

TOWN OF CALEDON
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Bolton North Hill Landowners Group

Commercial Impact Study

Bolton North Hill Residential Expansion

Revised: February 27, 2026

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Prepared By:

Arcadis Professional Services (Canada) Inc.
55 St. Clair Avenue West, 7th Floor
Toronto, Ontario M4V 2Y7
Canada
Phone: 416 596 1930

Prepared For:

Bolton North Hill lands Group
c/o Mr. Peter Campbell
PGC Land Management Inc.
8800 Dufferin St. Suite 200
Vaughan, ON L4K 0C5

Our Ref:

105027

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Executive Summary

Arcadis Professional Services (Canada) Inc. (Arcadis) has been retained by the Bolton North Hill Landowners Group (BNHLG) to prepare a Commercial Impact Study (CIS) in support of a Local Official Plan Amendment (LOPA) application for the Bolton Residential Expansion Study (BRES) Option 1/2 lands in the Town of Caledon (the Town), herein referred to as the “Bolton North Hill lands” or the “subject lands”. The subject lands are approximately 167.8 gross hectares¹ (415 gross acres) and are located north of the intersection of Highway 50 and Columbia Way. BNHLG is proposing to develop the Bolton North Hill lands with a total of 4,129 residential units, an estimated 86,585 square feet (SF) (8,044 SM) of commercial space, two new elementary schools, and approximately 9.0 hectares (ha) of parkland. The proposed development is expected to provide housing for 13,570 people² and 410 jobs.³

Summary of Findings

The following provides a summary of the findings of the Commercial Impact Study conducted by Arcadis:

- BNHLG is proposing 4,129 new residential units comprised of singles, townhouses, stacked and back-to-back townhomes and medium-to-high density apartment buildings. The concept plan envisions the development of a total area of 167.8 hectares, which is estimated to generate 13,570 new residents upon build-out. Only a portion of the overall development can be built-out to the 2031 planning horizon and the remaining growth will need to be accommodated through future 2051 population allocation to Bolton. The full build-out is currently estimated for completion by 2041.
- Based on the current Tertiary Plan design, it is estimated that the mixed-use blocks could generate approximately 86,585 SF of retail/service commercial space. Given the size of the proposed sites and the proximity to other commercial areas to the south, it is expected that the commercial designated lands will have a local neighbourhood function to service the immediate needs of the surrounding population.
- Arcadis has adopted the same Trade Area as identified in the Kircher Research Associates Ltd. report entitled “Retail Market Demand Analysis for 2031 – Bolton, Ontario” (Kircher Report) which was prepared for the Town of Caledon to inform the amount of retail and service commercial space to be provided through the BRES process.
- The inventory (December 2024) indicates that Bolton has some 1.21 million SF of retail/service commercial space, including 151,800 SF of Food Store Type Merchandise (FSTM), 588,100 SF of Non-Food Store Type Merchandise (NFTM) space, 47,800 SF of Other Retail space, and 425,000 SF of service space.
- The population of Bolton is anticipated to total 67,540 persons by 2041, representing growth of 37,340 persons since 2021. The proposed development would account for approximately 36% of the forecasted growth.
- An analysis of mobile phone data was used to determine the shopping patterns of consumers within the Bolton Trade Area. The data showed that the patterns of shopping within the Downtown Bolton had a greater amount of destination traffic due to the area’s quaint “small community” feel, while the

¹ Based on ‘Bolton North LOG’ February 11, 2026.

² Based on ppu for updated unit counts as per 2024 Town DCBS (July 2024)

³ Based on ‘Bolton North LOG’ February 11, 2026 – 100 school jobs, 161 retail jobs

- more traditional retail locations (Central Bolton and South Bolton) had between 46% and 70% of customers originate from within Bolton.
- Arcadis utilized a square foot per capita analysis to determine the market opportunity of retail space uses. Overall, the build-out of the site could support 223,700 SF of retail/commercial space, broken down into the following estimates of demand by retail category:
 - Supermarket and Grocery: 50,900 SF.
 - Other FSTM: 17,950 SF.
 - Other Non-Food Stores: 40,700 SF.
 - Beer, Wine, Liquor: 7,250 SF
 - Services: 114,150 SF
- The estimated 86,585 SF of retail/service commercial space represents 7% of the overall retail/service space in Bolton and is not anticipated to impact the overall function of Bolton's existing commercial areas. The proposed space could accommodate nearly 39% of the estimated retail/commercial demand for the Bolton North Hill lands at build-out, with the remaining demand being accommodated elsewhere throughout the Trade Area.
- Further assessment of the parking, loading and urban design standards may be required when further details for the commercial developments are brought forth through future planning processes.

Based on the findings of the opportunity analysis and the impact assessment, future growth in Bolton is expected to generate demand for new retail and service commercial space. In the context of the Bolton North Hill lands, the proposed commercial sites are expected to have a local retail function and are not anticipated to have adverse impacts on the existing inventory of space or the planned commercial hierarchy. The future commercial uses will help to meet the forecasted commercial demand in Bolton without impacting the operations of existing retailers within the Trade Area.

1 Introduction

Arcadis Professional Services (Canada) Inc. (Arcadis) has been retained by the BNHLG to prepare a Commercial Impact Study (CIS) in support of a Local Official Plan Amendment (LOPA) application for the Bolton Residential Expansion Study (BRES) Option 1/2 lands in the Town of Caledon (the Town), herein referred to as the “Bolton North Hill lands” or the “subject lands”. The subject lands are approximately 167.8 gross ha⁴ (414 gross acres) and are located north of the intersection of Highway 50 and Columbia Way.

BNHLG is proposing to develop the Bolton North Hill lands with a total of 4,129 residential units, an estimated 86,585 SF (8,044 SM) of commercial space, two new elementary schools, and approximately 9.0 ha of parkland. The proposed development is expected to provide housing for 13,570 people and 260 jobs, totaling 13,830 people and jobs.

The Region of Peel (Peel Region) began its Municipal Comprehensive Review (MCR) on May 23, 2013, to incorporate new provincial legislation, regulations and policies to help guide growth and development within the region. On December 8, 2016, Peel Region adopted Regional Official Plan Amendment (ROPA) 30 to expand the Bolton Rural Service Centre settlement boundary to accommodate the forecasted growth to 2031 in both the Town and Peel Region. ROPA 30 was approved on November 30, 2020⁵ by oral decision at the Local Planning Appeals Tribunal (now known as the Ontario Land Tribunal).

As per the “Future Caledon Official Plan”, the BRES lands as identified in ROPA 30 have been brought into the Urban Area and align with the amendments to the Urban Boundary through the Region’s MCR. The Town’s Urban System now includes 4,000 hectares of new Urban Area to provide land for new community and employment areas over the 30 years.

This report was originally submitted to the Town of Caledon as part of the previous submission relating to the LOPA for the Bolton North Hill lands and was received by the Town of Caledon on February 20, 2025. As part of this submission, the report’s references to unit counts, amount of retail space proposed as part of the application, and estimated population at build-out have been adjusted to reflect the in-effect concept plan dated February 11, 2026. Any analysis that was predicated on the concept plan’s unit has been updated however the remainder of the analysis has remained unchanged.

1.1 Purpose

As per the Town’s Terms of Reference, the purpose of a CIS is to “examine the market demand and potential impacts of the proposed development on the Town’s planned commercial structure”. The results of this study will help decision-makers, stakeholders and community members understand current commercial market conditions and the anticipated impacts of the proposed development.” In support of an application, the CIS will:

- Establish a Trade Area,
- Assess the Town’s commercial policy framework.

⁴ Based on ‘Bolton North LOG’ Concept Plan February 11, 2026

⁵ Peel Region. (n.d.). *Approved Regional Official Plan Amendments*. Retrieved from: <https://peelregion.ca/business/planning/official-plan/approved-regional-official-plan-amendments#:~:text=On%20November%2030%2C%202020%2C%20a,page%2C%20quoting%20case%20number%20PL170058.>

- Summarize the existing inventory of space and planned and proposed development,
- Analyze customer behavior patterns to establish inflows and capture rates of Trade Area retail,
- Estimate and future market demand based on estimated population growth; and,
- Provide expert opinion on the potential impact of the proposed development on the existing retail landscape of the Trade Area.

1.2 Site Location and Context

The Bolton North Hill lands are located south of Castlederg Side Road, north of Bolton Heights Road and Columbia Way, east of Humber Station Road and west of the Caledon King Townline and total 167.8 gross ha (415 gross acres). As per 'Schedule E-1' (Regional Structure) of the Region of Peel Official Plan (2022), the entirety of Bolton North Hill lands are within the Regional Urban Boundary and are designated both *Urban System* and *Bolton Residential Expansion Settlement Area*.

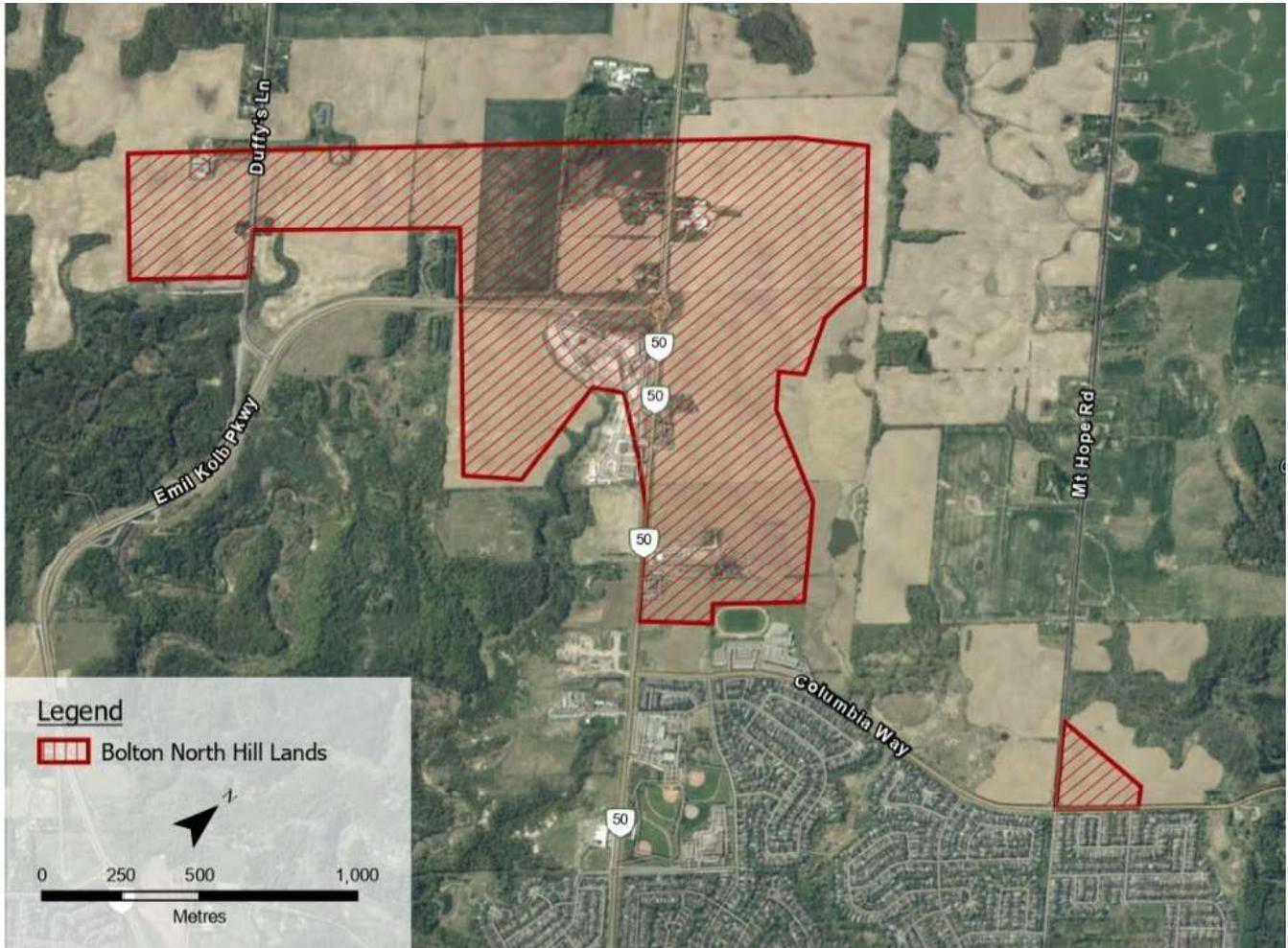
To conform with changes to the Region of Peel Official Plan through ROPA 30, the Future Caledon Official Plan designates the subject lands as *Urban Area* (Schedule B1) and *Designated Growth Area* with a *New Urban Area 2051* overlay (Schedule B2) and *New Community Area* (Schedule F2b). The *Designated Growth Area* designation applies to lands which are designated and available for residential/non-residential growth and may require additional planning through secondary plan process.⁶

The lands surrounding the Bolton North Hill lands including the following:

- **North:** Agricultural lands, Oak Ridges Moraine Conservation Plan Area
- **East:** Highway 50, Bolton North Hill Commercial Area, Gas Station, Natural Heritage System
- **West:** Agricultural lands, Farmers' Market
- **South:** Low-rise residential

⁶ Town of Caledon. (October 2025). *Future Caledon Official Plan*

Figure 1-1: Site Location



Source: Arcadis 2024

1.3 Site Accessibility

The subject lands are centered on an existing arterial road network. Highway 50, which runs through the land holdings, is the main north-south high-capacity arterial road in Bolton and provides strong access to the commercial areas to the south of the site. Emil Kolb Parkway, which runs east-west through the middle of the concept plan, is part of the Bolton Arterial Road network, and provides additional north-south access for the subject lands to connect to the employment area to the south as well as the City of Brampton. Columbia Way, which is located at the south end of the land holdings, runs east-west through the Bolton North Hill lands and connects the lands to existing uses in the northeast Bolton area.

1.4 Proposed Development & Statistics

The BNHLG is proposing the development of a complete community on the Bolton North Hill lands. The development will provide 4,129 new residential units comprising a combination of a variety of housing typologies, institutional spaces, public parks, open space and supporting infrastructure. As the proposed development is still within the secondary plan stage, the details are subject to change prior to the final submission of the development application.

The proposed development will provide 1,283 detached units, 1,690 townhouse units, 548 back-to-back units, 203 stacked townhomes, and 405 apartment units for a total of 4,129 units. The plan may incorporate an estimated 86,585 SF (8,044 SM) of commercial space into the 3.5 hectares of mixed-use area, and will also provide approximately 9.0 hectares of parkland, two new elementary schools totaling 5.7 hectares, 1.1 hectares of open space, a 1.7 ha wooded lot, and 10 stormwater management ponds integrated throughout the community. The proposed development is estimated to generate 260 jobs and 13,570 residents upon build-out, for a total of 13,830 people and jobs. See **Appendix B** for the concept plan.

Given that this process is in the early stages of development, specifics related to the proposed merchandise categories and their composition of space, as well as the exact tenanting of the retail space is yet to be determined. Arcadis, based on conversations with the BNHLG, understands that the intention of the retail space is to be local serving and support the population generated from the buildout of the subject lands with an aim to support the broader Bolton community by providing newly developed retail space for retailers to occupy.

Table 1-1: Estimate of Development

Unit Type	Units	PPU ⁽¹⁾	Population	Population Related Employment ⁽²⁾
Single Detached	1,283	3.64	4,670	
Street Townhouses	1,690	3.3	5,580	
Back-to-back Townhouse	548	3.3	1,810	
Medium Density Block ³⁾	203	3.3	670	
High Density/Mixed Use Block	405	2.07	840	
Subtotal - Residential	4,129		13,570	260

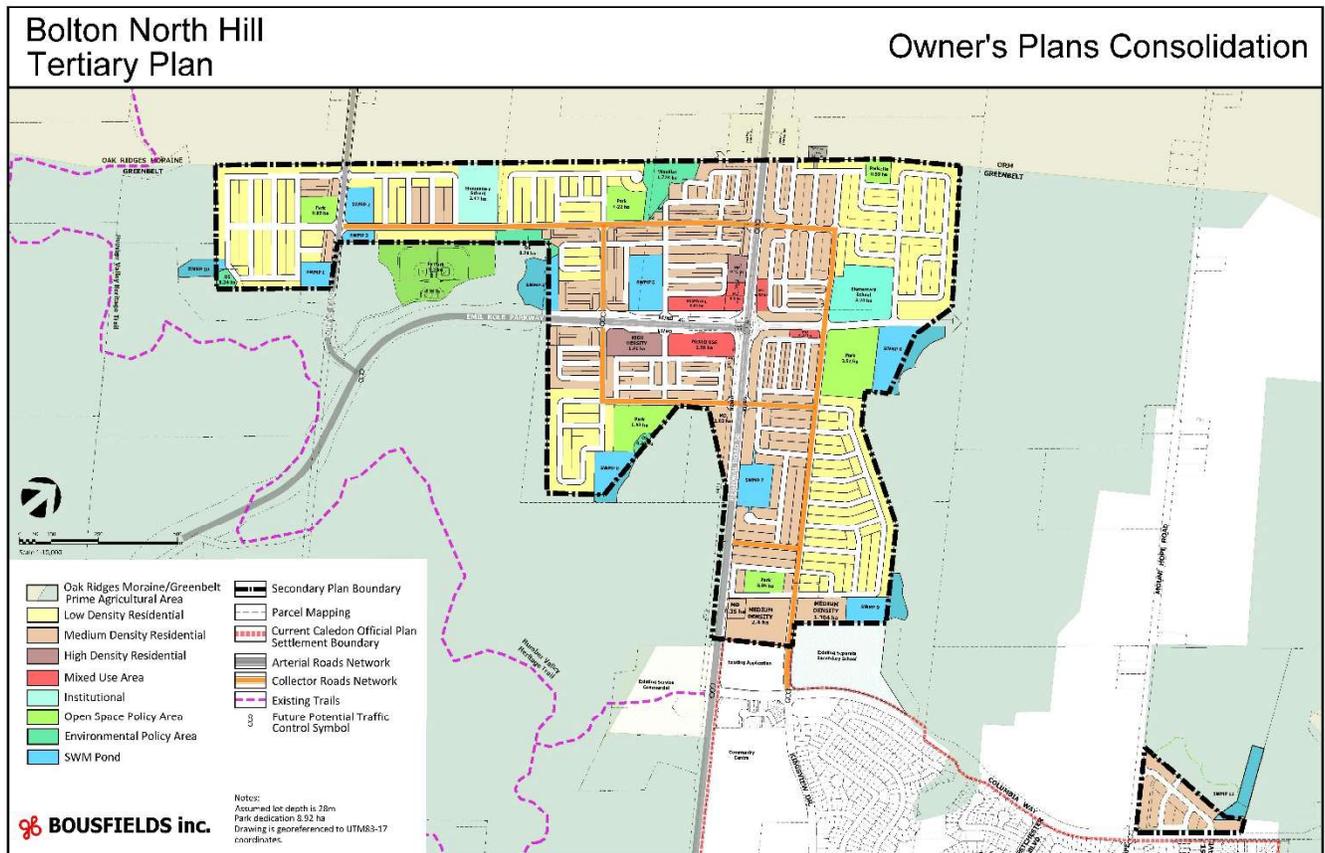
¹ PPU based on 2024 Town DCBS (July 2024)

² Estimate of Population-related Employment based on estimated retail space and two elementary school sites

³ Medium Density Block assumed to be stacked townhouse product

Note: Population and employment numbers have been rounded to a multiple of 10.

Figure 1-1: Concept Plan



Source: Bousfields February 2026

2 Planning Policy Framework

This report is conducted in the context of relevant policies in the Region of Peel and the Town of Caledon. The following section of the report provides an overview of the planning policies that are applicable to the proposed development of the subject lands.

2.1 Region of Peel Official Plan (2022)

The Peel Region Official Plan (ROP) provides comprehensive policy guidance to effectively manage long-term regional growth within Caledon, Mississauga, and Brampton, ensuring alignment with provincial policies. According to Schedule E-2 of the ROP, the subject lands are included within the Urban System. Notably, within the Town of Caledon, the subject lands are not identified as strategic growth areas (urban growth centres or nodes/centres), which are typically intended for the highest densities and the most significant scale of development and are supported by extensive employment, commercial, and public amenities.

The subject lands are designated as a *Greenfield Area*, and the ROP stipulates that these areas are to be developed as complete communities capable of fulfilling residents' daily needs (Section 5.6.20). From a commercial retail standpoint, these daily needs generally encompass food stores, health and personal care stores, miscellaneous retail outlets, and services such as restaurants, medical services, and financial services.

2.2 Future Caledon Official Plan (October 2025)

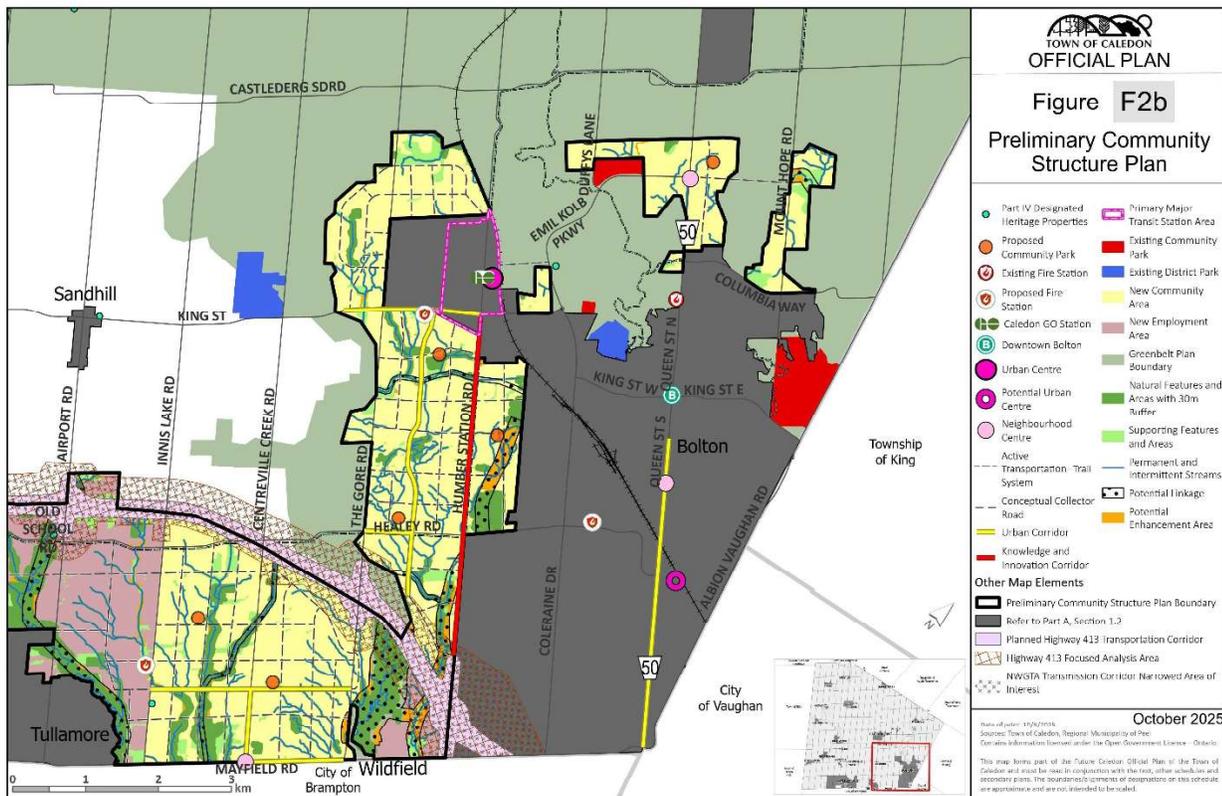
In March 2024, Caledon Town Council adopted the "Future Caledon Official Plan," which encompasses the vision and guiding principles, urban system policies, and implementation policies for future development in the Town. Included in Phase 1 of the Future Official Plan was an update to the Town-wide land use policies, including updates the urban structure and commercial policies for development. The subject lands are designated as *New Community Area* as noted in Figure 2-1 with a *Neighbourhood Centre* anticipated to be incorporated into the community's design. The following provides a broad overview of the commercial permissions within the various land use designations.

- **Urban Centres:** The *Urban Centre* designation applies to lands within the Caledon GO Major Transit Station Area and are intended to be developed with the tallest buildings and broadest range of uses within the Town. Permitted uses include residential, office and commercial development, the latter of which is to be provided through a range of retail and service experiences which service local needs and draw from a larger catchment area. Retail uses are also supposed to focus on spaces for independent small business and niche market retail.
- **Neighbourhood Centres:** The *Neighbourhood Centres* designations are intended to be vibrant focal points for the surrounding neighbourhoods which offer a range of goods and services within walking or cycling distance. Development is intended to take the form of mid-rise mixed use buildings which can integrate residential, commercial and office uses which are connected to transit and cycling infrastructure. Similar to *Urban Centres*, *Neighbourhood Centres* are meant to provide a range of retail and service experiences which serve local needs and can draw from a larger catchment area accordingly.
- **Urban Corridors:** The *Urban Corridor* designation connects neighbourhoods with mixed-use, mid-rise communities which support urban living and are connected to transit and cycling infrastructure. Permitted

uses within *Urban Corridors* include a range and mix of retail, service, office, institutional and residential uses. While mixed-use buildings are encouraged, stand-alone commercial is permitted.

- **Neighbourhood Area:** The *Neighbourhood Area* designation is intended to apply to areas where residential land uses are applicable. These areas can also accommodate neighbourhood-scale retail uses, commercial, personal services and professional service uses in a mixed-use setting with residential uses.
- **Major Commercial/Mixed-Use Areas:** The *Major Commercial/Mixed-Use Area* designation is intended to apply to areas where higher order retail uses and complementary medium/high density residential uses are co-located. These areas are intended to be strategically located to create destinations for commercial, personal service and professional services can located to serve adjacent communities. As per the development policies, the built form is intended to include a range of uses to support the needs of the local population in a transit-supportive and pedestrian-oriented design.
- **Major Institutional Area:** The *Major Institutional Area* designation applies to larger institutional uses such as hospitals, colleges, universities, secondary schools and larger places of worship. This designation permits supporting retail, personal service and professional services uses, but it is not intended to be the primary use on site.

Figure 2-1: Preliminary Community Structure Plan



Source: Town of Caledon Official Plan, Figure F2b

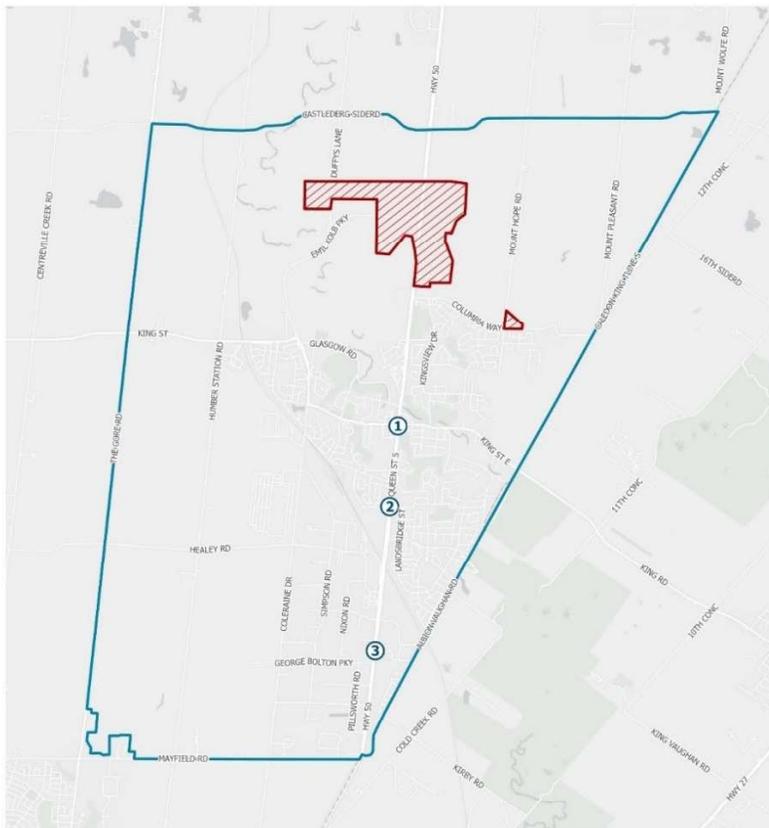
As part of Phase 2 of the Future Official Plan Process, the Bolton Secondary Plans are being reviewed, updated and consolidated to bring them into conformity with the Town and Region's updated planning framework. It is anticipated that this process will further refine the permissions within the above designations and update the policies associated with the relevant commercial permissions throughout the Bolton Secondary Plan Area.

3 Trade Area & Inventory of Space

The geographic area of influence from which a commercial development could typically expect to derive between 70.0% and 95.0% of the total sales volume is defined as the Trade Area. The extent of a Trade Area depends on numerous factors including the size and type of planned retail development, accessibility and visibility of the site.

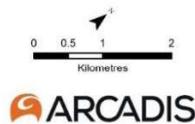
Although this study is primarily concerned with the amount and impacts of the retail/service space on the subject lands, it is necessary to study the total Bolton market demand in order to better understand the overall demand that could be required. Arcadis has adopted the same Trade Area as identified in the Kircher Research Associates Ltd. report entitled “Retail Market Demand Analysis for 2031 – Bolton, Ontario” (Kircher Report) which was prepared for the Town of Caledon to inform the BRES process.

Figure 3-1: Trade Area



Legend

- Bolton North Hill Lands
- Bolton Trade Area
- ① Bolton Core Commercial Area
- ② Bolton South Hill Commercial Area
- ③ Bolton Hwy 50 Commercial Area



⁷ “Retail Market Demand Analysis for 2031 – Bolton, Ontario”. Prepared for the Town of Caledon by Kircher Research Associates Ltd. (May 30, 2014)

The Bolton-wide Trade Area is the best representation of the customer source of the proposed retail on the subject lands as there is not regional or “destination” retail proposed whereby potential customers would be driving from great distances to patronize the shops. The local serving retail is likely to provide different options for merchandise categories that already exist within Bolton in an accessible and walkability format for local residents.

The retail that’s proposed on the subject lands is within mixed-use blocks and is proposed to be developed as at-grade retail within medium/high-density buildings on the main streets on of the concept plan. These condominium retail units will allow for retailers to have strong visibility from the street from both drive-by and walk-by traffic.

3.1 Existing Supply of Retail/Commercial Space

Arcadis conducted an inventory of the retail and service commercial space within Bolton in December 2024 using CoStar Analytics data as the basis for the inventory. Through desktop research, Arcadis conducted checks of the market area to update the inventory as required.

The inventoried space has been categorized into four major groupings of space: Food Store Type Merchandise (FSTM); Department Store Type Merchandise/Home Improvement (DSTM/HI); Other Retail; and Services. From there, the measured space was further divided into retail nodes which generally reflect the overall commercial hierarchy within Bolton. All retail to the south of the CP Rail spur has been classified into one node (Node 3).

3.1.1 Bolton Retail Inventory

The inventory indicates that Bolton has some 1.21 million SF of retail/service commercial space, including 151,800 SF of FSTM space, 588,100 SF of DSTM/HI space, 47,800 SF of Other Retail space and 425,000 SF of service space. It is estimated that there is currently 0 SF of vacant retail and service commercial space in the community, which is based on lease listings through CoStar Analytics.

Table 3-1: Bolton Retail and Service Commercial Inventory

Store Category	Total (sf)	% of Total Inventory	SF per Capita
Supermarkets & Grocery	103,700	8.5%	3.0
Other Specialty Food	48,100	4.0%	1.4
Total FSTM	151,800	12.5%	4.5
Building Material and Garden Equipment and Supplies Dealers	184,800	15.2%	5.4
Clothing and Clothing Accessories Stores	19,900	1.6%	0.6
Electronics and Appliance Stores	16,800	1.4%	0.5
Furniture and Home Furnishings	15,500	1.3%	0.5
General Merchandise Stores	314,100	25.9%	9.2
Pharmacies and Personal Care Stores	37,000	3.0%	1.1
Total DSTM/HI	588,100	48.5%	17.3
Subtotal FSTM/DSTM/HI	739,900	61.0%	21.7
Liquor / Beer / Wine	13,900	1.1%	0.4
Miscellaneous Retail Stores	33,900	2.8%	1.0
Total Other Retail	47,800	3.9%	1.4
Entertainment & Fitness	46,000	3.8%	1.4
Financial Services	32,100	2.6%	0.9
Restaurants	171,500	14.1%	5.0
Medical Services	18,000	1.5%	0.5
Professional Services	17,400	1.4%	0.5
Other Professional Services	90,100	7.4%	2.6
Personal & Laundry Services	50,400	4.2%	1.5
Total Services	425,500	35.1%	12.5
Vacant Space	0	0.0%	0.0
Total Retail and Service Commercial Space (SF)	1,213,200	100.0%	35.7

Source: Inventory Data from CoStar, December 2024

3.1.2 Node 1: Core Commercial Area

Node 1: Core Commercial Area is the smallest of the three nodes in Bolton, accounting for 131,850 SF or 10.8% of all retail/service commercial space within Bolton. The node is primarily comprised of service space, which account for 108,900 SF or 82.4% of space in the node. Caledon Town Council approved Caledon's Economic Development Strategy 2020-2030 in April 2020 and identified a need to revitalize downtown Bolton. Adopted by the Town Council in March 2021, the revitalization plan identified four key themes to encourage customer attraction and increase foot traffic to businesses downtown: organization, design, economic vitality and promotion.

Downtown Bolton is characterized by a traditional “Small Town” experience with two-storey buildings fronting the main street. Retail space is typically located at-grade in smaller units (1,000-5,000 SF) and living space or office space can be provided above.

Table 3-2: Node 1 – Downtown Bolton Retail and Service Commercial Inventory

Store Category	Total (sf)	% of Node Total Inventory
Supermarkets & Grocery	0	0.0%
Other Specialty Food	3,200	2.4%
Total FSTM	3,200	2.4%
Building Material and Garden Equipment and Supplies Dealers	1,250	1.0%
Clothing and Clothing Accessories Stores	350	0.3%
Electronics and Appliance Stores	900	0.7%
Furniture and Home Furnishings	5,750	4.4%
General Merchandise Stores	0	0.0%
Pharmacies and Personal Care Stores	4,150	3.2%
Total DSTM/HI	12,400	9.5%
Subtotal FSTM/DSTM/HI	15,600	11.9%
Liquor / Beer / Wine	0	0.0%
Miscellaneous Retail Stores	6,350	4.9%
Total Other Retail	6,350	4.9%
Entertainment & Fitness	1,000	0.8%
Financial Services	5,050	3.9%
Restaurants	43,050	32.9%
Medical Services	5,900	4.5%
Professional Services	4,800	3.7%
Other Professional Services	27,950	21.4%
Personal & Laundry Services	21,150	16.2%
Total Services	108,900	83.2%
Vacant Space	0	0.0%
Total Retail and Service Commercial Space (SF)	130,850	100.0%

Source: Inventory Data from CoStar, December 2024

3.1.3 Node 2: South Hill Commercial Area

Node 2: South Hill Commercial Area is the second largest node in Bolton, accounting for a third (375,950 SF or 31%) of all retail/service commercial space. The node is home to highest proportion of FSTM space, as Bolton’s two grocery stores (Fortinos and Food Basics) account for 103,650 SF or 27.6% of all space in the node. Following FSTM space, Node 2 is characterized by service space, accounting for 124,700 or 33.2% of all space in the node. Currently, there are no vacancies.

Table 3-3: Node 2 – Country Plaza Retail and Service Commercial Inventory

Store Category	Total (sf)	% of Node Total Inventory
Supermarkets & Grocery	103,650	27.6%
Other Specialty Food	35,800	9.5%
Total FSTM	139,450	37.1%
Building Material and Garden Equipment and Supplies Dealers	8,450	2.2%
Clothing and Clothing Accessories Stores	1,000	0.3%
Electronics and Appliance Stores	0	0.0%
Furniture and Home Furnishings	0	0.0%
General Merchandise Stores	47,600	12.7%
Pharmacies and Personal Care Stores	29,150	7.8%
Total DSTM/HI	86,200	22.9%
Subtotal FSTM/DSTM/HI	225,650	60.0%
Liquor / Beer / Wine	0	0.0%
Miscellaneous Retail Stores	25,600	6.8%
Total Other Retail	25,600	6.8%
Entertainment & Fitness	2,450	0.7%
Financial Services	12,500	3.3%
Restaurants	56,550	15.0%
Medical Services	5,450	1.4%
Professional Services	5,000	1.3%
Other Professional Services	26,650	7.1%
Personal & Laundry Services	16,100	4.3%
Total Services	124,700	33.2%
Vacant Space	0	0.0%
Total Retail and Service Commercial Space (SF)	375,950	100.0%

Source: Inventory Data from CoStar, December 2024

3.1.4 Node 3: Highway 50 Commercial Area

Node 3: Highway 50 Commercial Area is the largest node in Bolton, accounting for two thirds (832,400 SF or 60.3%) of all retail/service commercial space in the community. As the location for big box retail, the node includes major tenants such as Walmart (140,450 SF), Canadian Tire (90,500 SF), Home Depot (98,500 SF) and SportChek (16,550 SF) and is the largest node for Liquor/Beer/Wine retail and restaurant space. Currently, Node 3 has no vacancies.

Table 3-4: Bolton Retail and Service Commercial Inventory

Store Category	Total (sf)	% of Node Total Inventory
Supermarkets & Grocery	0	0.0%
Other Specialty Food	9,100	1.3%
Total FSTM	9,100	1.3%
Building Material and Garden Equipment and Supplies Dealers	175,150	24.8%
Clothing and Clothing Accessories Stores	18,550	2.6%
Electronics and Appliance Stores	15,850	2.2%
Furniture and Home Furnishings	9,750	1.4%
General Merchandise Stores	266,500	37.7%
Pharmacies and Personal Care Stores	3,700	0.5%
Total DSTM/HI	489,500	69.3%
Subtotal FSTM/DSTM/HI	498,600	70.6%
Liquor / Beer / Wine	13,900	2.0%
Miscellaneous Retail Stores	1,950	0.3%
Total Other Retail	15,850	2.2%
Entertainment & Fitness	42,550	6.0%
Financial Services	14,550	2.1%
Restaurants	71,900	10.2%
Medical Services	6,650	0.9%
Professional Services	7,600	1.1%
Other Professional Services	35,550	5.0%
Personal & Laundry Services	13,100	1.9%
Total Services	191,900	27.2%
Vacant Space	0	0.0%
Total Retail and Service Commercial Space (SF)	706,350	100.0%

Source: Inventory Data from CoStar, December 2024

3.2 Planned and Proposed Retail Development

In order to understand future retail and service commercial space that could be introduced into the Trade Area, Arcadis collected information on planned and proposed developments using on the Town’s Current Development Application website. The following provides an overview of new developments that have been approved or are in the development pipeline as of December 2024.

Table 3-5: Planned and Proposed Commercial Development in Bolton

Address	Type of Submission	Retail Area Proposed (SM)	Retail Area Proposed (SF)
Option 3 BRES Lands	OPA	7,575	81,537
14245 Highway 50	OPA, ZBLA	1,726	18,578
Total		9,301	100,115

Source: Town of Caledon Planning Department

There is a total of 100,115 SF of retail development proposed within Bolton. The most significant portion of development is within the Option 3 Lands (Macville) which is planned to provide approximately 81,537 SF of retail/commercial space.

While the planned and proposed retail development represents 8% of the total inventory of space within Bolton, it is not anticipated that the retail proposed in each of these locations will impact the viability of the development retail on the subject lands. The retail proposed within the BNHLG lands is intended to be local focused and serve the local community which is likely the scenario of the proposed retail in each of the planned retail locations.

3.3 Retail Trends

Within the Toronto retail market vacancy rates have remained low following the COVID-19 pandemic and both sale prices and rental rates have seen modest increases over the last 12 months. Across the GTA vacancy rates average 1.3% which is below the national index of 1.5% and well below the 10-year average of 2.3%. While vacancy rates are low and pricing continues to increase, there are signs that the economy and consumers may be more strained than high-level statistics can show. From CoStar,

“The Greater Toronto Area (GTA) is currently navigating significant economic challenges. A recent report by the Canadian Centre for Economic Analysis (CANCEA) highlights the severe impact of the housing affordability crisis, which has reduced residents' well-being and strained the local economy. Additionally, concerns around a localized recession in Toronto are emerging. Canadian payment processor Moneris and Statistics Canada show a notable decline in consumer spending and business activity, with consumer spending down 9% from 2023 levels and 17% when adjusted for inflation.”

The above byline illustrates that while the retail market is currently stable or increasing depending on the specific analysis metric, there may be long term uncertainties surrounding the retail market and consumer spending patterns as economic conditions continue to shift.

3.4 Mobile Data Survey Results

Arcadis retained Environics Analytics to conduct a search of mobile phone users' activity patterns related to the three retail nodes within Bolton. The survey was conducted based on data retrieved between January 1, 2023, and December 31, 2023, to encapsulate a full year of shopping patterns. A geofence surrounding each of the three nodes was established and each time a cellular device entered into the geofence it counted as a visit. The device has what's referred to as a "Common Evening Location" (CEL) which can be identified as it's "home" address and in certain instances, a "Common Daytime Location" (CDL) or a work address. For the purposes of this analysis, Arcadis reviewed the findings of visitors' CEL's to determine where customers originated from and to determine an understanding of the demographics of visitors to each node.

3.4.1 Node 1 – Downtown Bolton

Within Node 1, there were 65,700 unique visitors which represented a total of 757,300 visits to the node within 2023. This averages 11.5 visits per visitor. 74% of the visits were weekday visits and there was an average of 63,100 visits per month. The demographics of the unique visitors represent an average household income of \$161,000 with a maintainer age between 45 and 54 years of age. 58% of households have children and the average household size is greater than 4 people. Most households are university educated, and they represent a high degree of cultural diversity.

The Forward Sortation Area (FSA) with the greatest proportion of visits is L7E (Bolton, ON) which accounted for 58.7% of visits. The remaining top FSAs in terms of number of visits are L7C (Caledon), L0G, (Tottenham), and L6P (Brampton). A noteworthy finding from the survey is that the downtown node had approximately 130,000 more annual visits than the Country Plaza (Node 2) with fewer total visits originating from within Bolton. This indicates that the downtown area is a destination for a number of patrons even though the retail establishments are local serving. This aligns with destination shopping patterns where patrons will drive further than is necessary to experience a different shopping atmosphere. Downtown Bolton offers something different than traditional suburban retail and the data illustrates that patrons are driving from further away for the experience.

3.4.2 Node 2 – Country Plaza

Within Node 2, there were 43,400 unique visitors which represented a total of 621,900 visits to the node within 2023. This averages 14.3 visits per visitor. 63% of the visits were weekday visits and there was an average of 51,800 visits per month. The demographics of the unique visitors represent an average household income of \$166,000 with a maintainer age between 45 and 54 years of age. 60% of households have children and the average household size is greater than 4 people. Most households are university educated, and they represent a high degree of cultural diversity.

The Forward Sortation Area (FSA) with the greatest proportion of visits is L7E (Bolton, ON) where 70.2% of visitors originated from. The remaining top FSAs in terms of number of visits are L7C (Caledon), L0G, (Tottenham), and L4H (Woodbridge).

3.4.3 Node 3 – Regional Commercial

Within Node 3, there were 92,600 unique visitors which represented a total of 1.2 million visits to the node within 2023. This averages 12.5 visits per visitor. 64% of the visits were weekday visits and there was an average of 96,400 visits per month. The demographics of the unique visitors represent an average household income of \$167,000 with a maintainer age between 45 and 54 years of age. 63% of households have children and the average household size is greater than 4 people. Most households are university educated, and they represent a high degree of cultural diversity.

The Forward Sortation Area (FSA) with the greatest proportion of visits is L7E (Bolton, ON) where 46% of visits originated from. The remaining top FSAs in terms of number of visits are L6P (Brampton), L0G, (Tottenham), and L7C (Caledon).

4 Market Demand and Impact Analysis

This section of the report focuses on the current and forecasted retail expenditures of the subject lands as well as the Trade Area (Bolton) through the build-out of the site. The future demand has been calculated based on the existing inventory of retail space within the Trade Area, the results of the mobile data analysis conducted by Environics Analytics in Section 6.4 of this report, and a square foot per capita analysis. The future demand calculation was also based on the estimated population growth within the Trade Area through the build-out of the subject lands.

4.1 Population Forecast

The population in Bolton as of 2021 was 30,200 and is forecasted to increase to 93,290 by 2051. By contrast, the entire Town of Caledon is forecasted to increase in population from 80,030 in 2021 to 299,980 in 2051; a 275% increase. The BNHLG is proposing to 4,129 units which could generate a population of 13,570 or 19.8% of the total population growth in Bolton between 2021 and 2051. The subject lands are proposing a mix of low, medium, and high-density dwelling units that align with the goals of the Caledon Official Plan and help Caledon reach their target population in 2051.

The development timeline of the subject lands currently estimates that all units will be built and occupied by 2040 which means the subject lands would account for 33% of the total population growth by 2041.

Table 4-1: Population

	2016 Census	2021	2031	2041	2051	Growth 21 - 41	Growth 21 - 51
Bolton North Hill (1)	0	0	3,333	13,570	13,570	13,570	13,570
Bolton (2)	28,300	30,200	37,090	55,040	80,790	24,840	50,590
Caledon (2)	69,010	80,030	112,010	201,010	299,980	120,980	219,950

Sources:

- 1) Bolton North Hill Population based on development timing estimates provided by Bousfields (February 2026)
- 2) Peel Region Land Needs Assessment (2021) Appendix IV

As per the approved ROPA 30 settlement, the forecasted population growth within Bolton will be divided amongst the Option 6/Triangle lands, a portion of the Option 3 lands, Rounding Out Area 'B' and a portion of the Option 1 lands. The full build-out of all Option lands will require additional population allocation to Bolton beyond the 2031 planning horizon.

Figure 4-1: Proposed Development Summary



Source: Region of Peel, 2020

4.2 Market Opportunity Analysis

The Kircher Report was prepared for the Town of Caledon to assess the retail market demand for the Bolton Residential Expansion. The report recommended that approximately 350,000 SF of new retail space, primarily in a new major commercial centre, would be warranted in either the Option 1 or Option 3 area to service the expected population growth to 2031.

At the time of the report, forecasted growth through BRES was expected to be allocated to a single option to allow for the development of a comprehensive community area. With the settlement of ROPA 30 and the division of the growth to multiple option areas throughout the community, the viability of implementing the retail demand as envisioned in the report would not be as effective given the dispersion of the new population to different areas of Bolton. The provision of smaller retail opportunities throughout the different option areas to provide more localized commercial offerings, similar to what is being proposed on the concept plan, would likely be a more effective method to achieve stronger coverage to meet resident's commercial needs.

4.2.1.1 Market Opportunity – Bolton North Hill lands Build-Out

Given the expected function of the proposed commercial space on the Bolton North Hill lands, the analysis will focus on local serving neighbourhood retail. The estimated 86,585 SF of proposed space represents 7% of the total retail inventory within the Trade Area and would not function as a regional retail destination nor a disruptor the existing retail landscape within the Trade Area, especially given the Downtown Bolton Revitalization Plan discussed in Section 6.4 of this report. Understanding the local function, Arcadis' analysis focuses on the following commercial sectors:

- Food Store Type Merchandise (FSTM)
 - Supermarket & Grocery Store
 - Convenience & Specialty Food
- Department Store Type Merchandise (DSTM)
 - Pharmacies & Personal Care Stores
- Beer, Wine and Liquor
- Services
 - Food Services & Drinking Places
 - Finance, Insurance & Real Estate
 - Health Care
 - Personal Care
 - Business Services
 - Other Local Services

Arcadis' analysis focuses on the market opportunity to be created through the build-out of the Bolton North Hill lands. The analysis uses a standard square foot per capita analysis and is predicated on the following methodology:

- Based on Arcadis' experience in other retail market studies, an estimated range of commercial space per capita has been assigned by retail category. The square foot per capita assumptions were multiplied against the build-out population of the market area to provide an estimate of total commercial space.
- An estimate of market capture is applied to the total demand to determine the amount of space to be expected within the market area. Local shares are always less than 100%, as residents can be influenced by stores located out of the Trade Area, the convenience of completing shopping at larger shopping centres, as well as the ease of access of a shopping centre. Target captures for the market area range by retail category but are generally reflective of the methodology used in the Kircher Report and other recent commercial impact studies throughout Caledon.
- Inflow rates, which are the estimated influence of surrounding populations, passing by traffic, or potential employment opportunities within the market area, are estimated based on characteristics of the market, the type of commercial space being analyzed, the ease of access of the commercial centre, and the inventory of competitive facilities. Arcadis inflows are informed by the data observed in the Mobile Data

Survey by Environics and adjusted the rates based on the local nature of the Bolton North Hill lands in the north area of Bolton.

The build-out population of 13,570 on the Bolton North Hill lands it is estimated to generate the market opportunity for **223,700 SF** of space. A portion of this space will be required within the 2031 planning horizon, while the majority of it will be required post-2031 as the subject lands continues to build-out. See **Table 4-2**.

Table 4-2: Market Opportunity – Bolton North Hill lands Build-Out

Bolton North Hill Build Out		13,570		
	Typical SF per Cap	Target Capture	Estimated Inflow	Estimate of Retail Space Opportunity
FSTM				
Supermarket & Grocery	3.5	75.0%	30.0%	50,900
Specialty Food Store	1.5	75.0%	15.0%	17,950
Total Food Store	5.0			68,850
DSTM				
Health and Personal Care Stores	1.5	70.0%	30.0%	20,350
Other General Merchandise & Miscellaneous Store Retailers	3.5	30.0%	30.0%	20,350
Total Non-Food Store	5.0			40,700
Total Retail	10.0			109,550
Beer, Liquor, Wine	0.5	75.0%	30.0%	7,250
Services				
Restaurant and Fast Food	3.5	60.0%	15.0%	33,550
Personal Services	2.0	60.0%	15.0%	19,150
Financial, Professional Services	2.0	50.0%	15.0%	15,950
Medical Services	1.5	60.0%	15.0%	14,350
Other Service and Office	6.5	30.0%	15.0%	31,150
Total Service and Other	15.5			114,150
Total Estimated Retail and Service Commercial Opportunity	26.0			223,700

The following provides a summary of the estimated demand of space by retail category.

- There is demand for approximately 50,900 SF of supermarket space at the build-out of the subject lands. Given the format of the proposed commercial space in a mixed-use format, the majority of this demand could be accommodated through an urban format grocery store, which typically have floor plates ranging from 15,000 SF – 30,000 SF.
- The demand for 20,350 SF of health and personal care store space could warrant a larger pharmacy (e.g. Rexall or Shopper’s Drug Mart) or a variety of smaller vendors.
- The estimated demand of 7,250 SF of beer, wine and liquor is not likely to warrant an LCBO or Beer Store on site. Given the recent changes to allow for wine and beer in convenience and grocery stores, much of this demand could be satisfied through these alternatives.
- The mixed-use format is conducive to accommodating a portion of the estimated demand 114,150 SF of service space demand. The design of the building should give consideration for parking/loading, signage,

and internal requirements such as restaurant-grade HVAC systems to be able to accommodate a variety of local services.

5 Market Impact Assessment

As indicated in Section 5.2 of this report, growth in the Bolton Rural Service Center as well as the future build-out of the Bolton North Hill lands is expected to generate demand for additional retail and service commercial space beyond the existing inventory of stores.

5.1 Proposed Commercial Space on Site

The proposed commercial space on the Bolton North Hill lands totals and estimated 86,585 SF of retail/service commercial space. In the context of the existing inventory of space, the proposed commercial designated lands would only represent 7% of the overall retail/service and vacant commercial space in Bolton.

Table 5-1: Market Opportunity – Bolton North Hill lands Build-Out

Property	Commercial Space (SF)	% of Total Space
Existing Inventory of Retail/Service Space	1,213,200	87%
Planned and Proposed Space	100,115	7%
Bolton North Hill Lands	86,585	6%
Total	1,399,900	100%

Given the size of the proposed space, the format of space in a mixed-use development, and the proximity of the proposed space to other commercial areas to the south, it is expected that the retail commercial uses will have more of a local neighbourhood function to service the immediate needs of the future population in the Bolton North Hill lands. The location of the commercial sites in the north end of Bolton does not provide strong opportunities for significant commercial space outside of neighbourhood/convenience space as there will be limited vehicular traffic and visibility when compared to other potential lands in Bolton. This is likely to impact the ability for sites in the area to attract larger, multi-national tenants.

Though it would not satisfy all retail and service commercial demand for the build-out of the subject lands, the provision of space within the concept will help to meet part of the local service demand, while not impacting the role and function of the other commercial areas, such as the Downtown Bolton area which is located approximately 2 km south of the site and is covered by the Downtown Revitalization Plan. Expected retail and service commercial growth on the other lands identified through ROPA 30 (Option 6/Triangle lands and Option 3) will help to provide additional commercial space to meet the needs of residents to 2031. Both areas have stronger locational attributes (accessibility, visibility, surrounding population density) which would make them more ideal locations to accommodate larger commercial centres which could attract larger retail tenants.

5.2 Impacts of E-Commerce

The retail/commercial industries continue to change and evolve as e-commerce becomes more prevalent, especially in the context of the post-COVID world. As per the Retail Trade publication by Statistics Canada, e-commerce sales by Canadian retailers accounted for 5.8% of the total retail trade between September 2023 and August 2024. While the percentage share of e-commerce may fall back to pre-pandemic levels in the coming years, pivots and innovations by retailers to service customers may continue to alter the way consumers purchase goods in the future.

Local serving retail/service commercial uses are typically less impacted by e-commerce as they provide a good or service that requires an in-person visit. While it is not expected that e-commerce will substantially impact these uses, the potential impact of e-commerce on district and regional serving uses could impact the supply and demand of retail/commercial space within market areas. Additionally, innovations in web-based ordering platforms (e.g. UberEATS) and alternative web-based services (e.g. Zoom) could impact the design, parking and space requirements for businesses

The Kircher Report estimates that the current replacement of traditional retail space by the internet ranges between 1 and 2 square feet per capita and is expected to grow to 4 square feet per capita by 2031. As such, Kircher reduced the demand for space by 80,000 SF in their analysis to account for the impacts of e-commerce.

A reduction for e-commerce has been factored into the Arcadis analysis through an adjustment of the estimated captures and expected inflow.

6 Summary and Conclusion

The following provides a conclusion of the findings of the Commercial Impact Study conducted by Arcadis:

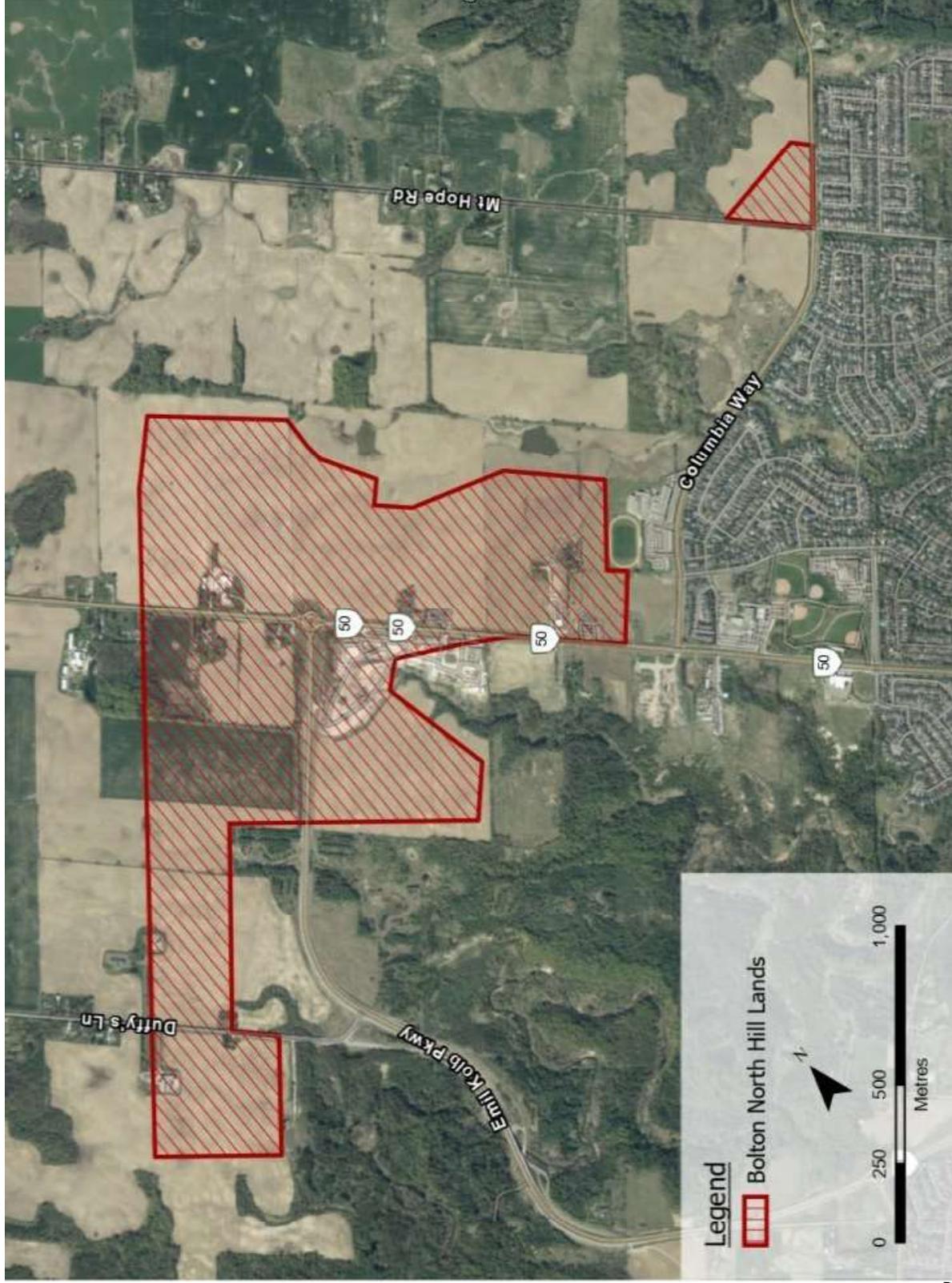
- BNHLG is proposing 4,129 new residential units comprised of singles, townhouses, stacked and back-to-back townhomes and medium-to-high density apartment buildings. The concept plan envisions the development of a total area of 167.8 hectares, which is estimated to generate 13,570 new residents upon build-out. Only a portion of the subject lands can be accommodated to the 2031 planning horizon. The remaining growth will need to be accommodated through future 2051 population allocation to Bolton and build-out is currently estimated for completion by 2041.
- The proposed commercial space is within mixed use blocks and totals approximately 86,585 SF of retail/service commercial space. Given the size of the proposed sites and the proximity to other commercial areas to the south, it is expected that the commercial designated lands will have a local neighbourhood function to service the immediate needs of the surrounding population.
- The Bolton retail structure is comprised of five main areas: the Bolton Core Commercial Area, the Bolton South Hill Commercial Area, the Bolton Community Shopping Centre Commercial Area, the Bolton Highway 50 Commercial Area, and the Bolton North Hill Commercial Area. The subject lands are located to the north of the Bolton North Hill Commercial Area and are approximately 2km north of the Bolton Core Commercial Area.
- Arcadis has adopted the same Trade Area as identified in the Kircher Research Associates Ltd. report entitled “Retail Market Demand Analysis for 2031 – Bolton, Ontario” (Kircher Report) which was prepared for the Town of Caledon to inform the amount of retail and service commercial space to be provided through the BRES process.
- The inventory (December 2024) indicates that Bolton has some 1.21 million SF of retail/service commercial space, including 151,800 SF of Food Store Type Merchandise (FSTM), 588,100 SF of Non-Food Store Type Merchandise (NFTM) space, 47,800 SF of Other Retail space, and 425,000 SF of service space.
- The population of Bolton is anticipated to total 67,540 persons by 2041, representing growth of 37,340 persons since 2021. The proposed development would account for approximately 36% of the forecasted growth.
- An analysis of mobile phone data was used to determine the shopping patterns of consumers within the Bolton Trade Area. The data showed that the patterns of shopping within the Downtown Bolton had a greater amount of destination traffic due to the area’s quaint “small community” feel, while the more traditional retail locations (Central Bolton and South Bolton) had between 46% and 70% of customers originate from within Bolton.
- Arcadis utilized a square foot per capita analysis to determine the market opportunity of retail space uses. Overall, the build-out of the site could support 223,700 SF of retail/commercial space, broken down into the following estimates of demand by retail category:
 - Supermarket and Grocery: 50,900 SF.
 - Other FSTM: 17,950 SF.
 - Other Non-Food Stores: 40,700 SF.
 - Beer, Wine, Liquor: 7,250 SF
 - Services: 114,150 SF

- The estimated 86,585 SF of retail/service commercial space represents 7% of the overall retail/service space in Bolton and is not anticipated to impact the overall function of Bolton's existing commercial areas. The proposed space could accommodate nearly 39% of the estimated retail/commercial demand for the Bolton North Hill lands at build-out, with the remaining demand being accommodated elsewhere throughout the Trade Area.
- Further assessment of the parking, loading and urban design standards may be required when further details for the commercial developments are brought forth through future planning processes.

Based on the findings of the opportunity analysis and the impact assessment, future growth in Bolton is expected to generate demand for new retail and service commercial space. In the context of the Bolton North Hill lands, the proposed commercial sites are expected to have a local retail function and are not anticipated to have adverse impacts on the existing inventory of space or the planned commercial hierarchy. The future commercial uses will help to meet the forecasted commercial demand in Bolton without impacting the operations of existing retailers within the Trade Area.

Appendix A

Aerial Photograph



Appendix B

Proposed Concept Plan

Appendix C

Applied Terms of Reference

Terms of Reference: Commercial Impact Study

Purpose:

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

Required in Support of:

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

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

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

Prepared By:

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

Peer Review and Scoping:

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



Terms of Reference: Commercial Impact Study

Content:

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



Terms of Reference: Commercial Impact Study

Section 6: Existing Supply of Retail/ Commercial Space

- Quantitative and qualitative analysis of the existing supply of retail/commercial space in Caledon and of similar and competitive space within the surrounding market area. The analysis should be focused on relevant categories to the proposed development.
- Assessment of the role and function, and relative health of commercial areas, shopping centers, and commercial designations.
- Identify and summarize planned and proposed retail/commercial developments in Caledon including location, site size, planning status, and where available, development components and timing, as well as those in the surrounding area that would have an influence on the Caledon market and in particular the proposed development.
 - Planned development includes any undeveloped commercial land of relevance.
- An inventory of retail space and site suitability, with a customer and/or license plate survey (if the vehicles cross municipal boundaries) and an inventory of competitive space
- Section 7: Market Demand and Impact Analysis
 - Calculate current and forecast future demand in relevant and corresponding categories to those proposed for development.
 - Assess shopping patterns, retail trends, existing market capture rates, and inflow trade, which may include survey research.
 - Forecast future market captures and inflow trade with the proposed development in combination with any other planned and/or proposed and approved developments.
 - Evaluate the degree of competitive effects and potential impact with the introduction of the proposed development.
 - Assess whether or not the proposed development would have a significant negative impact on the planned function of the existing and planned designated commercial areas and shopping centers.
- Section 8: Summary and Conclusion
 - Summarize the commercial impacts of the proposed development and provide an opinion on whether or not the development is appropriate.
 - Provide recommendations including any potential mitigation to impacts.
- Section 9: Background Information
 - Appendix 1: Aerial Photograph - Identifying the parcel of land and surrounding land uses
 - Appendix 2: Proposed Development or Concept Plan
 - Appendix 3: Applied Terms of Reference and Scope Details
 - Appendix 4: Literature Cited
 - Appendix 5: Other Data Sources Used



Terms of Reference: Commercial Impact Study

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

Resources:

- Town of Caledon Official Plan



6311 Old Church Road
Caledon, ON L7C 1J6
www.caledon.ca
T. 905.584.2272 | 1.888.225.3366 | F. 905.584.4325

Appendix D

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Appendix E

Curriculum Vitae

Matthew Heather B.ES, MCIP, RPP, PLE Associate Principal - Manager, Planning

Matthew is an Associate Principal – Manager, Planning on the Real Estate, Economics and Planning Division at Arcadis. As an urban planner and professional land economist with over 12 years of professional planning and development experience, Matthew has diverse experience in a variety of disciplines within the planning industry including municipal finance and fiscal impact analysis, land economics and growth management, retail commercial market assessment and development approvals and land use planning.

Through his experience with both public and private sector clients, Matthew has supported the preparation of numerous studies/reports including municipal financial feasibility assessments, retail commercial market impact analyses, residential and employment growth management studies, secondary plan studies and land budgets, employment land conversion studies, due diligence reports, and highest and best use studies. Matthew also has experience in preparing planning justification reports, zoning by-law and official plan amendments, and site plan/ plan of subdivision applications.

Representative Experience

Financial Impact Study, Mayfield West Phase 2, Town of Caledon – Arcadis was retained by a private developer to conduct a financial impact study for a proposed residential development application in the Town of Caledon. The purpose of the study was to assess the financial impact of the proposed development as it related to the long-term capital and operating revenues/expenditures of the Town. Matthew was project lead and developed the financial model to determine the build-out financial impacts of the residential development and tested the impacts of the anticipated capital costs against the Towns projected development charge revenues.

Fiscal Impact Study, Bolton Residential Land Expansion, Town of Caledon – Arcadis was retained by a landowner's group to conduct a Fiscal Impact Study to quantify the municipal financial impact of six land use scenarios for a future urban expansion in the Town of Caledon. Matthew assisted in the financial modelling, analysing the potential impacts of the different land use scenarios on the municipalities operating/capital budgets (ongoing).

Fiscal Impact Study, Eagle Heights Subdivision, City of Burlington – Arcadis was retained by a private landowner to conduct a Fiscal Impact Study to quantify the municipal financial impact of a proposed development in Burlington, ON. Matthew conducted the financial modelling, analysing the potential impacts of the different land use scenarios on the municipalities operating/capital budgets and conducting a cash flow analysis to illustrate the long-term impacts of the proposed development (ongoing).

Fiscal Impact Study and Retail Impact Study, 12100 Creditview Rd., Town of Caledon – Arcadis was retained by a private landowner to conduct a Fiscal Impact Study and Retail Impact Study to quantify the municipal financial and retail impacts of a proposed development in

Education

B.ES. – (Honours Urban Planning),
University of Waterloo, Ontario, 2012

Experience

2022–Present
Arcadis, Toronto, ON,
Associate Principal – Manager, Planning

2019–2022
Arcadis, Toronto, ON, Urban Planner

2012–2019
Malone Given Parsons Ltd. Markham, ON, Planner

2011
City of Waterloo, ON, Student Planner

2010
Region of Waterloo, ON, Strategic Policy Student
Planner

2009
Niagara Escarpment Commission. Georgetown,
ON, Planning and Monitoring Assistant

Memberships

Canadian Institute of Planners (CIP), Full Member

Ontario Professional Planners Institute (OPPI), Full
Member

Association of Ontario Land Economists, Full
Member (PLE)

Caledon, ON. Matthew was the project manager and was responsible for the financial modelling, analysing the potential impacts of the different land use scenarios on the municipalities operating/capital budgets, coordinating the retail commercial inventory, undertaking the retail impact analysis and overseeing the day-to-day operations of the project (ongoing).

Port Colborne Quarry Fiscal Impact Assessment, Port Colborne (ON) – Arcadis was retained to complete a financial impact assessment and economic benefit analysis to demonstrate the potential impacts of an expansion to the Port Colborne Quarry on the City and Region’s municipal finances. Arcadis conducted a land value assessment analysis to illustrate the potential impacts on the City’s operating revenues with the change in land use and used the input/output multiplier model to assess the potential economic benefits of the quarry. Matthew was lead on this project and was responsible for the financial analysis, drafting of the report, and the day-to-day management of the file.

Financial Sustainability Analysis, Township of Adjala-Tosorontio – Arcadis was retained by a private developer to conduct a financial sustainability analysis for an approved draft plan of subdivision to assess the financial sustainability of the project as it related to the long-term capital and operating revenues/expenditures of the Township. Matthew assisted in the development of the financial model to determine the build-out financial impacts of the residential development and tested the impacts of the anticipated capital costs against the Townships estimated water and wastewater connection charge revenues. Matthew also represented the developer in discussions with the Township through their development of a connection fee study for water and wastewater services.

Halton Region 2022 Development Charge Review - BILD Halton Chapter – Arcadis was retained by BILD Halton Chapter to review and assess Halton Region’s 2022 Development Charges Background Study and associated by-law. Arcadis’ analysis included an assessment of the proposed level of service, future capital project, and compliance of the study with the Development Charges Act. Matthew was the project lead, responsible for the detailed review of the Region’s work, consultation with BILD and Regional staff, and the provision of revisions/ recommendations for consideration by the industry.

City of Toronto 2022 Development Charge Review, Community Benefits Charge and Parkland Dedication Review - BILD Toronto Chapter – Arcadis, along with Altus Group, were retained by BILD Toronto Chapter to review and assess the City’s 2022 Development Charges Background Study, Community Benefits Charge and Alternative Parkland Dedication by-law. IBI’s analysis included an assessment of the proposed level of service, future capital project, and compliance of the studies with the overarching legislation. Matthew was the project lead, responsible for the detailed review of the City’s work, consultation with BILD and Regional staff, and the provision of revisions/ recommendations for consideration by the industry.

Town of Caledon Development Charges Peer Review – Arcadis was retained by a landowner group to peer review the Town of Caledon’s Development Charges Background Study to determine if the level of service and future capital infrastructure project assumptions used by the Town were appropriate. Matthew was the lead analyst on this project and ran the level of service calculations, analyzed the future capital projects, and determined areas of concern/issues with the background calculations. Matthew represented the landowner group at meeting with the Town to discuss updates and changes to the background study.

Halton Region Development Charge Review – Arcadis was retained by a BILD to review and assess the Region’s 2023 Development Charges Background Study. Arcadis’ analysis included an assessment of the proposed level of service, future capital project, and compliance of the studies with the overarching legislation. Matthew was the project lead, responsible for the detailed review of the City’s work, consultation with BILD and Regional staff, and the provision of revisions/ recommendations for consideration by the industry.

Economic Impact Studies/Market Studies/Highest and Best Use

Growth Management and Economic Impact Assessment, Industrial Development Park (St. Thomas, Ontario, Canada) — Arcadis was retained by PowerCo to conduct a Growth Management and Economic Impact Assessment for the proposed development of a 617 hectare industrial subdivision in St. Thomas, Ontario. The study assessed the need for future employment on site and identified the economic benefits (e.g. GDP, jobs, labour income, etc.) associated with the full build out of the subdivision. Upon completion of the study, it was announced by the Government of Ontario that the site would be the future home of the Volkswagen Battery Cell Gigafactory for the production of electric vehicle batteries.

Canada Lands Company (CLC) – Due Diligence/Highest and Best Use Studies (various locations) – Arcadis, along with EY and Golder, were retained by CLC to complete businesses cases to inform the potential purchase and redevelopment of surplus federal properties by CLC. Matthew assisted in the background market research and policy assessment for the Real Estate and Highest and Best Use component of this study to determine the potential on the site for added value.

Economic Impact Study, Broadway Triangle, Vancouver (BC) – Arcadis was retained by a private landowner to conduct an Economic Impact Study for the proposed development of the Broadway Triangle site, a 0.5-hectare site at the intersection of Main St. and East Broadway in Vancouver, BC. The purpose of the study was to quantify the direct, indirect and induced impacts of the proposed development and to identify additional benefits of the development within the broader planning context. Matthew was the project manager and was responsible for the economic analysis and the day-to-day management of the file.

Economic Impact Study, Nisku Area, Leduc County (AB) – Arcadis was retained by Leduc County to conduct an Economic Impact Study for the proposed expansion of the Nisku Spine Road. The purpose of the study was to quantify the potential short and long term economic impacts of the proposed expansion and to provide input into the County's grant application for the funding of the project. Matthew assisted with the background analysis to quantify the impacts on the County, contributed to the writing of the report, and was responsible for the day-to-day management of the file.

975 Dairy Dr. Market Study, Ottawa, ON – Arcadis was retained by the City of Ottawa to conduct a commercial market review in connection with the arbitration of a claim for additional compensation advanced following the acquisition of 975 Dairy Dr. by the City. The purpose of the study was to determine the market demand for new commercial office and industrial uses on the property to assess the viability of the claimant's proposed development in light of the City's acquisition of the property. Matthew was responsible for the market assessment and analysis, generating analysis on the City's forecasted employment growth and identifying market trends for commercial/industrial uses since the filing of the claimant's appeal.

Green Valley Secondary Plan Retail Market Study, Bradford West Gwillimbury – Arcadis was retained by a private developer to conduct a retail market study for a commercial block in an approved draft plan of subdivision to determine the viability of the site for commercial uses. Matthew was the project lead and conducted a retail commercial needs assessment, determined the retail commercial inventory within Bradford West Gwillimbury, and analyzed the viability of the site for future commercial uses based on anticipated market demand.

245 Steeles Ave W., Brampton Retail/Commercial Market Study – Arcadis was retained by a private developer to conduct a retail market assessment as part of an Official Plan and Zoning By-law amendment application a proposed mixed-use development. Matthew was the project lead and conducted a retail commercial needs assessment to determine the amount of ground floor retail/commercial space which could be supported by the development and forecasted growth within a local trade area. Other components of the study included a retail commercial inventory within the defined trade area in Brampton, an assessment of future growth and planned/proposed retail/commercial space, and an analysis of retail/commercial trends and design considerations which could help inform the design of the development.

Job Accommodation Analysis, Town of Ajax – Arcadis was retained by a private developer to conduct a job accommodation analysis to inform a future employment land conversion application. The purpose of this analysis was to determine then number of jobs under the existing planning regime and to understand the net impact on jobs of the proposed development. Matthew conducted the job yield analysis and provided recommendations to the client on the overall concept plan.

2 Champagne Dr., Toronto, ON Retail/Commercial Market Study– Arcadis was retained by a private developer to conduct a retail market assessment as part of a Zoning By-law amendment application to expand the commercial use permissions and minimum commercial GFA permissions to facilitate the development of an addition to the existing building on site. Matthew conducted a retail commercial needs assessment to determine the amount of retail/commercial space which could be supported by growth within the sites identified trade area. Matthew also assisted with an analysis on short-term stay accommodations to support proposed in-patient suites on site.

Fort Erie Racetrack Market Assessment, Fort Erie- Arcadis was retained by a private developer to conduct a market assessment of the Fort Erie market area to inform the creation of a development concept for the redevelopment of the Fort Erie Racetrack. As part of this work, Arcadis, along with CBRE and PMA Breathour, conducted market inventories of retail/commercial, residential and hotel space to inform the competitive market area. Based on market trends such as absorption, development of new space, and assessment of vacancy rates, the consulting team provided recommendation on the type and amount of different land uses which could be provided on the subject site.

Retail Market Assessment, King City – Arcadis was retained by a private developer to conduct a retail market assessment for King's Ridge Marketplace as part of an Official Plan and Zoning By-law amendment application to convert commercial lands to residential uses. Matthew was the project lead and conducted a retail commercial needs assessment, determined the retail commercial inventory within King City, and analyzed the impact of the proposed commercial land conversion to determine if the lands were required to accommodate future commercial demand.

Airport Road Commercial Impact Study Update, Caledon – Arcadis was retained by a private developer to conduct a commercial impact study update in support of a site plan application for a mixed-use townhouse/commercial development. Matthew led the commercial analysis and conducted a retail commercial needs assessment, analyzed the impact of the proposed commercial development on the surrounding trade area, and provided market justification to support the development of the commercial component of the development.

689 Victoria St. E. Market Impact Study, Town of New Tecumseth - Arcadis was retained a private developer to conduct a market impact study in support of a zoning by-law amendment application for the proposed mixed-use development at 689 Victoria St. E. in the Town of New Tecumseth. The purpose of the market impact study was to determine wither the proposed development could proceed on the basis of market demand without having a negative impact on Downtown. Matthew was the project manager for the file and conducted a retail commercial needs assessment, analyzed the impact of the proposed commercial development on the surrounding trade area, and provided market justification to support the development of the commercial component of the development.

170 Mill St. – Financial, Employment, Commercial and Residential Impact Studies, Essa, ON – Arcadis was retained by a private developer to complete four supplementary studies in support of a proposed hotel development in the Township of Essa. The financial impact study examined the potential direct and indirect impacts of a development on the existing local economy; the employment study assessed the impacts of a proposed use on employment areas, employment densities, job creation, and related employment data across a specific area; the commercial impact study examined the impacts of the development on the local competitive market, and the residential impact study assessed how the proposed development would impact housing stock and market activity. Matthew was the project lead and oversaw the research and analysis to support the proposed development.

Tunney's Pasture Market Analysis – Arcadis was retained by Canada Lands Company to conduct a Market Analysis to understand the Ottawa residential and retail markets. The analysis informed the design of the site and provided clarity on the scale of supportable redevelopment, anticipated pricing and absorptions, and commentary on general trends observed in the Ottawa residential and non-residential markets. Further development consideration was provided surrounding the impacts of interest rate changes, rate of investment in residential assets, and immigration statistics on the Ottawa new home market. Matt was team lead on the project and was responsible for the residential and retail data gathering and analysis as well as the market commentary reporting.

Heritage Heights Residential and Commercial Market Feasibility Analysis – Arcadis was retained by a private developer to undertake a Market Analysis that reviewed the demographic profile of West Brampton, current and historic performance of the ownership and rental residential markets, the retail and office markets, as well as other non-traditional land uses for consideration as part of the mixed-use development proposed within the Heritage Heights Secondary Plan. The report provided recommendations on the appropriate mix and pricing for units in the development as well as provide commentary on the viability of retail development at-grade. Matt was team lead on the project and was responsible for the residential and commercial data gathering and analysis and demographic trends analysis and reporting.

Terminal Avenue Economic Discussion Paper – Arcadis was retained by the Value Property Group and CN Railway to provide an economic discussion paper to highlight the existing market conditions, identify the market opportunities, and highlight the economic benefits to inform the next phase of discussions on the redevelopment of the Terminal Lands site in the City of Vancouver. The purpose of this economic discussion paper was to inform the land use conversion process and identify potential redevelopment opportunities for the subject site. Matt was responsible for commercial, residential, and demographic trends analysis and reporting.

Land Use Conversion/Community Services and Facilities

1799 St. Clair Av. W., Toronto – Employment Land Conversion Request and Community Services and Facility Study – Arcadis was retained by a private developer to provide an employment land conversion request letter and a community services and facilities study to support official plan and zoning bylaw amendment applications for the development of a mixed-use project. The subject site is located within the Keele-St. Clair Local Study Area and is within a Protected Major Transit Station Area. Current designated as employment lands, Arcadis conducted a review of the policy and locational context, the employment and market trends, the forecasted employment growth, and the potential job replacement of the new development to support the request for the conversion of the site.

To assess the need for community facilities within surrounding area, Arcadis assessed schools, libraries, parks and open spaces, community recreation centres/facilities and social services to determine the inventory of existing space and the demand which could be attributed to future residents of the development. As study lead, Matthew completed the demographic analysis and level of service calculations to determine if sufficient services/facilities were available to future residents of the site (ongoing).

87 Ethel Ave, Toronto - Community Services and Facility Review – Arcadis was retained by a private developer to conduct a community services and facilities study to support official plan and zoning bylaw amendment applications. The purpose of the study was to provide a review the available community services and facilities within the defined Study Area that would support the health, safety, and well-being of existing and future residents. Arcadis assessed schools, libraries, parks and open spaces, community recreation centres/facilities, social services and development applications located within the Study Area to determine the available community services/facilities that could be available to future residents of the development. Matthew was the study lead and

conducted the demographic analysis, generated the level of service calculations and conducted the report writing for the study (ongoing).

142 Ryding Ave., Toronto - Community Services and Facility Study – Arcadis was retained by a private developer to conduct a community services and facilities study to support official plan and zoning bylaw amendment applications. The purpose of the study was to provide a review the available community services and facilities within the defined Study Area that would support the health, safety, and well-being of existing and future residents. Matthew was the study lead and conducted the demographic analysis, generated the level of service calculations and conducted the report writing for the study.

180 Finch Street West, Toronto - Community Services and Facility Study – Arcadis was retained by a private developer to conduct a community services and facilities study to support official plan and zoning bylaw amendment applications. The purpose of the study was to provide a review the available community services and facilities within the defined Study Area that would support the health, safety, and well-being of existing and future residents. Arcadis assessed schools, libraries, parks and open spaces, community recreation centres/facilities, social services and development applications located within the Study Area to determine the available community services/facilities that could be available to future residents of the development. Matthew was the study lead and conducted the development analysis and report writing for the study.

991 Kennedy Rd., Toronto - Community Services and Facility Study – Arcadis was retained by a private developer to conduct a community services and facilities study to support official plan and zoning bylaw amendment applications. The purpose of the study was to provide a review the available community services and facilities within the defined Study Area that would support the health, safety, and well-being of existing and future residents. Arcadis assessed schools, libraries, parks and open spaces, community recreation centres/facilities, social services and development applications located within the Study Area to determine the available community services/facilities that could be available to future residents of the development. Matthew was the study lead and conducted the development analysis and report writing for the study.

250 Bowie Ave Employment Conversion Request, Toronto, ON - Arcadis was retained by a private developer to provide planning and market services in support of their request for an employment land conversion on 250 Bowie Avenue. Arcadis conducted a review of the policy and locational context, the employment and market trends, the forecasted employment growth, and the potential job replacement of the new development to support the request for the conversion of the site, which is located within a delineated MTSA. Matthew managed the day-to-day work for the project and conducted policy analysis, employment calculations and assisted with the drafting of the letter for submission to the City.

Welland Employment Lands Re-designation – Arcadis was retained by a private developer to work with the City of Welland and the Region of Niagara to review the re-designation of two parcels of former industrial land for a proposed mixed-use development. This study looks at the overall market profile of Niagara Region and the City of Welland and estimates the potential number of jobs and space which will need to be retained on the site. The goal of the study is to understand how the re-designation of the sites will impact the City of Welland's ability to accommodate future employment growth.

Metrolinx Durham-Scarborough BRT Socio-Economic and Land Use Study – Arcadis was awarded a contract by Metrolinx to develop a preliminary design and conduct an environmental assessment for the Durham-Scarborough BRT corridor. The Real Estate, Economics and Planning team has completed a socio-economic and land use review to determine the potential impact that the project would have on these environments and will put forward a collection of mitigation and monitoring measures to address potential adverse impacts. Matthew is assisting with the creation of demographic profile for the corridor and the analysis to inform the mitigation and monitoring measures.

Miscellaneous Studies

Bri-mor affordable Housing Strategy – Arcadis was retained by Bri-mor Developments to provide an overview of the Province of Ontario’s affordable housing policies and identify potential opportunities for entry into the affordable housing market. The purpose of the study was to define how affordable housing is defined in Ontario, highlight key changes that have occurred through changes to provincial policy, provide case studies of how local developers have integrated affordable housing into their projects, and identify potential growth markets in which Bri-mor could explore opportunities for entry into the market. Matthew was the project manager and was responsible for the policy analysis and the day-to-day oversight of the project.

Generational Housing Review, City of Toronto – Arcadis was retained by BILD Toronto to review the City of Toronto’s Generational Housing Report, which was conducted to inform the City’s municipal comprehensive review process. The assessment tested the City’s assumptions of aging in place and housing turnover to inform the BILD delegation on the numbers which were underpinning the City’s preliminary housing/population forecasts. Matthew was the project manager and was responsible for the peer review of the City’s analysis, the writing of the assessment piece for BILD and for correspondence with the City on behalf of BILD for discussions on the topic.

Prior Experience (Malone Given Parsons Ltd.)

Employment Land Studies

Employment Lands Study, Kingston, ON – A market demand and impact study and an industrial employment land study was conducted on behalf of a private developer in the City of Kingston. The studies tested demand and impact of a proposed retail development and assessed future employment needs to justify an employment land conversion. Matthew conducted the background research and policy review and assisted in the retail commercial needs and employment land needs modelling.

Employment Lands Conversion Land Use Study, Burlington, ON – An employment land conversion land use study was conducted on behalf of a private developer in Burlington, ON to provide justification for a proposed employment land conversion. The study assessed the existing land inventory and determined the requirements for future employment land needs based on employment forecasts. Matthew conducted the background research and policy review, completed the employment lands inventory assessment, and assisted in the employment land needs modelling.

Growth Management and Secondary Plans

Agerton and Trafalgar Secondary Plan, Milton, ON – A land budget, gap analysis, planning opinion report, and implementing official plan policies were required by the Town of Milton as part of the Agerton and Trafalgar Secondary Plan process. Matthew assisted in the development of the land budget, completed the planning opinion report and policy analysis and assisted in the crafting of the implementing official plan policies. Matthew also provided support to the Town throughout the public consultation process, engaging with stakeholders and writing the consultation summary report.

Robinson Glen Secondary Plan Area – Population, Housing and Employment Study, Markham, ON – As part of the secondary planning process, a population, housing and employment study was required for the Robinson Glen Secondary Plan area in the City of Markham. The purpose of the study was to identify the build-out population, jobs, and number of units, identify the necessary phasing in relationship to the delivery of infrastructure, provide an overview of the demographics and labour market, and identify opportunities for the provision of affordable housing within the plan. Matthew conducted the demographic/market analysis, determined the affordable housing requirement, assisted in the phasing of the development, and helped to determine the appropriate unit mix for build-out.

Commercial Policy Review

City of Cambridge Commercial Policy Review, Milton, ON – A commercial policy review of the City of Cambridge's Official Plan policies was conducted on behalf of the City of Cambridge. The study assessed future retail commercial demand, analyzed the City's commercial hierarchy and commercial policies, and determined if any policy changes were required as part of the City's Municipal Comprehensive Review process. Matthew assisted in the creation of the retail commercial demand model, conducted background research and analysis on the City's commercial policies, and assisted in the determination of the studies recommendations and commercial strategy.

Town of Hanover Commercial Policy Review, Hanover, ON – A commercial policy review of the Town of Hanover's Official Plan policies was conducted on behalf of the Town of Hanover. The study which was in response to the allocation of new commercial lands within the Town, assessed future retail commercial demand, analyzed the Town's commercial hierarchy and commercial policies, and provided guidance for the review of the Town's zoning by-law update. Matthew assisted in the creation of the retail commercial demand model, conducted background research and analysis on the City's commercial policies, and was the prime author of the report.

Development Approvals

101 Victoria Street, Town of Whitby – Mixed Use Building: Official Plan Amendment, Zoning By-law Amendment, Site Plan Approval

Mayfield West Phase 2- Stage 1, Town of Caledon – Draft Plan of Subdivision: Zoning By-law Amendment, Draft Plan Approval, Site Plan Approval for medium density blocks

9675 Yonge St., Town of Richmond Hill – Mixed Use Building: Official Plan Amendment, Zoning By-law Amendment

395 Harry Walker Parkway, Town of Newmarket – YRT Snow Storage Facility: Official Plan Amendment, Zoning By-law Amendment, Site Plan Approval

155 Snively St., Town of Richmond Hill – Draft Plan of Subdivision: Zoning By-law Amendment, Draft Plan of Subdivision, OMB Hearing

Mill Street, Community of Tottenham – Draft Plan of Subdivision: Official Plan Amendment, Zoning By-law Amendment, Draft Plan of Condominium, Site Plan Approval

1484-1498 Altona Road, City of Pickering – Draft Plan of Subdivision: Official Plan Amendment, Zoning By-law Amendment, Draft Plan of Condominium, Site Plan Approval

Arcadis Professional Services (Canada) Inc.
55 St. Clair Avenue West, 7th Floor
Toronto, Ontario M4V 2Y7
Canada
Phone: 416 596 1930

www.arcadis.com