



**urban
Metrics**

Glendale Secondary Plan

Population, Commercial & Employment Analysis

Niagara-on-the-Lake, Ontario

Prepared for The Regional Municipality of Niagara Region

February 28, 2024



**urban
Metrics**



Niagara-on-the-Lake
EST.1781



**Niagara
Region**

This document is available in alternative formats upon request by contacting:
info@urbanMetrics.ca
416-351-8585 (1-800-505-8755)

Title page image source: urbanMetrics inc., with ESRI satellite imagery



urbanMetrics inc.
15 Toronto St, Suite 602
Toronto ON M5C 2E3
Tel: 416-351-8585
urbanMetrics.ca

February 28, 2024

Donna Hinde, Partner
The Planning Partnership
1255 Bay Street, Suite 500
Toronto, Ontario, Canada
M5R 2A9

Dear Ms. Hinde:

RE: Glendale Secondary Plan – Population, Commercial & Employment Analysis
(Niagara-on-the-Lake, Ontario)

urbanMetrics inc. is pleased to submit this Population, Commercial, and Employment Analysis for the Glendale Secondary Plan Area in the Town of Niagara-on-the-Lake. This report examines the market dynamics for commercial and employment uses with the growth of the Glendale population.

The analysis and recommendations provided in this report are intended to support the planning of future commercial space and employment lands to support the complete needs of the Glendale SPA.

It has been a pleasure conducting this study on your behalf and we look forward to discussing the results of our findings with you.

Yours truly,

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

Rowan Faludi, MCIP, RPP, CMC, PLE
Partner

Contents

1.0	Executive Summary	1
2.0	Introduction	8
2.1	Context	9
2.2	Purpose	9
2.3	Approach	9
2.4	Assumptions & Limitations	11
3.0	Site & Access	13
3.1	Location Characteristics	14
3.2	Surrounding Area	15
3.3	Economic and Visitor Drivers	16
3.4	Access and Transportation	16
4.0	Policy Context	20
4.1	Provincial Policy Context	21
4.2	Niagara Region Official Plan	23
5.0	Population and Market Characteristics	25
5.1	Population and Employment Projections	26
5.2	Housing Market Dynamics in Glendale and NOTL	28
5.3	Demographic Characteristics	31
6.0	Commercial Needs Analysis	37
6.1	Retail Trends	38
6.2	Mixed-Use Development	42
6.3	Trade Area Delineation	45
6.4	Commercial Inventory	49
6.5	Expenditure Potential	52
6.6	Demand Assessment	53
7.0	Employment and Employment Land Needs Analysis	58
7.1	Existing Employment in Glendale	59

7.2	Overview and Trends	60
7.3	Current Employment Land Supply	63
7.4	Niagara Region Land Needs Assessment - Employment	64
7.5	Employment Lands Policy Review	66
8.0	Conclusions and Strategic Directions	74
Appendix A	Market Analysis	81
Appendix B	North American Industry Classification System	86

Figures

Figure 1-1 - Cumulative Projected Growth in Population Employment	2
Figure 3-1: Glendale SPA	14
Figure 3-2: Go Transit Connection – Route 12 & NRT Bus Routes	18
Figure 5-1: Forecast Population.....	27
Figure 5-2: St. Catharines and NOTL Average Annual Housing Starts	29
Figure 5-3: Housing Unit Allocation from Region of Niagara LNA 2021-2051.....	30
Figure 5-4: Per Capita Income in 2020.....	32
Figure 5-5: Commuter Flows, For those that Live in NOTL	33
Figure 5-6: Age Profile.....	34
Figure 5-7: Households by Tenure	34
Figure 5-8: Share of Households by Household Size & Dwelling Type	35
Figure 6-1: E-Commerce Penetration	39
Figure 6-2: Canadian Retail E-Commerce Sales as a Percentage of Total Retail Sales 2019-2022.....	41
Figure 6-3: Trade Area.....	46
Figure 6-4: Surveyed Nodes.....	48
Figure 6-5: Visitation Patterns by Origin and Node, 2021-2022	49
Figure 6-6: Total Retail/Service Commercial Inventory by Store Type.....	50
Figure 6-7: Inventory by Node.....	51
Figure 6-8: Summary of Total Space Warranted by Store Category	56
Figure 7-1: Glendale Secondary Plan Area Existing Employment Base	59
Figure 7-2: Industrial Vacancy and Availability Rate of Existing Buildings in Nlagara Region.....	61
Figure 7-3: Employment Growth Potential by Employment Area	65
Figure 7-4: LNA 2051 Projected Employment in Niagara-on-the-Lake by Type	65
Figure 7-5: Employment Areas, Schedule G, NOP, Glendale Secondary Plan Area	68
Figure 7-6: Site Specific Policy Area Identified in the NOP.....	69
Figure 7-7: Current Glendale Secondary Plan Land Use Plan.....	70
Figure 7-8: Estimated Employment Growth in Glendale.....	73
Figure 8-1: Cumulative Projected Growth in Population and Employment	75

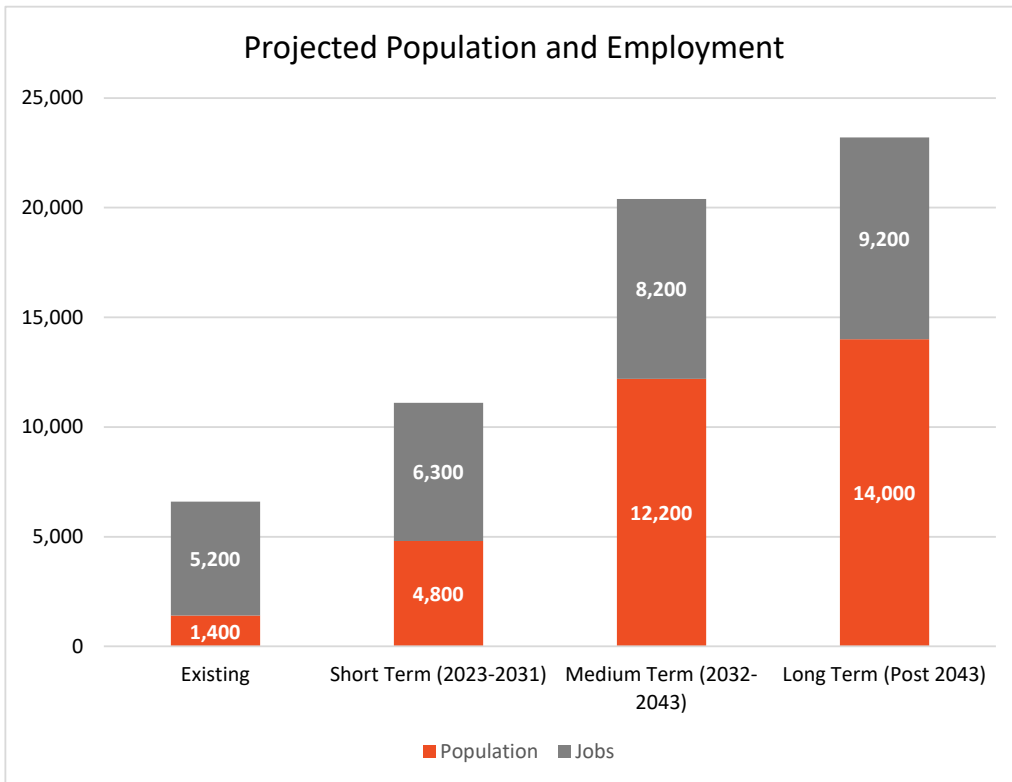
1.0 Executive Summary

Projected Population and Employment

Population projections have been undertaken based on historic and anticipated housing growth in Niagara-on-the-Lake and Niagara Region, as well as discussions with the Planning Partnership in terms of reasonable densities and height restrictions related to the nearby Airport. The long term population for Glendale has been projected at 14,000. This represents growth of some 12,600 persons over the current population of 1,400.

Employment projections are based on the commercial market demand analysis, planned densities within the Momentum Employment District, the opportunity for intensification on current employment lands, expansion plans by Niagara College and the need for other population serving jobs (e.g., education, government, recreation, institutional, and related employment) to support future residential growth. In total, the future employment potential at build-out is estimated at approximately 9,200 or a growth of approximately 4,000 over the current level.

Figure 1-1 - Cumulative Projected Growth in Population Employment



SOURCE: urbanMetrics inc.

Commercial Needs

While Glendale is the location of the Outlet Collection at Niagara, a major outlet centre which draws customers across South Central Ontario and the United States, it is almost completely lacking in retail and services space to serve the local population, such as food stores, pharmacies, and other specialty retail shops and services to serve the day-to-day and weekly shopping trips of residents. This is largely due to the current small population base within Glendale. However, to support future residents, a completely new local serving commercial infrastructure will be required.

While it is desirable to design and located future commercial facilities in a manner which encourages pedestrian and cycling-based shopping trips, the challenge with Glendale is that future residential development areas will be divided by the QEW corridor, so that there is no possible central commercial location which will be convenient to all residents.

Overall, the future population will support between about 187,000 and 240,000 square feet over the next 20 years.

The following describes our recommendations with regards to the distribution of this space by format and location.

Neighbourhood Shopping Node

The size of the future Glendale Population would warrant a supermarket within a neighbourhood scale retail node serving weekly shopping trips by Glendale residents. The amount of retail space for this facility should be between about 80,000 to 120,000 square feet. The uses incorporated into this node would include: a supermarket or major grocery store; a pharmacy; together with a range of other services and specialty retail outlets. This space could also include second floor office units to accommodate local serving offices – e.g., health and wellness; real estate, insurance, finance, co-working space, and other similar activities.

The difficulty facing Glendale is that the future population would be split by the QEW, so the neighbourhood shopping node would be significantly more convenient to half of the future Glendale population. In our opinion, this node should be located on the south side of the QEW on lands identified in the former Glendale District Plan for the creation of a Main Street on Niagara-on-the-Green Boulevard. This location would offer several advantages to other sites:

- It would draw on visitors to the outlet centre;
- It would be easily accessible via Glendale Avenue to the St. Catharines' neighbourhoods to the immediate east of the secondary plan area;

- It would also be within a reasonable walking or cycling distance from Niagara College and the existing Niagara-on-the-Green neighbourhood; and,
- Depending on the densities, the largest share of new growth in Glendale could be developed in the immediate vicinity of Niagara-on-the-Green Boulevard.

As noted above, we would recommend that flexibility be provided for in terms of planning regulations governing the format of retail space in this area. To minimize the need for on-site parking and to accommodate visitors from other parts of Glendale and beyond, we would recommend that on-street parking be made available in front of retail stores on Niagara-on-the-Green Boulevard. The street should also be designed to encourage pedestrians and cyclists.

Convenience Retail Node

Due to the divided nature of the future population, we would also recommend a small convenience retail node of between 20,000 and 40,000 square feet on the north side of the QEW at a location central to the future population in the area. This node could contain a small grocery or convenience store and a selection of other services and specialty retail uses.

Other Retail and Services Space

Additional opportunities should be provided for retail and services space in the area in appropriate locations. This could include:

- Ground floor retail space in mixed use buildings at appropriate locations;
- Limited small scale ancillary retail and services space in the Momentum District to serve local employees and businesses; and,
- Other retail space may be considered to support specific land uses, such as in proximity to hotels, the College, and the future transit terminal.

Employment Lands Needs

There are three key employment land use categories that direct the future development of the Glendale SPA:

1. Employment Areas;
2. A site specific policy which relates to lands in proximity to York Road and Townline Road; and,
3. Employment Lands.

Employment Areas

Employment Areas are areas of regional importance that are mapped and assigned policies by Niagara Region in the new Regional Official Plan. Residential uses and major retail uses are prohibited in these areas. Major office uses (4,000 square metres or greater or with 200 or more jobs) are also generally prohibited in employment areas except in Strategic Growth Areas, such as the Glendale Secondary Plan Area.

The employment areas within the Glendale Secondary Plan Area (referred to as the Glendale Momentum District) are identified as the “Knowledge and Innovation” type. Knowledge and Innovation employment areas are planned to be clusters of higher density employment uses, including office parks, and major institutional uses to facilitate partnerships and promote the sharing of ideas and information. These areas are intended to have high design standards and support active transportation and transit usage.

Currently there are some 25 hectares of vacant land in the Glendale Momentum District. There is also considerable intensification potential on a number of existing sites on which extensive land area is devoted to outside storage and vehicle/equipment parking. The current employment density of approximately 13 jobs per hectare is considered low by urban standards.

Employment Lands

Employment Lands are lands which are subject to policies and mapping by the Local Area municipalities that are supported by the Region.

A number of key differences exist between the “Employment Area (Regionally important) overlay” and the “Employment Land (Locally important) overlay”:

- Lands on the southwest quadrant of the Glendale interchange are identified as Prestige Employment Lands in the Glendale Secondary Plan but are outside the Regional Employment Area. These lands are occupied by the Niagara Corporate Business Centre, which was acquired by Niagara College and are part of their expansion identified in their Master Plan.
- Lands on the far eastern border of the Secondary Plan Area are also identified as Industrial Park and Prestige Employment in the Glendale Secondary Plan, are also outside of the Region’s Employment Area. These lands are separated from the Employment Area (Glendale Momentum District) by environmental lands. These lands, which are currently vacant, are not well suited for employment uses due to their isolation from the balance of the employment area, including access and environmental constraints and potential challenges with parcel configuration.
- Lands on the north side of the QEW immediately north of the outlet centre are designated Prestige Employment but are outside of the Employment Area overlay.

Site Specific Policy

Section 8.6.5 of the NOP includes a **Site Specific Policy** for lands in proximity to the intersection of York Road and Townline (Grantham) Road in the Glendale Secondary Plan Area. These lands, which are designated as Employment Area – Knowledge and Innovation, in Schedule G of the NOP, are approximately 4.5 hectares in size.

The Special Policy area is designated as Employment Area within the Glendale Momentum District Employment Area. Based on Section 8.6.5 of the Regional Official Plan, through the Glendale Secondary Plan update, technical studies may support adjusting the types of uses permitted or adjusting the boundary of Glendale Momentum District Employment Area for the identified area provided there is sufficient justification to support modification to the Region’s satisfaction. Notwithstanding the other policies of this Plan, the Region may reflect any adjustment without amendment to this Plan following the approval of the Secondary Plan.

The future use permissions on these lands are being reviewed as part of the planning analysis in the Secondary Plan process.

Region of Niagara Land Needs Assessment Report

The Region completed a Land Needs Assessment (LNA) to support its Municipal Comprehensive Review (MCR) of its Official Plan. The LNA Methodology, which was prescribed by the Province, was based on the population and employment targets in the Growth Plan.

With the Official Plan Review completed through the now-approved Regional Official Plan, the Land Needs Assessment has fulfilled its purpose and is likely no longer required to guide the planning of the Region’s employment lands. Furthermore, the proposed Provincial Planning Statement would remove the population and employment targets which were an integral part of the Growth Plan and provide more flexibility for municipalities in terms of growth management.

While the LNA, suggested that there was a surplus of employment land in Niagara-on-the-Lake, in our opinion, the results of the LNA with regards to the need for employment lands in Glendale should be treated very cautiously. The Region’s LNA was intended as a high level numerical planning exercise and does not capture the specific characteristics of the Glendale employment land supply particularly well.

Based on a review of the market for employment lands and the strategic location of Glendale, it is very unlikely that an employment land surplus exists in Niagara-on-the-Lake, particularly with respect to the Glendale Momentum District lands.

Future Market for the Glendale Momentum District

An Employment Land Strategy completed on behalf of the Region remarked that:

The Glendale Business Park is one of Niagara's premier prestige business parks. The concept for the Glendale Business Park is to leverage proximity to Niagara College and the QEW corridor by designating lands for business park development. The Glendale Business Park has an approved secondary plan in place that provides the detailed development vision for the area¹.

The advantages of Glendale noted in the Strategy include:

- Direct access/exposure to the QEW and close proximity to Highway 405;
- Close proximity to Niagara District Airport;
- Close proximity to the international border;
- Contains large supply of serviced employment land;
- Designated for Prestige Industrial uses;
- Proximity to Niagara College; and,
- A strategic gateway node for Niagara-on-the-Lake.

In our opinion, the Glendale Momentum District is an important resource for both the Town and the Region in terms of attracting high quality jobs and businesses. While the market for major office development in Glendale will likely evolve over the long term, the opportunity to attract high quality prestige businesses to these lands, both on new sites and on existing under utilized sites, should continue to be a priority in terms of economic development. The future use permissions on these lands are being reviewed as part of the planning analysis in the Secondary Plan process.

¹ MHBC and urbanMetrics, Niagara Region's Employment Area Strategy: Background Report and Recommendations, March 20, 2020,

2.0 Introduction

2.1 Context

The Planning Partnership has been engaged together with its sub-consultants - GM Blue Plan, Wood, NCSI and Matrix, LEA Consulting and **urbanMetrics inc.** (“urbanMetrics”, “uMi”) - to update the Glendale Secondary Plan (“Glendale SPA”, “GSPA”). urbanMetrics’ role in this assignment has been to conduct a *Commercial and Employment Land Needs Analysis*, as well as a *Fiscal Impact Analysis*. The Fiscal Impact Analysis is the subject of a separate report.

This study is in support of the Region’s process to refine the boundaries of the Glendale Secondary Plan. It assesses the employment and commercial designations in the Glendale Secondary Plan, and forecasts future market demand and supply dynamics in the Town of Niagara-On-The-Lake (“NOTL”) more generally.

2.2 Purpose

The purpose of this *Commercial and Employment Land Needs Analysis* is to assess how commercial, and employment uses within Glendale can be best positioned to serve residents, attract businesses, and build upon Glendale’s strategic industrial and locational advantages. This study will provide guidance for the ongoing Glendale Secondary Plan by assessing the adequacy of the existing supply of lands to accommodate future demand — an underlying factor in attracting and sustaining diverse employment opportunities.

This study also includes guidance on commercial policies, including: the amount, locations, and formats of future commercial space, and how to best position employment lands in Glendale. The study also provides strategic direction with regards to both commercial and employment lands on how to support current and future residents and employees in Glendale and the broader Region. As part of this study, we have also undertaken population and employment projections as background to the assessment of commercial and employment land needs.

2.3 Approach

In preparing this *Commercial and Employment Land Needs Analysis*, urbanMetrics completed the following work tasks:

Policy Review

- Reviewed background data, including the District Plan, Official Plan, Secondary Plan, Land Needs Assessment, Economic Development Strategies, Regional Employment Area Study, and other relevant planning documentation.

Commercial Analysis

- Completed a commercial inventory of retail and service space in the Glendale SPA, including all vacant space.
- Collected and analyzed mobile analytics data to understand consumer movements and shopping patterns across Glendale and nearby nodes.
- Delineated a trade area from which the majority of consumer support is expected to be generated.
- Analyzed the future commercial need in Glendale 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.
- Estimated overall employment that would be required to support the development of warranted retail space to adequately serve population growth anticipated in Glendale.
- Provided recommendations with regards to the amount, locations, and formats of commercial space, including the planned mixed-use Main Street Area.

Employment Lands Analysis

- Reviewed historical development and absorption patterns.
- Analyzed broader employment land trends and commented on potential impacts on Niagara-on-the-Lake and Niagara Region.
- Conducted interviews with local landowners, developers, interest groups and business owners.
- Identified all employment lands in Glendale, including underutilized parcels, and developed employment projections based on utilization and intensification of these parcels.
- Translated anticipated employment growth into demand for additional employment space need, as well as land requirements.

- Provided recommendations for suitable formats, industrial types, and policy direction in order to accommodate future employment lands-related growth.

2.4 Assumptions & Limitations

There are several underlying assumptions upon which the validity of the findings presented in this report depend. Based on our considerable and long-term experience in the 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 Niagara Region.
- 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 Niagara Region 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 Glendale and Niagara-on-the-Lake 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, Niagara Region, and Niagara-on-the-Lake 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.

3.0 Site & Access

3.1 Location Characteristics

The Glendale SPA is located in the Town of NOTL, directly east of St. Catharines. It is generally bounded by Queenston Road to the north, Concession 7 Road to the east, the Niagara Escarpment to the south and Homer Road to the west and is approximately 700 hectares in size. The Queen Elizabeth Way (“QEW”) bisects the Glendale SPA, with a mix of uses distributed on the north and south side of the district. The Glendale SPA also includes the new Diverging Diamond Interchange at the QEW and Glendale Avenue.

Identified in the Niagara Region Official Plan, the Glendale District is one of the Region’s strategic growth areas and is a high priority for development and intensification. It is anticipated to develop as a complete, mixed-use community that also encompasses a broad range of uses including: institutional uses, office, commercial and recreation uses, public service facilities and higher-density development.

The boundary of the Glendale SPA is shown in Figure 3-1.

Figure 3-1: Glendale SPA



SOURCE: urbanMetrics inc., with ESRI satellite imagery.

3.2 Surrounding Area

The Glendale SPA represents a logical opportunity for intensified, high-density, and mixed-use development due to a number of locational advantages. The following provides a brief description of the Glendale SPA's location relative to surrounding lands uses, services and amenities below.

- **North** – The lands north of the Glendale SPA largely include a Protected Countryside area. Some 2.4 kilometres north of the Glendale SPA is the Niagara District Airport, providing opportunity for distinct access and economic linkage. Further north is one of the Town's other urban communities, Virgil, which contains a small Industrial area.
- **East** – To the east of the Glendale SPA is the Village of St. David's, a mixed-use village with a distinct rural character. The area between the Glendale SPA and the Village of St. David's is largely rural, interspersed with a variety of wineries and open space.
- **South** – The area to the south of the Glendale SPA is largely defined by the Niagara Escarpment Plan Area, an area which encourages the protection of environmental features. Further south are the neighbouring municipalities of Thorold and Niagara Falls, slightly west and east respectively.
- **West** – Directly west is the Welland Canal, which runs north-south between Lake Ontario and Lake Erie. Beyond the Welland Canal, is the Municipality of St. Catharines which is connected to the Glendale SPA by Glendale Avenue and the QEW. Adjacency to St. Catharines means the Glendale SPA is already well connected to existing and emerging development in St. Catharines.

Located in NOTL, just east of St. Catharines, the Glendale SPA represents an optimal location for the development of an intensified mixed-use community. It is well positioned with respect to existing and emerging jobs and commercial opportunities in St. Catharines, as well as the recreational amenities provided throughout western Niagara.

There is opportunity to distinguish this area from the scale and character of the Town's other existing urban places, due in part to its location in NOTL and the existing land uses that surround the area today. In adopting a more intensified development concept, with higher density uses and a greater mix of uses, the Glendale SPA will also support and enhance the local economy, complement other existing communities, and significantly support population growth in the area.

3.3 Economic and Visitor Drivers

Glendale functions as an important gateway to the major visitor destinations in Niagara Region, including: the historic town of Niagara-on-the-lake, Niagara Falls and the many wineries in the Region. It functions as a visitor reception area to the region containing a number of hotels, service centres and visitor services. In addition, it contains a number of important economic drivers for the region, including:

- Industrial lands on the north side of the QEW and east of Glendale Avenue. These lands house a range of local and regionally important businesses and have been designated in the Regional Official Plan as a future cluster of Knowledge and Innovation type uses.
- The Niagara Outlet Collection, with over 100 retail brands, attracts visitors from across the GTA and southern Ontario and the United States.
- White Oaks Resort & Spa is an upscale hotel, spa, sports centre, and conference centres which has established itself as a popular destination for business and pleasure travelers to the region, with excellent access to local attractions due to its location on the QEW.
- Niagara College Niagara-on-the-Lake Campus – Niagara College has approximately 13,500 full and part time students in their two campuses. The college offers applied learning programs many of which relate to the key sectors of the Niagara economy, such as agriculture, viticulture, culinary arts, and hospitality/tourism management. Through its acquisition of a neighbouring business centre, the Niagara-on-the-Lake (Glendale) Campus is planning a major expansion project.

As a result, Glendale is a multi-functional gateway into Niagara, including regional retail, post-secondary, hospitality, and employment activities.

3.4 Access and Transportation

Vehicular Access

The Glendale SPA is well situated in terms of vehicular access to the surrounding region. The area benefits from its access and exposure to the QEW, which runs east west through the Glendale SPA and connects existing uses and users to a major highway interchange on the route to the US Niagara border crossings. Access to the QEW serves as a distinct draw for various employment uses, offering direct and convenient access to both the GTA and US marketplaces.

Vehicular circulation and movement throughout the area is also supported through the introduction of Ontario’s first-ever diverging diamond interchange. This interchange at Glendale Avenue and the QEW, was integrated to help minimize congestion and improve traffic flow for vehicles getting off the QEW. **While additional study is required, the Diamond Interchange may improve overall traffic circulation in the area, enhancing the accessibility and attractiveness of the area as a place to live, locate a business or maintain/establish an employment use.**

However, the QEW also represents a distinct barrier that separates uses in the north and south end of the Glendale SPA. This is heightened by the existing lack of local roadways, which minimize the ability for people to navigate within and between uses in the area. While the QEW enhances regional accessibility, it makes local traffic movements challenging as the only link between the north and south sides of Glendale is via Glendale Avenue and through the Diamond Interchange, which also discourages pedestrian and cycling traffic.

Public Transit

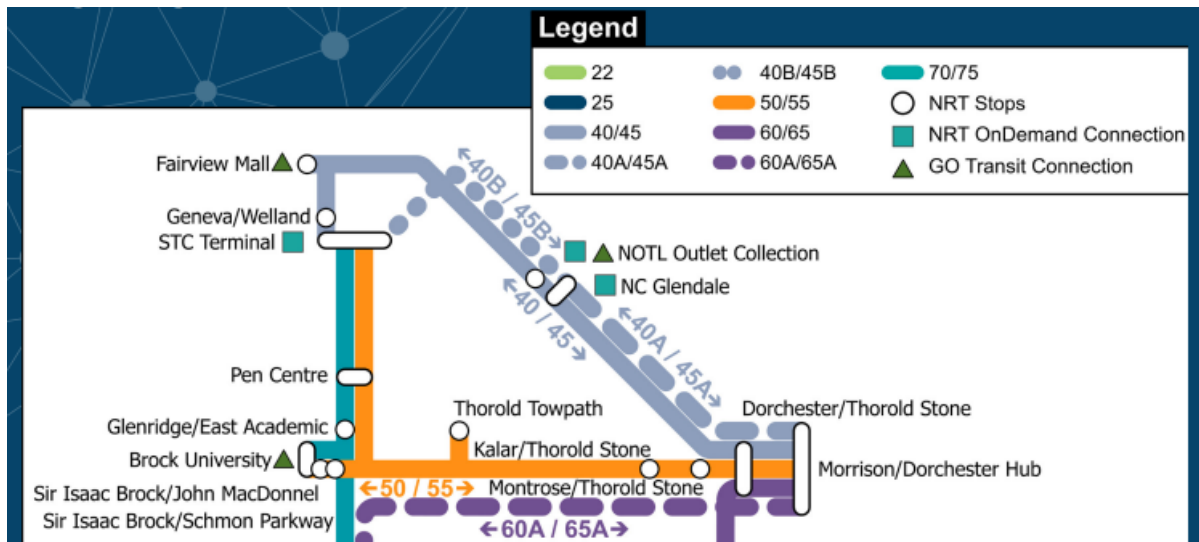
Existing Niagara Region Transit (NRT) provides two transit routes with stops at the Niagara College Glendale Campus and the Outlet Collection of Niagara. Existing NRT Routes connect between the St. Catharines Terminal to the Morrison/Dorchester Hub. Furthermore, transit is provided through NRT OnDemand, which is a real-time trip request service.

GO Transit also runs through Glendale, currently offering one route—Route 12—which connects west from Burlington and east to Niagara-on-the-Lake/Niagara Falls. Route 12 has numerous stops, including one at the Niagara College Glendale Campus.

Figure 3-2 illustrates the routes of both transit options.

We would note that Metrolinx is planning the expansion of GO Train service to include weekday trains to the Niagara Region, with upgraded stations in St. Catharines and Niagara Falls. This service will enhance the attractiveness of the Glendale community to more commuters in the region.

Figure 3-2: Go Transit Connection – Route 12 & NRT Bus Routes



SOURCE: Go Transit Route 12 Map, and Niagara Region Transit (NRT) Bus Route Map.

The integration of a multi-modal transit hub at Glendale Avenue and Taylor Road is proposed as part of the Glendale District Plan as a means to enhance and better serve the community—and the Region—with public transit opportunities going forward. The location of the transit hub within Glendale is still under study.

Active Transit

Currently, there is a limited amount of active transportation connectivity in the Glendale SPA, effectively limiting pedestrian movement throughout the area. This is amplified by the lack of local streets in the area, constraining pedestrian movement in the local area. Similarly existing cycling facilities are only offered along certain segments of select roadways (including Glendale Avenue, and Airport Road) but are inconsistent and not widespread. In part, this is due to the fact that up until now, Glendale has developed as a commercial and industrial area with a very limited residential base. The road network has functioned largely to move commercial and industrial traffic.

Pedestrian friendly streetscapes that encourage a more walkable environment and establish a less vehicle-dependent environment will aid in developing this area as a complete community that promotes and supports both residential and non-residential development. This will be of particular importance in select locations such as the proposed Main Street, as it will help animate the streetscape, create a neighbourhood-scale environment, and provide for a more local scale retail shopping experience.

Overall, Glendale has developed into an important economic gateway for the Region with excellent regional transportation connectivity. However, moving forward, as Glendale evolves into a mixed use community, better internal connectivity and infrastructure that supports active transportation will need to be provided to create a more cohesive community.

4.0 Policy Context

In this section, we address how provincial, regional, and local planning policy shape the current and future function of commercial and employment development in the Glendale SPA.

4.1 Provincial Policy Context

Provincial policy states that accommodating an appropriate range and mix of employment uses including commercial and employment functions are 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.

The Provincial Policy Statement

The Provincial Policy Statement (“PPS”, 2020) provides high-level policy direction for planning and regulating the development and use of land. 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).

Promoting efficient land-use and development patterns to support community and economic growth is detailed in Section 1 of the PPS. Policies included in Section 1.3 of the PPS relate to Employment. **Policy 1.3.1 a)** through **e)** detail the importance of promoting economic development and competitiveness, providing a range of uses, establishing a diversified economic base, and encourage the development of mixed-use development that integrates employment uses with other community uses.

Section 1.3.2 pertains to Employment Areas, highlight the importance of protecting these areas for current and projected needs. **Policies 1.3.2.2** and **1.3.2.3** speak about providing buffers to sensitive land uses within the Employment Area. Additionally, **Policy 1.3.2.6** notes that planning authorities are to protect employment areas in proximity to major goods movement facilities and corridors for employment uses that rely on these locations.

The PPS states that municipalities may only permit the conversion of employment lands to nonemployment uses only through a municipal comprehensive review. It must be demonstrated that the land is not needed for employment in the long-term and that there is a need for the conversion (**Policy 1.3.2.4**).

Notwithstanding Policy 1.3.2.4, the PPS permits municipalities to convert employment lands prior to the update of the official plan as described in Policy 1.3.2.4 according to certain criteria, providing that the lands are not identified as either provincially or

regionally significant. As the Regional Official Plan was updated in 2022, this policy would likely not apply to the employment lands in Glendale.

A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2020

The Growth Plan for the Greater Golden Horseshoe (“Growth Plan”, 2020) 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 Greater Golden Horseshoe. It outlines where and how growth and development will occur within the Greater Golden Horseshoe (GGH) over the longer-term planning horizon to 2051. It also emphasizes the importance of sustaining a defined community structure, including the natural heritage system, settlement areas, mixed-use and higher density areas, established residential neighbourhoods and employment areas.

Employment is addressed in **Section 2.2.5** of the Growth Plan. Emphasizing the efficient use, connectivity of, and availability of land to accommodate forecasted employment growth is detailed in **Policy 2.2.5.1 a) through d)**. Strategic growth areas with existing or planned frequent transit services are identified as a key location for major office and some major institutional uses while retail and office uses more generally are to be directed to locations which support active transportation and transit opportunity. The province also highlights the role of sustaining employment areas in proximity to goods movement facilities in **Policy 2.2.5.5**, specifically:

“Municipalities should designate and preserve lands within settlement areas located adjacent to or near major goods movement facilities and corridors, including major highway interchanges, as areas for manufacturing, warehousing and logistics, and appropriate associated uses and ancillary facilities.”

Furthermore, the Growth Plan highlights the role of upper- and single-tier municipalities in preserving Employment Lands in **Policy 2.2.5.6**:

“Upper- and single-tier municipalities, in consultation with lower-tier municipalities, will designate all employment areas in official plans and protect them for appropriate employment uses over the long-term. For greater certainty, employment area designations may be incorporated into upper- and single-tier official plans by amendment at any time in advance of the next municipal comprehensive review.”

The Proposed Provincial Planning Statement

The Province has released a proposed Provincial Planning Statement for review and commentary. The Planning Statement would combine the current Provincial Policy Statement and the Growth Plan into a single policy document. The Provincial Planning Statement is not currently in effect and subject to change, some key changes with regards to employment areas, such as those in Glendale, include:

- Municipalities will no longer be required to plan for specific Provincially mandated employment and population targets.
- The definition of ‘employment areas’ is proposed to be changed in both the Planning Act and the new PPS, with a focus on uses that cannot locate in mixed use areas, such as heavy industry, manufacturing, and large-scale warehousing.
- Municipalities will be able to consider the removal of land from employment areas. The tests to be met include that there is a need for the removal, and the land is not required for employment uses over the long term. However, in the absence of land budgets and targets to be met, the application of these tests will rely on targets contained in official plans. Private landowners will also be able to apply for employment land conversions.

4.2 Niagara Region Official Plan

The Niagara Official Plan, approved in November 2022, outlines policies and direction for the Niagara Region. Section 4.2 of the Plan provides guidelines on planning for employment in the region. As specified in the Plan, the Region outlines policies for *employment areas*, while Local Area Municipalities identify and develop *employment lands*. These lands are identified in municipalities’ local Official Plans or zoning by-laws and may or may not be located within *employment areas* designated by the Region.

There are three types of employment areas specified in the plan:

1. *Core employment areas*, which accommodate traditional employment uses (e.g., industrial, warehousing, manufacturing). Institutional uses are prohibited in these lands (Policy 4.2.15);
2. *Dynamic employment areas*, which include a mix of traditional and light industrial uses, as well as office and institutional uses. Complementary employment uses are permitted so long as they do not limit the viability of existing or future employment uses within the area (Policy 4.2.16); and

3. *Knowledge and Innovation employment areas*, which are designated for higher density employment, such as office and institutional uses (Policy 4.2.1.7).

The Plan prohibits residential uses, major retail/commercial uses, and major office uses (buildings 4,000 sqm or larger or 200 jobs or more) on employment areas. Strategic Growth Areas, however, permit major office uses on employment areas (Policy 4.2.1.2).

The Niagara Official Plan designates the employment lands on the north side of the QEW east of Glendale Avenue as a “Knowledge and Innovation Employment Area”, and is also referred to as the Glendale Momentum District:

As described by Policy 4.2.1.7:

Knowledge and Innovation employment areas are clusters of higher density employment uses, including office parks, and major institutional uses.

Knowledge and Innovation employment areas will:

- a. contain a mix of complementary land uses to facilitate partnerships and promote the sharing of ideas and information;*
- b. accommodate built form that supports nearby major institutional uses and major office uses where permitted;*
- c. attain high-quality urban design;*
- d. encourage densities that are transit-supportive; and*
- e. incorporate active transportation facilities along active transportation networks.*

The target density for the Glendale Momentum District is 60 jobs per hectare, which is considerably higher than currently exists in the area. In addition to the employment area designated in the Regional Official Plan, are other employment lands identified in the Niagara-on-the-Lake Official Plan, which are locally significant. These include the lands occupied by Niagara College and some lands on the north side of the QEW west of Glendale Avenue

More detail with respect to Regional and local policies governing the employment lands within the Glendale Secondary Plan Area are provided in Section 7.5.

5.0 Population and Market Characteristics

This section provides a detailed overview of the population, per capita income and other demographic characteristics of the Glendale Secondary Plan Area, and the Town of Niagara-on-the-Lake as a whole, which will serve as important inputs to our commercial market demand analysis to be completed in subsequent phases of this study.

5.1 Population and Employment Projections

Population and Employment projections were undertaken by urbanMetrics (See Figure 5-1) based on a number of factors. The existing population was derived from the 2021 Census of Canada small area counts. The projected population was derived from a review of market absorption occurring in St. Catharines and Niagara-on-the-Lake (See Section 5.2). Although Glendale is situated within Niagara-on-the-Lake, it also effectively represents the expansion of urban growth from St. Catharines. The markets in both St. Catharines and Niagara-on-the-Lake will influence the opportunity for residential development within the Glendale community.

We have also considered the likely forms and density of development within the Glendale community, which were in part informed by the Secondary Plan land use plan prepared by The Planning Partnership, which also reflected input from individual landowners and developers. Our projections also take into consideration the height restrictions due to the proximity of Niagara District Airport.

We had assumed that the vast majority of lands identified in the Secondary Plan for residential development would be built at medium densities of approximately 57.5 units per hectare. The only exception would be lands towards the eastern edge of the planning area separated by green space. These were assumed to be developed at lower densities in the range of 35 units per hectare. No residential development was assumed for the two Special Policy Areas, including the Collections at Niagara outlet centre (SPA 2) and a site within the Momentum District (SPA 1).

The timing of residential development over the short, medium, and long term should be considered as a general estimate based on potential unit absorption. The actual timing of development will be highly dependant on the ability of individual landowners to bring their developments to market and the phasing and timing of hard services. A more detailed discussion of how the estimated timing of development relates to historic absorption levels is provided in Section 5.2 below.

The existing employment base in the Glendale Secondary Plan Area was based on the 2022 Region of Niagara Employment Inventory. As is discussed in detail in Section 7, future employment growth will result from four principle sources:

- The planned expansion of Niagara College – approximately 500 jobs;
- The development of vacant lands and the intensification of underutilized lands in the Momentum Employment District – 2,370 jobs;
- The population associated with warranted new retail development – 525 jobs; and,
- Other population serving employment (including, schools, government, institutional, hospitality, work from home, etc.) – 600 jobs.

We have assumed that the Niagara College expansion would occur in the short term. Retail and population growth would occur in conjunction with population growth. The development of vacant employment lands would occur over the short term and the intensification of the Momentum District would occur over the medium and long term.

Glendale currently has a population of some 1,400 residents, the majority of whom live in the Niagara on the Green subdivision on the south side of Glendale Avenue to the southeast of the outlet centre. In addition, there are some older single family homes along Queenston Road. The Secondary Plan Area currently accommodates some 5,200 jobs², which are generated primarily by the outlet centre, Niagara College, businesses with the Glendale Momentum District and other employment lands, and a variety of hospitality uses.

Over the long term, it is estimated that the population could grow to approximately 14,000, representing an increase of some 12,600 persons. The employment base, currently estimated at 5,200, is anticipated to increase by some 4,000 persons over the long term, to a level of 9,200.

Figure 5-1: Forecast Population

Phase	Population	Jobs	Persons and Jobs
Existing	1,400	5,200	6,600
Short Term (2023-2031)	4,800	6,300	11,100
Medium Term (2032-2043)	12,200	8,200	20,400
Long Term (Post 2043)	14,000	9,200	23,200
Total Growth	12,600	4,000	16,600

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

² Based on the Region of Niagara 2022 Employment Survey.

5.2 Housing Market Dynamics in Glendale and NOTL

The Glendale Secondary Plan Area presents an opportunity to attract population growth and density in the Town of Niagara-on-the-Lake. While physically located within the Town of Niagara-on-the-Lake, the Glendale Secondary Plan Area is much closer to the City of St. Catharines than it is to the urban communities within the Town, including Virgil and the historic Old Town. The Glendale Secondary Plan Area is directly connected to St. Catharines by Glendale Avenue and the QEW. In our opinion, from a housing and business perspective, the Secondary Plan Area draws from a similar market as St. Catharines.

The City of St. Catharines is largely developed. While small greenfield land opportunities are available to the west of the built-boundary and the St. Catharines Urban Growth Centre is planned to accommodate a density of 150 persons and jobs per hectare, from a market perspective the Glendale Secondary Plan Area can offer a variety of housing forms and represents the logical extension of growth that has been attracted to St. Catharines. Glendale is exceptionally well positioned from a market perspective with immediate access to the QEW.

Figure 5-2 summarizes average housing starts by decade in the City of St. Catharines and Niagara-on-the-Lake based on historical CMHC data. As noted in this figure, the number of housing starts in Niagara-on-the-Lake has increased steadily over the past three decades. The vast majority of starts continue to be ground-related units.

The number of housing starts in St. Catharines has fluctuated over the past three decades, although the past decade has seen starts below the overall average since 1990. As developable greenfield land has become eroded, the percentage of apartment starts has increased significantly. Over the past decade almost half of all starts in the City were apartment units. In this same time period, NOTL and St. Catharines collectively averaged some 462 starts annually, which is marginally above the historical average since 1990.

Figure 5-2: St. Catharines and NOTL Average Annual Housing Starts

Niagara-on-the-Lake

	Single Detached	Semi Detached	Townhomes	Apartments	Total Ground Related Units	Grand Total	% Apartments
1990-2001	62	3	14	9	78	87	10%
2002-2011	99	10	32	8	141	149	6%
2012-2022	89	22	48	5	159	164	3%
1990-2022	82	11	31	7	124	131	5%

City of St. Catharines

	Single Detached	Semi Detached	Townhomes	Apartments	Total Ground Related Units	Grand Total	% Apartments
1990-2001	142	29	94	116	265	381	30%
2002-2011	129	17	78	29	225	254	11%
2012-2022	63	20	73	141	156	298	47%
1990-2022	112	22	82	98	217	315	31%

Total St. Catharines and NOTL

	Single Detached	Semi Detached	Townhomes	Apartments	Total Ground Related Units	Grand Total	% Apartments
1990-2001	204	32	108	125	343	468	27%
2002-2011	228	27	110	37	366	403	9%
2012-2022	152	42	121	146	315	462	32%
1990-2022	194	33	113	105	341	446	24%

SOURCE: CMHC Starts and Completions Survey

The projected build-out population for Glendale is based on the attraction of some 12,600 new residents. At an average mid-rise household size of approximately 2.2³, this would require some 5,700 households. If the build-out of the Glendale Secondary Plan Area were to occur by 2051, this would entail an average absorption of some 211 units between 2024 and 2051. This would represent approximately 45% of historic housing starts since 2012 in St. Catharines and Niagara-on-the-Lake combined. It is important to recognize that the housing market is undergoing significant change in recent years, with considerable pent-up demand in many parts of the GTA. A much greater emphasis is being placed on mid-

³ Based on a review of the population and housing unit projections in the 2022 Region of Niagara Development Charges Background Study and discussions with the Planning Partnership.

rise and high-rise units to fill the current housing gap. As a result, a comparison with historic housing starts is not necessarily a true indicator of the capacity of an emerging market area, such as Glendale to attract and absorb new housing units.

It is also important to note that the projections for the Glendale Secondary Plan Area represent the build-out population and employment base, for the purposes of long-range planning. The timing and phasing of development within the Glendale Secondary Plan Area will be dependant on a range of factors in addition to the local market.

Niagara Region Land Needs Assessment – Housing

In June 2022, the Region released its Land Needs Assessment (“LNA”) report which provides a region-wide understanding of land supply, relative to provincial population and employment forecasts prepared as part of the 2019 Growth Plan. The report allocates the 2051 population and employment growth forecasts to local municipalities, including the Town of Niagara-on-the-Lake.

Land need for Niagara-on-the-Lake was predicated on achieving a minimum net population growth of 8,930 and 4,600 new residential units between 2021 and 2051. It is important to recognize that the Region’s Land Needs Assessment was intended to examine population growth to 2051, whereas, the Glendale Secondary Plan Area projection represents the build-out population, which may extend beyond 2051. Achieving the full build-out of Glendale prior to 2051 is supported from a policy perspective, as long as servicing is planned appropriately, which will be based on growth monitoring and alignment with infrastructure planning.

Figure 5-3 summarizes the assumed housing growth in Niagara-on-the-Lake and St. Catharines based on the Region’s Land Needs Assessment.

Figure 5-3: Housing Unit Allocation from Region of Niagara LNA 2021-2051

	Single/Semi Detached	Townhome	Apartment	Total	Average Annual Growth
Niagara-on-the-Lake	3,058	914	628	4,600	153
% of Total	66.5%	19.9%	13.7%	100.0%	
St. Catharines	3,040	4,500	12,230	19,770	659
% of Total	15.4%	22.8%	61.9%	100.0%	
Total	6,098	5,414	12,858	24,370	812
% of Total	25.0%	22.2%	52.8%	100.0%	

SOURCE: urbanMetrics inc., based on Table 6 of the 2022 Niagara Region Land Needs Assessment

Niagara Region has allocated some 4,600 new housing units to Niagara-on-the-Lake to 2051. Of these, 3,430 or 74.5% would be allocated to the Designated Greenfield Area (DGA), which would include Glendale. While it is likely that the majority of these units would be developed in Glendale, a portion would also accrue to the DGA lands in Virgil and the Old Town. As a result, the Region’s housing unit allocation would be somewhat lower than the potential 5,700 units which urbanMetrics estimated for Glendale at build-out.

However, Niagara Region has recognized, through the work on its Consolidated Housing Master Plan, that the need for housing is far exceeding its supply. Regional Council recently approved the creation of a special office that has a focused mandate to expedite the construction of diverse housing options across Niagara.

It should be recognized that the Growth Plan recognizes its population targets as minimums, and for this reason, the Region’s Land Needs Assessment should be viewed in this context. The Glendale Secondary Plan represents an opportunity to augment the Region’s housing supply beyond that envisioned in the Land Needs Assessment.

On average the Region’s Land Needs Assessment allocates just under 20,000 new homes to St. Catharines, averaging some 659 units per year. This is more than double the historical average since 1990. Although Glendale is in Niagara-on-the-Lake, it would have considerable market overlap with St. Catharines. Depending on how quickly Glendale is phased, it may benefit from this expansion of the St. Catharines market.

The Region’s Land Needs Assessment allocated some 3,058 single/semi-detached units to Niagara-on-the-Lake, which represents about two-thirds of the Town’s total allocation of 4,600 units. Furthermore, some 80% of units included in the DGA including Glendale were single or semi-detached.

In our opinion, Glendale has the potential to accommodate higher densities owing to its strategic location, shifting demand patterns in the area, and the fact that there needs to be a greater emphasis in using DGA lands more efficiently than in the past. For this reason, the development of Glendale will likely proceed with a higher proportion of townhome and low/mid-rise apartments than allocated to Niagara-on-the-Lake in the Region’s LNA.

5.3 Demographic Characteristics

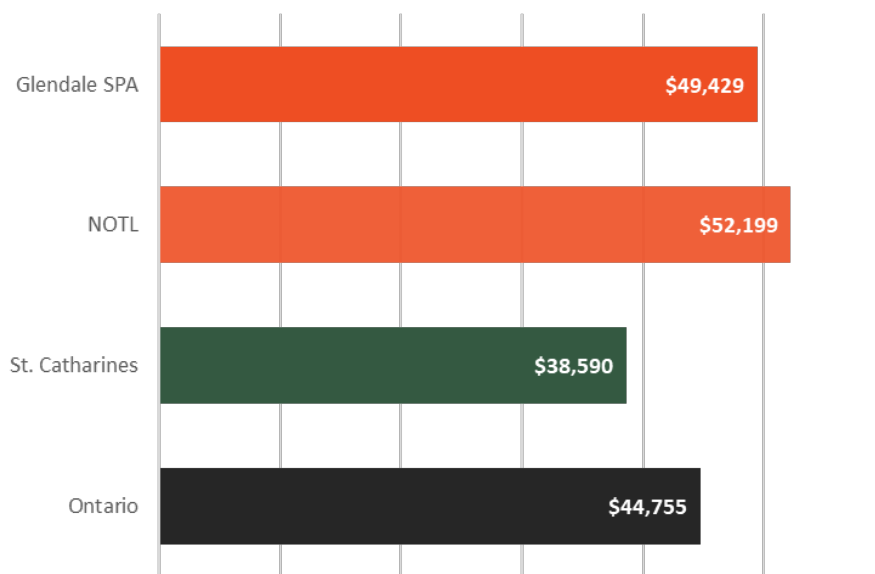
Income

Per capita income levels provide a reasonable guide for determining the expenditure habits of the local population living within a defined area. Although certain intervening variables, including age and geographic location, can influence consumer expenditure

habits and shopping preferences, population groupings with similar income characteristics tend to exhibit similar expenditure habits for broad merchandise groupings.

Figure 5-4 details the 2020 per capita income levels for Trade Area residents, relative to the Town, and the Province. It is important to recognize that the current Glendale Secondary Plan incomes are based on a relatively small number of residents, mostly in the Niagara on the Green subdivision. For comparison purposes, it also contextualizes income levels relative to the per capita income levels of St. Catharines’ residents.

Figure 5-4: Per Capita Income in 2020



SOURCE: urbanMetrics inc., based on 2021 Statistics Canada Census data.

NOTL had a per capita income level of \$52,199 in 2020, while Glendale has a moderately lower per capita income of \$49,429. The per capita income level of Glendale was 10% more than the Provincial average, while the Town’s was some 17% higher than the Province.

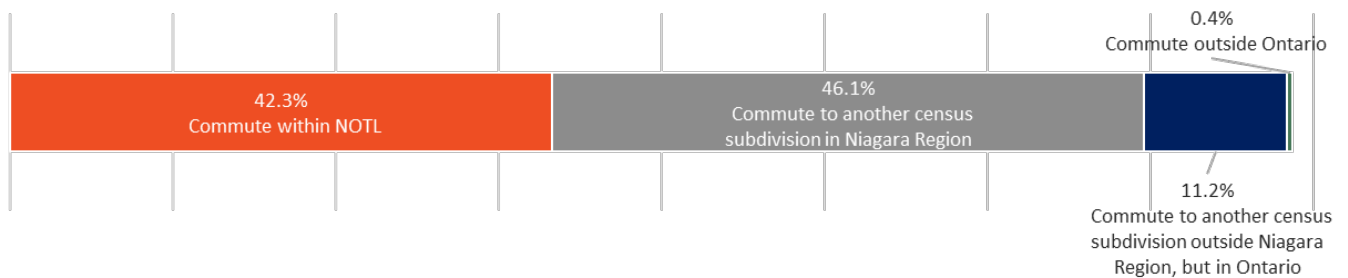
Retail Trade and Health Care and Social Assistance employ the largest number of Glendale residents, followed by Accommodation and Food Services. In NOTL, Retail Trade employs the largest number of residents with Health Care and Social Assistance, and Professional, scientific, and technical services following behind.

Employed Labour Force and Commuting Patterns

Despite the relatively high per capita income of residents in NOTL, Figure 5-5 below indicates that some 58% of NOTL’s employed labour force work outside the community.

This indicates that residents could be commuting to higher paying, or more diverse job opportunities in municipalities elsewhere in Niagara Region or beyond. With the development of the Glendale SPA, both Glendale and the Town as a whole have the potential to capture some of these commuters through the introduction of more diversified employment uses alongside a greater scale of residential uses. This could potentially increase the average per capita income in the future.

Figure 5-5: Commuter Flows, for those that Live in NOTL



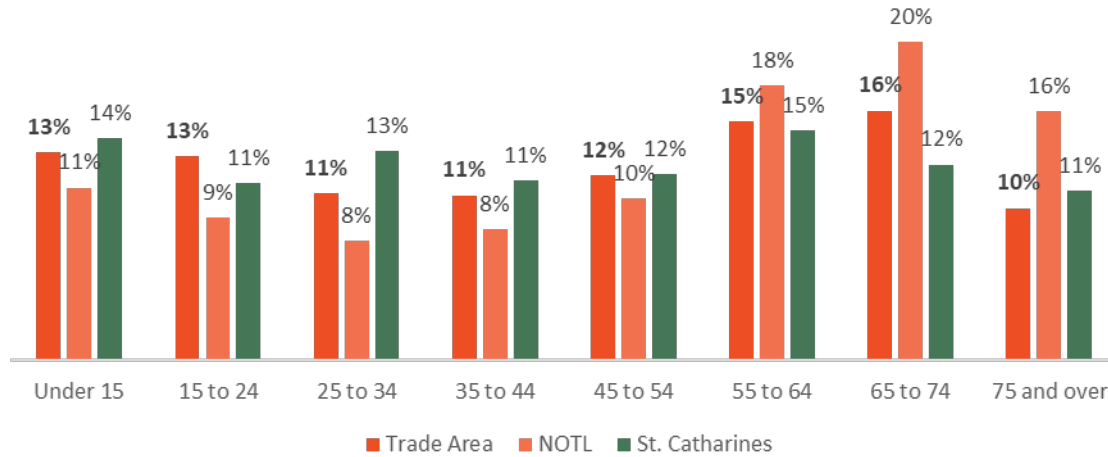
SOURCE: urbanMetrics inc., based on 2021 Statistics Canada Census Data.

Population by Age Group

The table below shows the number of people in each age group in the Glendale SPA, NOTL and St. Catharines. As shown, those between the ages of 55 and 74 comprise the most significant portion of the Glendale SPA population. This is similar to the population of NOTL, where the older age cohorts generally comprise a larger share of the overall population.

Designating employment lands for intensified business opportunities that take better advantage of Glendale’s existing proximity to Niagara College and the QEW will help to attract and retain younger segments of the local population, and for supporting economic growth and prosperity in the Glendale SPA and NOTL more generally.

Figure 5-6: Age Profile

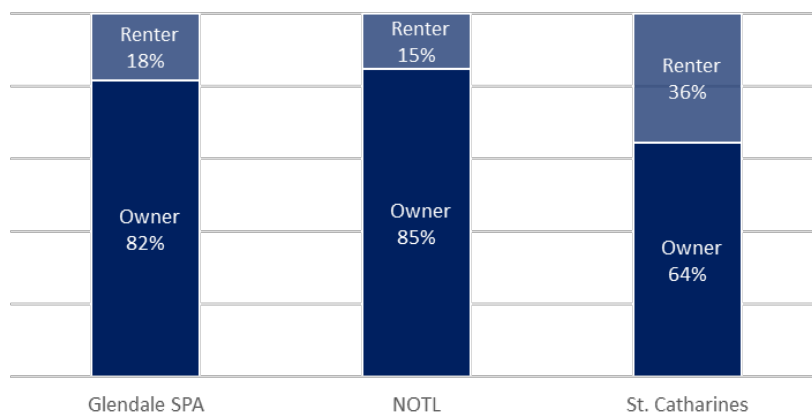


SOURCE: urbanMetrics inc., based on 2021 Statistics Canada Census Data.

Housing Tenure and Types

Figure 5-7 illustrates the share of households by tenure from the 2021 Census. The share of households who own their home in the Glendale SPA and NOTL more broadly, exceeds the average in St. Catharines, over 80% of households. The relatively high proportion of renters in Glendale is an interesting dynamic in that the vast majority of the housing stock comprises single detached homes, with only a small number of semi-detached and townhomes, with no purpose built rental facilities. This would suggest a need for more rental housing and purpose built rental housing in the local area.

Figure 5-7: Households by Tenure



SOURCE: urbanMetrics inc., based on 2021 Statistics Canada Census Data.

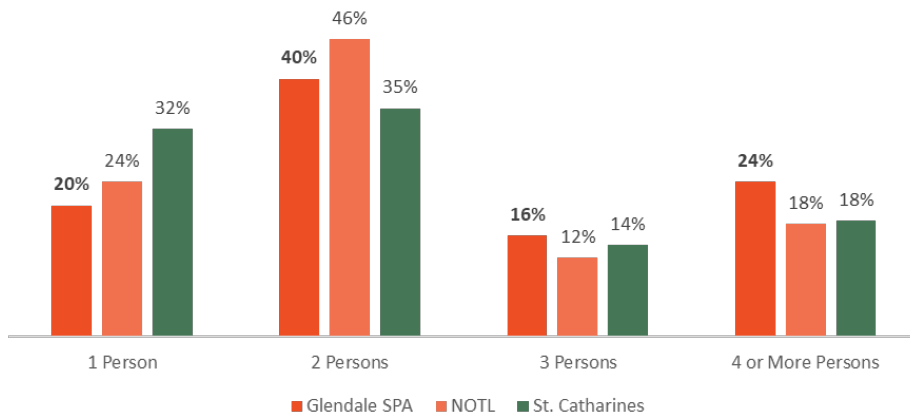
Figure 5-7 shows that the Glendale SPA also contains a larger share of households living in single and semi-detached dwelling units, some 90%. This also represents the overall lack of housing diversity present in the Glendale SPA area today. That said, relative to St. Catharines, there is still a heightened share of NOTL households living in lower density housing formats. There has been a small uptake of households living in townhome units, however only some 6% of NOTL households reside in apartment units. This compares to 30% of households in St. Catharines.

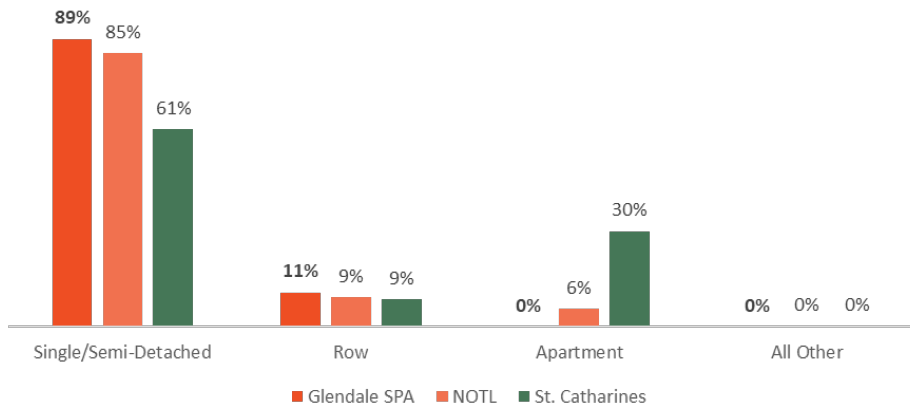
Niagara-on-the-Lake, owing to its historic and rural setting, has generally lagged behind other Niagara municipalities in terms of adopting a more diversified housing stock, notably medium density, and high density formats.

Household Sizes

Figure 5-8 identifies that in comparison to St. Catharines, most notably Glendale but also NOTL has a smaller share of one person households (20%), and a higher share of 4 or more persons households (24%). The higher concentration of larger households is consistent with the existing concentration of lower density housing formats in the area today.

Figure 5-8: Share of Households by Household Size & Dwelling Type





SOURCE: urbanMetrics inc., based on 2021 Statistics Canada Census Data.

In summary, Niagara-on-the-Lake and the Glendale Secondary Plan Area contain a demographic that has above average incomes, living predominantly in low density owner-occupied housing types, and skewing towards older age groups. The development of the Glendale Secondary Plan Area has the opportunity to provide for more affordable medium and higher density housing to attract more younger and family-oriented households.

6.0 Commercial Needs Analysis

This section describes the current commercial inventory in the Glendale SPA and provides an analysis of warranted space in the Glendale SPA to 2043 (the medium term). Our analysis detailed herein evaluates the demand characteristics for Food Store Retail (“FSR”) space (which would include the potential for a new grocery store) and Non-Food Store Retail (“NFSR”) space, using a traditional expenditure-based retail market demand analysis. We have also evaluated the market opportunity for a range of Services using a supplementary per capita space ratio assessment.

6.1 Retail Trends

E-Commerce

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

The convenience of shopping online has come directly at the expense of traditional brick and mortar retailers as consumers 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 slowly penetrating various traditional market segments. As shown in Figure 6-1, 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.

More broadly, 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. There is a “grey area” in terms of what expenditures are included as online shopping (i.e., if a product was purchased online but picked up in a store as part of “click and collect” offerings, for example). Traditional retail market demand analyses focus exclusively on market demand for physical 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 purchases through omni-channel networks is largely unknown.

Figure 6-1: E-Commerce Penetration

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

SOURCE: urbanMetrics inc.

E-commerce may come in the form of several non-traditional shopping opportunities:

- Online shopping from traditional physical retailers;
- Online shopping from internet-based retail channels, such as Amazon or eBay;
- Online ordering and pick-up from traditional retailers and shopping centres;
- Electronification of traditional physical products, such as music, books, and event tickets.
- Food delivery services either provided directly by the restaurant or through third party providers, such as DoorDash or UberEats; and,
- Home meal preparation services, such as HelloFresh or Chefs Plate.

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

Although e-commerce continues its rise across store categories, particularly exacerbated by the COVID-19 pandemic, it remains our view that in-person shopping and e-commerce will be able to co-exist and support each other.

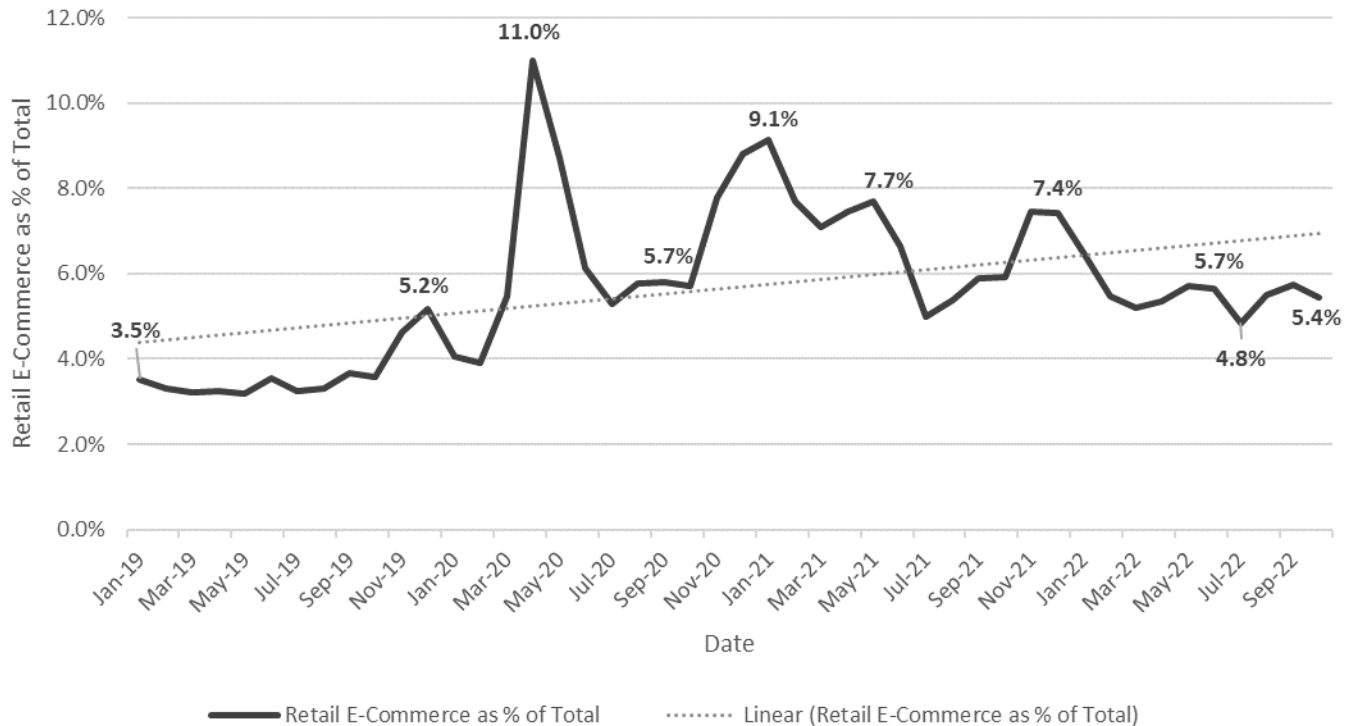
How will e-commerce continue to impact brick and mortar shopping?

- E-commerce will continue to account for an increasingly large share of overall consumer expenditures; however, that share will “max” out at a certain point. In North America, e-commerce sales have begun to decline and stabilize following their pandemic high points.
- 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, while others may see a significant reduction in their physical space 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.
- Major general merchandise retail organizations which have augmented their brick and mortar stores with effective and complementary on-line strategies, such as Walmart, Canadian Tire and Costco, continue to thrive.

Figure 6-2 below demonstrates the impact that the COVID-19 pandemic has had on recorded e-commerce sales in Canada since 2019. Prior to the pandemic, online sales were estimated to account for roughly 2-5% of overall activity.⁴ In April 2020, the figure spiked to 11% of the total. Since the initial spike, e-commerce sales remain elevated relative to historic patterns. In the past two years, subsequent spikes in e-commerce sales correspond to increased government restrictions with regards to in-person shopping.

⁴ As calculated using Statistics Canada Retail Trade data, which excludes “pure play” online retailers such as Amazon.

Figure 6-2: Canadian Retail E-Commerce Sales as a Percentage of Total Retail Sales 2019-2022



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

A recent study by Cushman & Wakefield in the United States has suggested that e-commerce sales as a percentage of core retail sales have experienced a slight reduction since the peak of the pandemic, echoing the Canadian experience, while the growth in physical store openings has surged over the past year.⁵ Many retailers have recognized that on-line sales are strongest in areas where there exists physical stores to facilitate returns and to allow for “showrooming” of products that may be eventually purchased on-line in sizes, colours, models and styles not available in store.

⁵ Cushman & Wakefield, Making an impact in Retail: Why Brick and Mortar is Here to Stay. June 16, 2022. <https://www.cushmanwakefield.com/en/united-states/insights/us-articles/making-an-impact-in-retail-why-brick-and-mortar-is-here-to-stay>

Implications for Glendale

For most day-to-day and weekly store categories, which are integral to the establishment of walkable communities, there will not be a significant change in physical store requirements over current per capita space ratios. Many store types, such as supermarkets and restaurants, have already rationalised their space needs to account for delivery fulfillments. Regional and outlet shopping centres at the highest level of the hierarchy are still successful in creating a shopping experience that cannot be duplicated by online shopping. The most significant impact in terms of brick and mortar retailers would likely be with respect to large format single category (formerly known as “category killer” stores). These retailers have been effectively directly competing with online retail channels for the same customers, as well as selected retail categories that have been strongly embraced by the online market, such as books, music, electronics, and basic apparel.

6.2 Mixed-Use Development

In many municipalities across Ontario, 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. There are examples of successful mixed-use projects, particularly in very high-density urban environments. At the same time, ubiquitous planning policies requiring mixed-use development combined with unfavourable development economics and, in some cases, a lack of developer experience in mixed-use formats have resulted in many poorly designed projects that do little to benefit the urban landscape or the communities in which they are situated.

In the past decade, mixed-use projects have increasingly found their way onto the urban landscape. There are several reasons for this:

- Intensification policies at the provincial and local levels have led to more high-rise residential projects at strategic locations. In some cases, there are no feasible sites to accommodate free-standing retail projects, and consequently, mixed-use development is the only option available to accommodate retail and service uses to serve new residents.
- Residential land values had been at exceptionally high levels, minimizing the incentive to construct much lower valued retail components. More recently, the rapid escalation in construction costs has meant that in many areas, the rents collected from retail and office spaces in mixed-use projects are lower than the cost to construct them. With more recent declines in residential prices and higher interest rates, the addition of ground floor retail may jeopardize the feasibility of entire residential projects.

- The prevailing vision in urban planning is to create vibrant pedestrian communities, with street-fronts animated by retailing and food services, whereby people can work and shop within walking and cycling distance of where they live or within an easy transit commute.
- In many cases, there is a wide gap between the intentions of planners and the experience and interest by developers to create high quality commercial spaces within mixed-use projects. Policies requiring minimum ground floor commercial components in residential projects often result in small ubiquitous retail units that have minimal utility to tenants other than a select group of offices and services. Often projects sustain high ground floor vacancy rates with office/service tenants that do little to generate foot traffic or animate the street fronts.
- Live-work type units can be modestly successful in delivering very small-scale services to a local community and in providing employment opportunities to small businesses. However, they are very limited in their ability to provide for day-to-day or weekly shopping for a community owing to the small size of retail units.
- While there are good examples of mixed-use developments with strong retail tenants, these tend to occur in very high-density areas often served by mass transit. This provides for high rents to offset the cost of retail construction, as well as low parking requirements for both retail and residential uses, further reducing construction costs. Commercial units at the base of high-rise buildings have a number of issues distinct from those of live-work units.
 - The developer needs to pre-lease any significant retail spaces before they can design the building. This is because of the need to accommodate loading facilities, ventilation, parking requirements, drive-through areas, ATMs, truck movements, trash collection and emergency vehicle access for the commercial tenants. This will undoubtedly extend the approval, construction and sales periods adding to the cost of the project.
 - Good quality retail space at the base of high-rise residential buildings is far more expensive to construct than free standing commercial units or shopping centre space. This is due to the expense of underground or structured parking, the need to modify the structural supports to allow for the retail space to be configured according to tenant needs, as well as other design changes.
 - Often, planning regulations for mixed-use developments do not allow for design elements that are core to a retailers concept, such as parking within a certain radius of the doors, drive through access, signage, etc. In addition,

depending on the ownership of the commercial space, condominium by-laws may also restrict changes to the retail unit after it has been constructed.

Strategies to Enhance the Success of Commercial in Mixed-Use Neighbourhoods

- Planning policies should allow for considerable flexibility in the approach to commercial development. While design standards should remain high, freestanding commercial buildings should be permitted as part of mixed-use neighbourhoods. This is especially important for larger uses, such as, supermarkets, grocery stores and large pharmacies which are much more difficult to integrate into mixed use developments and which require large amounts of parking.
- Municipalities should look for ways to reduce parking requirements for commercial uses in mixed-use areas by permitting on-street parking and potentially adding public parking lots and structures. In mixed-use areas, private parking areas owned by individual commercial property owners discourages people from cross shopping and walking between properties.
- Municipalities should complement mixed-use policies and design guidelines through the creation of streets which encourage pedestrian and cycling activity. For example, streets supporting mixed-use development should have sidewalks of a minimum depth to accommodate cafes, pedestrians walking side by side, people in mobility scooters, etc. As appropriate, streets should be designed with the pedestrian and cyclist as a priority and not simply to segregate them from traffic on narrow sidewalks and bike lanes.
- Great pedestrian streets are designed to attract both local residents and visitors to the area. For this reason, vibrant pedestrian streets, such as, The Danforth, West Queen West, and even Queen Street in Niagara-on-the-Lake provide for on-street parking to accommodate people who are travelling from other areas. This will be important to Glendale as the residential development will be dispersed across both sides of the QEW and that no single retail area can be located such that it would be within walking distance of the majority of future residents.

Implications for Glendale

A flexible approach to mixed-use development will be important to creating a vibrant community. In some cases, free-standing retail buildings strongly integrated into the surrounding neighbourhood may be the most effective format in terms of serving the community. Policies should provide for a mix of retail unit sizes and store types to ensure that the full breadth of retail need is met. At the core of any strategy, is to prepare policies that will facilitate and encourage the development of supermarkets, specialty food stores, pharmacies, and convenience services, and to ensure that they are distributed so that they are convenient to all parts of the community, supporting pedestrian and other active transportation-related shopping.

6.3 Trade Area Delineation

A Trade Area represents the geographic extent from which a commercial node, retailer, or community would expect to draw most of its sales volume. Trade areas can be delineated by physical barriers, municipal boundaries, travel distances, or population densities. These boundaries typically capture the furthest distance that consumers would be willing to travel to purchase goods and services within the given node.

In our opinion, the Outlet Collection at Niagara already provides a wide range of regional scale retail opportunities. The scale of the build-out population (i.e. around 14,000) is below the threshold for typical higher order uses, such as Walmart, Costco, Home Depot, and similar outlets. At the same time, there are minimal local (i.e. neighborhood and convenience) type retailers and service providers that will be required as part of a complete community.

For this reason, we have focused the market analysis on the retail categories required to serve the day-to-day and weekly shopping trips by existing and future residents, including:

- Supermarkets and food stores;
- Pharmacies;
- Small scale specialty retailers;
- Food services;
- Financial services;
- Personal services; and,
- Other small scale services and local serving offices.

The goal in recommending a future commercial structure for Glendale will be to minimize residents' need to leave the community for these types of goods and services and make them sufficiently accessible that they are convenient for pedestrian and cycling based trips.

For this reason, in order to plan for future commercial space in Glendale, we have used the boundaries of the Glendale Secondary Plan Area for our Trade Area, illustrated in Figure 6-3 below.

Figure 6-3: Trade Area



SOURCE: urbanMetrics inc.

Customer Origins

In addition to the trade area delineation criteria identified above, urbanMetrics conducted a mobile analytics survey to better understand the geographic draw of certain retail nodes in and around Glendale. The data captures customer origins over a rolling full year from June 1, 2021, to May 31, 2022. The data collected are representative samples of visitation volumes for each given geography. They do not intend to present the absolute volume of visitation. As such, the visitation patterns are reported in percentage terms, illustrating the general geographic origins of customers to each node. The results highlight the local and regional composition of these selected retail destinations.

In this study, three retail geographies were surveyed, illustrated in Figure 6-4:

- **Outlet Collection at Niagara**, within the Glendale SP. This node is characterized by its NFSR as a major regional-serving shopping destination.
- **Lincoln Value Centre**, a suburban plaza in St. Catharines with banners such as Canadian Tire, Dollarama, and Walmart. This plaza serves many of the daily and weekly shopping needs of local residents.
- **Hartzel Plaza**, a minor shopping plaza owned by SmartCentres, anchored by a Food Basics. This node is more local-serving and offers a contrast in the visitation patterns when compared to the above retail nodes.

Figure 6-4: Surveyed Nodes



SOURCE: urbanMetrics inc.

Figure 6-5 below shows the visitation patterns to selected nodes by geographic origin. Visitation to the surveyed nodes is largely represented by St. Catharines (42%) residents. The rest of the Niagara Region (including NOTL and Niagara Falls) comprise about 26% of overall visitation to the selected commercial nodes.

Figure 6-5: Visitation Patterns by Origin and Node, 2021-2022

Survey Geography	Outlet Collection at Niagara	Lincoln Value Centre	Food Basics (Hartzel Plaza)	Total
Niagara-on-the-Lake	4%	4%	1%	4%
St. Catharines	18%	74%	72%	42%
Niagara Falls	13%	4%	8%	9%
Other Niagara Region	15%	10%	14%	13%
GTHA (Toronto, Hamilton, Halton, Peel, York, Durham)	32%	4%	3%	20%
Other	18%	4%	2%	12%
Total	100%	100%	100%	100%

SOURCE: urbanMetrics inc., based on mobile analytics data.
 NOTE: Data reflects rolling full year (June 2021 to May 2022)

The data includes the tail end of the Covid period so that it likely under-represents persons travelling longer distances, particularly from the United States. However, it is important to note that about half of customers to the outlet centre are from Niagara Region indicating that it performs an important regional serving function in addition to being a tourist draw.

For residents of Glendale, shopping centres in St. Catharines, such as Lincoln Value Centre and Hartzel Plaza’s represent the closest food shopping destinations. While these two shopping centres draw the majority of their sales from St. Catharines, they are still important draws for the small number of current Glendale residents.

As additional retail is added to support the future population of Glendale, visitation from Niagara-on-the-Lake to St. Catharines will likely decrease. However, the Outlet Collection will likely continue to be a significant draw for regional and local visitation.

6.4 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 Glendale currently fulfill for residents and visitors, as well as the potential competitive influences which could affect the market opportunity available for additional retail/service commercial space.

An inventory of retail/service commercial space was conducted in Glendale by urbanMetrics in September of 2022. 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:

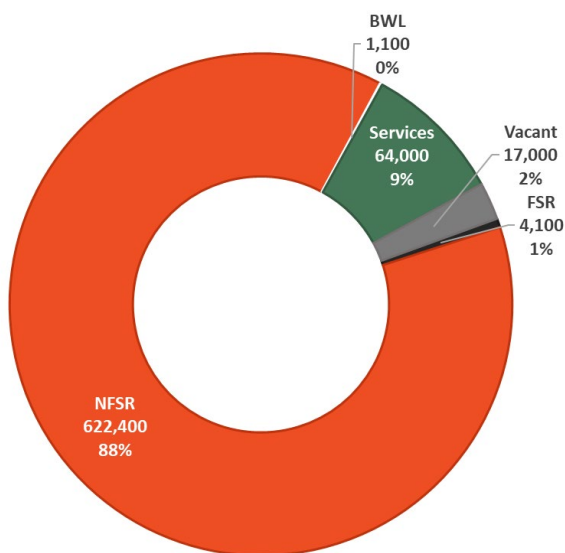
- **FSR (Food Store Retail):**
- **BWL (Beverage Stores):**
- **NFSR (Non-Food Store Retail):**
- **Commercial Services:**

See **Appendix B** for all store types included in this inventory.

Glendale currently contains nearly 710,000 square feet of retail and service commercial space.

Figure 6-6 shows the percentage of each retail category in the total inventory. The inventory is comprised of 1% FSR facilities (4,100 square feet), less than 1% BWL facilities (1,100 square feet), 88% NFSR facilities (622,400 square feet), and 9% Services (64,000 square feet). The remaining 17,000 square feet (2.4%) is classified as vacant.

Figure 6-6: Total Retail/Service Commercial Inventory by Store Type



SOURCE: urbanMetrics inc., based on inventory completed in September 2022. Rounded to the nearest 100 square feet.

Existing space in Glendale is largely concentrated in the Niagara Outlet, or some 87% of all retail/service commercial space in Glendale (as detailed in Figure 6-7). The Niagara Outlet Centre hosts a range of fashion and lifestyle retailers in addition to some food services. It also contains a large Bass Pro Shop and a Leon’s Home Furniture Store. As the largest serving outlet-centre in Canada, this prominently located centre sits just south of the QEW and attracts shoppers from across the Greater Toronto Area, the Niagara Region, and the United States.

Figure 6-7: Inventory by Node

Category	Other Glendale	Share of Total	Outlet Centre	Share of Total	Total
FSR	-	0%	4,100	100%	4,100
Convenience & Specialty Food	-	0%	4,100	100%	4,100
BWL	-	0%	1,100	100%	1,100
NFSR	42,300	7%	580,100	93%	622,400
Apparel and Accessories	-	0%	392,100	100%	392,100
Automotive	26,800	100%	-	0%	26,800
Building and Outdoor Home Supply	4,600	100%	-	0%	4,600
Furniture, Home Furnishings & Electronics Store	1,200	1%	89,400	99%	90,600
Miscellaneous Retailers	-	0%	89,000	100%	89,000
Pharmacies & Personal Care	9,700	50%	9,600	50%	19,300
SERVICES	47,600	74%	16,400	26%	64,000
Food Services & Drinking Places	13,400	47%	15,400	53%	28,800
Health Care	1,200	100%	-	0%	1,200
Personal & Household Goods Repair & Maintenance	2,400	100%	-	0%	2,400
Personal Care	-	0%	1,000	100%	1,000
Professional, Scientific & Technical Services	14,000	100%	-	0%	14,000
Other Services ¹	16,600	100%	-	0%	16,600
VACANT	1,400	8%	15,600	92%	17,000
GRAND TOTAL	91,300	13%	617,300	87%	708,600

SOURCE: urbanMetrics inc., based on inventory completed in September 2022. Rounded to the nearest 100 square feet.

¹ Includes Selected Civic and Social Organizations, Consumer Goods Rental, Selected Office Administrative Services, and Social Services.

Recognizing the prominence of retail/service commercial development at the Niagara Outlet is key in understanding the existing function of retail space in Glendale. Existing space is largely comprised of regional-serving retail space (e.g., apparel and accessory stores), that cater to the visitor population.

By contrast, there is a significant lack of local/neighbourhood-serving retail uses in the area to support the daily and ongoing needs of residents living in the Glendale community. For the most part, where these uses do exist, they are

either on the outlet centre site or are mainly oriented to serving visitors to the region.

The future population will need the establishment of an entirely new overlay of local shopping opportunities.

6.5 Expenditure Potential

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 conventional 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 and Non Food Store Retail, as identified in Section 6.4.

The following section details our methodology and estimated retail expenditures of Glendale residents by major retail store category, based on per capita expenditure and population estimates. We have estimated the need to 2043 or a population of about 12,200. This represents almost a 20-year planning period which is a lengthy period for retail planning, particularly in mixed use areas. This will still encompass the vast majority of the build-out population and will allow for the planning of a comprehensive local retail structure. Over time, population growth should be monitored to ensure that retail space can be planned and developed as required.

- **Base Per Capita Expenditures (2022)**
 - Estimates of average per capita retail expenditures in Ontario, by store category, for 2022, based on Statistics Canada Retail Trade data. Distributions for all future periods have been held constant based on existing provincial averages.
 - 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.
 - We have based our per capita income estimate on current Niagara-on-the-Lake population levels.

- **Forecast Per Capita Expenditures (2031 and 2043)**
 - Estimates of average per capita retail expenditures of *only* Glendale Secondary Plan Area residents to 2043. These do not include purchases made by persons residing outside of Glendale (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 (2022) and future (2031, 2043) per capita retail expenditures, the total expenditures of local residents have been calculated by multiplying the average per capita retail expenditure by the projected Glendale population over the forecast period.
 - Adjustments for e-commerce have been applied, marginally reducing the expenditure potential available from Glendale residents. This adjustment recognizes that a growing share of consumers’ purchases are being made through online channels. Our e-commerce adjustment is based on Statistics Canada Retail Trade data for 2022 and our assessment of ongoing trends.

Total retail expenditures by Glendale SPA residents have been estimated at some \$17.3 million in 2022. As the Glendale SPA is built out, total retail expenditures will increase to up to \$47.1 million by 2031 and up to \$160.1 million by 2043. This represents spending growth of some \$143 million between 2022 and 2043.

See **Appendix A** for detailed retail expenditure calculations.

These estimates reflect the spending of Glendale residents in all FSR and NFSR categories, whether located within the Secondary Plan Area or elsewhere. The portion of these expenditures made in stores located outside of the Project Area are referred to as “outflow”. Similarly, expenditures by non-local residents at stores located within the Project Area are termed “inflow”. **We have recognized both outflow and inflow in the market demand analysis, as presented in the following sections of this report.**

6.6 Demand Assessment

Glendale is home to the Outlet Collection at Niagara, a major tourist draw reporting annual visitation of approximately 5 million. However, the Glendale area has virtually no retail outlets to support the local population. The current population in Glendale must leave the

Glendale Area to conduct its daily and weekly shopping, likely at retail nodes in nearby St. Catharines. In this demand assessment, we identify the future demand for retail/service space required to support the day-to-day shopping needs of the future Glendale population.

Retail Demand Analysis (Expenditure Approach)

We have estimated the future expenditure potential available in Glendale. This analysis also outlines the allocation of expenditures by store type (e.g., FSR, NFSR).

The warranted floor space figures estimates included herein are intended as general guidelines based on future expectations with respect to market growth, recapture, and inflow.⁶ We assess in particular, the anticipated growth in available retail expenditures from the local residential population. Additional floor space based on sales transfers should only be considered at the time of application based on an acceptable impact analysis, if required.

The following summarizes the results of our warranted floor space analysis, which should be considered as a general guideline in determining future floor space needs.

See **Appendix A** for detailed results of retail expenditure analysis.

- **Food Store Retail**

- By 2043, FSR expenditures by Glendale residents will be approximately \$38.1 million, some \$22.9 million of which will be spent within the Glendale.
- We estimate that there will be market support to introduce 33,000 to 45,000 square feet of FSR space by 2043.⁷
- The population at this point would warrant a major food store or supermarket, which should be centrally located to serve the future Glendale market.

- **Non-Food Store Retail**

- By 2043, NFSR expenditures by Glendale residents are estimated to be approximately \$105.6 million, some \$31.7 million of which will be spent within the Secondary Plan Area, but outside of the outlet centre.

⁶ With recognition of the existing retail/service space in Glendale, we apply a 20% reduction to the low range of total warranted space for each category.

⁷ Based on sales per square foot ratios between \$800/SF and \$600/SF.

- We estimate that by 2043, the Glendale SPA will warrant an additional 47,000 to 65,000 square feet of NFSR space—with particular emphasis on local-serving NFSR not currently accommodated within existing facilities.⁸
- Stores in this category may include: pharmacies, hardware stores, pet supply outlets, and other small scale specialty retailers.

Services Demand Analysis (Per Capita Approach)

To evaluate the future need for commercial services within Glendale, we have applied a per capita space approach. Given limited data availability, the expenditure approach cannot be applied to the space analysis for services.

The per capita space analysis relies on many of the same or similar inputs as the expenditure-based analysis outlined above, but requires a slightly different focus, including the following central analytical assumptions:

- The portion of Glendale residents' space requirements that are likely to be fulfilled within the Glendale SPA; and
- The amount of space that is likely to be supported from inflow expenditures from persons residing outside of Glendale.

The detailed per capita space analysis presented in Appendix A of this document provides a high-level indication as to the amount of commercial space required to serve the anticipated 13,600 residents in Glendale across the various Service categories.

See **Appendix A** for detailed per capita space calculations.

Based on our per capita space analysis, the Glendale SPA will support approximately 118,000 square feet of Services space by 2043.

Warranted Space Summary

As highlighted in Figure 6-8 below, the Glendale SPA will warrant up to 256,100 square feet of space for new retail and service facilities by 2043. These estimates summarize the total warranted space based on the expenditure (retail) and per capita space ratio (services) demand analyses. **The warranted space estimates ensure that full range of local-serving retail and services to support weekly and day-to-day shopping needs are available to support the Glendale SPA population. This estimate also recognizes the proximity of**

⁸ Based on sales per square foot ratios between \$700/SF and \$500/SF.

existing regional shopping facilities in Glendale and in nearby communities in Niagara Region (i.e., St. Catharines).

Figure 6-8: Summary of Total Space Warranted by Store Category

	2031		2043			
	Low	High	Low	High		
FSR	12,600 SF	-	16,800 SF	33,600 SF	-	44,900 SF
NFSR	13,500 SF	-	18,900 SF	46,800 SF	-	65,500 SF
Services	41,900 SF	-	51,300 SF	106,600 SF	-	130,200 SF
Total Space Warranted	68,000 SF	-	87,000 SF	187,000 SF	-	240,600 SF

SOURCE: urbanMetrics inc. Rounded to the nearest 100 square feet.

Recommended Space Distribution

Neighbourhood Shopping Node

The size of the Glendale Population by 2043 would warrant a supermarket within a neighbourhood scale retail node serving weekly shopping trips by Glendale residents. The amount of retail space for this facility should be between about 80,000 to 120,000 square feet. The uses incorporated into this node would include: a supermarket or major grocery store; a pharmacy; together with a range of other services and specialty retail outlets. This space could also include second floor office units to accommodate local serving offices – e.g., health and wellness; real estate, insurance, finance, co-working space, and other similar activities.

The difficulty facing Glendale is that the future population would be split by the QEW, so the neighbourhood shopping node would be significantly more convenient to half of the future Glendale population. In our opinion, this node should be located on the south side of the QEW on lands identified in the former Glendale District Plan for the creation of a Main Street on Niagara-on-the-Green Boulevard. This location, would offer several advantages to other sites:

- It would draw on visitors to the outlet centre;
- It would be easily accessible via Glendale Avenue to the St. Catharines’ neighbourhoods to the immediate east of the secondary plan area;
- It would also be within a reasonable walking or cycling distance from Niagara College and the existing Niagara-on-the-Green neighbourhood; and,

- Depending on the densities, the largest share of new growth in Glendale could be developed in the immediate vicinity of Niagara-on-the-Green Boulevard.

As noted above, we would recommend that flexibility be provided for in terms of planning regulations governing the format of retail space in this area. To minimize the need for on-site parking and to accommodate visitors from other parts of Glendale and beyond, we would recommend that on-street parking be made available in front of retail stores on Niagara-on-the-Green Boulevard. The street should also be designed to encourage pedestrians and cyclists.

Convenience Retail Node

Due to the divided nature of the future population, we would also recommend a small convenience retail node of between 20,000 and 40,000 square feet on the north side of the QEW at a location central to the future population in the area. This node could contain a small grocery or convenience store and a selection of other services and specialty retail uses.

Other Retail and Services Space

Additional opportunities should be provided for retail and services space in the area in appropriate locations. This could include:

- Ground floor retail space in mixed use buildings at appropriate locations; and,
- Limited small scale ancillary retail and services space in the Momentum District to serve local employees and businesses.

7.0 Employment and Employment Land Needs Analysis

The following provides an understanding of supply and demand patterns for industrial/employment lands in Niagara-on-the-Lake and the broader Niagara Region. The results of this exercise will identify land supply opportunities in Niagara Region, as well as opportunities to accommodate additional employment growth on underutilized sites.

7.1 Existing Employment in Glendale

Glendale is an important employment centre for the Town of Niagara-on-the-Lake with a current employment base of some 5,235 based on the Region of Niagara 2002 Employment Inventory. As indicated by Figure 7-1, the largest employment nodes are the Outlet Collection at Niagara outlet centre and Niagara College, which includes the adjacent business centre, which the college acquired to facilitate its future campus expansion. We would note, however, that the business centre employment includes two home health care companies. The majority of the employment identified in the business centre likely consist of home health care workers who do not work directly from this location.

The Momentum District lands as designated in the Niagara Official Plan currently accommodates some 552 employees representing a density of 12.7 jobs per hectare. In addition to these employment uses, are other industrial businesses situated east of Glendale Avenue on lands that are designated as Employment Lands in the Niagara-on-the-Lake Official Plan. These businesses employ another 169 persons. The other large employer in the area is White Oaks Resort and Spa with some 523 employees.

The remaining 927 jobs are located predominantly in other hotels, commercial businesses, and the Niagara Regional Native Centre.

Figure 7-1: Glendale Secondary Plan Area Existing Employment Base

Business/Cluster	Employment Count
Outlet Collection at Niagara	1,557
Niagara College	761
Niagara College (Business Centre) ⁽¹⁾	746
Momentum District	552
White Oaks Resort & Spa	523
Local Industrial Uses	169
Other Employment	927
Total	5,235

Source: urbanMetrics based on the 2002 Niagara Region Employment Inventory

1) Includes home health care workers.

7.2 Overview and Trends

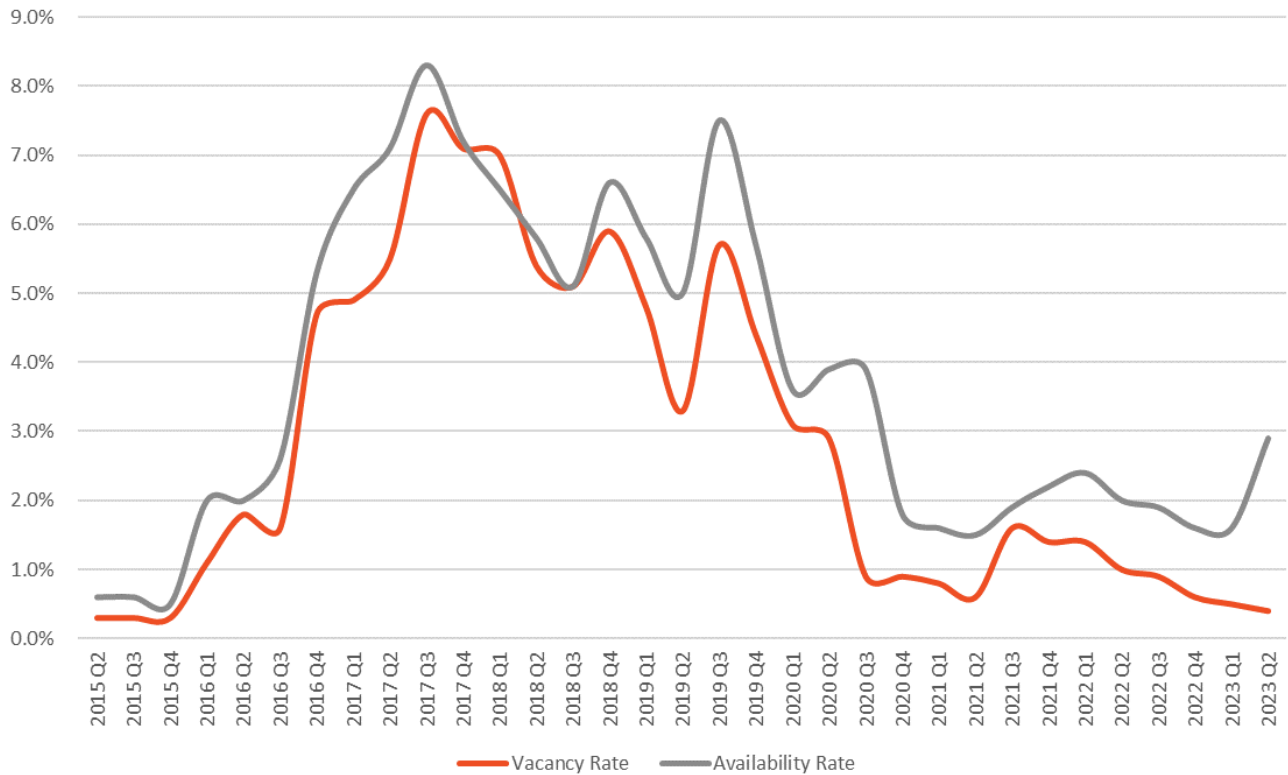
Employment Lands

The market for industrial land in Ontario—particularly Southern Ontario—has been exceptionally strong and resilient in the face of external challenges brought forward by the COVID-19 pandemic. Across Southern Ontario, and including Niagara Region, reported vacancy rates for industrial space remain at low levels.

As shown in Figure 7-2 below, industrial vacancy and availability rates for existing buildings in Niagara Region have seen a general decline. Vacancy and availability rates peaked in Q3 2017 at 7.6% and 8.3% respectively and have since seen a steady decline—accelerated during increased demand for quality logistics and warehousing facilities at the onset of the COVID-19 pandemic. Interestingly, in Q2 2023, Niagara Region’s vacancy rates were extremely low at 0.4% while the availability rate increased to 3%, showing an increase in properties currently being marketed (e.g., soon to be vacant).

According to CoStar, there is approximately 754,000 square feet of available industrial space in properties under construction. With the introduction of this additional supply in the market, the total availability rate in Niagara Region increases to 5.8%.

Figure 7-2: Industrial Vacancy and Availability Rate of Existing Buildings in Nlagara Region



SOURCE: urbanMetrics inc., based on data collected from CoStar

Despite increased supply that will soon enter the market, the available inventory within the Niagara Region is not keeping pace with the overall demand for industrial space. However, Niagara Region benefits from being strategically located and accessible to major highway corridors (QEW, 406) and its proximity to the United States. The Region will continue to see interest in industrial developments in the Region, given its location advantages as well as competitive land prices in comparison to neighbouring regions.

Logistics and Fulfillment Centres

Logistics, fulfillment centres, and warehousing have seen continuous interest with the ongoing adoption of e-commerce.

Growth prospects for logistics-based businesses are strong as demand grows and customer expectations increase. PricewaterhouseCoopers identifies demand drivers from two primary sources, **Business to Business** (“B2B”) and **Business to Consumer** (“B2C”).⁹

Business to Business demands have experienced significant change driven by ever increasing expectations for manufacturing industries around delivery times, efficient turnaround, and product performance. Business customers increasingly expect manufacturers to provide products in increasingly short-time periods and to higher level specifications. In turn, manufacturers are pressuring suppliers for input materials to respond to these demands. Demand for well-located, technologically advanced warehousing and distribution facilities, in proximity to raw materials and manufacturing processors will increasingly support demand.

Business to Consumer demand patterns have been more firmly established and are driven by e-commerce and online shopping comprising an ever-increasing share of consumer goods spending. Increasingly, consumer expectations are driven by distribution innovations promising ever faster delivery times, low cost or no cost delivery, and mass product availability. Furthermore, the COVID-19 pandemic has rapidly increased usage of delivery-services and online shopping. It remains to be seen if those bumps are sustained, or trends revert to the broader secular increase in e-commerce as part of consumers’ spending habits.

Location of distribution and logistics centres is key, with these facilities requiring very large parcels to facilitate large scale buildings and truck movements; immediate access to major highways with limited turning movements and traffic delays; and proximity to end users. The Niagara Region sees high demand for industrial space in these categories, particularly in St Catharines and Niagara Falls. The Town of Niagara-on-the-Lake is likely to see increase in demand as natural spillover from the surrounding municipalities which are unable to accommodate all interest in industrial space.

According to discussions with ICI brokers, a large number of businesses interested in industrial space in Niagara are logistics and distribution centre operations (including grocery store distribution). These operators require parcels between 5 to 8 hectares in size to accommodate distributions and logistics uses. There is also significant interest in large parcels up to 16 hectares in size for immediate development. Smaller-scale operators require parcels up to 4 hectares. Glendale is well-positioned to accommodate uses in this parcel size range category. Currently, Glendale is home to Purolator which is located on a 3.5 hectare site on Townline Road.

⁹ SOURCE: “The Future of the Logistics Industry’s prepared by PwC in 2016.

While Glendale could be an attractive location for logistics type uses, it is currently the location for a variety of employment land uses and is being planned by the Region's Official Plan to attract and accommodate Knowledge and Innovation uses.

Office Market

Overall, the office market in the Greater Toronto Area is stagnant, characterised by high availability and vacancy rate, negative absorption, and minimal supply being added, other than projects that had been committed before the pandemic, which are largely in the Toronto downtown core. While there has not been full adoption of return to office in Toronto, companies are mandating more office time for their employees. Despite this, however, both private and public sector offices are being rationalized to reduce their overall space requirements.

Glendale is currently home to the Niagara Corporate Business Centre, which was recently acquired by Niagara College as part of its campus expansion strategy. With the exception of this one building, Glendale does not have a significant office cluster. While Glendale does enjoy excellent highway access and proximity to the College, positioning it to become attractive to major offices will ultimately be dependent on the future planning and design of the community. For example, over the past decade, large scale tenants, such as Aviva, PriceWaterhouseCoopers and KPMG have been attracted to suburban non-traditional office markets (i.e. Markham Centre and Vaughan Metropolitan Centre) following extensive public and private sector investment in creating vibrant communities.

Attracting new office development to Glendale in a sustained manner will likely be a long-term process, requiring a reversal of current market conditions together with investment in the creation of a dynamic mixed-use community with a strong range of amenities in addition to well-designed residential neighbourhoods.

7.3 Current Employment Land Supply

As noted in the 2020 Niagara Employment Land Strategy, while the Region does have large amounts of vacant employment lands, much of it is unserviced and/or constrained by environmental features or contains small, awkwardly shaped parcels that limit its capacity for development.

Currently there are some 25 hectares of vacant land in the Glendale Momentum District. There is also considerable intensification potential on a number of existing sites on which extensive land area is devoted to outside storage and vehicle/equipment parking. The current employment density of approximately 13 jobs per hectare is considered low by urban standards.

The Employment Land Strategy remarked that:

The Glendale Business Park is one of Niagara’s premier prestige business parks. The concept for the Glendale Business Park is to leverage proximity to Niagara College and the QEW corridor by designating lands for business park development. The Glendale Business Park has an approved secondary plan in place that provides the detailed development vision for the area¹⁰.

The advantages of Glendale noted in the Strategy include:

- Direct access/exposure to the QEW and close proximity to Highway 405;
- Close proximity to Niagara District Airport;
- Close proximity to the international border;
- Contains large supply of serviced employment land;
- Designated for Prestige Industrial uses;
- Proximity to Niagara College; and,
- A strategic gateway node for Niagara-on-the-Lake.

In our opinion, the Glendale Momentum District is an important resource for both the Town and the Region in terms of attracting high quality jobs and businesses.

7.4 Niagara Region Land Needs Assessment - Employment

The Region completed a Land Needs Assessment (LNA) to support its Municipal Comprehensive Review (MCR) of its Official Plan. The LNA Methodology, which was prescribed by the Province, was based on the population and employment targets in the Growth Plan.

With the Official Plan Review completed through the now approved Regional Official Plan, the Land Needs Assessment has fulfilled its purpose and is likely no longer required to guide the planning of the Region’s employment lands. Furthermore, the proposed Provincial Planning Statement would remove the population and employment targets which were an integral part of the Growth Plan and provide more flexibility for municipalities in terms of growth management.

¹⁰ MHBC and urbanMetrics, Niagara Region’s Employment Area Strategy: Background Report and Recommendations, March 20, 2020,

The Region’s Land Needs Assessment provides an estimate of the land supply and forecasts for employment growth. As it pertains to the Town of Niagara-on-the-Lake, the LNA estimates that employment in NOTL will reach 17,610 jobs by 2051. This is a growth of 5,810 jobs from 2021, of which 2,045 jobs will be located in employment areas – of which only 290 or less than 15% would be employment land (i.e., industrial) jobs. **As shown in Figure 7-3 below, as per the LNA, the vacant land supply of 37 hectares in NOTL can accommodate 2,819 jobs.**

Figure 7-3: Employment Growth Potential by Employment Area

Employment Area	Vacant Land Supply (ha)	Vacant Land Density Target (jobs/ha)	Existing Employment Area Growth Capacity
Virgil Business Park	5	45	221
Glendale Momentum District	32	80	2598
Total	37		2,819

SOURCE: urbanMetrics inc., modified from Niagara Region Land Needs Assessment (June 2022)

The estimated jobs in the LNA are allocated by the following employment types outlined in Figure 7-4.

Figure 7-4: LNA 2051 Projected Employment in Niagara-on-the-Lake by Type

Employment Type	Number of Jobs
Office/Major Office	1,000
Population Related	3,040
Employment Land Employment	290
Rural	1,480
TOTAL	5,810

SOURCE: urbanMetrics inc., data from Niagara Region Land Needs Assessment (June 2022)

The LNA only allocates 2,045 employment land jobs to Niagara-on-the-Lake, suggesting that there are more employment lands than are required (i.e., a capacity for 2,819 jobs with an allocation of just 2,045 jobs). At a density target of 80 jobs/ha, the LNA figures suggest that NOTL has a surplus of employment lands amounting to 10 hectares.

In contrast, the LNA revealed that other municipalities in Niagara Region, namely Fort Erie, West Lincoln, and Welland, required in total 255 hectares of additional developable Employment Area lands.

In our opinion, the results of the LNA with regards to the need for employment lands in Glendale should be treated very cautiously. It was intended as a high level numerical planning exercise and does not capture the specific characteristics of the Glendale employment land supply particularly well.

The allocation of only 290 employment land jobs to Niagara-on-the-Lake, which includes Glendale and Virgil, undervalues the current and future attractiveness of Glendale to industrial businesses as noted in the Employment Land Strategy.

Furthermore, the capacity has been determined based on a target of 80 jobs per hectare in Glendale which far exceeds the current rate of 13 jobs per hectare and higher than the current Official Plan target of 60 jobs per hectare. Using a density of 60 jobs per hectare and the current vacant supply of 25 hectares against the LNA employment land employment estimate, for example, would result in an employment land deficit rather than a surplus¹¹. Furthermore, 25 hectares is a relatively small amount within the context of the Niagara market and given the strategic location of Glendale, it will likely be fully absorbed well before 2051.

In our opinion, while a density of up to 60 jobs per hectare should be a strategic long-term goal, it should not restrict the ability of Glendale to attract traditional prestige industrial uses that are still important contributors to the local economy.

In conclusion, it is unlikely that there is an oversupply of employment land in Glendale as might be inferred by the Land Needs Assessment.

7.5 Employment Lands Policy Review

We have reviewed Niagara Region’s policy and strategic directions with regards to employment lands in Glendale based on the new Regional Official Plan, which was approved in November 2022. This section focuses on the regional framework and policy direction for the lands in Glendale, as well as the local (NOTL) planning direction for employment within the Glendale SPA.

¹¹ The current vacant land supply is 25 hectares in Glendale. At a density of 60 jobs per hectare, this results in a capacity for 1,500 jobs. Including the capacity in Virgil of 221 results in a total employment land capacity of 1,771 employees against a 2051 employment target of 2,045.

There are three key employment land use categories that direct the future development of the Glendale SPA:

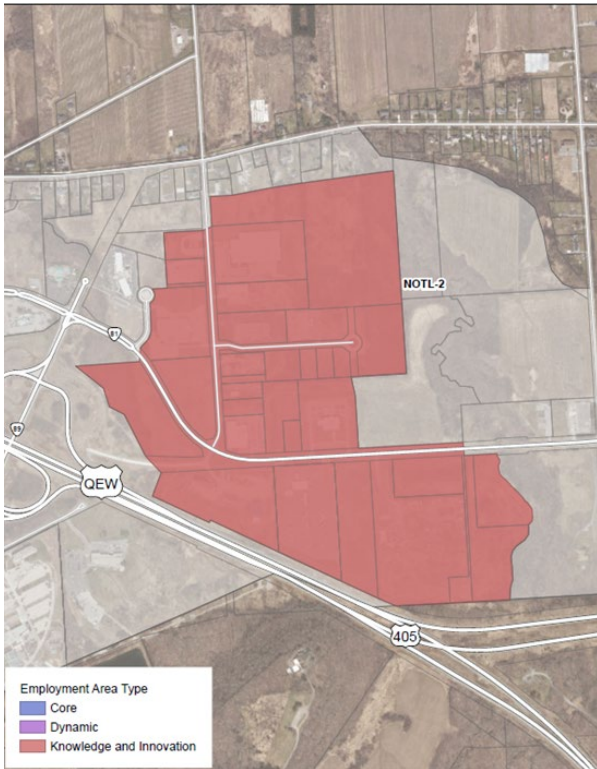
1. Employment Areas;
2. A site specific policy which relates to lands in proximity to York Road and Townline Road; and
3. Employment Lands.

Employment Areas

Employment Areas are areas of regional importance that are mapped and assigned policies by Niagara Region in the new Regional Official Plan. Residential uses and major retail uses are prohibited in these areas. Major office uses (4,000 square metres or greater or with 200 or more jobs) are also generally prohibited in employment areas except in Strategic Growth Areas, such as the Glendale Secondary Plan Area.

Employment Areas in Glendale are outlined in Schedule G of the NOP and are outlined in Figure 7-5. Three types of employment areas are classified in the Plan. The employment areas within the Glendale Secondary Plan Area (referred to as the Glendale Momentum District) are identified as the “Knowledge and Innovation” type.

Figure 7-5: Employment Areas, Schedule G, NOP, Glendale Secondary Plan Area



SOURCE: Niagara Region Official Plan

Section 4.2.1.7 of the NOP defines Knowledge and Innovation employment areas as clusters of higher density employment uses, including office parks, and major institutional uses. Knowledge and Innovation employment areas will:

- a) *contain a mix of complementary land uses to facilitate partnerships and promote the sharing of ideas and information;*
- b) *accommodate built form that supports nearby major institutional uses and major office uses where permitted;*
- c) *attain high-quality urban design;*
- d) *encourage densities that are transit-supportive; and*
- e) *incorporate active transportation facilities along active transportation networks.*

There currently 25 vacant hectares of employment area in the “Glendale Momentum District” net of environmental lands. The minimum target density for the Glendale Momentum District is 60 jobs per hectare as per Table 4-2 of the Regional Official Plan. As an area classified as a Knowledge and Innovation Employment Area, the Region and local

municipalities are also anticipated to direct major office uses, office parks and major institutional uses to Glendale. This will further support economic growth, the viability of employment uses in this area of Niagara-on-the-Lake and the unique opportunity for higher density employment in the longer term.

Site Specific Policy Area

Section 8.6.5 of the NOP includes a **Site Specific Policy** for lands in proximity to the intersection of York Road and Townline (Grantham) Road in the Glendale Secondary Plan Area. These lands, which are designated as Employment Area – Knowledge and Innovation, in Schedule G of the NOP, are shown in Figure 7-6 below. The developable portion of these lands is approximately 4.5 hectares in size.

Figure 7-6: Site Specific Policy Area Identified in the NOP



SOURCE: Niagara Official Plan, Site Specific Policies, Policy 8.6.5

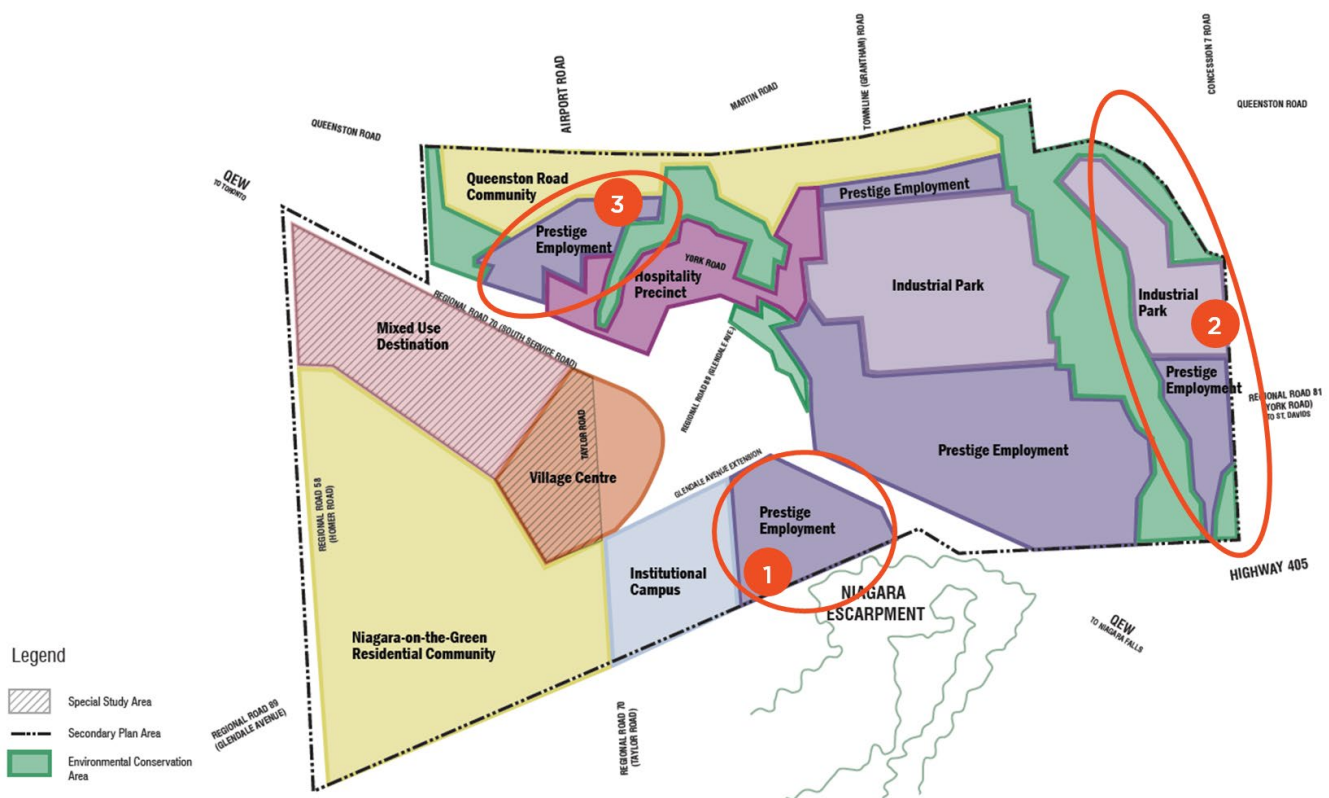
The Special Policy area is designated as Employment Area within the Glendale Momentum District Employment Area. Based on Section 8.6.5 of the Regional Official Plan, through the Glendale Secondary Plan update, technical studies may support adjusting the types of uses permitted or adjusting the boundary of Glendale Momentum District Employment Area for the identified area provided there is sufficient justification to support modification to the

Region’s satisfaction. Notwithstanding the other policies of this Plan, the Region may reflect any adjustment without amendment to this Plan following the approval of the Secondary Plan. The future use permissions on these lands are being reviewed as part of the planning analysis in the Secondary Plan.

Employment Lands

Employment Lands are lands which are subject to policies and mapping by the Local Area municipalities that are supported by the Region. The existing Glendale Secondary Plan, as shown in Figure 7-7, designates lands both within and outside the Glendale Momentum District (i.e., Employment Areas) for employment uses. These lands would be considered to be *employment lands* under the NOP.

Figure 7-7: Current Glendale Secondary Plan Land Use Plan



Schedule F1: LAND USE & CHARACTER PRECINCTS
Glendale Secondary Plan



Source: Town of Niagara-on-the-Lake Official Plan (Schedule F1), modified by urbanMetrics

A number of key differences exist between the “Employment Area (Regionally important) overlay” and the “Employment Land (Locally important) overlay”:

1. Lands on the southwest quadrant of the Glendale interchange are identified as Prestige Employment Lands in the Glendale Secondary Plan but are outside the Regional Employment Area. These lands are occupied by the Niagara Corporate Business Centre, which was acquired by Niagara College and are part of their expansion identified in their Master Plan.
2. Lands on the far eastern border of the Secondary Plan Area are also identified as Industrial Park and Prestige Employment in the Glendale Secondary Plan, are also outside of the Region’s Employment Area. These lands are separated from the Employment Area (Glendale Momentum District) by environmental lands. These lands, which are currently vacant, are not well suited for employment uses due to their isolation from the balance of the employment area, including access and environmental constraints and potential challenges with parcel configuration.
3. Lands on the north side of the QEW immediately north of the outlet centre are designated Prestige Employment but are outside of the Employment Area overlay.

The conversion of any Employment Lands would have to be considered in the context of the Adopted Niagara Official Plan policies, including:

- Redevelopment to non-employment uses shall retain space for a similar number of jobs to remain accommodated on the site;
- Section 4.2.5 indicates that Local Official Plans may contain criteria for the conversion of employment lands. The current Glendale Secondary Plan indicates that conversion of Prestige Employment lands and Industrial Parks would be subject to a municipal comprehensive review. The Regional Official Plan also provides for the local municipality to use the Region’s conversion criteria in Appendix 3 of the Regional Official Plan;
- The Region and local municipalities shall discourage any redevelopment of employment lands that may restrict the ability of existing or planned employment uses to operate or expand.

Long Term Employment Potential

Figure 7-8 outlines the estimated employment that could be accommodated in Glendale, for both employment land and population-serving employment. The employment projections are based on a review of individual sites, market expectations and planning policies:

Vacant Employment Lands – We have assumed a long-term employment density of 60 jobs per hectare, based on the designation of the Glendale Momentum District for Knowledge and Innovation uses. We would have envisioned that these lands will be developed with a mix of traditional prestige industrial uses and offices.

Occupied Employment Lands – These lands currently have a very low employment density with a number of sites occupied by low intensity uses with large amounts of outdoor storage. Over the long term, we have assumed that many sites will be occupied by more intensive uses. We have assumed an average of growth of 20 employees per hectare.

Retail Commercial Lands – Based on the market analysis, there will be a need for between 187,000 and 240,600 square feet. The employment estimate is based on an average of 210,000 square feet at a typical employment density of 400 square feet per employee.

Niagara College Expansion – Niagara College has plans for a major expansion of its Niagara-on-the-Lake Campus with the introduction of a number of new programs. At this point, we do not have information regarding the increase in students or staff. For the purposes of this analysis, we have assumed that the campus employment would increase by 500 persons in the long term.

Miscellaneous/Population Serving Employment – The new residential population in Glendale will generate a need for a range of population related services. In addition to commercial uses, this would include: schools, places of worship, government services, social and community services, among others. We have estimated that the future population would generate a need for approximately 600 employees¹².

In total, it is estimated that the Glendale Secondary Plan Area has the potential to attract approximately 4,000 additional employees at build-out. In addition to the employment identified in Figure 7-8, would be the home-based workforce.

¹² Within the Greater Toronto Area there is approximately 1 population serving job per 5 residents. This will ultimately vary by municipality and by location. With respect to Glendale, a portion of the required population serving jobs would be located outside of the district (i.e. in other parts of Niagara-on-the-Lake and Niagara Region). Excluding the future Niagara College employees, the number of commercial and miscellaneous other jobs represents approximately 40% of the population serving jobs supported by the Glendale build-out population of 14,000.

Figure 7-8: Estimated Employment Growth in Glendale

	Net Hectares¹	Density	Employment
Vacant	25	60	1,500
Intensification on Occupied Lands	43.5	20	870
Total Employment Land	68.5		2,370
Population Serving Employment			
210,000 SF Commercial	(400 sf per employee)		525
Niagara College Expansion			500
Miscellaneous (Schools, POW, Municipal, etc.)			600
Total Population Serving			1,625
Total Employment in Glendale District			3,995

Source: urbanMetrics inc.

1) Excludes environmental lands

8.0 Conclusions and Strategic Directions

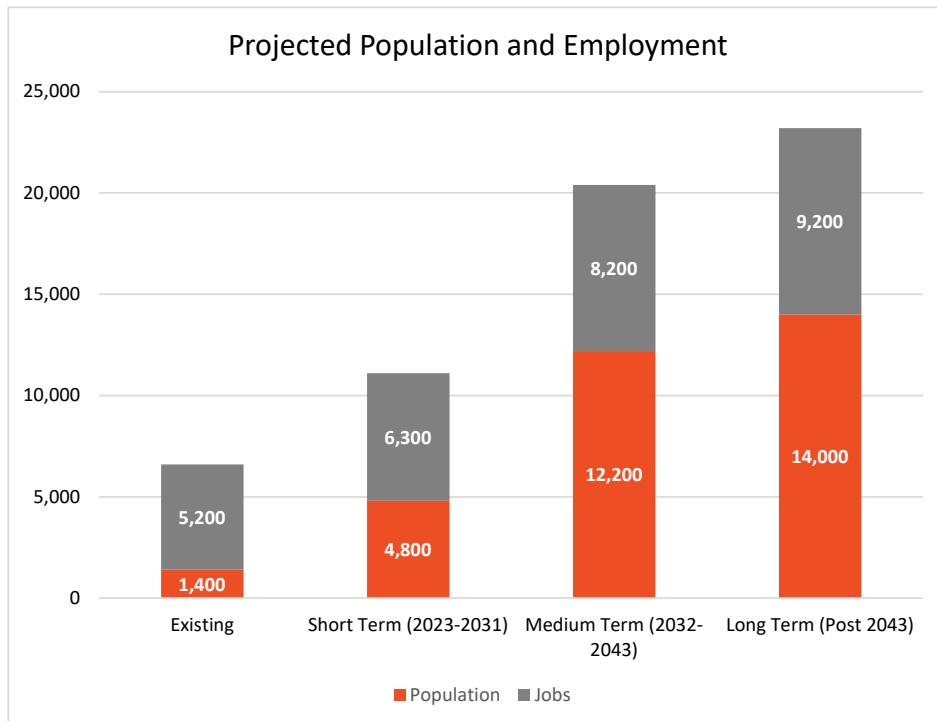
Based on our review of commercial needs and employment lands in Glendale and to some extent the Town of Niagara-on-the-Lake, we present the following strategic directions to inform future commercial and employment land uses in the Glendale SPA.

Projected Population and Employment

Population projections have been undertaken based on historic and anticipated housing growth in Niagara-on-the-Lake and Niagara Region, as well as discussions with the Planning Partnership in terms of reasonable densities and height restrictions related to the nearby Airport. The long term population for Glendale has been projected at 14,000. This represents growth of some 12,600 persons over the current population of 1,400.

Employment projections are based on the commercial market demand analysis, planned densities within the Momentum Employment District, the opportunity for intensification on current employment lands, expansion plans by Niagara College and the need for other population serving jobs (e.g., education, government, recreation, institutional, and related employment) to support future residential growth. In total, the future employment potential at build-out is estimated at approximately 9,200 or a growth of approximately 4,000 over the current level.

Figure 8-1: Cumulative Projected Growth in Population and Employment



SOURCE: urbanMetrics inc.

Commercial Needs

While Glendale is the location of the Outlet Collection at Niagara, a major outlet centre which draws customers across South Central Ontario and the United States, it is almost completely lacking in retail and services space to serve the local population, such as food stores, pharmacies, and other specialty retail shops and services to serve the day-to-day and weekly shopping trips of residents. This is largely due to the current small population base within Glendale. However, to support future residents, a completely new local serving commercial infrastructure will be required.

While it is desirable to design and locate future commercial facilities in a manner which encourages pedestrian and cycling based shopping trips, the challenge with Glendale is that future residential development areas will be divided by the QEW corridor, so that there is no possible central commercial location which will be convenient to all residents.

Overall, the future population will support between about 187,000 and 240,000 square feet over the next 20 years.

The following describes our recommendations with regards to the distribution of this space by format and location.

Neighbourhood Shopping Node

The size of the future Glendale Population would warrant a supermarket within a neighbourhood scale retail node serving weekly shopping trips by Glendale residents. The amount of retail space for this facility should be between about 80,000 to 120,000 square feet. The uses incorporated into this node would include: a supermarket or major grocery store; a pharmacy; together with a range of other services and specialty retail outlets. This space could also include second floor office units to accommodate local serving offices – e.g., health and wellness; real estate, insurance, finance, co-working space, and other similar activities.

The difficulty facing Glendale is that the future population would be split by the QEW, so the neighbourhood shopping node would be significantly more convenient to half of the future Glendale population. In our opinion, this node should be located on the south side of the QEW on lands identified in the former Glendale District Plan for the creation of a Main Street on Niagara-on-the-Green Boulevard. This location, would offer several advantages to other sites:

- It would draw on visitors to the outlet centre;
- It would be easily accessible via Glendale Avenue to the St. Catharines' neighbourhoods to the immediate east of the secondary plan area;

- It would also be within a reasonable walking or cycling distance from Niagara College and the existing Niagara-on-the-Green neighbourhood; and,
- Depending on the densities, the largest share of new growth in Glendale could be developed in the immediate vicinity of Niagara-on-the-Green Boulevard.

As noted above, we would recommend that flexibility be provided for in terms of planning regulations governing the format of retail space in this area. To minimize the need for on-site parking and to accommodate visitors from other parts of Glendale and beyond, we would recommend that on-street parking be made available in front of retail stores on Niagara-on-the-Green Boulevard. The street should also be designed to encourage pedestrians and cyclists.

Convenience Retail Node

Due to the divided nature of the future population, we would also recommend a small convenience retail node of between 20,000 and 40,000 square feet on the north side of the QEW at a location central to the future population in the area. This node could contain a small grocery or convenience store and a selection of other services and specialty retail uses.

Other Retail and Services Space

Additional opportunities should be provided for retail and services space in the area in appropriate locations. This could include:

- Ground floor retail space in mixed-use buildings at appropriate locations;
- Limited small scale ancillary retail and services space in the Momentum District to serve local employees and businesses; and,
- Other retail space may be considered to support specific land uses, such as in proximity to hotels, the College, and the future transit terminal.

Employment Lands Needs

There are three key employment land use categories that direct the future development of the Glendale SPA:

1. Employment Areas;
2. A site specific policy which relates to lands in proximity to York Road and Townline Road; and
3. Employment Lands.

Employment Areas

Employment Areas are areas of regional importance that are mapped and assigned policies by Niagara Region in the new Regional Official Plan. Residential uses and major retail uses are prohibited in these areas. Major office uses (4,000 square metres or greater or with 200 or more jobs) are also generally prohibited in employment areas except in Strategic Growth Areas, such as the Glendale Secondary Plan Area.

The employment areas within the Glendale Secondary Plan Area (referred to as the Glendale Momentum District) are identified as the “Knowledge and Innovation” type. Knowledge and Innovation employment areas are planned to be clusters of higher density employment uses, including office parks, and major institutional uses to facilitate partnerships and promote the sharing of ideas and information. These areas are intended to have high design standards and support active transportation and transit usage.

Currently there are some 25 hectares of vacant land in the Glendale Momentum District. There is also considerable intensification potential on a number of existing sites on which extensive land area is devoted to outside storage and vehicle/equipment parking. The current employment density of approximately 13 jobs per hectare is considered low by urban standards.

Employment Lands

Employment Lands are lands which are subject to policies and mapping by the Local Area municipalities that are supported by the Region.

A number of key differences exist between the “Employment Area (Regionally important) overlay” and the “Employment Land (Locally important) overlay”:

- Lands on the southwest quadrant of the Glendale interchange are identified as Prestige Employment Lands in the Glendale Secondary Plan but are outside the Regional Employment Area. These lands are occupied by the Niagara Corporate Business Centre, which was acquired by Niagara College and are part of their expansion identified in their Master Plan.
- Lands on the far eastern border of the Secondary Plan Area are also identified as Industrial Park and Prestige Employment in the Glendale Secondary Plan, are also outside of the Region’s Employment Area. These lands are separated from the Employment Area (Glendale Momentum District) by environmental lands. These lands, which are currently vacant, are not well suited for employment uses due to their isolation from the balance of the employment area, including access and environmental constraints and potential challenges with parcel configuration.
- Lands on the north side of the QEW immediately north of the outlet centre are designated Prestige Employment but are outside of the Employment Area overlay.

Site Specific Policy

Section 8.6.5 of the NOP includes a **Site Specific Policy** for lands in proximity to the intersection of York Road and Townline (Grantham) Road in the Glendale Secondary Plan Area. These lands are designated as Employment Area – Knowledge and Innovation, in Schedule G of the NOP. The developable portion of these lands is approximately 4.5 hectares.

The Special Policy area is designated as Employment Area within the Glendale Momentum District Employment Area. Based on Section 8.6.5 of the Regional Official Plan, through the Glendale Secondary Plan update, technical studies may support adjusting the types of uses permitted or adjusting the boundary of Glendale Momentum District Employment Area for the identified area provided there is sufficient justification to support modification to the Region’s satisfaction. Notwithstanding the other policies of this Plan, the Region may reflect any adjustment without amendment to this Plan following the approval of the Secondary Plan. The future use permissions on these lands are being reviewed as part of the planning analysis in the Secondary Plan process.

Region of Niagara Land Needs Assessment Report

The Region completed a Land Needs Assessment (LNA) to support its Municipal Comprehensive Review (MCR) of its Official Plan. The LNA Methodology, which was prescribed by the Province, was based on the population and employment targets in the Growth Plan.

With the Official Plan Review completed through the now approved Regional Official Plan, the Land Needs Assessment has fulfilled its purpose and is likely no longer required to guide the planning of the Region’s employment lands. Furthermore, the proposed Provincial Planning Statement would remove the population and employment targets which were an integral part of the Growth Plan and provide more flexibility for municipalities in terms of growth management.

While the LNA, suggested that there was a surplus of employment land in Niagara-on-the-Lake, in our opinion, the results of the LNA with regards to the need for employment lands in Glendale should be treated very cautiously. The Region’s LNA was intended as a high level numerical planning exercise and does not capture the specific characteristics of the Glendale employment land supply particularly well.

Based on a review of the market for employment lands and the strategic location of Glendale, is very unlikely that an employment land surplus exists in Niagara-on-the-Lake, particularly with respect to the Glendale Momentum District lands.

Future Market for the Glendale Momentum District

An Employment Land Strategy completed on behalf of the Region remarked that:

The Glendale Business Park is one of Niagara’s premier prestige business parks. The concept for the Glendale Business Park is to leverage proximity to Niagara College and the QEW corridor by designating lands for business park development. The Glendale Business Park has an approved secondary plan in place that provides the detailed development vision for the area¹³.

The advantages of Glendale noted in the Strategy include:

- Direct access/exposure to the QEW and close proximity to Highway 405;
- Close proximity to Niagara District Airport;
- Close proximity to the international border;
- Contains large supply of serviced employment land;
- Designated for Prestige Industrial uses;
- Proximity to Niagara College; and,
- A strategic gateway node for Niagara-on-the-Lake.

In our opinion, the Glendale Momentum District is an important resource for both the Town and the Region in terms of attracting high quality jobs and businesses. While the market for major office development in Glendale will likely evolve over the long term, the opportunity to attract high quality prestige businesses to these lands, both on new sites and on existing under utilized sites, should continue to be a priority in terms of economic development.

¹³ MHBC and urbanMetrics, Niagara Region’s Employment Area Strategy: Background Report and Recommendations, March 20, 2020,

Appendix A Market Analysis



Figure A-1: Trade Area Retail Expenditure Potential

2022 Dollars	2022		
Province of Ontario			
Food Store Retail (FSR)	\$ 2,733	26.5%	
Supermarket & Grocery	\$ 2,335	22.7%	
Other Specialty Food	\$ 399	3.9%	
Selected Non-Food Store Retail (NFSR)	\$ 7,567	73.5%	
Building & Outdoor Home Supply	\$ 1,184	11.5%	
General Merchandise	\$ 2,410	23.4%	
Apparel & Accessories	\$ 927	9.0%	
Furniture, Home Furnishings & Electronics	\$ 916	8.9%	
Other Miscellaneous Retail	\$ 859	8.3%	
Health & Personal Care	\$ 1,272	12.3%	
Total Retail Expenditures ¹	\$ 10,300	100.0%	
2022 Dollars	2022	2031	2043
Trade Area			
Per Capita Retail Expenditures ²	\$ 10,787	\$ 11,210	\$ 11,775
Population ³	1,600	4,800	12,200
TOTAL RETAIL EXPENDITURE POTENTIAL (\$Millions)	\$ 17.3	\$ 53.8	\$ 143.7
Food Store Retail (%) ⁴	26.5%	26.5%	26.5%
Supermarket & Grocery (%)	22.7%	22.7%	22.7%
Other Specialty Food (%)	3.9%	3.9%	3.9%
Non-Food Store Retail (%) ⁴	73.5%	73.5%	73.5%
Building & Outdoor Home Supply (%)	11.5%	11.5%	11.5%
General Merchandise (%)	23.4%	23.4%	23.4%
Apparel & Accessories (%)	9.0%	9.0%	9.0%
Furniture, Home Furnishings & Electronics (%)	8.9%	8.9%	8.9%
Other Miscellaneous Retail (%)	8.3%	8.3%	8.3%
Health & Personal Care (%)	12.3%	12.3%	12.3%
TOTAL	100.0%	100.0%	100.0%
Food Store Retail (\$Millions)	\$ 4.6	\$ 14.3	\$ 38.1
Supermarket (\$Millions)	\$ 3.9	\$ 12.2	\$ 32.6
Other Food (\$Millions)	\$ 0.7	\$ 2.1	\$ 5.6
Non-Food Store Retail (\$Millions)	\$ 12.7	\$ 39.5	\$ 105.6
Building & Outdoor Home Supply (\$Millions)	\$ 2.0	\$ 6.2	\$ 16.5
General Merchandise (\$Millions)	\$ 4.0	\$ 12.6	\$ 33.6
Apparel & Accessories (\$Millions)	\$ 1.6	\$ 4.8	\$ 12.9
Furniture, Home Furnishings & Electronics (\$Millions)	\$ 1.5	\$ 4.8	\$ 12.8
Other Miscellaneous Retail (\$Millions)	\$ 1.4	\$ 4.5	\$ 12.0
Health & Personal Care (\$Millions)	\$ 2.1	\$ 6.6	\$ 17.7
TOTAL (\$Millions)	\$ 17.3	\$ 53.8	\$ 143.7
Cumulative Growth in Expenditures:			
TOTAL RETAIL EXPENDITURES		\$ 36.5	\$ 126.4
Food Store Retail (\$Millions)		\$ 9.7	\$ 33.5
Supermarket (\$Millions)		\$ 8.3	\$ 28.6
Other Food (\$Millions)		\$ 1.4	\$ 4.9
Non-Food Store Retail (\$Millions)		\$ 26.8	\$ 92.9
Building & Outdoor Home Supply (\$Millions)		\$ 4.2	\$ 14.5
General Merchandise (\$Millions)		\$ 8.5	\$ 29.6
Apparel & Accessories (\$Millions)		\$ 3.3	\$ 11.4
Furniture, Home Furnishings & Electronics (\$Millions)		\$ 3.2	\$ 11.2
Other Miscellaneous Retail (\$Millions)		\$ 3.0	\$ 10.5
Health & Personal Care (\$Millions)		\$ 4.5	\$ 15.6

SOURCE: urbanMetrics inc.

¹Based on Statistics Canada Retail Trade data (2022), adjusted for e-commerce spending.

²Based on per capita retail expenditures calculated separately, adjusted based on income characteristics.

³Based on Glendale population projections prepared by urbanMetrics detailed in Figure 4-1.

⁴ 2022 distribution of FSR and NFSR expenditures by subcategory based on current provincial averages. Future years held constant.

Figure A-2: FSR Market Analysis

Food Store Retail (FSR) Analysis

2022 Dollars	2022	2031	2043
Trade Area			
FSR Expenditures (\$Millions) ¹	\$ 4.6	\$ 14.3	\$ 38.1
Estimated Trade Area Share (%) ²	0.0%	60.0%	60.0%
Estimated Trade Area Share (\$Millions)	\$ -	\$ 8.6	\$ 22.9
Residual Potential (\$Millions)		\$ 8.6	\$ 22.9
Trade Area WARRANTED ADDITIONAL FSR SPACE (including inflow)			
Additional Residual Potential Available from Trade Area Residents		\$ 8.6	\$ 22.9
Plus Inflow Sales ³		15.0%	15.0%
Inflow Sales		\$ 1.5	\$ 4.0
TOTAL ADDITIONAL SALES POTENTIAL AVAILABLE IN THE Trade Area (\$Millions)		\$ 10.1	\$ 26.9
Square Feet Warranted (excluding sales transfers from Trade Area Stores) ³		Square Feet ⁴	
@\$600 per square foot		16,800	44,900
@\$700 per square foot		14,400	38,500
@\$800 per square foot		12,600	33,600

SOURCE: urbanMetrics inc.

¹ Based on expenditure potential calculations presented earlier in the Appendix.

² urbanMetrics estimates.

³ urbanMetrics estimate.

⁴ Rounded to the nearest 100 square feet.

Figure A-3: NFSR Market Analysis

Non-Food Store Retail (NFSR) Analysis			
2022 Dollars	2022	2031	2043
Trade Area			
NFSR Expenditures (\$Millions) ¹	\$ 12.7	\$ 39.5	\$ 105.6
Estimated Trade Area Share (%) ²	30.0%	30.0%	30.0%
Estimated Trade Area Share (\$Millions)	\$ 3.8	\$ 11.9	\$ 31.7
Residual Potential (\$Millions)		\$ 8.0	\$ 27.9
Trade Area WARRANTED ADDITIONAL FSR SPACE (including inflow)			
Additional Residual Potential Available from Study Area Residents		\$ 8.0	\$ 27.9
Plus Inflow Sales ³		15.0%	15.0%
Inflow Sales		\$ 1.4	\$ 4.9
TOTAL ADDITIONAL SALES POTENTIAL AVAILABLE IN THE STUDY AREA (\$Millions)		\$ 9.5	\$ 32.8
Square Feet Warranted (excluding sales transfers from Trade Area Stores) ³		Square Feet ⁴	
@\$500 per square foot		18,900	65,500
@\$600 per square foot		15,800	54,600
@\$700 per square foot		13,500	46,800

SOURCE: urbanMetrics inc.

¹ Based on expenditure potential calculations presented earlier in the Appendix.

² urbanMetrics estimates.

³ urbanMetrics estimate.

⁴ Rounded to the nearest 100 square feet.

Figure A-4: Per Capita Analysis (2031 Population)

Commercial Needs - Retail Category	Typical Space Per Capita (Sq Ft)	Total Space Required by Residents (Sq Ft)	Target Capture	Space Required (Sq Ft)	Inflow	Total Warranted Space (Sq Ft)
Population (2031)	4,800	A = B x C = D x E =	F			
Store Categories						
Services						
Food Services & Drinking Places	3.5	16,800	40%	6,720	15%	7,900
Finance, Insurance and Real Estate	2.0	9,600	60%	5,760	15%	6,800
Health Care	2.0	9,600	60%	5,760	15%	6,800
Personal Care	2.0	9,600	60%	5,760	15%	6,800
Business Services ¹	1.5	7,200	50%	3,600	15%	4,200
Other ²	5.0	24,000	50%	12,000	15%	14,100
Total	16.0					46,600

SOURCE: urbanMetrics inc.

¹ Includes: Professional, Scientific and Technical Services, Select Civic and Social Organizations, Selected Office Administration and Selected Educational Services

² Includes: Cultural, Entertainment and Recreation, Personal & Household Goods Repair and Maintenance, & Social Services

Figure A-5: Per Capita Analysis (2043 Population)

Commercial Needs - Retail Category	Typical Space Per Capita (Sq Ft)	Total Space Required by Residents (Sq Ft)	Target Capture	Space Required (Sq Ft)	Inflow	Total Warranted Space (Sq Ft)
Population (2043)	12,200	A = B x C = D x E =	F			
Store Categories						
Services						
Food Services & Drinking Places	3.5	42,700	40%	17,080	15%	20,100
Finance, Insurance and Real Estate	2.0	24,400	60%	14,640	15%	17,200
Health Care	2.0	24,400	60%	14,640	15%	17,200
Personal Care	2.0	24,400	60%	14,640	15%	17,200
Business Services ¹	1.5	18,300	50%	9,150	15%	10,800
Other ²	5.0	61,000	50%	30,500	15%	35,900
Total	16.0					118,400

SOURCE: urbanMetrics inc.

¹ Includes: Professional, Scientific and Technical Services, Select Civic and Social Organizations, Selected Office Administration and Selected Educational Services

² Includes: Cultural, Entertainment and Recreation, Personal & Household Goods Repair and Maintenance, & Social Services

Appendix B North American Industry Classification System

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

Trade Group	NAICS	Description
FOOD STORE RETAIL (FSR)		
90	Supermarkets 44511	Supermarkets and Other Grocery (except Convenience) Stores
100	Convenience and Specialty Food Stores 44512 44521 44522 44523 44529	Convenience Stores Meat Markets Fish and Seafood Markets Fruit and Vegetable Markets 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)		
Automotive		
20	Used and Recreational Motor Vehicle and Parks Dealers (Tires, Batteries, Automotive Accessories component) 44131 44132	Automotive Parts and Accessories Stores Tire Dealers
Furniture, Home Furnishings and Electronics Stores		
30	Furniture Stores 44211	Furniture Stores
40	Home Furnishings Stores 44221 44229	Floor Covering Stores (excludes retailers or only ceramic or only hardwood flooring which are in Building Supply) 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 44313	Appliance, Television and other Electronics Stores Camera and Photographic Supplies Stores
Building and Outdoor Home Supplies Stores		
70	Home Centres and Hardware Stores 44411 44413	Home Centres Hardware Stores (includes tool stores)
80	Specialized Building Materials and Garden Stores 44412 44419 44421 44422	Paint and Wallpaper Stores Other Building Material Dealers (excluding manufacturing and construction firms) (includes doors, windows, kitchen cabinets, electrical, glass, plumbing, ceramic floor, roofing materials, fencing) Outdoor Power Equipment Stores (lawn mowers, tractors, hedge trimmers, snow blowers) Nursery Stores and Garden Centres
Pharmacies and Personal Care Stores		
120	Pharmacies and Personal Care Stores 44611 44612 44613 44619	Pharmacies and Drug Stores Cosmetics, Beauty Supplies and Perfume Stores Optical Goods Stores Other Health and Personal Care Stores (includes stores retailing health and personal care items, such as vitamin supplements, hearing aids, and medical equipment and supplies)

Continued...

Trade Group	NAICS	Description
NON-FOOD STORE RETAIL (NFSR) (Continued)		
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 Retailers	
	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)

Continued...

Trade 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 rental and leasing, Video recorder and player rental and leasing, Washers and dryers rental)
	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 and supplies, and party and banquet equipment and supplies)
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 (e.g., 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 (e.g., 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 studios)
	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 (e.g., printing, copying, mail centres) (excludes commercial printing)
	56144	Collection Agencies
	56145	Credit Bureaus
241	56151	Travel Agencies
	56159	Other Travel Arrangement & Reservation Services (e.g., ticket sales agency, tourist info, bus ticket offices, etc.)
	56162	Security Systems (includes security system sales, installation and monitoring, locksmiths (excluding key duplication - 81149))
245	Selected Educational Services	
	61161	Fine Arts Schools (e.g. dance, drama, music, art, handicrafts)
	61162	Athletic Instruction (e.g. aerobic dance, gymnastics, judo, karate, martial arts, scuba, swimming) (excludes athletic instruction in sport and recreation facility)
	61163	Language Schools
	61169	All Other Schools and Instruction (e.g. driving instruction, public speaking, Kumon, Oxford)

Continued...

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