Integrated Columbus Part II Planning Act And Municipal Class Environmental Assessment Act Study, Oshawa
Retail Background Report – Phase 1

Prepared for City of Oshawa

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DRAFT

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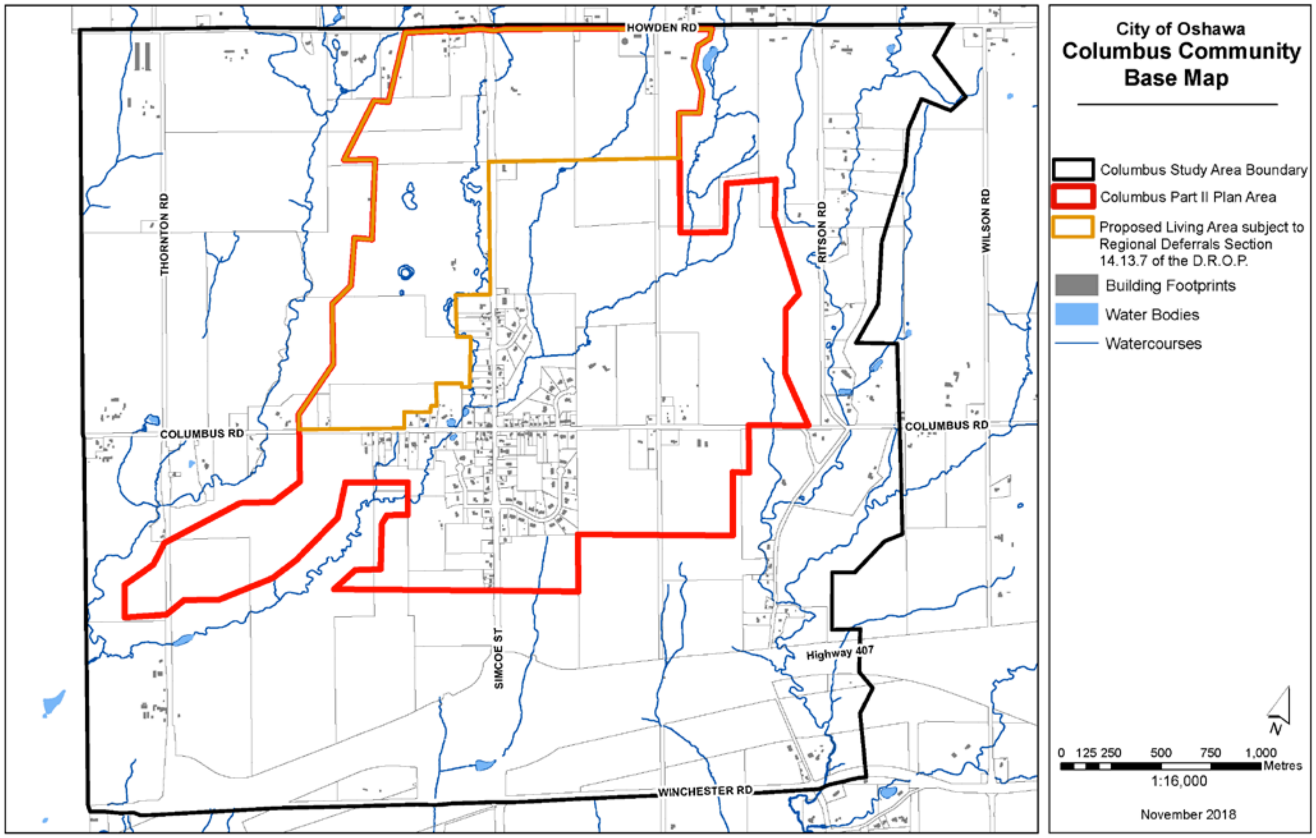
1.0 INTRODUCTION

Three Sixty Collective is part of a larger consulting team led by Macauley Shiomi Howson Ltd. (MSH). MSH was retained by the City of Oshawa to prepare the Integrated Columbus Part II Planning Act and Municipal Class Environmental Assessment Act Study (Columbus Study Area).

This report is part of Stage 1of the study that includes a discussion of the demand and supply elements associated with the future retail demand calculation analysis. At this stage in the process, the size and dimensions of the residential and employment areas are not known. This will be available upon further analysis by other MSH Team members. At that point, Three Sixty Collective will conduct the retail demand analysis calculations and add them to this report.

This report is only to inform the other MSH Team members and the City of Oshawa of key points to consider for retail planning as it relates to the vision and potential build-out scenarios.

Map1: Integrated Columbus Part II Planning Act and Municipal Class Environmental Assessment Act Study, Oshawa

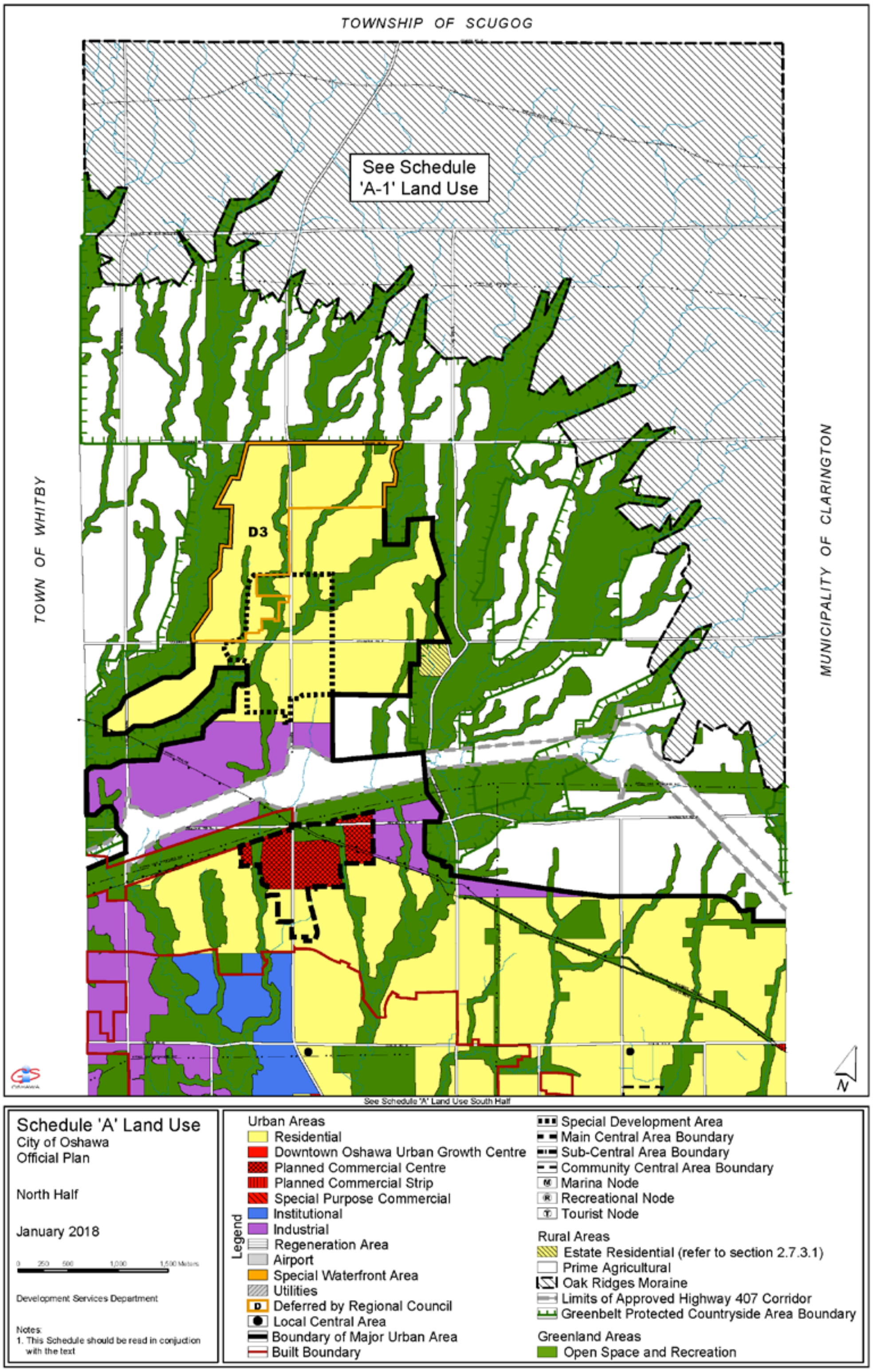


Source: City of Oshawa

Integrated Columbus Part II Planning Act and Municipal Class Environmental Assessment Act Study, Oshawa

- Development is focused in areas adjacent to the historic hamlet of Columbus located to the north of Highway 407 East

Map 2 – Schedule A, City of Oshawa Land Use (North Half)



Source: City of Oshawa

1.1 Policy Context for Columbus Retail Commercial Development

Growth Plan for the Greater Golden Horseshoe (2017)

The Ontario Growth Plan for the Greater Golden Horseshoe (2017) sets the long-term policy framework for where communities in the region should grow. The guidance it provides for retail development is summarized below.

The Plan supports the achievement of complete communities that feature a diverse mix of land uses, including residential and employment uses, and convenient access to local stores, services and public service facilities (Section 2.2.1.4a). It is intended to ensure the development of high-quality compact built form and an attractive and vibrant public realm, including open spaces, through site design and urban design standards (Section 2.2.1.4e).

The Plan's Employment Policies (Section 2.2.5) indicate that:

- Retail and office uses will be directed to locations that support active transportation and have existing or planned transit (Section 2.2.5.3).
- The retail sector will be supported by promoting a compact built form and intensification of retail and service uses and areas and encouraging the integration of those uses with other land uses to support the achievement of complete communities (Section 2.2.5.12).
- In Employment Areas, major retail uses are to be prohibited or a size or scale threshold for any major retail uses that are permitted to be established and any major retail uses that would exceed that threshold are to be prohibited (Section 2.2.5.7b).
- Any change to an official plan to permit new or expanded opportunities for major retail in an employment area may occur only through a municipal comprehensive review.

Durham Regional Official Plan

Columbus is designated a "Living Area" in the Durham Regional Official Plan. Sub-Section 8B sets out the Region's policies for these areas.

The predominant land use is intended to be housing. However, certain home occupations, convenience stores and public and recreational uses can be permitted provided that they are compatible with their surroundings (Sub-Section 8B.2.1a.) In addition, Local Centres can be designated in municipal official plans provided that the functions and characteristics of already designated Centres are not adversely affected (Sub-Section 8B2.1b)). Subject to the inclusion of appropriate provisions and designations in the area municipal official plan, Sub-Section 8B.2.2 also permits local municipalities to permit Local Centres and Corridors, major retail uses, and Employment Area uses provided that they are not obnoxious in nature.

The Regional Plan also provides direction to municipalities for the permission of limited retail and personal service uses in Employment Areas.

- Sub-Section 8C2.12 permits such uses to serve the immediate Employment Area as a minor component (e.g. 10%) of the aggregate gross floor area of the Area's employment uses.
- A single retail use cannot exceed 500 square meters.
- Retail sales as a minor ancillary component of an industrial operation may be permitted (Sub-Section 8C.2.13).
- Additional major retail uses are not permitted except where they are set out as a permitted use in a municipal official plan as of June 3, 2009.

City of Oshawa Official Plan

At present, the majority of the Study Area (see Map 1) is designated a Residential Area in the City of Oshawa's Official Plan (see Map 2 - Schedule A: City of Oshawa Land Use – North Half). Section 2.3.1.2. of the Plan indicates that Residential Areas are to be predominantly used for residential dwellings. Community uses are permitted provided that by nature of their activity, scale and design they are compatible with residential uses. In addition, Convenience Commercial Centres and limited office, retail and personal services are permitted.

Zoning By-laws may permit convenience stores serving primarily the immediate area as part of mixed-use developments or free-standing units. They should not generally exceed 200 square meters (2,155 square feet) of gross retail and/or personal service floor space (Section 2.3.1.3).

Larger concentrations of convenience commercial uses are to be planned as Convenience Commercial Centres and identified as such in the Part II Plans and Zoning By-law. They should generally range in size from 200 to 1000 square meters (2,155 to 10,674 square feet) of gross leasable floor space for the retailing of goods and services and shall not exceed 0.6 hectares (1.5 ac.) in site area. Their designation should ensure that the development is compatible with its surroundings and does not detrimentally affect the development and function of Central Areas and Corridors. A market impact study is not required due to the nature and small size of the commercial activity (Sections 2.2.6.2 through 2.2.6.6).

Commercial concentrations larger than 1000 square meters should be designated a Planned Commercial Centre. Section 2.2.3.4. of the Official Plan states that the City shall encourage the establishment of a functional hierarchy of Planned Commercial Centres related to the trade area population of respective commercial centres, the arterial road and public transit systems, and to the convenient travel distance associated with each type of centre and market area. When an existing Planned Commercial Centre is established, preference shall be given to its expansion rather than to the development of a new Planned Commercial Centre in the same general vicinity (Section 2.2.3.5).

The functional hierarchy of shopping centres is set out in Table 1 of Section 2.2.3.3. Neighbourhood Commercial Centres are intended to serve trade areas with between 2,500 and 30,000 people and to include between 750 and 6000 square meters (8,075 and 64,585 square feet) of gross leasable floor space. Community Commercial Centres are intended to serve trade areas between 30,000 and 75,000 people and to include between 6000 and 14,000 square meters (64,585 and 150,700 square feet) of gross leasable floor space.

Oshawa requires a retail impact study for any development involving 56,000 square meters (602,779 square feet) or more retail and personal service floor space or for development with the potential to negatively impact the planned function of a Central Area or Corridor as determined by the City (Section 2.2.7).

Oshawa's policies regarding the inclusion of retail and personal service uses in Industrial Areas are set out in Section 2.4 of the Plan. The policies are consistent with those included in the Durham Regional Official Plan.

Section 2.4.1.2 allows certain commercial, community and recreational uses in accordance with Policy 2.4.1.6. This states that such uses:

- Primarily serve the needs of nearby businesses and employees and shall not exceed approximately 10% of the aggregate gross floor area within the immediate Industrial Area, excluding offices in multi-storey office buildings;
- Not collectively occupy more than 25% of any multi-unit industrial mall's gross floor area;
- Be limited to no more than one unit of each type of use on a particular development site; and
- Not exceed 500 square meters (5,382 square feet) for any single commercial operation.

Accessory sales outlets are permitted in Industrial Areas if smaller than and located on the same lot as the primary use, the floor space is detailed in the Zoning By-law and they don't detrimentally affect adjacent land uses (Section 2.4.1.4).

Section 2.4.1.8 states that major retail uses with gross leasable areas of 2000 square meters (21,528 square feet) or greater shall not be permitted in Industrial Areas.

Windfields Main Central Area

The Windfields Main Central Area is designated in the Oshawa Official Plan Schedule A Land Use (see Map 2) as a "Planned Commercial Centre" for a future major retail development. The proposed site is located about 2 km. south of Columbus in the southeast and southwest quadrants of Simcoe Street North and Winchester Road The market analysis for the development was completed in 2011. At that time, it was envisaged as a Hybrid Centre, combining the convenience of a power centre with dining, entertainment and specialty retail shopping typical of "life style" centres. Large and mid-sized "big box" format retail would surround smaller outlets oriented in a main street format. The market study considered a development of 1.3 million square feet of gross leasable area, 75% to be retail (975,000 square feet) and 25% service uses (325,000 square feet) The Official Plan (Section 8.6.4.2) and Zoning By-law (Section 17.3.15(1)) permits the Centre to include up to 200,000 square meters (2,153,000 square feet) of commercial gross leasable area.

Summary

Future retail commercial development in the Study Area to serve the convenience needs of residents should generally be consistent with current planning policies as set out in the Durham Regional Official Plan and Oshawa Official Plan. The scale of commercial development should not negatively impact the planned commercial functions of any of the designated Commercial Centres. The prime Centre to consider would be the Windfields Planned Commercial Centre - Main, located about 2 km to the south. It is yet to be determined whether other areas in Durham should be included as part of this evaluation.

Depending on the amount and distribution of population growth that is anticipated and the results of the residual demand analysis, either a new Neighbourhood Commercial Centre and/or one or two Convenience Commercial Centres could be considered. A new Neighbourhood Commercial Centre designation would be required to address its possible impact on the planned commercial functions of the existing centres.

The form of new commercial space should support the goals of creating a complete community in Columbus, promoting a compact built form and active modes of transportation (walking and cycling) and supporting the intensification of retail and service uses and their integration with other land uses.

Documents Reviewed:

1. Tate Economic Research Inc., **Windfields Main Central Area Retail Market Demand and & Impact Analysis,** May 2011
2. City of Oshawa, **Development Plan for the Historic hamlet of Columbus,** as amended April 28, 2003
3. City of Oshawa, **Oshawa Official Plan**, Office Consolidation last updated November 2018
4. Durham, **Durham Regional Official Plan,** Consolidation May 11, 2017
5. Province Of Ontario, **Growth Plan for the Greater Golden Horseshoe,** 20172.0 Retail Commercial Inventory

2.0 Retail Commercial Inventory

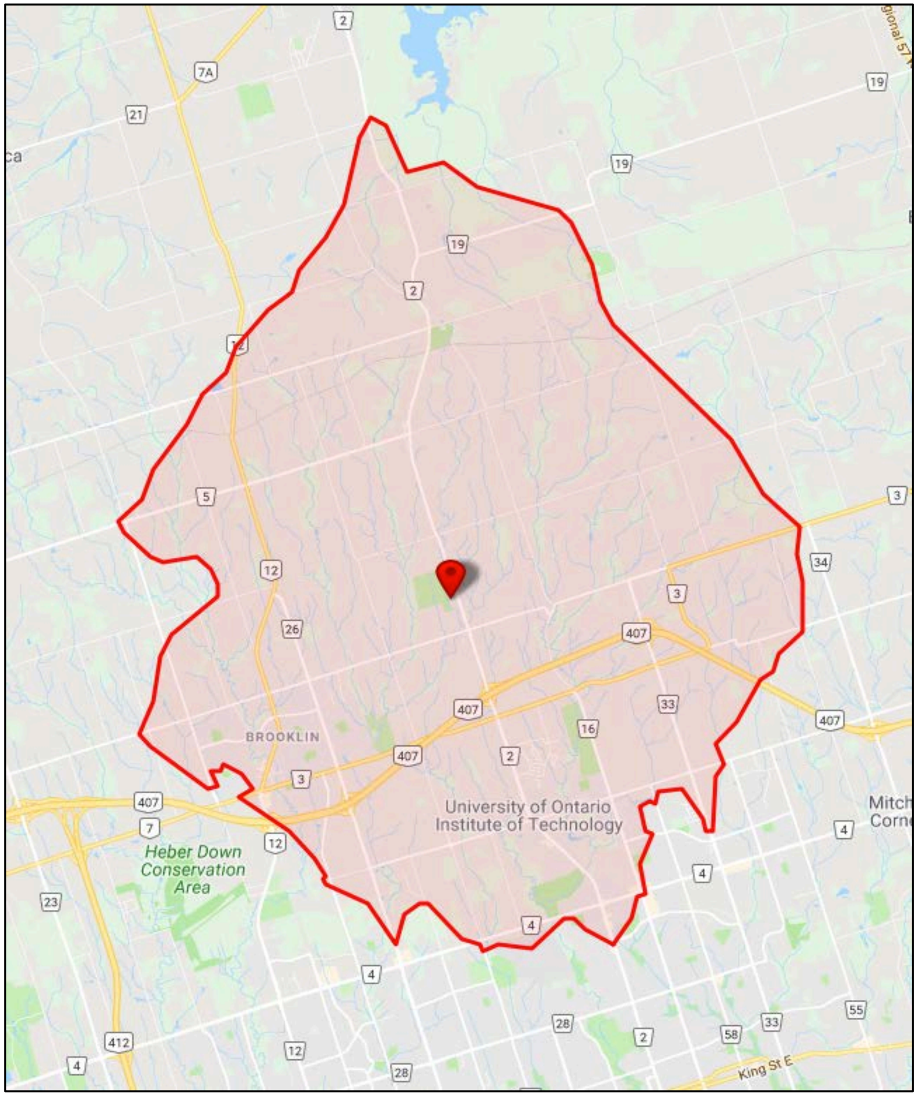
2.1 Retail Inventory

For the assessment of the current retail inventory, a trade area that included a 10 minute drive time was created. The centre was the half way point along the north south axis of the proposed built up area of the Columbus Study Area. On Map 1, this is referred to as the Integrated Columbus Part II Planning Act and Municipal Class Environmental Assessment Act Study Area.

The retail inventory includes retail located in Oshawa within the 10 minute and a retail inventory of Brooklin, Whitby.

Outside the 10 minute drive time, to the south, is Taunton Road. This runs the length of Whitby and Oshawa. Retail along this corridor is included to provide additional context for the retail inventory competition. While the future Windfields Planned Commercial Centre - Main development will be closer to the future Columbus Study Area residents, the critical mass and location of the retail along this corridor may provide a level of competition.

Map 3: Columbus Study Area Retail Inventory within 10 Minute Drive Time



10 MINUTE DRIVE TIME
(red outer zone)

Retail Inventory

- The current 2018 inventory was based on a 10 minute drive time. The centre point is halfway from Howden Road at the north and south points of the Integrated Columbus Part II Planning Act and Municipal Class Environmental Assessment Act Study Area boundary.
- The inventory primarily includes retail along Simcoe Street North from Taunton Road to Highway 407 East.
- Retail commercial in Brooklin (in Whitby) was separated out for analysis for comparative purposes.
- Retail along Taunton Road in Whitby and Oshawa was included as a separate analysis.
- This excludes the 1.3 million square feet of retail commercial proposed at the Windfields Planned Commercial Centre - Main. The proposed business mix at the time of the study was to be 75% retail commercial and 25% services.
- It was noted that the total allowable gross leasable area for Windfields Planned Commercial Centre - Main is 2.1 million square feet

Table 1: Columbus Study Area Retail Inventory within 10 Minute Drive Time, November 2018 (Oshawa Only)

Retail Categories	No. of Businesses	% of Total	Estimated Square Feet	% of Total
Retail Merchandise				
Furniture And Home Furnishings	0	0%	0	0%
Electronics And Appliances	0	0%	0	0%
Home Improvement, Building Supply	3	7%	12,300	11%
Clothing And Accessories	0	0%	0	0%
Sporting Goods, Book, Music, Hobby	2	5%	2,400	2%
General Merchandise	0	0%	0	0%
Other Retail	1	2%	1,200	1%
Total Retail Merchandise	**6**	**14%**	**15,900**	**14%**
Food And Drug				
Food And Beverage	5	11%	16,340	15%
Health And Pharmacy	7	16%	23,540	21%
Total Food And Drug	**12**	**27%**	**39,880**	**36%**
Food Services				
Eating Establishments	**11**	**25%**	**21,400**	**19%**
Other Services				
Beauty, Barber, Spa	4	9%	6,200	6%
Other Personal Services	0	0%	0	0%
Financial, Banking	1	2%	5,500	5%
Professional Office	3	7%	4,600	4%
Medical	5	11%	12,600	11%
Recreation / Fitness / Learning	0	0%	0	0%
Other Services	0	0%	0	0%
Total Services	**13**	**29%**	**28,900**	**26%**
Total Occupied	**42**	**95%**	**106,080**	**95%**
Vacant	**2**	**5%**	**5,000**	**5%**
Total	**44**	**100%**	**111,080**	**100%**

Source: Centre for the Study of Commercial Activity (CSCA), 360 Collective, City of Oshawa Employment Study

Table 2: Brooklin Retail Inventory, November 2018

Retail Categories	No. of Businesses	% of Total	Estimated Square feet	% of Total
Retail Merchandise				
Furniture And Home Furnishings	1	1%	3,000	1%
Electronics And Appliances	2	2%	2,800	1%
Home Improvement, Building Supply	2	2%	8,000	4%
Clothing And Accessories	3	3%	4,900	2%
Sporting Goods, Book, Music, Hobby	0	0%	0	0%
General Merchandise	0	0%	0	0%
Other Retail	0	0%	0	0%
Total Retail Merchandise	**8**	**8%**	**18,700**	**8%**
Food And Drug				
Food And Beverage	8	9%	49,100	22%
Health And Pharmacy	5	5%	18,900	9%
Total Food And Drug	**13**	**14%**	**68,000**	**31%**
Food Services				
Eating Establishments	**21**	**23%**	**40,900**	**19%**
Other Services				
Beauty, Barber, Spa	9	10%	17,700	8%
Other Personal Services	2	2%	1,500	1%
Financial, Banking	3	3%	8,500	4%
Professional Office	15	16%	31,200	14%
Medical	10	11%	11,000	5%
Recreation / Fitness / Learning	8	8%	13,600	6%
Other Services	1	1%	1,000	1%
Total Services	**48**	**51%**	**84,500**	**39%**
Total Occupied	**90**	**96%**	**212,100**	**97%**
Vacant	**3**	**4%**	**7,700**	**3%**
Total	**93**	**100%**	**219,800**	**100%**

Source: Centre for the Study of Commercial Activity, 360 Collective, City of Oshawa Employment Study

Table 3: Taunton Road Retail Inventory, 2018

Retail Categories	No. of Businesses	% of Total	Estimated Square feet	% of Total
Retail Merchandise				
Furniture And Home Furnishings	16	4%	252,840	8%
Electronics And Appliances	24	5%	55,373	2%
Home Improvement, Building Supply	6	1%	423,482	14%
Clothing And Accessories	30	7%	209,769	7%
Sporting Goods, Book, Music, Hobby	12	3%	85,685	3%
General Merchandise	18	4%	612,974	20%
Other Retail	17	4%	98,311	3%
Total Retail Merchandise	**123**	**27%**	**1,738,434**	**57%**
Food And Drug				
Food And Beverage	31	7%	476,938	16%
Health And Pharmacy	23	5%	83,110	3%
Total Food And Drug	**54**	**12%**	**560,048**	**18%**
Food Services				
Eating Establishments	**110**	**24%**	**235,521**	**8%**
Other Services				
Beauty, Barber, Spa	38	8%	51,555	2%
Other Personal Services	17	4%	19,741	1%
Financial, Banking	17	4%	63,769	2%
Professional Office	19	4%	43,520	1%
Medical	31	7%	50,673	2%
Recreation / Fitness / Learning	7	2%	78,100	3%
Other Services	11	2%	23,394	1%
Total Services	**140**	**29%**	**330,752**	**11%**
Total Occupied	**427**	**94%**	**2,864,755**	**95%**
Vacant	**27**	**6%**	**165,342**	**5%**
Total	**454**	**100%**	**3,030,097**	**100%**

Source: Centre for the Study of Commercial Activity, 360 Collective

Methodology:

- The inventory is based on City of Oshawa Employment Survey, Centre for the Study of Commercial Activity on major retail shopping centres as well as an audit by 360 Collective conducted in November 2018.
- The categories include all retail categories uses excluding automotive and gas stations.
- The square footage is based on estimates where actual retail square footages were not available.

Salient Findings:

- Excluding Brooklin, there is approximately 111,000 square feet of retail in the ten minute drive time trade area. Brooklin adds a further 220,000 square feet of retail to the area.
- Taunton Road in Whitby and Oshawa adds a further 3 million square feet of retail to the competitive landscape.
- Vacancies primarily reflect new units that were recently completed and have yet to be occupied.
- Local serving food and drug-related retail is the dominant retail category. The retail is primarily local serving oriented including a commuter-based population in Brooklin and North Oshawa as well as the local student population.
- Eating establishments account for one-fifth of all square footage. The growing shift across North America to more food services is evident in North Oshawa and Brooklin.
- Services including professional services (e.g., accountant), medical services, and personal beauty related services account for a high proportion of the total square footage.
- Retail merchandise tends to account for a smaller proportion and is impacted by some larger businesses such as home improvement or home furnishings stores that can be destination oriented primarily.

Implications for Columbus Study Area

- The retail in the Columbus Study Area 10 minute drive time trade area is primarily local serving with a combination of some destination businesses.
- The fact that the 1.3 million square feet of retail at Windfields Planned Commercial Centre - Main has not started impacts the ability to determine future potential for the Study Area as it is not clear on the mix of local serving, destination, power centre oriented, and lifestyle and entertainment/eating oriented retailing that will be provided.
- Brooklin offers a good indication of the amount and type of retailing that could be accommodated as part of the Columbus Study Area site depending on the population and employment build out and density scenarios.

2.2 Visitation Analysis

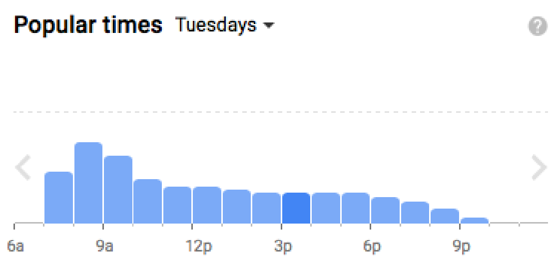
A review of Google visitation data for local area businesses reveals insights into the customer shopping behaviours and patterns as well as the types of businesses and services that would be warranted in the Columbus Study Area and the hours of operation that are required to serve the local population.

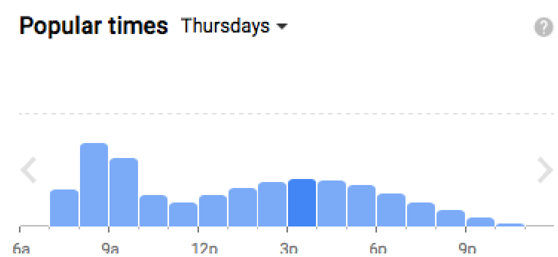
As the information is constantly being updated based on the most recent visitations. The dark blue column represents that time of day that the data was downloaded for the analysis.

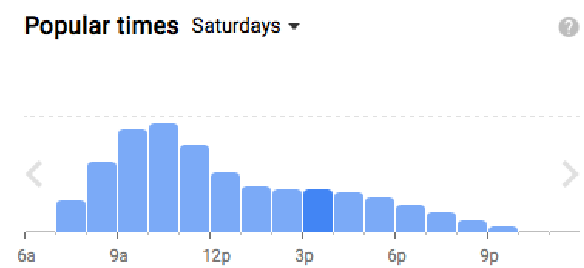
Chart 1: Store Visitation Analysis

Columbus Study Area

Tim Horton's, Columbus

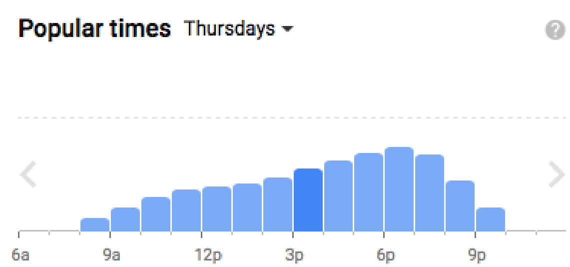


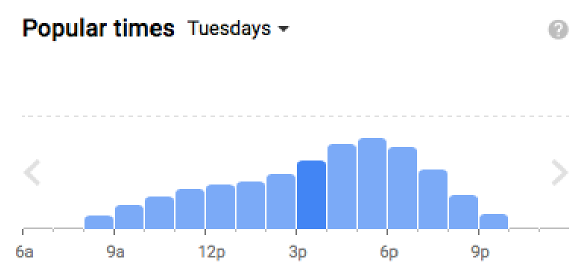




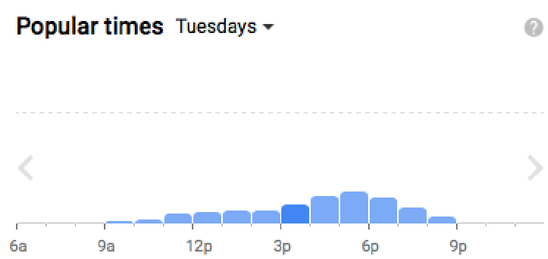
Brooklin, Whitby

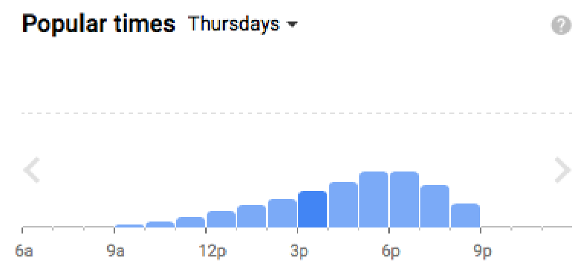
Freshco, Brooklin, Whitby

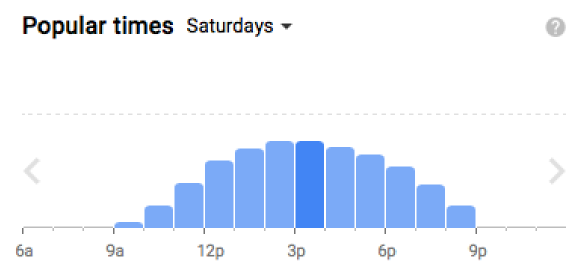




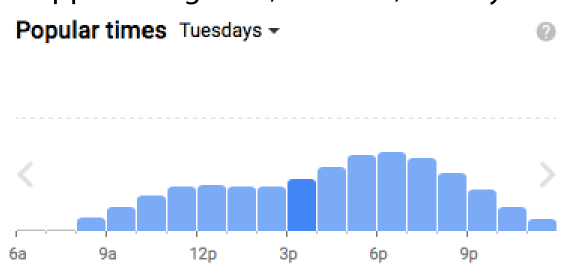
L.C.B.O., Brooklin, Whitby

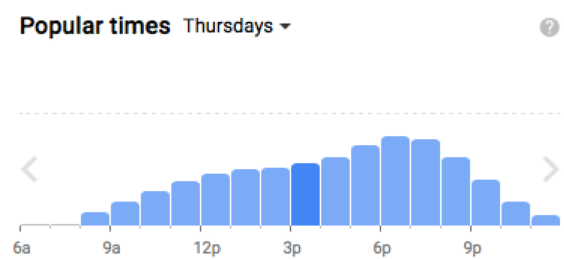


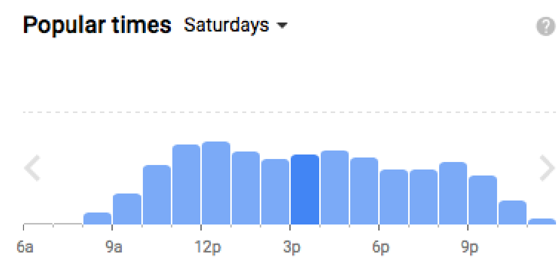




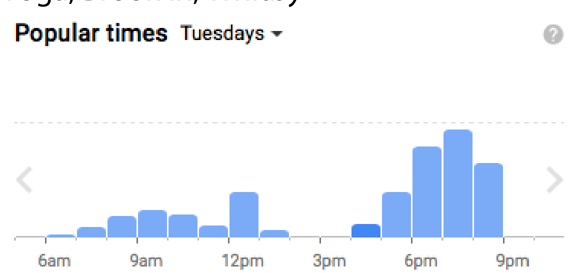
Shoppers Drug Mart, Brooklin, Whitby

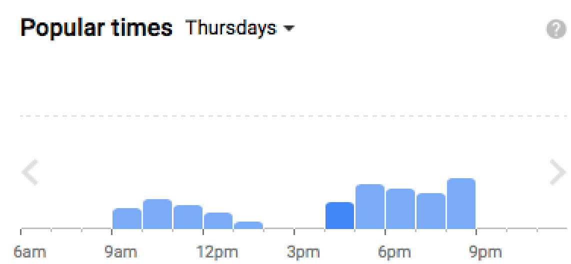


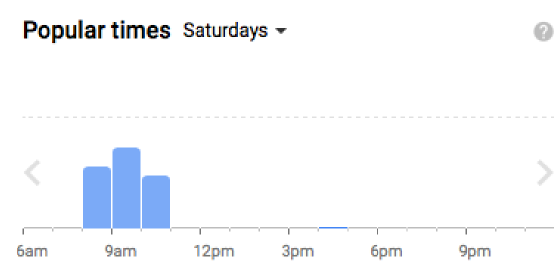




Yoga, Brooklin, Whitby

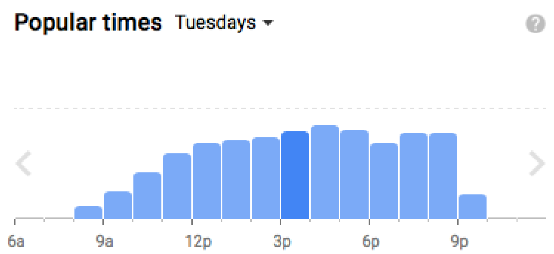


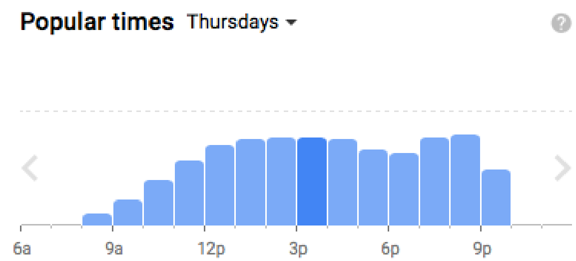


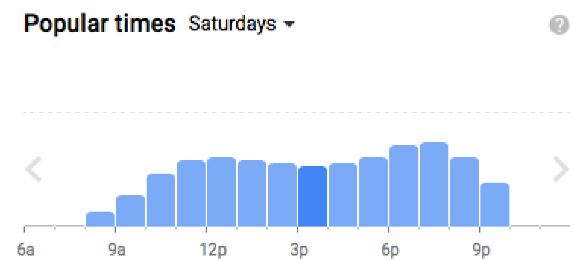


Other Oshawa Businesses

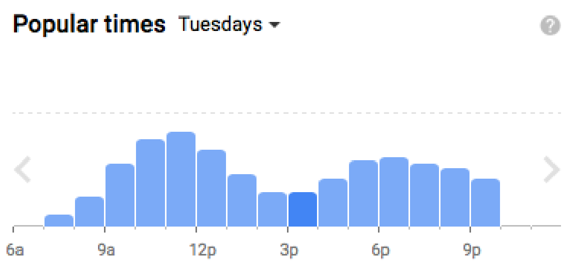
Shoppers Drug Mart, Samac

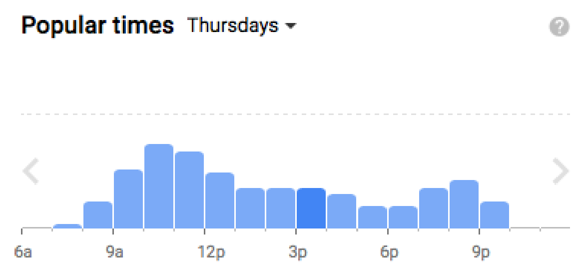


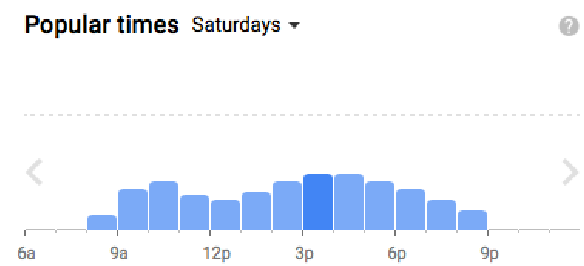




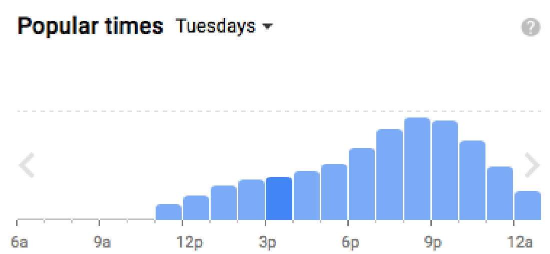
Coffee Culture, Samac

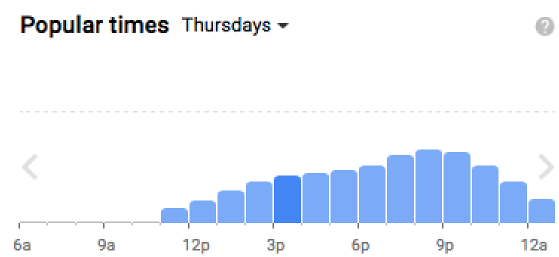


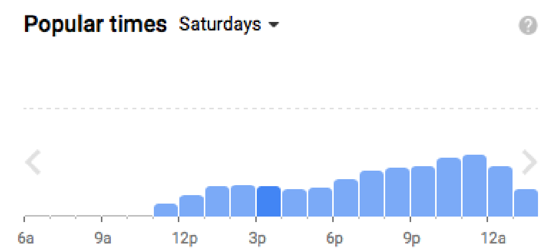




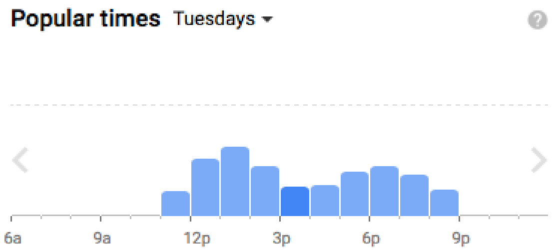
St. Louis B&G, Samac

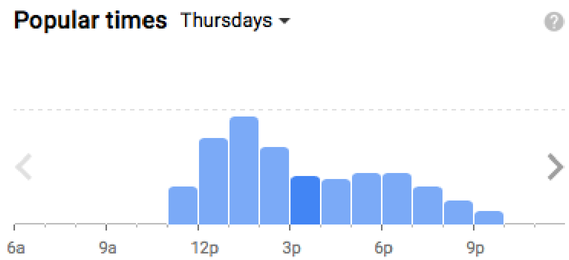


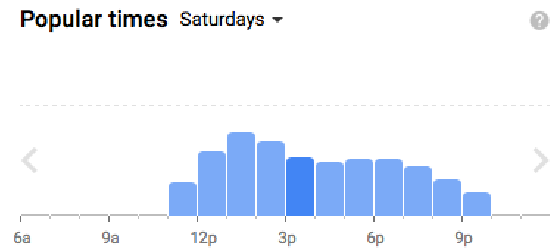




McCoy Burger, Samac

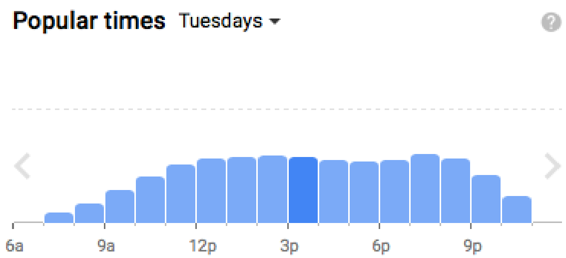


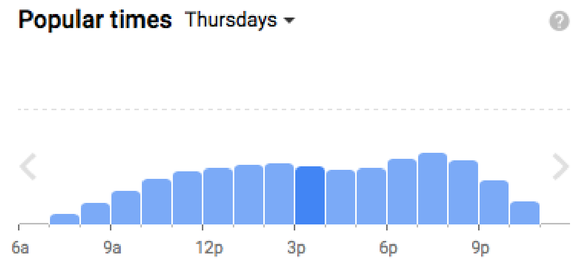


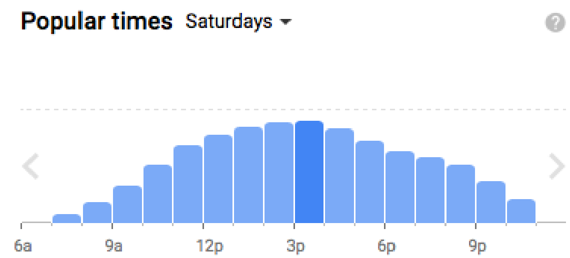


Larger Format Grocery and General Merchandise Stores

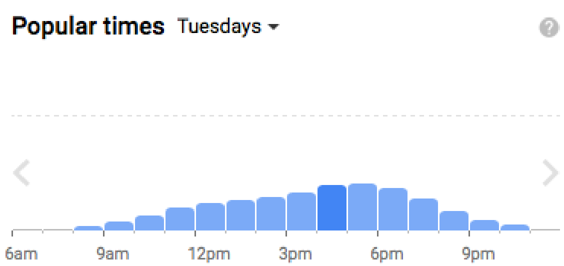
Walmart, 1471 Harmony Road N., Oshawa

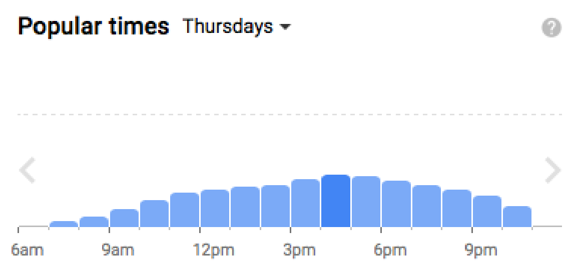


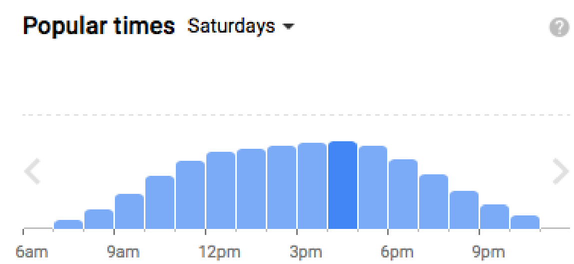




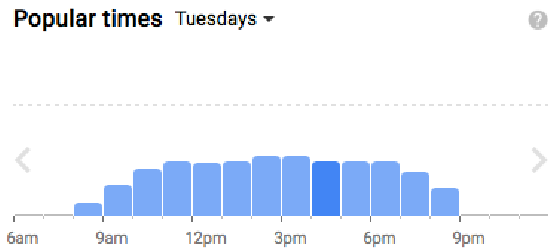
Real Canadian Superstore, 1385 Harmony Road N., Oshawa

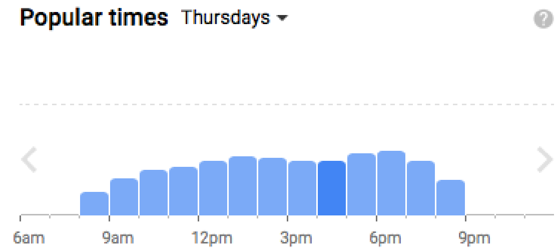


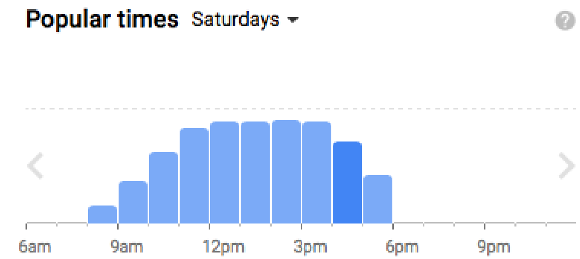




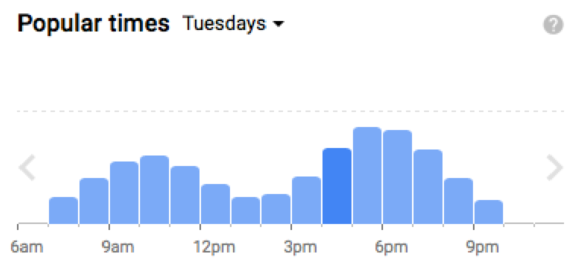
Canadian Tire, 1333 Wilson Road N., Oshawa

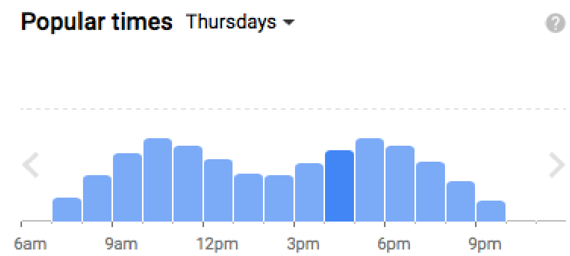


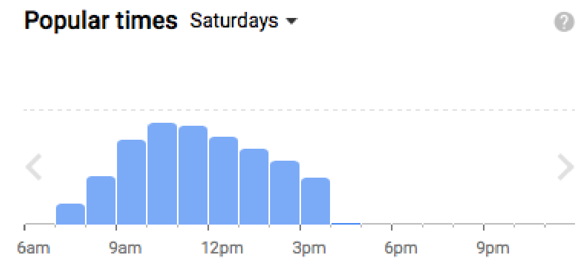




Goodlife, 1385 Harmony Road N., Oshawa







Salient Findings:

- Commuters tend to favour the following:
    - Small to medium-sized grocers and pharmacies that are easy to access. They allow for quick and easy purchases. The visitor does not have to search an entire large format store for what they need.
    - By contrast, larger format food and drug retailers (e.g., Walmart, Real Canadian Superstore, Canadian Tire) are geared to weekend shopping when the local residents have more time to shop. Walmart is busy weekdays and weekends.
    - Coffee shops and cafes that are easily accessible and can handle the morning traffic rush (e.g., right in right out).
    - Goods and services that are adjacent or combined such as grocery stores, gym/recreation/yoga, café, dollar store that allows the residents to get several errands done in one trip.
- Weekend shopping tends to focus on larger purchases and extended shopping dwell time. Residents are up early and start their errands early including visiting nearby cafes, fitness/recreation/yoga.
- Eating establishment visitation is primarily focused on the evening meal with some areas able to have a good lunch and evening turnover.

Implications for Columbus Study Area

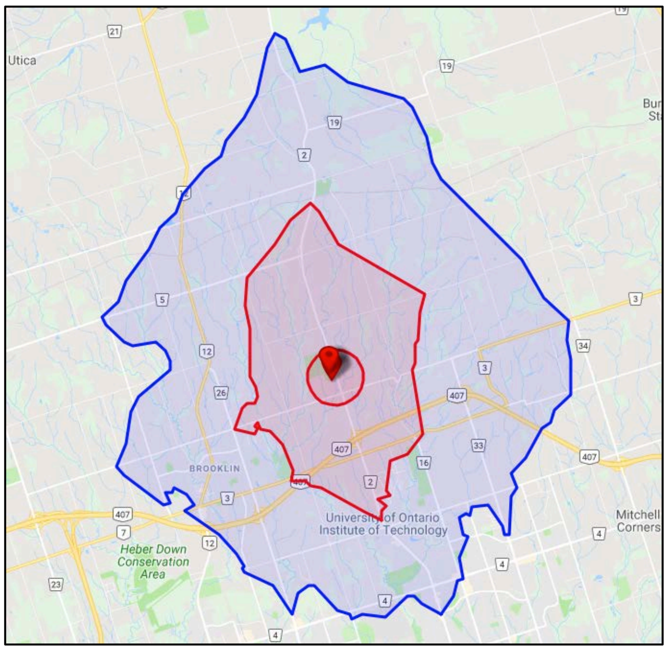
- Develop a plan that allows for easily accessible goods and service type retailers ('right in right out" in terms of accessibility) that complement one another for evening commutes.
- Focus on highly specialized and smaller versions of retailers (e.g., 15,000 to 25,000 square feet grocer rather than 50,000 square feet grocers).
- Allow for spaces that can accommodate functions such as learning, young children focused art schools, dance schools, and recreational venues, that can only pay below market rents.

3.0 Trade Area Socio-Economic Profile

The trade area socio-economic profile is made up of current residents living in the area. The centre is located approximately half way along the north south axis of the proposed built up area of the Columbus Study Area or in Map 1, the Columbus Part II Plan Area. This includes:

- 10 minute walk time: 800 m radius
- 5 minute drive time: Includes the Columbus Study Area and adjacent areas
- 10 minute drive time: Includes Brooklin and Durham College / University of Ontario Institute of Technology

Map 4: 10 Minute Walk Time and 5 and 10 Minute Drive Time Trade Areas



10 MINUTE DRIVE TIME (blue outer zone) **5 MINUTE DRIVE TIME (red middle zone)** **10 MINUTE WALK TIME (red inner circle)**

In addition, benchmarks areas are included:

- City of Oshawa
- Oshawa CMA
- Toronto CMA

3.1 Trade Area Delineation

Trade areas are dependent on:

- Travel times
- Site accessibility and visibility
- Critical mass and clustering
- Natural barriers and opportunities (e.g., rivers, creeks, ravines)
- Man-made barriers and opportunities (e.g., highways, rail lines)
- Psychological barriers and opportunities (e.g., safety, town loyalty, and branding)

Travel Times

- The retail trade areas for the Study Area will be primarily locally oriented.
- The importance of the five and ten-minute time frame is extremely important to supplying local area residents with neighbourhood focused retail goods and services.
- It is generally accepted that most shoppers will not spend more than 5 to 10 minutes (walking, cycling, on transit, or driving) to get to a grocery store. This number is reduced if the shopper is only looking for quick meal replacement and supplementary goods.
- The 10 minute walk time is critical to the success of retail in the Columbus Study Area as there needs to be sufficient residential density in the area to support local neighbourhood retail.
- It is determined that the Columbus Study Area cannot compete directly with the retail at the proposed Windfield Planned Commercial Centre – Main location, as well as the retail located along Taunton Road in Oshawa (e.g., Harmony Road North and Wilson Road North), but should find a way to complement these areas.

Site Accessibility and Visibility

- Simcoe Street North and Columbus Road have higher visibility and accessibility for retail. However, the two roads carry a high number of vehicles as they are major corridors for the City.
- The community of Brooklin, Whitby, to the west is unlikely to shop locally in Columbus due to “gravitational” pull towards the south and the west for commuters. It is unlikely they will want to bypass their home to shop. Rather, they will shop on the commute towards their home.
- Residents to the south of Highway 407 East will not likely shop further north and bypass the large retail commercial centre proposed in Windfields Planned Commercial Centre - Main.

- The limited residential to the north and east of the study area means the trade area is truncated and reliant on residents nearby. It is also affected by Port Perry to the north.

Critical Mass

- There has to be enough retail in the core retail commercial areas of Columbus Study Area to satisfy future local residential retail needs. The local residential consumer has to know that there is more to do there than just one or two stores.

Natural Barriers or Opportunities

- Rivers and creek systems

Man-Made Barriers or Opportunities

- Highway 407 East

Psychological Barriers or Opportunities

- As stated, residents in Brooklin or Windfields will be reluctant to travel east or north due to familiarity with other retail nodes in the daily commute patterns. This tends to be south and west of the Columbus Study Area.

3.2 Socio-Economic Profile – Current Residents

The following data is current as of 2018. It is based on the 2016 Census and adjusted by Environics.

Table 4: Population Overview

Socio-Economic Elements	10 Minute Walk Time	5 Minute Drive	10 Minute Drive	Oshawa	Oshawa C.M.A.	Toronto C.M.A.
Population 2018 Estimated	664	7,606	44,567	170,445	405,688	6,419,713
Annual Growth Rate 2011 to 2016	-0.9%	8.8%	3.1%	1.9%	1.9%	2.0%
Persons Per Household	2.88	3.22	2.99	2.52	2.7	2.75
Households 2018 Estimated	232	2,353	14,847	66,887	148,564	2,313,451
Daytime Worker Population	335	837	9,855	69,526	139,035	3,367,418

Source: Statistics Canada 2016 and Environics 2018 Estimates

Salient Findings:

- The existing population within Columbus in the 10 minute walk time trade area is relatively small and has been decreasing. The population characteristics of the historic hamlet of Columbus are different than the surrounding areas that are growing and changing rapidly.
- At present, there are 7,606 residents within a 5 minute drive time and the annualized growth rate has been very high (8.8% annually).
- These households are relatively large at 3.22 persons per household.
- The 10 minute drive time trade area includes both the more stabilized community of Brooklin and the fast-growing communities of Windfields and the Samac area.

Implications for Columbus Study Area

- While there is a fast-growing base of over 7,600 residents within a 5 minute drive time, these residents are primarily on the fringes in Brooklin or in Windfields. The Study Area will have to have enough residential density to support local retail needs.

Table 5: Age Profile

Socio-Economic Elements	10 Minute Walk Time	5 Minute Drive	10 Minute Drive	Oshawa	Oshawa C.M.A.	Toronto C.M.A.
0 to 9	11%	18%	15%	11%	11%	11%
10 to 19	11%	12%	15%	11%	12%	11%
20 to 29	14%	12%	12%	15%	137%	15%
30 to 39	12%	17%	14%	13%	13%	15%
40 to 49	12%	17%	17%	12%	14%	14%
50 to 59	16%	10%	12%	15%	15%	14%
60 to 69	15%	7%	8%	12%	11%	11%
70+	11%	5%	7%	12%	10%	10%
Median Age	42.9	33.6	36.5	40.8	39.8	39.2

Source: Statistics Canada 2016 and Environics 2018 Estimates

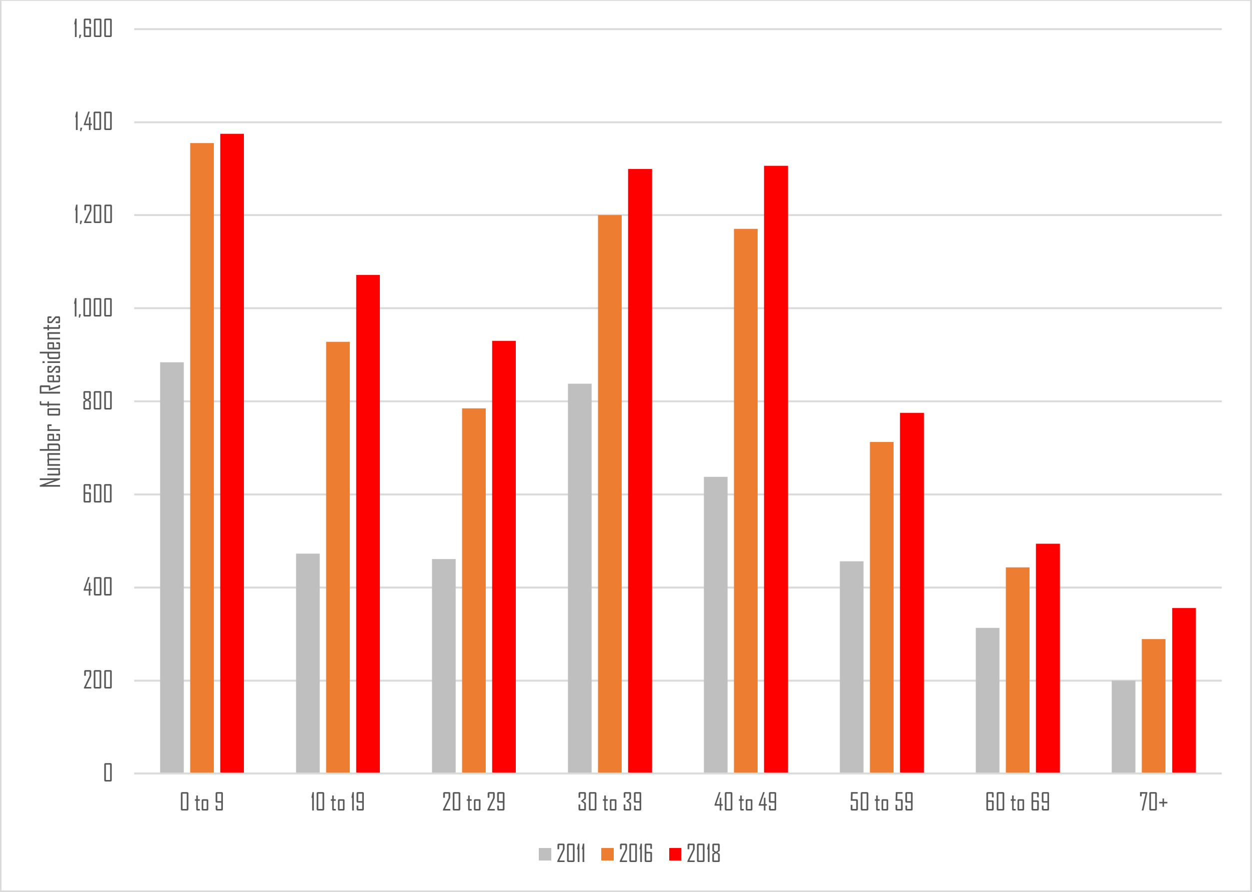
Salient Findings:

- In the 5 minute drive time trade area, there is a young family age profile. 18% of the population is under 10 years of age and 12% are 10 to 19 years of age. The 10 minute drive time trade area is similar in terms of family-oriented population but the age of the children is evenly split. These two trade areas stand in contrast to the City of Oshawa and Toronto CMA where only 22% of the population is under 20 years of age.
- In the 5 minute drive time trade area, the middle-aged families have young children but the adults are primarily 30 to 49 years of age.
- There are very few seniors living in the area except those currently residing in the Historic hamlet of Columbus.

Implications for Columbus Study Area

- The very high proportion of households are in their early to mid-family formation and career building years. This means that they are overspending on items for their home, children, and career wardrobes.
- There will be a significant focus on family life and work/life balance.
- After school activities such as dance, martial arts, sports, and learning keep these families on the go.
- These younger families are looking to age in place in their community and feel an attachment to their community.
- Despite the focus on family, they are looking for opportunities to go out and relax with other couples and friends. Eating establishments will play a vital role in creating the glue between work and family life.

Chart 2: 5 Minute Drive Time Trade Area Change in Population – 2011 to 2018



Source: Statistics Canada 2016 and Environics 2018 Estimates

5 Minute Drive Time Trade Area Change in Population

- In 2011, the population in the five minute drive time trade area was relatively small.
- By 2016, the population growth had focused on families with very young children.
- The majority of households are led by adults in the 30 to 49 age range.
- By 2018, there is little to no growth in the number of young children and higher growth associated with teenagers as these families settle in to their new communities rather than moving on to other communities

Table 6: Household Income

Socio-Economic Elements	10 Minute Walk Time	5 Minute Drive	10 Minute Drive	Oshawa	Oshawa C.M.A.	Toronto C.M.A.
Average Household Income	$179,681	$145,922	$123,018	$92,301	$107,299	$118,346
HH Income $100,000 to $150,000	25%	29%	$26%	21%	3%	18%
HH Income $150,000 to $200,000	14%	15%	14%	9%	12%	9%
HH Income $200,000+	19%	13%	10%	5%	8%	11%
Annual Growth Real HH Inc. 2018 to 2023	0.4%	0.5%	1.0%	0.3%	0.3%	0.6%
Housing Tenure						
Own/Rent	96% / 4%	90% / 10%	83% / 17%	68% / 32%	78% / 22%	66% / 34%

Source: Statistics Canada 2016 and Environics 2018 Estimates

Salient Findings:

- Average household income for nearby households is high for both the 10 minute walk time and 5 and 10 minute drive time trade areas.
- 13% of the 5 minute drive time trade area households have a household income greater than $200,000 annually.
- The real growth in household income (excluding any inflationary impacts) increased at a modest rate of 0.5% annually for the 5 minute drive time trade area. The households and families living in the area work hard (many are dual income households), and are being rewarded through healthy pay increases at above the inflation rate.
- There is a high proportion of homeowners nearby.

Implications for Columbus Study Area

- Higher household incomes and high real household income growth (i.e., growth that excludes inflation) open up opportunities for higher quality retail goods and services. They will spend this on career building expenses as well as their homes and children.
- These households are very active and will be looking to the local neighbourhood retail and services to provide the "glue" for their in between activities.

Table 7: Education and Occupation

Socio-Economic Elements	10 Minute Walk Time	5 Minute Drive	10 Minute Drive	Oshawa	Oshawa C.M.A.	Toronto C.M.A.
Bachelor Degree or Higher	15%	33%	30%	18%	23%	40%
Labour Force Participation Rate	65%	73%	68%	60%	63%	64%
Management, Business, Admin	37%	27%	27%	22%	23%	28%
Science Related	13%	9%	8%	6%	7%	10%
Health Related	14%	5%	6%	6%	6%	5%
Education, Government	6%	19%	16%	12%	13%	12%
Arts, Culture, Recreation	6%	8%	4%	2%	3%	4%
Sales and Services	14%	17%	22%	27%	24%	23%
Other Blue Collar	21%	16%	15%	22%	20%	16%

Source: Statistics Canada 2016 and Environics 2018 Estimates

Salient Findings:

- Local area residents (15yr+) in the 5 and 10 minute drive time trade areas are well educated.
- The labour force participation rate is above other trade areas and Toronto CMA. There are a number of dual-income households, especially in the 5 minute drive time trade area. Some households may opt to live close to family members to support their daycare needs.
- Residents (15yr +) are employed in white and grey collar professions including management, business, and administration. There is a very high proportion who work in education or government-related occupations.

Implications for Columbus Study Area

- Most residents are working regular hours Monday to Friday with standard office work hours (i.e., 9 am to 5 pm approximately).
- There is a high proportion of dual income earners.
- Commute related shopping behaviours and patterns are extremely important to the success of retail in the Columbus Study Area.
- Retail location and design should respond to this working and commuting pattern.
- In addition, family life and work/life balance provide the remainder of retail opportunities for these busy households.

Table 8: Travel to Work

Socio-Economic Elements	10 Minute Walk Time	5 Minute Drive	10 Minute Drive	Oshawa	Oshawa C.M.A.	Toronto C.M.A.
Vehicle	86%	87%	85%	84%	85%	70%
Public Transit	8%	9%	10%	10%	10%	23%
Other	6%	4%	5%	6%	5%	7%

Source: Statistics Canada 2016 and Environics 2018 Estimates

Salient Findings:

- Residents in the 5 and 10-minute drive trade areas are heavily reliant on their vehicles for commuting to work.

Implications for Columbus Study Area

- Commuting patterns in and through the north Oshawa and north Whitby areas will influence retail opportunities.
- Ease of shopping with goods and services that local households want will be critical.

Table 9: Ethnicity

Socio-Economic Elements	10 Minute Walk Time	5 Minute Drive	10 Minute Drive	Oshawa	Oshawa C.M.A.	Toronto C.M.A.
Visible Minority	3%	20%	17%	14%	16%	52%
1st Generation	12%	19%	19%	17%	18%	50%
2nd Generation	21%	26%	23%	21%	22%	27%
3rd+ Generation	67%	55%	58%	63%	60%	23%
Non-Canadians	2%	4%	3%	3%	3%	12%

Source: Statistics Canada 2016 and Environics 2018 Estimates

Salient Findings:

- Overall, there are relatively lower proportionate numbers of visible minorities in the Oshawa region.
- Within the 5 and 10 minute drive time trade areas, there are slightly higher proportions of visible minorities, but compared to Toronto CMA it is relatively low.
- Similarly, most residents are third generation or higher.

Implications for Columbus Study Area

- Despite some pockets of higher ethnicity and generation status, at present, ethnicity or generational status do not play a major factor in the retail demand.

Table 10: Marital Status

Socio-Economic Elements	10 Minute Walk Time	5 Minute Drive	10 Minute Drive	Oshawa	Oshawa C.M.A.	Toronto C.M.A.
Married / Common Law	63%	69%	63%	53%	58%	56%
Single Never Married	28%	22%	25%	28%	27%	30%
Sep. Divorced, Widowed	10%	9%	12%	18%	15%	14%

Source: Statistics Canada 2016 and Environics 2018 Estimates

Salient Findings:

- There is a very high proportion of married or common-law couples in the 5 and 10 minute drive time trade areas.
- Correspondingly, the number of households with 3 or more persons is higher in the local trade areas compared to the City of Oshawa and Toronto CMA.

Implications for Columbus Study Area

- These families will be looking for retail to provide:
  - Convenient to get to retail goods and services
  - Higher quality goods and services to match their income and their income/career aspirations
  - Additional services to make their lives easier
  - Complementary goods and services clustered together
  - Retail and services that are fun and a distraction from their busy work and family lives

Table 11: Annual Household Expenditure

Socio-Economic Elements	10 Minute Walk Time	5 Minute Drive	10 Minute Drive	Oshawa	Oshawa C.M.A.	Toronto C.M.A.
Local Neighbourhood Goods						
Food From Grocery Stores	**$13,237**	**$11,807**	**$9,892**	**$7,485**	**$8,441**	$8,615
Health Care And Pharmacy	$4,548	$3,814	$3,286	$2,572	$2,902	$3,218
Alcohol Purchased From Stores	$2,203	$1,742	$1,577	**$1,322**	**$1,493**	$1,537
Retail Merchandise						
Women's Clothing And Accessories	$2,964	$2,545	$2,196	$1,558	$1,868	$2,301
Men's Clothing And Accessories	$1,738	$1,750	$1,450	$1,007	$1,193	$1,420
Children's Clothing And Accessories	$56	**$153**	**$108**	**$68**	**$76**	$80
Clothing As Gifts	$568	$409	$397	$357	$397	$463
Reading Materials	**$394**	**$382**	**$305**	$195	**$235**	$255
Pet Food	**$662**	**$405**	**$347**	**$276**	**$318**	$262
Home Furnishings	$2,805	**$2,542**	$2,011	$1,350	$1,637	$2,052
Appliances	**$1,758**	**$1,426**	$658	**$873**	**$1,059**	$1,005
Building Materials	**$771**	**$675**	**$650**	**$395**	**$483**	$399
Garden Nursery Items	**$471**	**$315**	**$281**	**$214**	**$256**	$227
Electronics	$1,662	**$1,782**	**$1,433**	**$978**	**$1,150**	$1,184
Sporting Goods / Bikes	$569	**$682**	**$518**	**$333**	**$410**	$426

Table 11: Annual Household Expenditure (Continued)

Socio-Economic Elements	10 Minute Walk Time	5 Minute Drive	10 Minute Drive	Oshawa	Oshawa C.M.A.	Toronto C.M.A.
Eating Establishments						
Dinner At Restaurants	$4,078	**$3,570**	$2,911	$2,157	$2,446	$2,868
Lunch At Restaurants	$2,140	$1,887	$1,511	$1,085	$1,248	$1,560
Breakfast At Restaurants	$507	$384	$325	$259	$279	$369
Snacks And Beverages	$720	**$784**	**$634**	**$478**	**$526**	$534
Alcohol Served On Premises	$1,307	**$1,316**	**$1,009**	**$731**	$807	$900
Services						
Clothing Services	$56	**$153**	**$193**	**$68**	**$76**	$80
Packaged Travel	**$1,543**	**$948**	**$810**	$522	**$708**	$725
Recreation Memberships	**$1,039**	**$791**	**$658**	$415	$534	$607
Personal Care	**$1,321**	$1,049	$893	$647	$767	$864
Movies	$140	**$176**	**$128**	$77	$88	$103
Sporting Events	$59	**$77**	$42	$23	$31	$55
Arts Events	**$203**	**$266**	**$177**	**$99**	**$131**	$125
Museums	$132	**$140**	**$113**	$76	$94	$108

Source: Statistics Canada 2016 and Environics 2018 Estimates

(Bolded commodities represent expenditures that receive a high index relative to the Toronto CMA expenditure and trade area household income)

Salient Findings:

- For all retail commodity categories listed, residents within 5 minute drive time generally spend higher amounts than the average Toronto CMA household.
- However, for certain categories, local area households spend disproportionately higher amounts compared to other households in Toronto CMA.

Implications for Columbus Study Area

- Households in the 5 and 10 minute drive time trade areas spend disproportionately higher amounts than others on:
  - Home – focus on the children and family life such as food from stores, children's clothing and accessories, pet supplies, home entertainment, reading, furniture and appliances, home improvement, nursery/plants items, and sporting goods.
  - Fun – eating out for dinner, movies, the arts, sporting events, museums. This also includes other activities such as libraries, community centre, recreation centres, as well as retail venues that may include dance studios, physical fitness centres, children's art schools, game rooms, and retail that weaves sports and activities into retail.
  - Food as a glue for work/life balance – snacks and beverages as treats and extending dwell times.

3.3 Socio-Economic Profile – Proxy Area (Brooklin, Whitby)

Given that there is limited existing population within the Study Area, the community of Brooklin was separated out of the trade areas as a potential proxy area for how the Study Area might evolve.

The following data is current as of 2018. It is based on the 2016 Census and adjusted by Environics.

Table 12: Population Overview

Socio-Economic Elements	Brooklin
Population 2018 Estimated	21,391
Annual Growth Rate 2011 to 2016	2.5%
Persons Per Household	3.27
Households 2018 Estimated	6,546
Daytime Worker Population	2,542

Source: Statistics Canada 2016 and Environics 2018 Estimates

Salient Findings:

- Brooklin has evolved into a compact community of over 21,000 residents. It continues to grow at an annualized rate of 2.5%.
- Household sizes are quite large.
- There is a small base of employment including retail workers and professional workers such as medical practitioners, lawyers, accountants.

Table 13: Age Profile

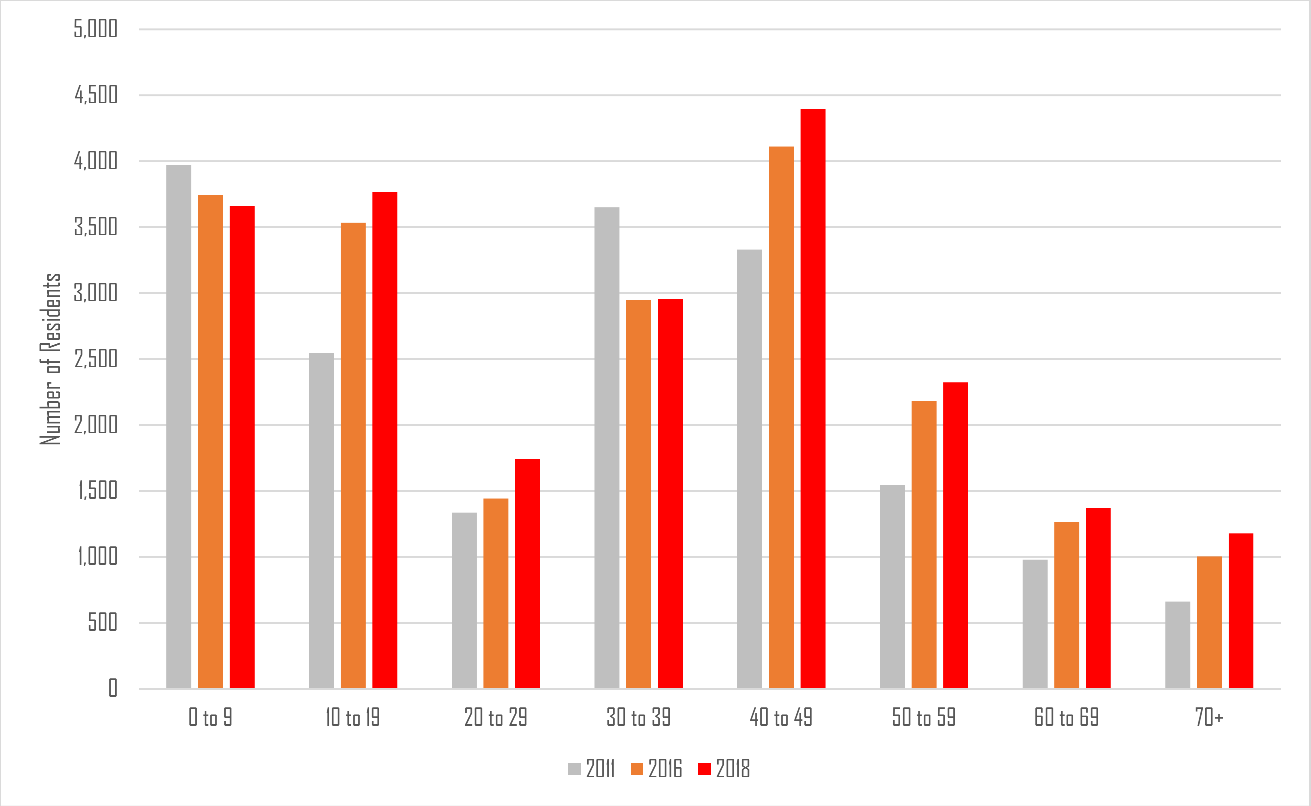
Socio-Economic Elements	Brooklin
0 to 9	17%
10 to 19	18%
20 to 29	8%
30 to 39	14%
40 to 49	21%
50 to 59	11%
60 to 69	6%
70+	6%
Median Age	36.2

Source: Statistics Canada 2016 and Environics 2018 Estimates

Salient Findings:

- As a proxy, Brooklin has a very young family profile. 35% of the population is under 20 years of age. However, there are proportionately more teenagers. Families that have moved into Brooklin are clearly opting to remain in the community as they grow rather than moving out of the community.

Chart 3: Proxy – Brooklin Change in Population – 2011 to 2018



Source: Statistics Canada 2016 and Environics 2018 Estimates

Salient Findings

- Young families dominate Brooklin.
- The number of very young children has maintained itself and the number of teenagers has increased as the households want to remain in their community.

Table 14: Household Income and Tenure

Socio-Economic Elements	Brooklin
Household Income	
Average Household Income	$146,986
HH Income $100,000 to $150,000	30%
HH Income $150,000 to $200,000	18%
HH Income $200,000+	13%
Annual Growth Real HH Inc. 2018 to 2023	0.5%
Housing Tenure	
Own/Rent	96% / 4%

Source: Statistics Canada 2016 and Environics 2018 Estimates

Table 15: Education and Occupation

Socio-Economic Elements	Brooklin
Education	
Bachelor Degree or Higher	37%
Labour Force Participation Rate	72%
Occupation	
Management, Business, Admin	31%
Science Related	9%
Health Related	5%
Education, Government	18%
Arts, Culture, Recreation	4%
Sales and Services	22%
Other Blue Collar	11%

Source: Statistics Canada 2016 and Environics 2018 Estimates

Salient Findings:

- Brooklin has a high average household income profile and a high labour force participation rate. There are a high proportion of dual income earners that are professionally employed.

Table 16: Travel to Work

Socio-Economic Elements	Brooklin
Vehicle	87%
Public Transit	9%
Other	4%

Source: Statistics Canada 2016 and Environics 2018 Estimates

Table 17: Ethnicity

Socio-Economic Elements	Brooklin
Visible Minority	13%
1st Generation	19%
2nd Generation	24%
3rd + Generation	58%
Non Canadians	3%

Source: Statistics Canada 2016 and Environics 2018 Estimates

Salient Findings:

- Brooklin residents (15Yr +) are reliant on their vehicles for commuting. This will affect retail opportunities.
- There is a relatively low proportion of visible minorities and the majority of residents are 3rd + generation Canadians.

Table 18: Annual Household Expenditure

Socio-Economic Elements	Brooklin	Toronto C.M.A.
Local Neighbourhood Goods		
Food From Grocery Stores	**$11,661**	$8,615
Health Care And Pharmacy	$3,809	$3,218
Alcohol Purchased From Stores	$1,836	$1,537
Retail Merchandise		
Women's Clothing And Accessories	$2,672	$2,301
Men's Clothing And Accessories	**$1,767**	$1,420
Children's Clothing And Accessories	**$131**	$80
Clothing As Gifts	$441	$463
Reading Materials	**$365**	$255
Pet Food	**$385**	$262
Home Furnishings	$2,428	$2,052
Appliances	**$1,427**	$1,005
Building Materials	**$671**	$399
Garden Nursery Items	**$332**	$227
Electronics	**$1,748**	$1,184
Sporting Goods / Bikes	**$670**	$426

Table 18: Annual Household Expenditure (Continued)

Socio-Economic Elements	Brooklin	Toronto C.M.A.
Eating Establishments		
Dinner At Restaurants	$3,494	$2,868
Lunch At Restaurants	$1,838	$1,560
Breakfast At Restaurants	$369	$369
Snacks And Beverages	**$762**	$534
Alcohol Served On Premises	**$1,210**	$900
Services		
Clothing Services	**$134**	$80
Packaged Travel	**$1,020**	$725
Recreation Memberships	**$844**	$607
Personal Care	**$1,085**	$864
Movies	**$165**	$103
Sporting Events	$59	$55
Arts Events	**$239**	$125
Museums	**$138**	$108

Source: Statistics Canada 2016 and Environics 2018 Estimates

(Bolded commodities represent expenditures that receive a high index relative to the Toronto CMA expenditure and trade area household income)

Salient Findings:

- Households in the proxy area, Brooklin spend similarly as the 5 minute drive time trade area for items related to home, having fun, and food. The exception is that they spend more on career wardrobes including men's clothing and accessories and personal care services.

4.0 Columbus Oshawa Retail Demand Analysis

To be completed in 2019 based on agreed upon build-out scenarios of residential and employment areas.

Appendix: Trends

Item	Trend Topic	Description – Major Finding	Implication For Retail Development
1.0	• Traditional metrics to evaluate retailer and shopping centre/main street success are succumbing to pressures to evolve and match the new realities. • Retail productivity can't be measured by sales only, have to look at gross margins and profitability.	• While sales have been increasing across many retail categories, retailers are still struggling. • By analyzing sales, gross margins, and profitability stats across retail categories for Toronto, ON, or Canada it illustrates the need for increased space efficiencies.	• Retailers will be looking to maximize space better – resulting in smaller stores. • Retailers will want to consolidate on highly accessible and visible locations, especially on main streets.
2.0	• Retail distribution is becoming increasingly important • Concepts such as the "last mile" in the retail distribution system is key.	• Increasing importance of the last mile for product delivery to consumers (e.g., consumer pick up for their omni-channel purchases, store locations functioning as delivery portals). • Centrally located retailers and those near main streets will be more valuable.	• Retailers will be looking for locations that offer easy access for people and quick vehicle pick-ups, including loading areas that can get in and out of easily. • Store layouts will become showroom and fulfillment centres.

Appendix: Trends (Continued)

Item	Trend Topic	Description – Major Finding	Implication For Retail Development
3.0	• Growth and decline of formats.	• Enclosed malls, power centres, grocery-anchored, neighbourhood, strips, main streets are experiencing different growth and declines.	• Declining importance or declining investment in B and C malls and power centres (i.e., shopping centre rankings are based on a number of factors including store and mall design, guest experience, and product/service assortment as well as vacancy) • Number of projects in Toronto CMA related to shopping area redevelopment as these places need to re-invent themselves to stay relevant. • Main streets are showing better signs of resiliency.
4.0	• How to integrate technology into retail built form.	• Increased use of technology – sensors, online, and big data – to create more pedestrian-friendly and retailer-friendly environments.	• Main streets need to integrate technology into shopping and everyday life.
5.0	• Shopping as a destination is no longer the norm. • People are looking for a seamlessly integrated journey where all aspects of their lives have meshed together.	• Retail is no longer about securing anchors and developing an infill mix – but is more about developing an open and flexible use of the developed space.	• Traditional retail mix and development plans may no longer be relevant. • The main streets need to integrate a variety of uses and activities throughout to create these seamless, integrated experiences desired by the visitors.

Appendix: Trends (Continued)

Item	Trend Topic	Description – Major Finding	Implication For Retail Development
6.0	• Main Street Competitiveness.	• To compete, main streets need to compete on one of three visions – convenience (complete streets anchored by high density residential, grocers, within walkable distances); engagement and community building attributes (e.g., restaurants and patios for people gathering, urban plazas); and experience (ephemeral in nature including pop-ups, programmed events, food trucks, etc.)	• The first line of action is to develop enough density to support local convenience based shopping. • Then to add in aspects of community building. • Finally, experiences are added in to round out the neighbourhood.
7.0	Demographics is destiny.	• Retail demand is keeping in line with demographics.	• Millennials are moving from young singles to young families – this has implications in terms of less demand for cool and hip restaurants and more demand more children's wear and career wardrobes • Implication for form and design is flexible space, family friendly spaces, etc.