0%
Financial Services	0.0%	0.0%	0.0%	100.0%	100.0%
Medical Services	0.0%	23.2%	3.8%	73.0%	100.0%
Other Professional Services	0.0%	0.0%	0.0%	100.0%	100.0%
Other Services	7.5%	9.4%	0.0%	83.1%	100.0%
Entertainment and Fitness	0.0%	0.0%	0.0%	100.0%	100.0%
Automotive Dealerships	11.5%	0.0%	0.0%	88.5%	100.0%
Total Services	6.1%	7.5%	1.4%	85.0%	100.0%
Total Occupied Space	4.4%	8.2%	2.2%	85.2%	100.0%
Vacant Space	0.0%	4.9%	0.0%	95.1%	100.0%
Total Measured Space	4.3%	8.1%	2.1%	85.5%	100.0%

Appendix B

Customer Origin Data

Customer origin survey data provide input to the assessment of shopping patterns at various locations within the Study Area. The shopping pattern information provides input to the retail commercial needs and impact assessment.

Customer origin of mobility data for a one year period from July 15, 2020 to July 15, 2021 were provided by UberMedia/Near. The sampling of cellular location mobility data is based on anonymized, permission-based data provided by location enabled mobile devices. The customer origin location data are based on common evening location and are analyzed by geographic area including distance from each surveyed location and by Study Area sector.

Customer origin mobility data were assessed at three supermarkets and two supermarket anchored shopping centres in the Study Area. The locations include:

- No Frills (Upper Paradise Centre) – SW Upper Paradise Road and Stone Church Road West
- Upper Paradise Centre – SW Upper Paradise and Stone Church Road West
- Fortinos (South Hamilton Square) – NW Upper James Street and Rymal Road West
- South Hamilton Square – NW Upper James Street and Rymal Road West
- Derringers – NE Upper James Street and Stone Church Road

The following tables and figures summarize the customer origin data.

Table B-1: Customer Origin by Distance from Each Supermarket or Shopping Centre¹⁾

	Upper Paradise Street		Upper James Street		
	No Frills Upper Paradise Centre	Upper Paradise Centre	Fortinos South Hamilton Square	South Hamilton Square	Derringers
< 2km	42%	38%	18%	15%	17%
2-4km	21%	21%	24%	20%	20%
Subtotal <4km	63%	59%	42%	34%	37%
4-10km	10%	23%	31%	33%	29%
> 10km	26%	18%	27%	32%	33%
Subtotal >4km	37%	41%	58%	66%	63%
Total	100%	100%	100%	100%	100%

Sample Size (rounded)	1,560	2,060	2,800	7,630	1,750
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1) Customer origin is measured by radius distance from each supermarket or shopping centre location.

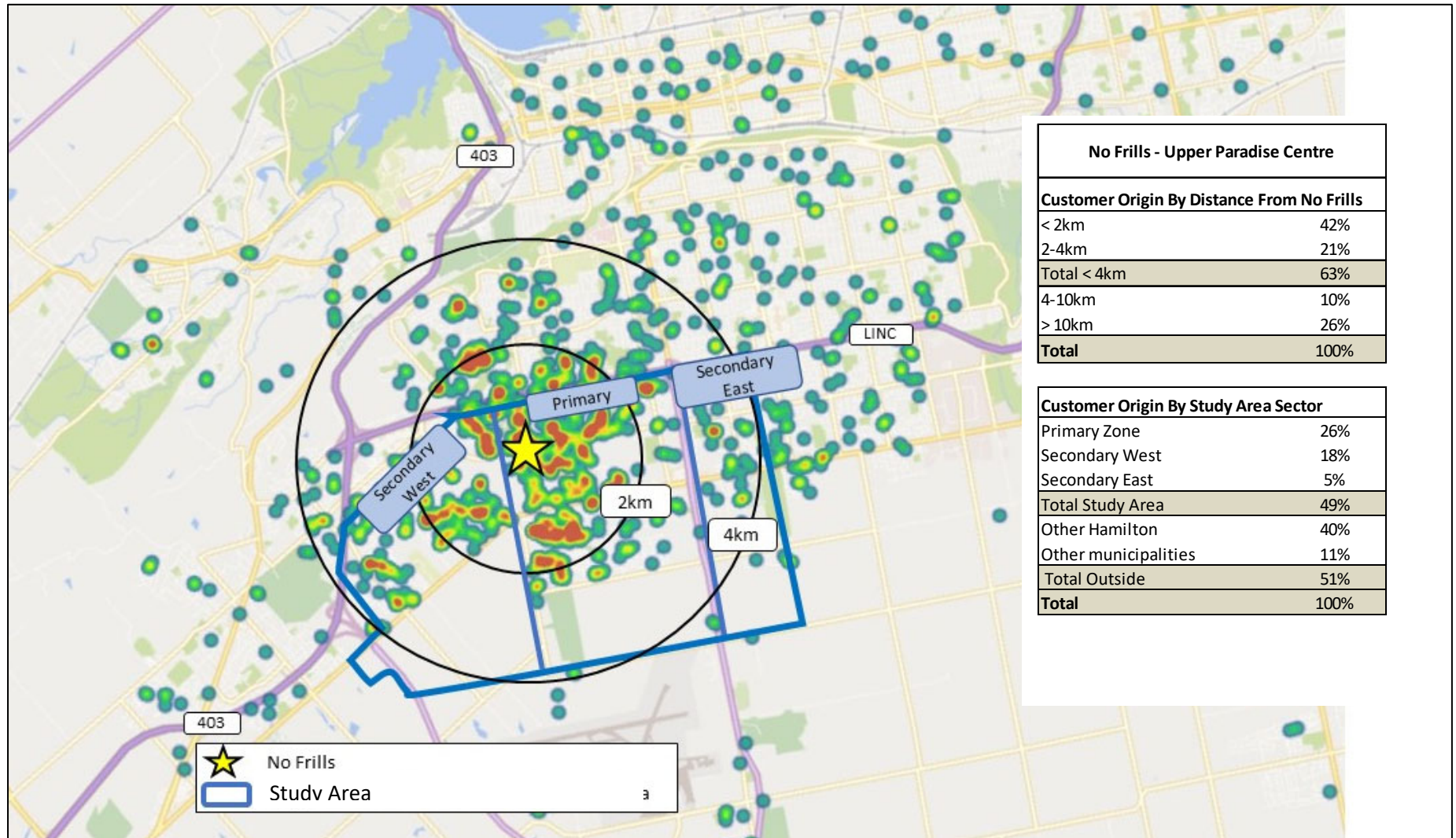
Source: Ward Land Economics Inc. summary of UberMedia/Near mobility data July 15, 2020 to July 15, 2021.

Table B-2: Customer Origin by Study Area Sector

	Upper Paradise Street		Upper James Street		
	No Frills Upper Paradise Centre	Upper Paradise Centre	Fortinos South Hamilton Square	South Hamilton Square	Derringers
Primary Area	26%	22%	15%	12%	10%
Secondary West	18%	16%	5%	4%	4%
Secondary East	5%	5%	9%	7%	9%
Total Study Area	49%	44%	28%	23%	23%
Other Hamilton	40%	44%	51%	51%	51%
Other	11%	12%	21%	26%	26%
Outside Study Area	51%	56%	72%	77%	77%
Total	100%	100%	100%	100%	100%

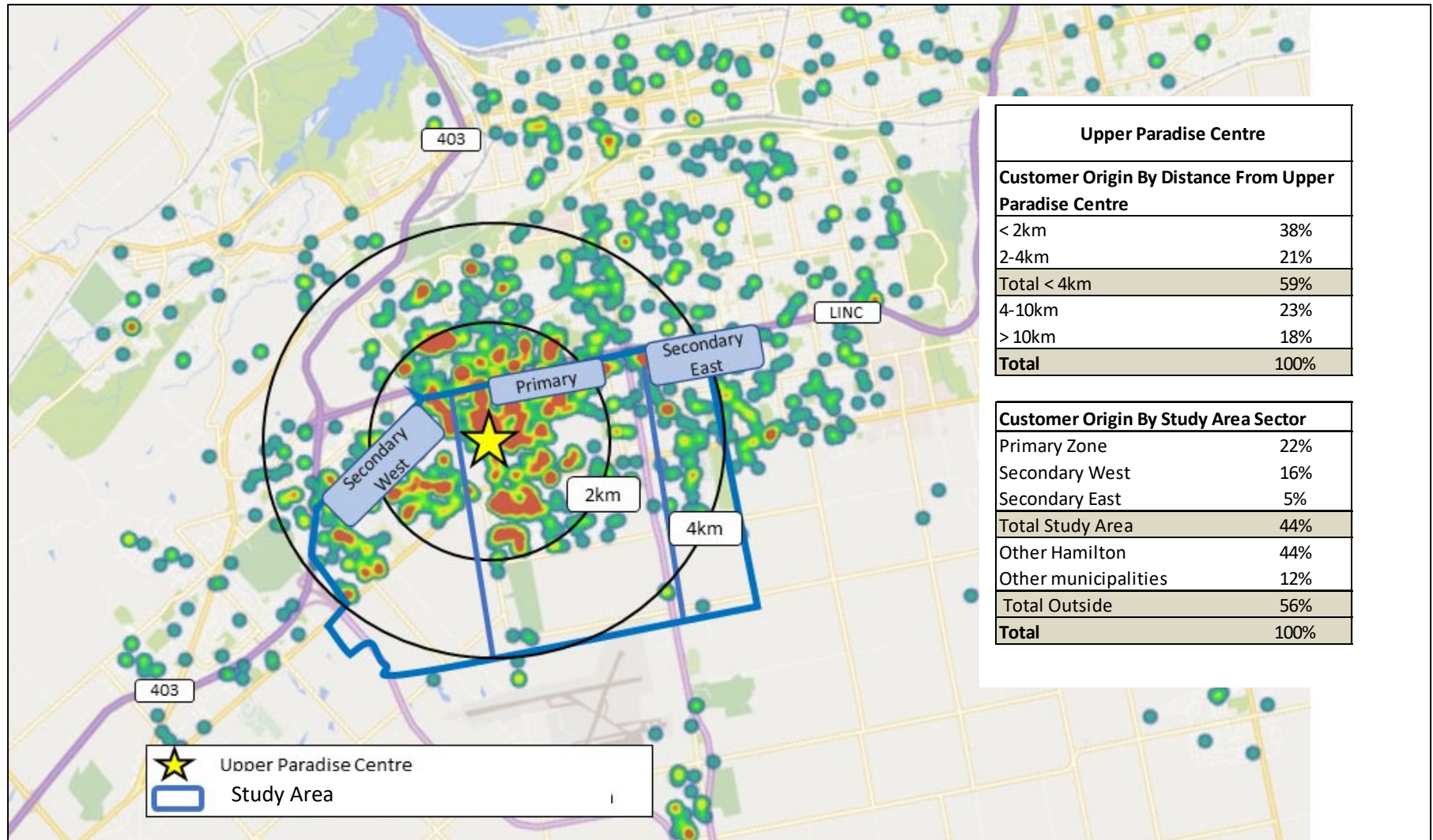
Source: Ward Land Economics Inc. summary of UberMedia/Near mobility data July 15, 2020 to July 15, 2021.

Figure B-3: No Frills – Upper Paradise Centre Customer Origin



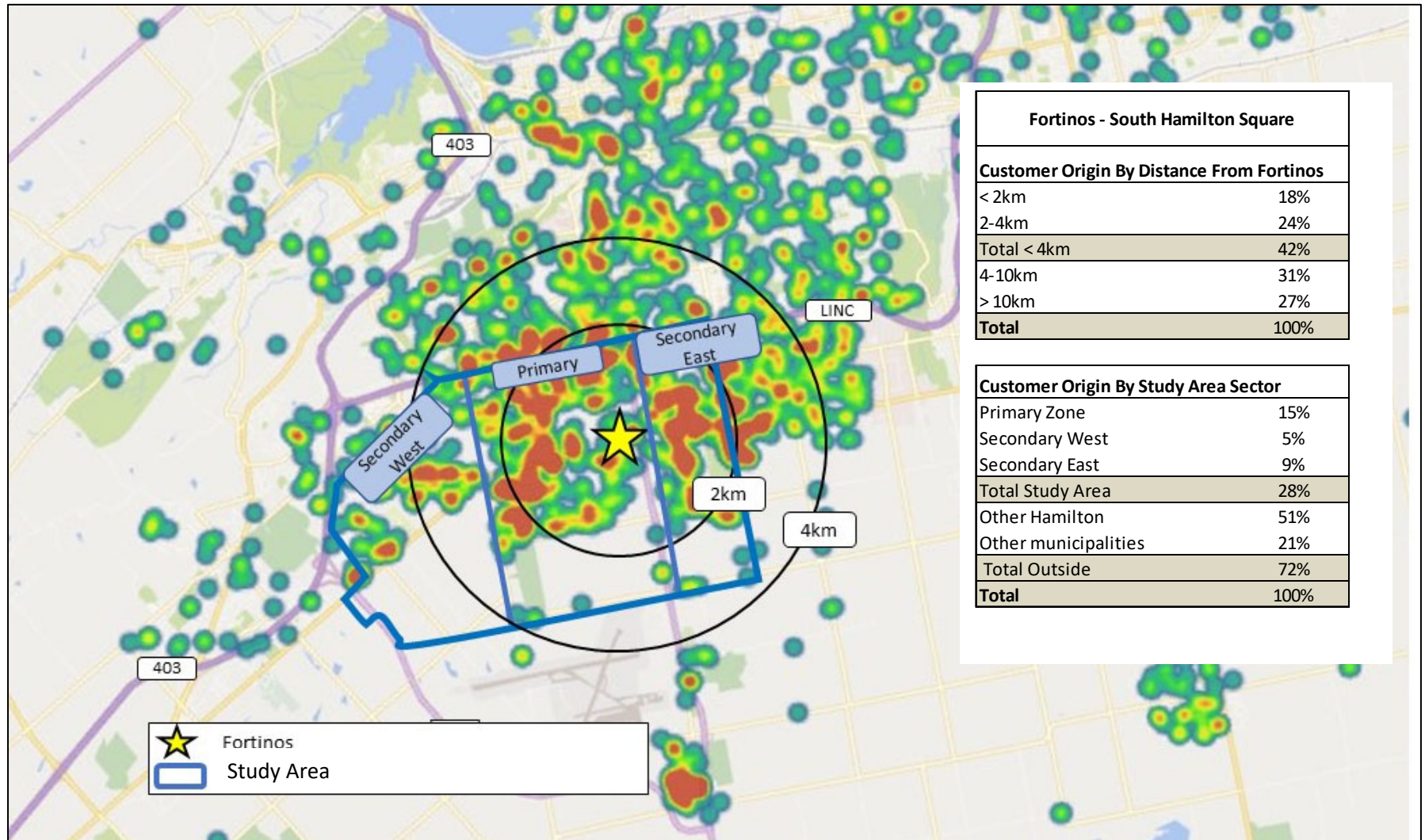
Ward Land Economics Inc. summary of UberMedia/Near mobility data, common evening location July 15, 2020 to July 15, 2021.

Figure B-4: Upper Paradise Centre Customer Origin



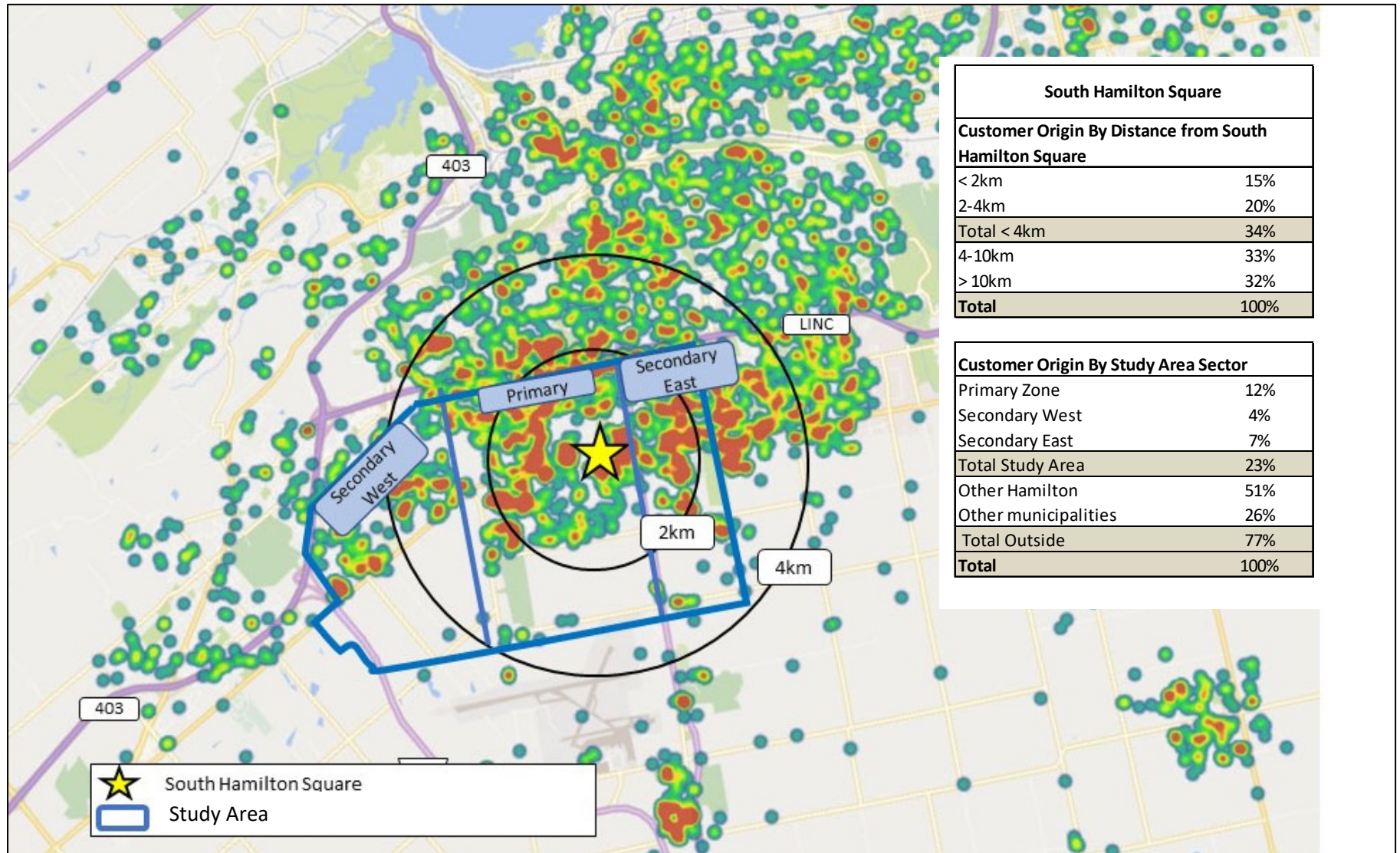
Ward Land Economics Inc. summary of UberMedia/Near mobility data, common evening location July 15, 2020 to July 15, 2021.

Figure B-5: Fortinos South Hamilton Square Customer Origin



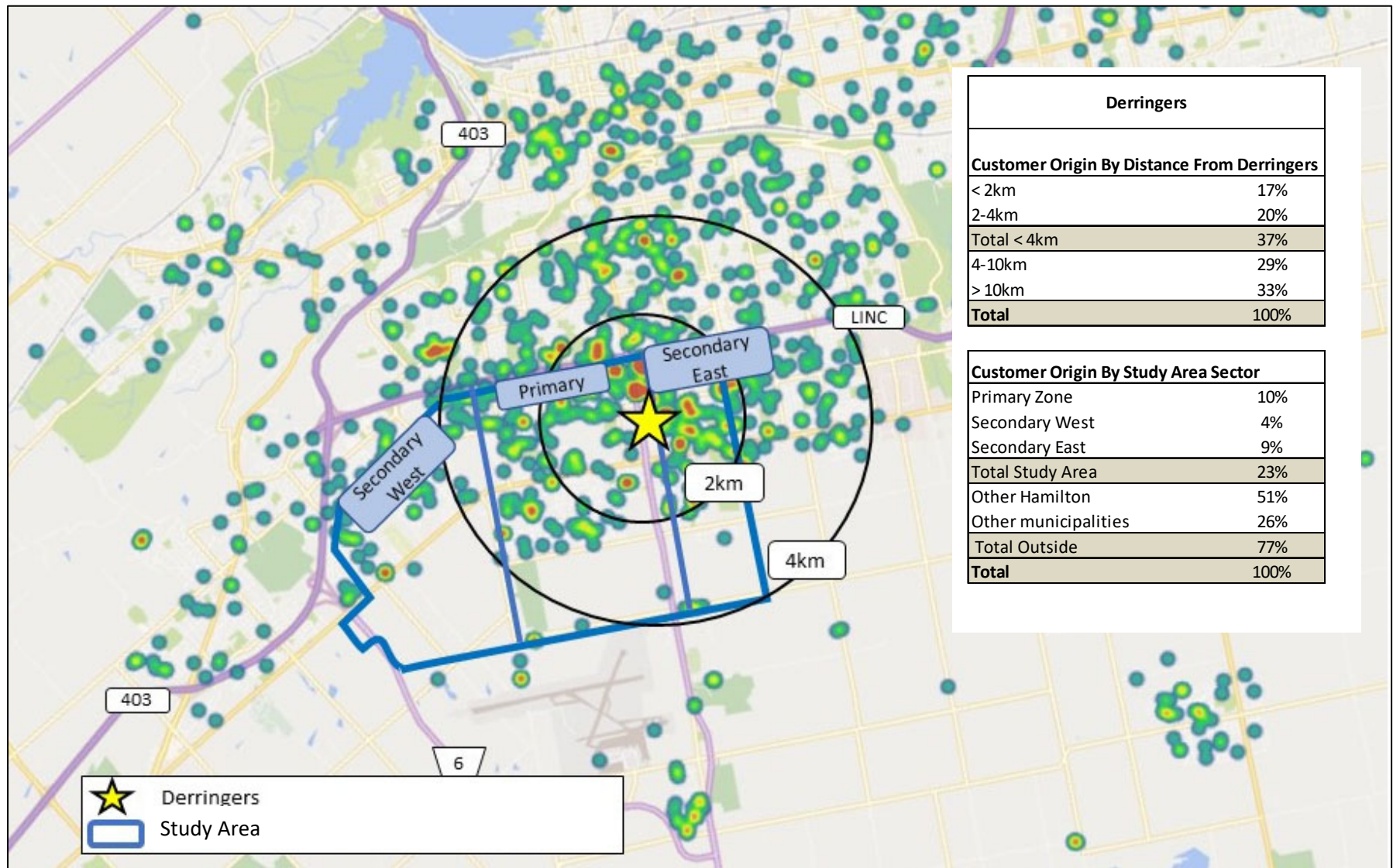
Ward Land Economics Inc. summary of UberMedia/Near mobility data, common evening location July 15, 2020 to July 15, 2021.

Figure B-6: South Hamilton Square Customer Origin



Ward Land Economics Inc. summary of UberMedia/Near mobility data, common evening location July 15, 2020 to July 15, 2021.

Figure B-7: Derringers Customer Origin



Ward Land Economics Inc. summary of UberMedia/Near mobility data, common evening location July 15, 2020 to July 15, 2021.

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