



1357 BELLE AIRE BEACH ROAD

Retail/Service Market Justification Study

Innisfil, Ontario

Prepared for **Laurel View Homes**

September 6, 2018



This document is available in alternative formats upon request by contacting:

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September 6, 2018

Laurel View Homes
C/O Mr. Cameron Sellers, B.B.A.
Associate
Innovative Planning Solutions
150 Dunlop Street East, Suite 201
Barrie, Ontario L4M 1B1

Dear Mr. Sellers:

RE: 1357 Belle Aire Beach Road – Retail/Service Market Justification Study (Innisfil, Ontario)

Pursuant to your recent request, urbanMetrics inc. is pleased to submit this *Retail/Service Market Demand Analysis* for the Belle Aire Beach community located in the Lefroy Secondary Plan Area which comprises part of the Lefroy – Belle Ewart Settlement Area in the Town of Innisfil, in Simcoe County.

The purpose of this study is to identify the amount of retail/service commercial space that is warranted in the Lefroy Secondary Plan Area to serve the future residents of this community, as well as the appropriate location for this warranted space.

1.0 Study Approach

In carrying out our analysis, this market study focuses on the following:

- **Site and Access Review** – We have visited the area, including the subject site, and evaluated the site and the area’s physical characteristics, accessibility to surrounding communities and the site’s compatibility with proximate land uses. Additionally, we have evaluated the portion of the subject site identified as “Convenience Retail” (2011 Official Plan, and in the Lefroy Secondary Plan) or “Neighbourhood Commercial” (2018 Draft Official Plan) and assessed its suitability for the type of commercial uses that normally locate in this type of commercial centre.
- **Study Area Delineation** – We have delineated a Study Area which corresponds with the Lefroy Secondary Plan Area—including the subject site and surrounding residential community. In addition, we have also reviewed the population and existing retail/service commercial inventory in the Alcona Primary Area, as delineated in the Town of Innisfil’s *Retail Sector Discussion Paper (June 2015)*. Although, our main focus has been to determine the amount of commercial space warranted locally by the population living in the Lefroy Secondary Plan Area, residents of nearby Alcona will be an additional source of market support for the future

commercial facilities in the Study Area, and residents of the Study Area, will provide support to the retail and service commercial facilities located in Alcona.

- **Evaluation of Existing Retail/Service Structure** – We have conducted a detailed inventory of all existing and proposed retail/service facilities located within the Lefroy Secondary Plan Area, as well as in the Alcona community. This existing space inventory has been recognized in our evaluation of the future warranted space in the Lefroy Secondary Plan Area, as these facilities will be very competitive with any future commercial space that will locate in or near the Secondary Plan Area.
- **Commercial Needs Analysis** – The future population residing in the Lefroy Secondary Plan Area has been estimated. Utilizing a space per capita ratio analysis approach—recognizing this future population—the future additional warranted retail/service space has been estimated for the Study Area (i.e., the Lefroy Secondary Plan Area).
- **Retail/Service Space Allocation** – Based on our estimates of the warranted additional retail/service space forecast at build-out of the Lefroy Secondary Plan Area, the most suitable location(s) for this space have been recommended to best serve the local needs of Secondary Plan Area residents.

2.0 Site Context

The subject site is located at 1357 Belle Aire Beach Road and is comprised of approximately 1.96 hectares (4.84 acres) of land within the Lefroy – Belle Ewart Settlement Area. The lands are bound to the south and west by an emerging residential subdivision comprised of single and semi-detached units, as well as townhome developments. Lands to the north of the subject site contain two residential dwellings and are designated agricultural. Lands to the east of the site are designated for future low-density residential uses and are bound in the east by the GO Transit rail corridor. Figure 2-1 illustrates the location of the subject site in relation to the existing and future uses surrounding it. We note that the emerging subdivision to the south and west of the subject site is significantly more built-out than is evident in the aerial imagery from 2016 (i.e., the most recent image available).

Figure 2-1: Site Context

SOURCE: urbanMetrics inc., based on Google Earth 2016 imagery. For illustration only.

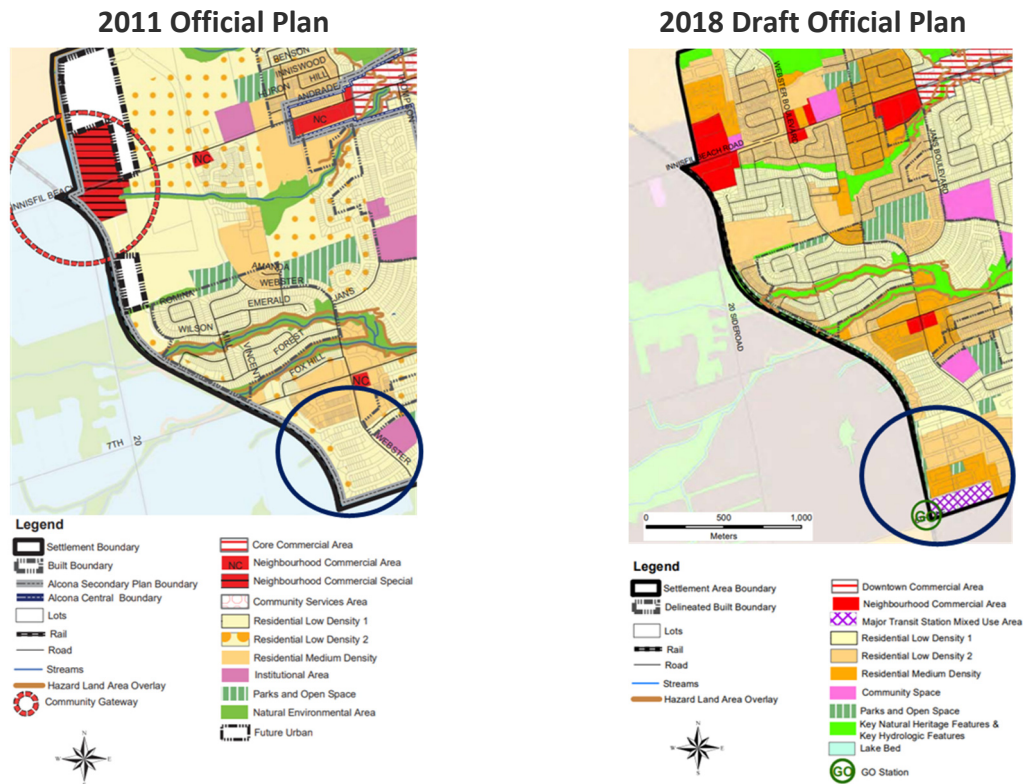
The subject site is well served by the existing roadway network, including direct access onto Belle Aire Beach Road, identified as an Arterial Road in the Innisfil Official Plan. 20th Sideroad, also an Arterial Road, provides direct access to the Community of Alcona, located some 4 kilometres north of the subject site. The site is also located approximately 13 kilometres from the intersection of Innisfil Beach Road and Highway 400. Highway 400 is a limited access highway that provides a direct connection to Toronto, Barrie, and various municipalities further to the north.

The Town of Innisfil is currently in the process of updating its Official Plan. The Town has adopted the Official Plan, but certain modifications have been proposed by Simcoe County. These modifications have yet to be approved by Innisfil Council. However, these modifications do not appear to present implications for either the proposed or potential intended use of the subject site. That being said, until the Official Plan is fully ratified and in force, it is prudent to evaluate the site's designations under both the consolidated 2011 Official Plan, as well as the proposed 2018 Draft Official Plan. Based on our review, it appears that any difference between the 2011 and proposed 2018 Draft Official Plans do not ultimately alter the designation or planned function of the subject site.

It is important to note that in 2016 the Town of Innisfil changed the location of the GO Station to a site in the Alcona Primary Area, at the northwest corner of the 6th Line and 20th Sideroad intersection. As shown in Figure 2-2 below, that change is reflected in the 2018 Draft Official Plan. As part of the relocation of the GO Station, planning staff re-designated an adjacent site as ‘Major Transit Mixed Use’ – intended to accommodate a broad range of uses, including mixed residential/commercial, a full range of retail, office and professional services.

The designation of adjacent land for mixed use commercial purposes was intended primarily to serve the station traffic. However, when the station was relocated to Alcona, the commercial designation on the subject site was not altered to reflect a more appropriate use of that site. Whereas, the previous commercial designation of the subject site was appropriate when there was an adjacent transit station, once the transit station was relocated, it is our opinion that the site should no longer be designated for commercial uses.

Figure 2-2: GO Station Designation in Alcona Urban Area



SOURCE: urbanMetrics inc., based on Town of Innisfil, Schedule B1 of 2011 Official Plan and Schedule B1 of 2018 Draft Official Plan.

2011 Official Plan

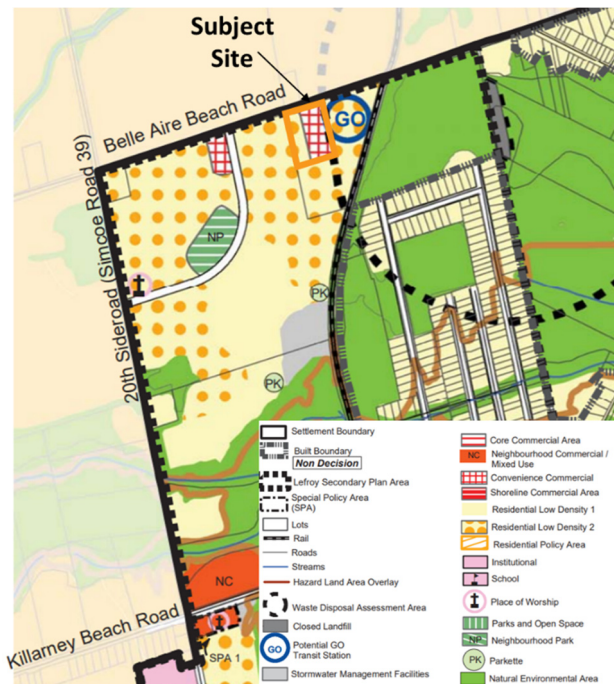
As shown in Figure 2-3, the 2011 Official Plan designated the site as a mix of ‘Convenience Commercial’ and ‘Residential Low Density 2.’

Section 3.4.7.1 of the 2011 Official Plan outlines the following with respect to the Convenience Commercial Designation:

“Convenience Commercial uses include small retail stores providing a convenience function to the local neighbourhood including variety stores, laundromats, video stores, personal service shops and a gas bar.”

As shown on Figure 2-3, the location and orientation of the commercial portion of the site clearly reflects the location of the GO Station. Also shown on Figure 2-3 is a second Convenience Commercial site located just west of the subject site on Belle Aire Road, which has now been relocated in the 2018 Draft Official Plan to a site on the 20th Sideroad, south of Belle Aire Road, as a larger Neighbourhood Commercial designation.

Figure 2-3: Subject Site Designation under 2011 Official Plan



SOURCE: urbanMetrics inc., based on 2011 Consolidated Innisfil Official Plan.

2018 Official Plan (DRAFT)

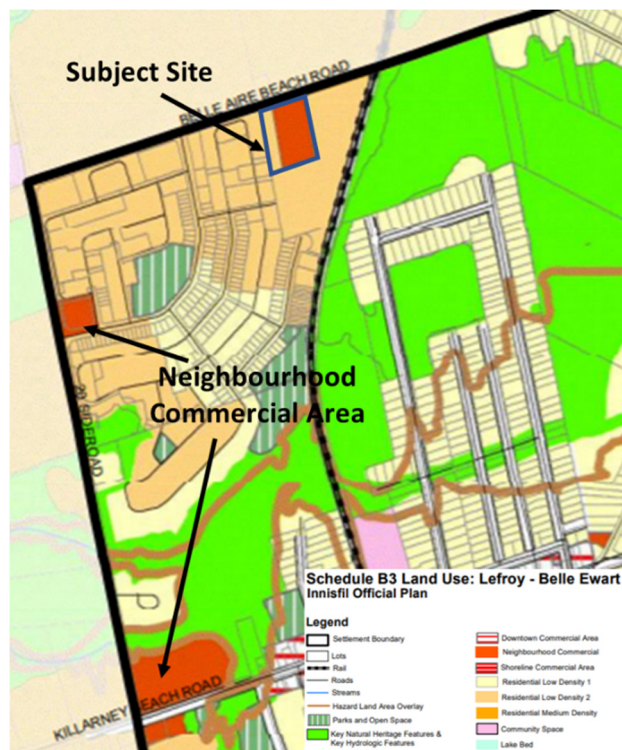
The subject site is designated in the 2018 Draft Official Plan as ‘Neighbourhood Commercial’ as well as ‘Residential Low Density 2’. According to Official Plan Section 11.3.4:

“The two Neighbourhood Commercial Area designations in the northwest neighbourhood of Lefroy-Belle Ewart may be moved without amendment to this plan.”

Therefore, this policy suggests that, subject to market demand and the provision of an adequate amount of commercial space to serve the residential population, the commercial designation on the site could be moved or removed to permit residential uses. Notwithstanding this provision, it is useful to examine the planned function of the designation. Section 11.3.3 limits the maximum floor area of areas under this designation to 10,000 square metres (approximately 107,000 square feet). Further, Official Plan Section 11.3.1 articulates that:

“The Neighbourhood Commercial Area is intended to serve the frequent shopping needs of the surrounding residents as well as the weekly needs for groceries, personal care products and other services.”

Figure 2-4: Subject Site Designation Under Proposed 2018 Draft Official Plan



SOURCE: urbanMetrics inc., based on Town of Innisfil Draft Official Plan, 2018.

The western portion of the subject site is designated Residential Low Density 2. According to Section 10.2.1 of the 2018 Draft Official Plan, this designation is,

“...intended to apply generally to newer greenfield areas at a higher density to create compact low-rise neighbourhoods and to reflect opportunities for infill development.”

As shown in Figure 2-4, based on the 2018 Draft Official Plan the residential community is served by two designated Neighbourhood Commercial sites, in addition to the subject site. Located some 600 metres to the southwest of the subject site at 20th Sideroad and Laurel Gate Avenue, the 2018 Draft Official Plan indicates a designated Neighbourhood Commercial site that was not shown in the 2011 Plan. Based on the size (i.e., approximately 1.24 acres) and location of this site, its function will primarily be to serve the needs of the local community. Additionally, further to the south at 20th Sideroad and Killarney Beach Road, there is a larger Neighbourhood Commercial designation. Due to its size (i.e., approximately 7.58 acres) and location at the intersection of an Arterial and Major Collector route, this node is expected to be a larger facility, serving the broader community of Lefroy-Belle Ewart.

As a result, the new Official Plan—even with the removal of the Convenience Commercial designation on the subject site—provides for more commercial space to serve the local population than was indicated in the 2011 Plan. In addition, with the relocation of the GO Station, in our opinion it is appropriate that the entire subject site is designated for residential uses, as it is no longer required as commercial to serve the local community.

Lefroy Secondary Plan

The Lefroy Secondary Plan is intended to implement the broader Official Plan policies in more detail. Consistent with the 2011 Official Plan shown in Figure 2-3, the subject lands are designated both “Residential Low Density 2” and “Convenience Commercial” in the Lefroy Secondary Plan. However, the Secondary Plan does allow for the Convenience Commercial designation to be removed from the site.

Further, Section 13.3.8a) of the Lefroy Secondary Plan reaffirms that the lands designated Convenience Commercial within the ‘northwest neighbourhood’, as outlined in Policy 11.3.4 of the 2018 Draft Official Plan, can be moved or deleted without requiring an amendment. It further states that the subject site may be used for residential uses consistent with the adjacent designation in the event that this occurs (i.e., Residential Low Density 2).

Proposal

As shown in the Draft Plan of Subdivision contained in the Appendix, the subject site is proposed to include 93 townhomes. As noted in the Planning Justification Report prepared by Innovative Planning Solutions for the subject site, an Official Plan Amendment and site-specific Zoning By-law Amendment are required in order to permit the residential uses, as proposed.

In the analysis described below we have determined whether there will still be sufficient retail and service space to serve the Lefroy Secondary Plan Area if the Convenience Commercial designation on the subject site is removed.

3.0 Study Area

For the purposes of this study, we have focused our analysis on a Study Area that corresponds with the Lefroy Secondary Plan Area. This is the area from which the retail/service facilities in the Lefroy Secondary Plan Area—including the subject site—will draw the majority of their sales support. In addition, we have also reviewed the retail/service commercial facilities in the Community of Alcona located to the north of the Study Area, as existing and future facilities in this area will also serve Study Area residents. The Alcona Commercial Area along Innisfil Beach Road is located a 5-minute drive from the northwest portion of the Secondary Plan Area. Figure 3-1 illustrates the Study Area, as well as the Alcona Primary Area.

Figure 3-1: Study Area



SOURCE: urbanMetrics inc. For illustration only.

Population

As of the 2016 Census there were some 620 residents in the Study Area, adjusted for net under-coverage. Based on information contained in the 2017 Innisfil Residential Land Budget prepared by Simcoe County, the Study Area could accommodate some 3,973 residents at full build out, including the future residents of the additional townhomes proposed for the subject site. The future population of the Study Area is detailed in Figure 3-2.

Figure 3-2: Study Area Population at Full Build-out

	Growth Plan Policy Area	Residential Units					X	Persons Per Unit	=	Future Population
		Singles	Semis	Rows	Apts	Total				
Registered and Draft Approved Plans	iUBUA	736	38	192	0	966		2.64		2,550
Complete Application Pending Approval	iUBUA	38	0	0	0	38		2.64		100
Unit Potential on all Vacant Lands for Urban Uses	iUBUA	408	0	0	0	408		2.64		1,077
		1,182	38	192	0	1,412				3,727
Proposed Townhomes on the Subject Site	iUBUA	0	0	93	0	93		2.64		246
Future Population at Full Build-out										3,973

SOURCE: urbanMetrics inc., based on the 2017 Innisfil Residential Land Budget and the Draft Plan of Subdivision in Appendix A.

4.0 Retail/Service Commercial Space

Existing Retail/Service Commercial

The Study Area currently contains some 16,300 square feet of retail/service commercial space. In addition to the retail/service space in the Study Area, a large portion of future Study Area resident's retail/service needs will be met by the well-established facilities in the Alcona Primary Area, which contains an additional 376,200 square feet of retail/service commercial space. Figure 4-1 summarizes this space by major store category.

Figure 4-1: Existing Inventory

Store Category	Study Area		Alcona Primary Area	
	Sq. Ft.	%	Sq. Ft.	%
Food Store Retail (FSR)	5,400	33.1%	93,900	25.0%
Supermarkets & Grocery	—	—	77,500	20.6%
Convenience & Specialty Food	5,400	33.1%	16,400	4.4%
Beer/Wine/Liquor (BWL)	—	—	11,900	03.2%
Non-Food Store Retail (NFSR)	3,100	19.0%	121,500	32.3%
Building and Outdoor Home Supply	—	—	25,800	06.9%
Furniture, Home Furnishings & Electronics Store	—	—	1,300	00.3%
Pharmacies & Personal Care	1,800	11.0%	21,100	05.6%
General Merchandise	—	—	70,700	18.8%
Miscellaneous Retailers	1,300	8.0%	2,600	.7%
SERVICES	7,800	47.9%	130,200	34.6%
Finance	900	5.5%	17,600	4.7%
Insurance and Real Estate	—	—	7,300	1.9%
Professional, Scientific & Technical Services	—	—	30,200	8.0%
Selected Office Administrative Services	—	—	500	.1%
Selected Educational Services	—	—	3,400	.9%
Health Care	—	—	12,500	3.3%
Social Services	—	—	2,300	.6%
Full-Service Restaurants	1,900	11.7%	4,100	1.1%
Limited-Service Eating Places	1,300	8.0%	40,000	10.6%
Personal Care	1,800	11.0%	12,300	3.3%
Transportation	1,900	11.7%	—	—
VACANT	—	—	18,700	5.0%
TOTAL	16,300	100.0%	376,200	100.0%

SOURCE: urbanMetrics inc., based on CoStar Realty data and urbanMetrics fieldwork (August 2018). Rounded to the nearest 100 square feet.

At the time that our fieldwork was conducted, there was some 18,700 square feet of vacant space, all located in the Alcona Primary Area. However, we note that the majority of this space is new retail/service commercial space that has been constructed and is in the final preparation stages of occupancy at the Choice Properties Retail Plaza located at 2211 20th Sideroad on the western end of the Alcona Commercial Area on Innisfil Beach Road.

Proposed Retail/Service Commercial

As noted above there is a block of land in the Lefroy Secondary Plan Area that is designated for commercial uses that fronts onto 20th Sideroad, as previously shown in Figure 2-4. It is expected that this site will provide neighbourhood serving retail and commercial services (i.e., a convenience food store, dry cleaner, fast food restaurant, etc.) and could likely accommodate up to 1,300 square metres (14,000 square feet)¹ of retail/service space. This block is currently occupied by a sales centre for the surrounding residential developments. Furthermore, a larger commercial parcel is identified at the intersection of 20th Sideroad and Killarney Beach Road. Due to the size and location of this site, it is likely that stores and services in this centre will serve a broader area, and include larger stores such as a supermarket. This site is capable of accommodating up to the maximum of 10,000 square metres (107,000 square feet)². Retail/service development on this site could include a small to medium size supermarket and would likely require the remaining space to be spread across two storeys in order to accommodate the required parking on the site. Both of these centres in our opinion will provide significant local serving facilities to serve new residents in both existing and developing adjacent communities.

Furthermore, in the Alcona Primary Area to the north, it appears that an additional 21,620 square feet of retail/service commercial space could be added in the future at 2211 20th Sideroad, based on the proposed site plan for the Choice Properties site. This location is evolving into a major component of Alcona's commercial structure through the provision of higher order community wide retail/service uses.

5.0 Commercial Needs Analysis

Utilizing an approach commonly used to estimate the future retail/service commercial needs of a community, we have completed a high-level per capita space analysis in order to assess the retail/service commercial needs of the future residents in the Lefroy Secondary Plan Area, as shown in Figure 5-1. For this analysis, we have used normal per capita space ratios that we have developed based on a large number of commercial inventories carried out in other southern Ontario markets. These ratios have been shown for each retail and service category and in total comprise **41.4 square feet** of space per person. Based on the future population of the Study Area (i.e., the Lefroy Secondary Plan Area), future residents will support a total of some 164,300 square feet of new retail/service commercial space in all locations, including Alcona, Barrie and beyond, as detailed in Column B.

¹ Based on a single storey building with 25% lot coverage and parcel area based on Simcoe County GIS website.

² Based on maximum space outlined in Section 11.3.3 of the 2018 Draft Official Plan and parcel area based on Simcoe County GIS website.

Recognizing that future residents of the Secondary Plan Area will continue to shop in other retail areas outside of the Study Area, we have estimated target Study Area capture rates in Column C, which vary for each store category depending on their normal drawing power (e.g., local versus community wide or regional). It should be noted that for some categories, including: *Department Stores, Building & Outdoor Home Supply and Selected Automotive*, no target capture is assumed since these stores are not likely to locate in the type of commercial facilities planned for the Lefroy Secondary Plan Area, as these uses would serve the entire Alcona Community and beyond, and in all likelihood would seek a location closer to the larger population base residing in Alcona. Applying these estimated captures rates from Column C to the per capita figures in Column A results in the adjusted space figures shown in Column D. This results in a total of **11.8 square feet** of warranted retail/service commercial space per resident, or some 47,000 square feet of local serving space that is required to serve the needs of local Lefroy Secondary Plan Area residents.

In addition to the sales generated from Lefroy Secondary Plan Area residents, future retail/service commercial businesses in the community will also generate a portion of their sales from customers living outside the Study Area, also known as inflow. The majority of this inflow support is expected to come from pass-through traffic primarily along 20th Sideroad. The amount of inflow will vary by store category, resulting in an estimated overall increase in the total space warranted in the Secondary Planning Area of 7,500 square feet.

As detailed in Figure 5-1, the full build-out of the Study Area is expected to result in an overall demand for some **54,500 square feet of local serving retail/service commercial space**. This amount of space may in fact be overstated as on a more frequent basis Study Area residents will likely visit the existing commercial centres in the Alcona Commercial Area along Innisfil Beach Road, as well as the larger regional serving retail commercial centres located in Barrie and Bradford West Gwillimbury. In addition, certain types of retail or service facilities though warranted from an analytical perspective are unlikely to consider a location in the proposed commercial space in Lefroy.

Figure 5-1: Lefroy Secondary Plan Area Per Capita Commercial Needs Analysis

Commercial Needs - Retail Category	Typical Space Per Capita (Sq Ft)	Total Space Required by Lefroy Residents (Sq Ft)	Lefroy Target Capture	Adjusted Space Per Capita (Sq Ft)	Future Space Required by Residents (Sq Ft)	Inflow	Total Warranted Space (Sq Ft)
Lefroy Secondary Plan Area Population¹:	3,973						
Food Store Retail (FSR)							
Supermarket	3.5	13,900	70%	2.5	9,700	20%	12,100
Specialty Food	1.5	6,000	50%	0.8	3,000	20%	3,800
SUB TOTAL	5.0	19,900	64%	3.2	12,700	20%	15,900
Beer/Wine/Liquor (BWL)	0.4	1,600	50%	0.2	800	20%	1,000
Non-Food Store Retail (NFSR)							
Selected Automotive	2.5	9,900	0%	0.0	—	0%	—
Furniture, Home Furnishings & Electronics	3.0	11,900	20%	0.6	2,400	15%	2,800
Building & Outdoor Home Supplies	3.0	11,900	0%	0.0	—	0%	—
Pharmacy & Personal Care	1.5	6,000	50%	0.8	3,000	10%	3,300
Clothing & Accessories	2.0	7,900	20%	0.4	1,600	20%	2,000
Department Store	3.5	13,900	0%	0.0	—	0%	—
Other General Merchandise	3.0	11,900	45%	1.4	5,400	10%	6,000
Miscellaneous Retail	2.0	7,900	35%	0.7	2,800	10%	3,100
SUB TOTAL	20.5	81,300	19%	3.8	15,200	12%	17,200
SERVICES							
Finance, Insurance & Real Estate	2.0	7,900	35%	0.7	2,800	15%	3,300
Business Services ²	1.5	6,000	30%	0.5	1,800	10%	2,000
Health Care	1.5	6,000	40%	0.6	2,400	10%	2,700
Cultural, Entertainment & Recreation	2.0	7,900	10%	0.2	800	15%	900
Food Service & Drinking Places	3.5	13,900	35%	1.2	4,900	10%	5,400
Personal Care	2.0	7,900	40%	0.8	3,200	10%	3,600
Other ³	3.0	11,900	20%	0.6	2,400	5%	2,500
SUB TOTAL	15.5	61,500	30%	4.6	18,300	10%	20,400
TOTAL	41.4	164,300	28%	11.8	47,000	14%	54,500

SOURCE: urbanMetrics inc.

NOTES: A Professional judgement from other communities

B = A x Future Population

C Professional judgement from other communities

D = A x C

E = D x Future Population

F Professional Judgement

G = E / (1 - F)

¹ Population estimate based on Innisfil Residential Land Budget within the Lefroy Secondary Plan Area. Estimate includes population associated with the additional 93 townhomes proposed. See Figure 3-2.² Includes: Professional, Scientific & Technical Services; Selected Office Administration³ Includes: Consumer Goods Rental; Selected Educational Services; Social Services; Personal & Household Goods Repair & Maintenance; Civic & Social Organizations

Rounded to the nearest 100 square feet.

Recognizing the results of the per capita analysis detailed in Figure 5-1, we also note the following:

- The 2018 Draft Official Plan identifies three 'Neighbourhood Commercial' sites— including the subject site—for the broader neighbourhood. As previously stated, Section 11.3.3 of the 2018 Draft Official Plan establishes an upset limit on the amount of commercial space that can be accommodated on each Neighbourhood Commercial Site as 10,000 square metres (approximately 107,000 square feet). Based on our analysis, the buildout of just one of these sites—the site located at 20th Sideroad and Killarney Bead Road—would constitute significantly more space than is justified by the per capita space analysis shown in Figure 5-1.

- The analysis suggests that warranted demand could support a *Supermarket* of some 12,100 square feet. We note that modern supermarkets typically serve populations ranging between 8,000-10,000 people and require at least 20,000 square feet. Based on these two factors, the likelihood of attracting a supermarket to serve the Lefroy Secondary Plan Area is unlikely. Furthermore, we note that any potential supermarket use would likely locate as part of the designated Neighbourhood Commercial site located at the intersection of Killarney Beach Road and 20th Sideroad and not on a site the size of the subject.
- There is opportunity to accommodate a *Specialty Foods* store in the Study Area, based on a warranted space yield of some 3,800 square feet.
- Opportunities for a *Selected Automotive, Building & Outdoor Home Supplies and Department Store* uses in the Study Area is likely limited due to the large space requirements of the tenants in these categories, as well as the larger populations and trade areas that these retailer types typically serve. If such uses were to locate in Innisfil, they are overwhelmingly likely to locate in the Alcona Commercial Area, along Innisfil Beach Road. However, these uses are unlikely to locate on the subject site or the other designated commercial sites in the Lefroy Secondary Plan Area due to limited regional visibility, space constraints and the limited local market.
- Based on a typical space per capita ratio for *Beer/Wine/Liquor (BWL)* stores of 0.4 square feet per capita, it is unlikely that the additional population living in the Lefroy Secondary Planning Area will warrant an additional BWL store in the Study Area.
- A *Pharmacy & Personal Care* store may be viable in the Study Area, likely in the form of a small pharmacy, or health and nutrition store.
- There is opportunity to support Service uses in the Lefroy Secondary Planning area. The nature of these uses could include *Finance, Insurance & Real Estate, Personal Care*, (i.e., nail salon, hair care, dry cleaning etc.), *Health Care*, and additional *Professional, Scientific & Technical Services*.
- The Study Area could support some 5,400 square feet of *Food Service & Drinking* space. This could be accommodated in potentially 2-3 unique, small fast food facilities.
- Opportunities for a *Furniture, Home Furnishings & Electronics* store in the Study Area are likely very limited due to the space intensive nature of tenants in this category, as well as the broader study area they typically serve. These types of tenants are more likely to locate in the Alcona Commercial Area along Innisfil Beach Road. However, there may be some opportunity for a computer or electronics store that serves Study Area.

- With the recent addition of the Canadian Tire store in the Alcona Commercial Area in addition to the operating Dollarama, the *General Merchandise* needs of Lefroy Secondary Plan Area residents are already well met. However, it is possible that a small format “dollar” store would locate in the Study Area to better serve local residents.

6.0 Recommended Retail/Service Space Allocation

As demonstrated in Section 5.1, the anticipated commercial space needs from the community yields some 54,500 square feet of retail and service space to serve residents of the Lefroy Secondary Plan Area. The Draft 2018 Innisfil Official Plan notes that Neighbourhood Commercial sites can accommodate a maximum of 10,000 square metres (approximately 107,000 square feet), however, we note that not all sites could accommodate this much space. Excluding the subject site—if re-designated to residential uses—the two remaining Neighbourhood sites could likely accommodate a maximum of 11,300 square metres (121,000 square feet) of retail/service space, given their site characteristics. This represents a more than sufficient supply of designated commercial space to support the needs of both the immediate Lefroy Secondary Planning Area and the broader community.

It is also our professional opinion that the site located along 20th Sideroad at Laurel Gate Drive is better suited for Neighbourhood Commercial uses than the subject site. This location offers the highest degree of visibility for automobile traffic and ease of accessibility both for adjacent residents and traffic travelling along 20th Sideroad. This site is also within walking distance (approximately 500 metres) for a large portion of the residential subdivision that is currently under construction. This location would also provide retail/service facilities to serve not only community residents, but commuters from other areas of Innisfil or Bradford West Gwillimbury heading north towards the proposed GO Station in Alcona.

Furthermore, as noted previously, Innisfil Council has moved the preferred location of the proposed GO Station in Innisfil from Belle Aire Beach Road to a location further north at 6th Line. This relocation has significant implications as to the viability of the subject site for commercial uses. Adjacency to a transit station can create demand for convenience retail/service uses to serve customers beginning or ending their trips on GO Transit. The relocation of the station reduces the commercial appeal of the subject site, particularly relative to other commercially designated sites fronting onto 20th Sideroad.

Based on these conditions, it is our professional opinion that the current designation of a large portion of the subject site (i.e., 1.23 hectares or 3.04 acres) as a Neighbourhood Commercial site (2018 Draft Official Plan) is unnecessary. This portion of the subject site represents just 2 – 4% of the

future retail/service land needs forecast in the Town of Innisfil's *Retail Sector Discussion Paper* (June 2015) to 2031. In addition, our analysis illustrates that the warranted commercial space in Figure 5-1 can be accommodated on the two remaining Neighbourhood Commercial sites in the Lefroy Secondary Plan Area, which will adequately serve the current and future needs of the population forecasted to reside in the area.

It has been a pleasure conducting this assignment on behalf of Laurel View Homes and we look forward to discussing the results of our analysis with you.

Yours truly,

A handwritten signature in black ink, appearing to read "D. R. Annand". The signature is fluid and cursive, with a large initial "D" and "A".

Douglas R. Annand, CMC, PLE
Partner
dannand@urbanMetrics.ca

Appendix A



SOURCE: Innovative Planning Solutions.