



KESWICK SECONDARY PLAN

Commercial & Employment Land Analysis

Town of Georgina, Ontario

Prepared for The Planning Partnership

December 20, 2019



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

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December 20, 2019

Mr. Ron Palmer, MCIP, RPP
Principal, The Planning Partnership
1255 Bay Street
Toronto, Ontario

Dear Mr. Palmer,

RE: Keswick Secondary Plan – Commercial & Employment Land Analysis (Town of Georgina, Ontario)

urbanMetrics inc. is pleased to submit our commercial and employment land assessment, completed as a component of the Keswick Secondary Plan Review. The purpose of this study is to determine how the commercial land supply in the Keswick Secondary Plan Area should be best planned and managed to accommodate the future needs of the community and its trade area.

The findings and recommendations of this report are intended to provide background technical information used as input to the Keswick Secondary Plan. The primary objectives of this study are to determine:

- The amount and type of commercial space required to serve local residents to 2041;
- The most appropriate location(s) for new commercial space;
- The impacts of the Keswick Business Park on the need for commercial space in Keswick; and
- The policies or policy modifications that are required to ensure that commercial space best serves the needs of the Keswick community.

We appreciate the opportunity to conduct this assignment on your behalf and we look forward to discussing our findings and recommendations with you.

Yours truly,

A handwritten signature in blue ink that reads "Rowan Faludi". The signature is fluid and cursive, written in a professional style.

Rowan Faludi
Partner
rfaludi@urbanMetrics.ca

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1.0 Introduction

1.1 Background

The Planning Partnership, BA Group, Plan B Natural Heritage, and urbanMetrics inc. (“urbanMetrics”) have been retained by the Town of Georgina to undertake a review of the Keswick Secondary Plan (herein referred to as “KSP”). urbanMetrics role in this assignment involves a review of the commercial components of the Secondary Plan. The key questions to be addressed by this study are:

- How much commercial space and land is required to support the projected population of the Secondary Plan to 2041?
- What retail formats and types of commercial space will be required to serve the future Secondary Plan population?
- Where should future commercial space be located?
- What are the impacts of the development of the Keswick Business Park (“KBP”) on the need for commercial space in Keswick?
- What policies or policy modifications are required to ensure that commercial space best serves the needs of the Keswick community?

The following report details our approach and methodology, along with the findings and recommendations of our commercial market assessment for the Keswick Secondary Plan Review (KSPR).

1.2 Approach

The following outlines the various work steps that we have carried out in the completion of this Commercial and Employment Land Analysis.

- **Site and Access Evaluation**

This included a general review of the locational and transportation characteristics of the Keswick Secondary Plan Area (“Study Area”), including an assessment of the compatibility with surrounding land uses and the accessibility of potential commercial sites.

- **Review of Policy Framework**

We have reviewed the existing policy framework in the Town of Georgina, focusing on the Official Plan policies, including the KSP and the Keswick Business Park Secondary Plan (“KBSP”). The review has been used to identify the range of commercial designations, and the recommended areas where commercial development is encouraged.

- **Trade Area Delineation**

A Trade Area has been defined for the KSP based on a number of factors: accessibility, existing and future competition in the area, as well as the anticipated ability for retailers to attract customers outside of the immediate Study Area.

A Trade Area represents the geographic area from which the majority (70% to 80%) of regular customer support would be derived. The remainder of customer support would come from employees working in the area, pass-by-traffic, and other non-residents. The Trade Area delineated by urbanMetrics has formed the basis of our commercial market analysis.

- **Market Dimensions of the Trade Area**

The population in the Trade Area has been determined for selected years of the study period to 2041. Historic population levels are based on Statistics Canada, from the 2006, 2011, and 2016 Census. Future population levels are based on the most current official projections prepared for the Town of Georgina Development Charges Background Study, the Region of York Preferred Population Projections prepared in 2016, and have been confirmed by the Town of Georgina Planning staff. The future population in Keswick has been determined using the assumption that two-thirds of future growth in Georgina to 2041 will be attracted to Keswick. This is consistent with the assumptions used in the Keswick Development Charges Background Study.

- **Commercial Inventory**

In order to evaluate the existing competition in the KSP Area, an inventory of retail and service commercial space has been completed. The inventory included all food store retail (FSR), non-food store retail (NFSR), commercial services, and vacant space.

In addition to our inventory of existing commercial space, we conducted a review of planned and proposed commercial developments in the KSP Area, which have been identified as future competition.

- **Commercial Market Opportunity Analysis**

A per capita analysis approach has been used to determine the amount of commercial space warranted as part of the Keswick Secondary Plan Review. Our analysis has examined the need for a range of retail and services space. Through this analysis, we have estimated the expected commercial space requirements of the local residents as the Trade Area builds out, as well as local capture rates, the extent to which existing space is supported by Trade Area residents, and inflow opportunities. The results of this analysis have been compared to the amount of existing, planned, and proposed commercial space in the Trade Area. Based on this analysis, we have determined if sufficient commercial designated lands have been allocated to the KSP Area to meet demands of local residents, or if the planned commercial space in the KSP Area will result in an oversupply or undersupply.

- **Employment Area Analysis**

The Keswick Business Park (KBP), although undeveloped, is now serviced and capable of being developed going forward. We have reviewed the KBPSP and employment projections for the Town of Georgina to understand how the development of this area will influence the need for future commercial uses in the rest of Keswick. We will consider both commercial uses – i.e. office uses and ancillary retail uses – that can be developed within the KBP, as well as, uses not permitted in the business park that may be supported by KBP businesses and their employees.

1.3 Assumptions

There are a number of underlying and basic assumptions upon which the validity of the findings presented in this report depend. Based on our considerable and long-term experience in the retail planning process, we recognize and appreciate the problems associated with making broad and generalized assumptions about future conditions. Deviations from historical and current trends will certainly take place in the future, however, basic assumptions are required regarding the possible extent of such deviations.

These basic assumptions include:

- During the forecast period discussed in this report, a reasonable degree of economic stability will prevail in the Province of Ontario, the Town of Georgina, and specifically in Keswick;
- Estimates of future population growth in the Trade Area are assumed to be sufficiently accurate and are based on our review of Statistics Canada data, as well our review of relevant publications produced for the Town of Georgina and Keswick;
- The official statistical sources utilized in this report (based largely on Statistics Canada publications) are considered sufficiently accurate for the purposes of this analysis;
- The year 2019 has been assumed as the base year in our analysis;
- References to the Canadian dollar in this report, dealing with present and future periods, reflect its 2019 value. We recognize that fluctuation in the absolute value and purchasing power of the dollar will likely occur during the period covered by this report. We assume, however, that the relationship between per capita income and expenditure levels and the value of the dollar will remain more or less constant during the period analyzed. Since this report deals with future space additions, inflation has been eliminated since it has no

influence on the physical space used in retail facilities. However, real growth (excluding inflation) in expenditures has been acknowledged in the analysis.

If, for any reason, major changes occur which could influence the basic assumptions stated above, the recommendations contained in this report should be reviewed in light of such changed conditions and revised, if necessary.

2.0 Keswick Study Area

Key Findings

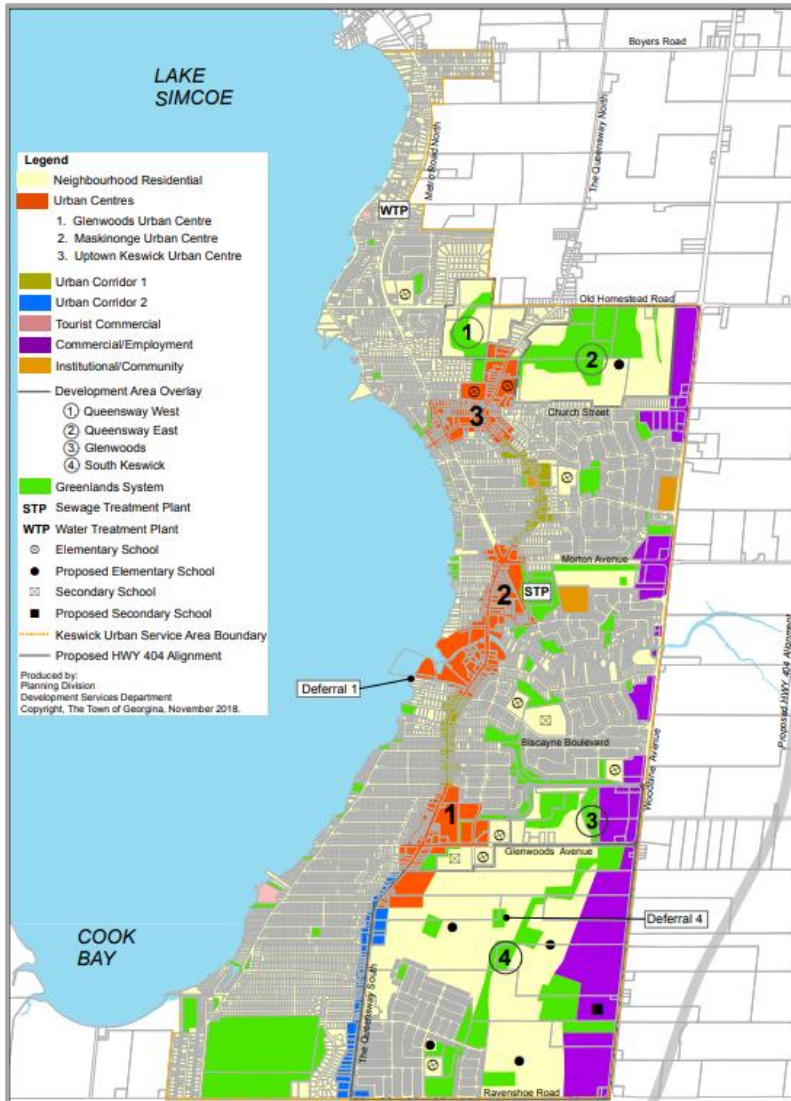
- The Study Area is the Keswick Secondary Plan Area (“Keswick”). Keswick is the largest urban community in the Town of Georgina and is anticipated to attract approximately two-thirds of the population growth for the Town as a whole over the next 20 years.
 - Keswick has seen a significant boost to its regional accessibility with the expansion of Highway 404 to Ravenshoe Road. The planned Highway 404 extension to Highway 12 and the planned Bradford By-Pass would further enhance the accessibility of the community. With continued housing price escalation in the GTA, Keswick is well positioned to accommodate future housing and business growth.
 - Owing to restrictive commercial land use permissions in the KBP, there would be minimal competitive overlap with the commercial uses that could be accommodated within the business park and those that would be required to serve the broader Keswick Community. This overlap would be limited to office uses that might otherwise locate in retail centres (e.g. real estate, financial, insurance and similar local serving offices) and ancillary retail and services that could be part of business park office buildings.
-

2.1 Location Characteristics

The Keswick Secondary Planning Area, herein referred to as the “Study Area”, is located on the western edge of the Town of Georgina. The Study Area is approximately 16.25 square kilometres and is bordered by Woodbine Avenue to the east, Ravenshoe Road to the south, Cook’s Bay shoreline to the west, and a combination of Boyers Road and Old Homestead Road to the north. The land use structure and boundary of the Study Area is detailed in Figure 2-1.

Keswick is the largest urban community in the Town of Georgina. The established area has a wide range of residential, commercial, institutional, and recreational offerings; and has continued to evolve into a well-balanced community for residents.

Figure 2-1: Keswick Land Use Plan (Schedule F-1), Keswick Secondary Plan



Source: Town of Georgina

Access to Transportation and Mobility Network

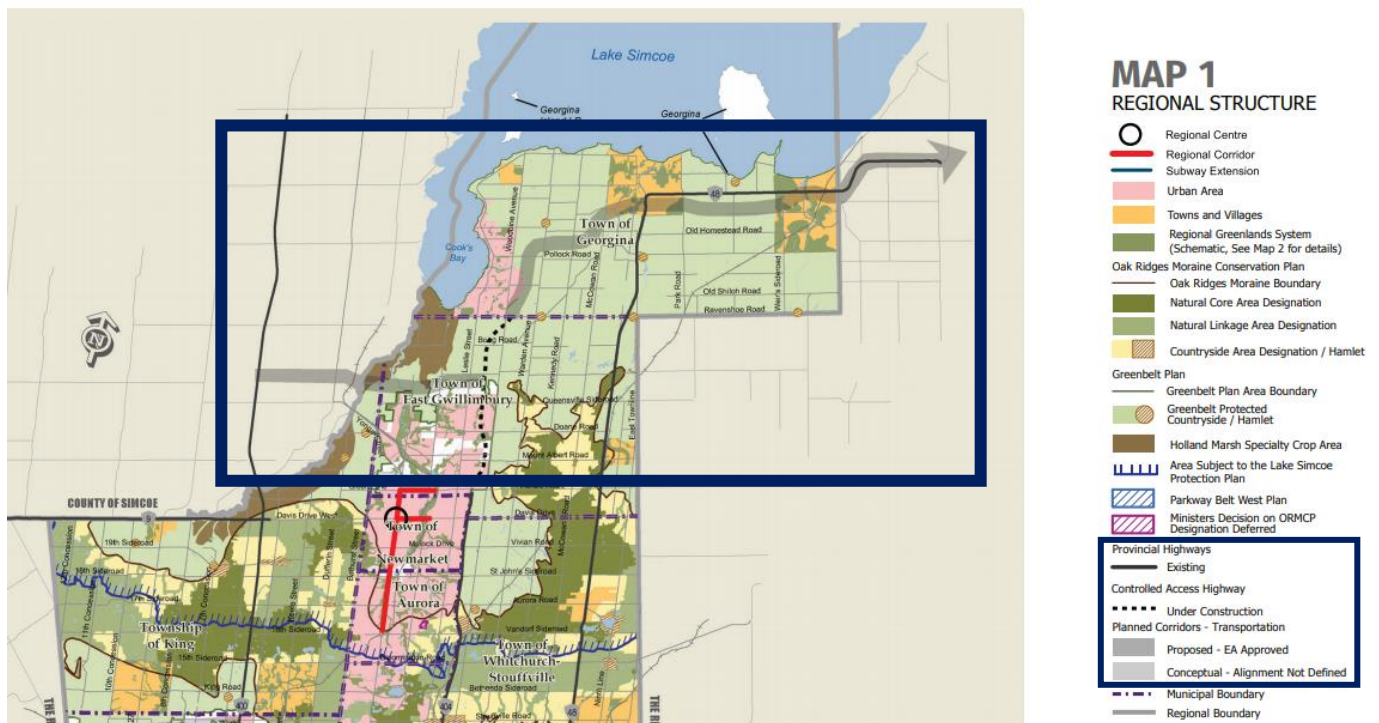
The community of Keswick is still heavily oriented to automobile travel. While York Region Transit does operate two bus routes through the community, for the most part distances between residential areas and other destinations are significant and densities are too low to support extensive active transportation. The 2016 Transportation for Tomorrow Survey indicated that on a daily basis, between 85% and 90% of trips by Keswick residents were as a driver or passenger in a private vehicle.

In late 2014, the Highway 404 extension from Green Lane to Ravenshoe Road was completed. This infrastructure investment created a direct highway connection between Keswick and major municipalities to the south, including Newmarket, Markham, Richmond Hill, and Toronto. There are long-term proposals that call for Highway 404 to be further extended to Highway 12, near the community of Beaverton.

The 404 extension to Ravenshoe Road will help to accelerate both residential and non-residential growth in Keswick, although it may also make competing commercial facilities in Newmarket more accessible to local residents. The extension northeast towards Beaverton would enhance the accessibility of Keswick commercial facilities to the communities to the east which have more limited commercial opportunities.

Additionally, Keswick would benefit from the Bradford By-Pass, which has been recently ‘green-lighted’ by the provincial government. This route would serve as a connector between Highway 400 and Highway 404 near the southern edge of Georgina. As with the Highway 404 extension, the Bradford By-pass will enhance the accessibility and attractiveness of Keswick as a place to live and locate a business. Figure 2-2 illustrates the location of both proposed highway extensions.

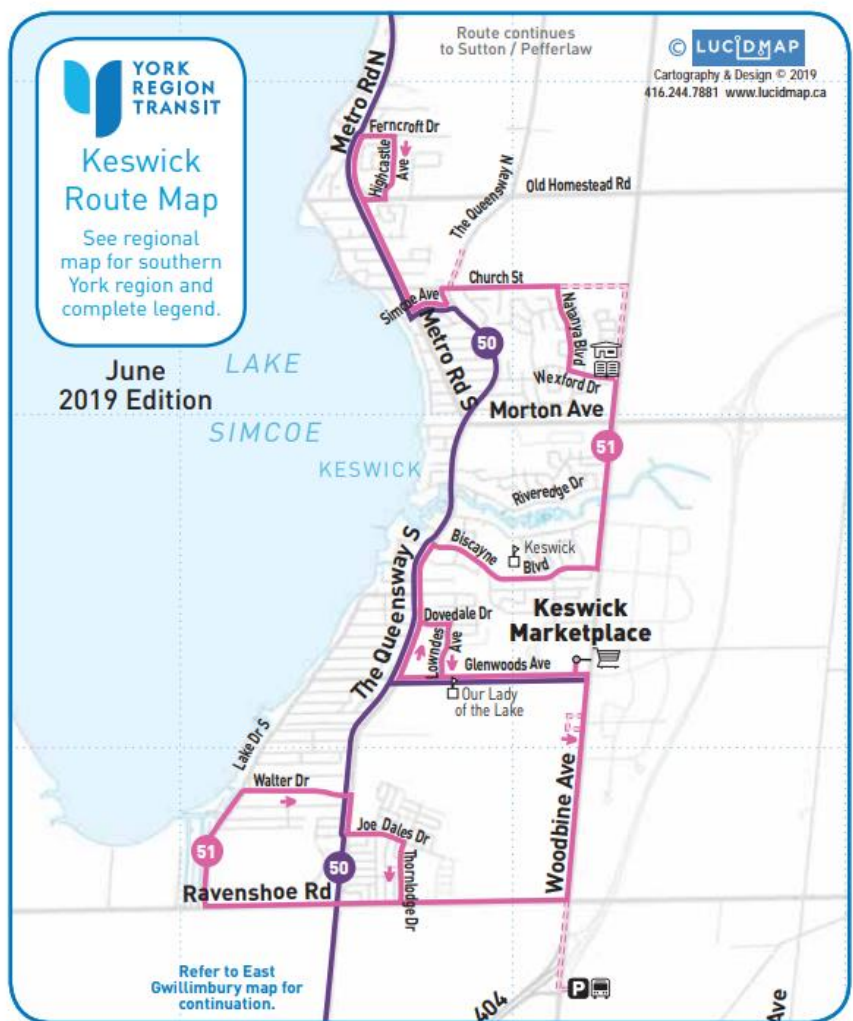
Figure 2-2: Provincial Highway Extensions (Proposed)



Source: York Region

The local public transportation for the Keswick population is provided by York Region Transit. As shown in Figure 2-3, there are two primary routes – Route 50 and Route 51 – that serve local residents and employees. Route 50 serves The Queensway and Metro Road North corridor, while Route 51 has a more complex route that connects Ravenshoe Road and Woodbine Avenue to most of the commercial and residential nodes in Keswick. In 2015, average daily ridership for the routes along The Queensway and Woodbine Avenue was estimated at 1000-5000 people per day. According to the 2016 Transportation for Tomorrow survey, only between 2% to 3% of daily trips by Keswick residents involve local transit.

Figure 2-3: York Region Transit Routes, Serving Keswick



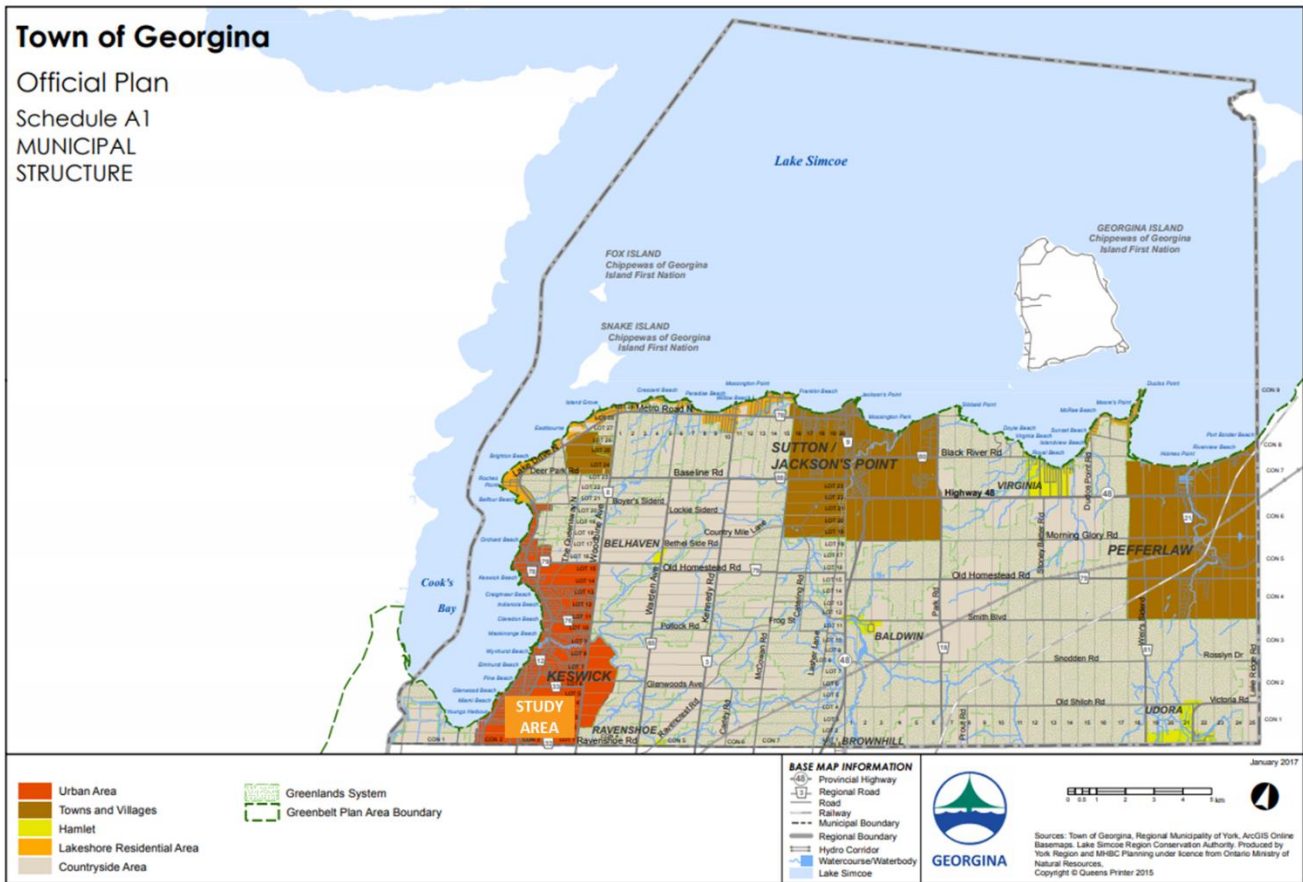
Source: York Region Transit

The Study Area is additionally served by a GO Transit bus route (Route 67) that has a terminus station where Highway 404 meets with Woodbine Avenue just south of Ravenshoe Road. The route is primarily a commuter route for Keswick residents, as it only departs from Keswick in the morning, and returns in the evening. The route terminates at Finch Station Bus Terminal; however, it contains stops along Highway 404 in Newmarket, Aurora, Markham, and the Sheppard Subway Station. In addition, the closest GO Train station is approximately 20 kilometres to the south in East Gwillimbury. According to the 2016 Transportation for Tomorrow Survey, GO Transit serves only a very small portion of commuting trips by Keswick residents.

2.2 Surrounding Communities

As illustrated in Figure 2-4, the Study Area is situated on the western edge of the Town of Georgina. Georgina is a traditionally rural community comprising a variety of small settlement areas, recreation uses along the lakeside and protected environmental and agricultural areas. Keswick is the largest and fastest growing settlement area in the Town, although Sutton/Jackson's Point to the northeast is also experiencing some development pressure.

Figure 2-4: Town of Georgina Municipal Structure Map (Schedule A1), Official Plan



Source: Town of Georgina

- To the West** – situated immediately west of the Keswick is Cook’s Bay, the southernmost bay of Lake Simcoe. Keswick is the largest community on the shores of Cook’s Bay, and has multiple marinas and related facilities located along the shoreline. The largest marina in Keswick is Krate’s Marina. The bay is popular in winter and summer for a variety of outdoor recreation opportunities, including fishing, ice-fishing, swimming, and windsurfing. Unfortunately, virtually all of the shoreline in Keswick is under private ownership – mostly by permanent and seasonal residents, which limits the opportunity for additional lake-based tourism commercial opportunities.
- To the North** – the area situated directly north of the Study Area is designated as and occupied by a variety of low intensity land uses; including Serviced Lakeshore Residential Area along Lake Drive North, Orchard Beach Golf Course on Commercial Recreation land, and a combination of Environmental and Agricultural Protection Areas (The Greenbelt). The protected areas were defined as part of the Greenbelt Act in 2005. The Greenbelt was

established to protect green space, farmland, communities, forests, wetlands, and watersheds in Ontario's Greater Golden Horseshoe. Permanent and seasonal residents to the north of Keswick would be dependent on Keswick for a large share of their commercial needs.

- **To the East** – the lands to the east of the Study Area (Woodbine Avenue) are primarily protected by the Greenbelt as Environmental and Agricultural Protection Areas. Additionally, the area features a variety of watercourses that lead to Cooks Bay. There are a few exceptions along Woodbine Avenue whereby parcels of land are designated as Rural Industrial or Rural Commercial Areas. Despite being currently undeveloped, the lands east of Woodbine Avenue generally between the Maskinonge River and Ravenshoe Road are reserved for the KBP. The KBP is estimated to be 113.87 hectares in total, with 89.40 hectares of industrial designated lands. Further east, there are a variety of communities which accommodate permanent residents, seasonal residents and tourism uses. Lands on the south shore of Lake Simcoe contain a number of public beaches, as well as accommodations and recreation properties, which attract visitors from across the Region. Keswick represents the largest commercial focal point for the Georgina communities to the east.
- **To the South** – the lands to the south of the Study Area are located in the Municipality of East Gwillimbury and are primarily protected by the Greenbelt, with a few site-specific exemptions. Further south in south East Gwillimbury and northern Newmarket are a number of major commercial uses that would attract spending from Keswick residents. These would include large format retail uses in the vicinity of Green Lane and Yonge Street, Upper Canada Mall and additional retail uses along Yonge Street and Davis Drive in Newmarket.

3.0 Land Use Policy Context

Key Findings

- There are five land use designations that can accommodate future commercial development within the Study Area.
 - **Commercial/Employment Area on the west side of Woodbine Avenue** – These lands comprise some 316 acres (127 hectares), of which 207 acres (83 hectares) are vacant and are intended for large scale retailing that relies on arterial road access and a range of prestige industrial uses. This designation permits a very broad range of commercial and prestige industrial uses.
 - **Urban Centres** – Three Urban Centres are designated to encourage mixed-use development at strategic locations. Commercial uses in these areas generally support local shopping. Available site sizes would generally limit the size of uses that could be accommodated within the Urban Centres.
 - **Urban Corridors** – Two Urban Corridors are designated along the Queensway to connect the Urban Centres. Commercial uses are permitted, however, there is limited land availability to accommodate future commercial space in the corridors.
 - **Neighbourhood Centres** – Neighbourhood Centres can be designated in residential areas to provide for a 5 to 10 minute walk of convenience retail and services. These are intended to be small sites. There are no vacant Neighbourhood Centre sites at present.
 - **Tourist Commercial** – This designation exists to recognize individual tourist commercial properties outside of established commercial areas. There is only one very small site of vacant land with this designation in Keswick
-

In order to help determine the most appropriate land uses designations, formats and functions for commercial space in the KSP, we have reviewed and provided an overview of existing commercial policies. In the following subsections we have summarized the KSP’s commercial policies relating to Urban Centres and Urban Corridors, as well as other areas within the municipal structure that permit commercial uses.

3.1 Commercial/Employment

To support the growing population and employment base within the Study Area, the Town of Georgina has designated a large portion of the west side of Woodbine Avenue as a “Commercial/Employment” area. The corridor is generally located between Old Homestead Road and

Ravenshoe Road, and comprises the most accessible lands in the community, including: frontage on Woodbine Avenue, proximity to Highway 404, and well positioned to serve existing residential areas and the future KBP.

There is a total of 315 acres (127 hectares) of designated Commercial/Employment land in Keswick, and the entirety of it is located along Woodbine Avenue. Of this, some 207 acres (83 hectares) are vacant. About 60% is south of Glenwoods Avenue and is distributed over 3 large properties.

Within the Commercial/Employment designation, the following uses are permitted: retail and service commercial uses; business and professional offices; institutional and community uses; industrial mall complexes and prestige industrial uses including any manufacturing or industrial use which is contained within a wholly enclosed structure and which is not an obnoxious use, with accessory office and associated retail; public and private recreation/community complexes including movie theatres, bowling alleys, athletic clubs and athletic facilities; building supply outlets; hotels and motels; and, auto service stations and automobile dealerships, only in a campus setting.

The Commercial/Employment designation encourages medium-density development, whereby maximum building heights shall be generally four storeys, and mixed-use office and commercial buildings can be up to six storeys. Further, to encourage residents and employees to commute and travel by sustainable modes of transportation, the Commercial/Employment designation requires all new development to provide convenient access and integration with active transportation infrastructure.

The Commercial/Employment Area is the location of a number of major commercial uses, which serve a broad area, including: Walmart Supercentre, Canadian Tire, Zehrs Markets, and Staples, as well as, a variety of other retail uses. It also contains the largest vacant commercial land supply in the community and would be well positioned to attract the largest share of future commercial space required to serve new growth in Keswick.

3.2 Urban Centres

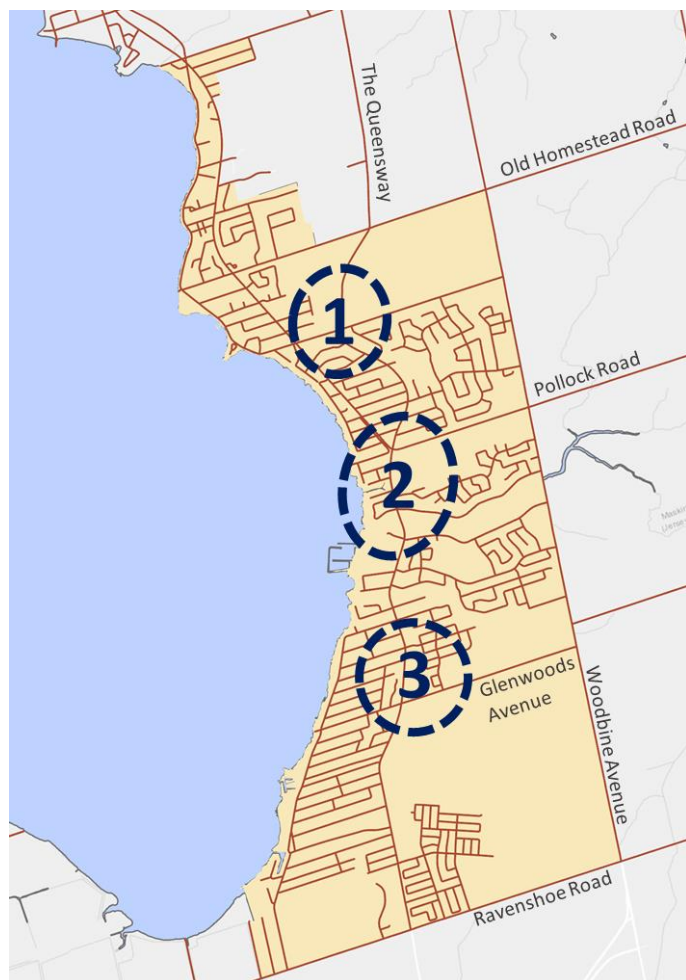
To promote the appropriate development and distribution of commercial space across Keswick, the KSP designates three Urban Centres located along The Queensway. Urban Centres are considered key components of the community's structure, and are intended to provide opportunities to create a distinct character for Keswick.

Urban Centres are intended to be developed as mixed-use districts with a variety of uses, retail formats, and densities. The vision of growth for the three Centres include high density and taller buildings that are located close to arterial roads for pedestrian access, high quality urban design features, and retail/service commercial uses located on the ground floor of mixed-use projects. Single-use buildings and parking in front of buildings are not encouraged. In total, there are 282 acres

(114 hectares) of land that permit commercial uses in the Urban Centres. Of this total, some 26 acres (10 hectares) are vacant.

As shown in Figure 3-1, the three Urban Centres include Uptown Keswick, Maskinonge, and Glenwoods. All are located on The Queensway, a primary arterial route through Keswick for residents. As stated in the Town of Georgina’s Transportation Master Plan and the 2015 Annual Daily Traffic Report, The Queensway is identified as a regional road that an estimated 10,000 to 25,000 persons use per day.

For the most part, the Urban Centres function to provide commercial uses and services to their surrounding neighbourhoods. This is in contrast to the Commercial/Employment designated lands west side of Woodbine Avenue which contain a number of larger scale retail uses that serve a Town-wide or more regional serving function. The Urban Centres are also well positioned to support intensification within the centres themselves or along the nearby Urban Corridors.

Figure 3-1: Urban Centres in Keswick Secondary Plan

Source: urbanMetrics inc.

1. Uptown Keswick Urban Centre

Commercial properties in this urban centre are primarily strip retail or along moderately walkable main streets. The node has predominantly service-related tenants. Total retail space amounts to some 122,300 square feet, around 12% of Keswick's total retail supply.

2. Maskinonge Urban Centre

Commercial development in this node is meant to integrate small-scale retail with the Lake Simcoe shoreline, into a tourism-commercial, recreation, and mixed-use area. Currently the urban centre has predominantly service-related tenants and 10% of Keswick's retail space, amounting to some 105,000 square feet.

3. Glenwoods Urban Centre

This area accounts for 20% of total retail space (211,100 square feet), and is intended to function as a retail node that supports residents in South Keswick. Major retail centres include Glenwoods Centre, and the Queensway Medical Centre. This node has the most vacant space out of all three urban centres.

There is some 26 acres (10 hectares) of vacant commercial land in these urban centres. Approximately 20 acres (8 hectares) of which is contained in a single site at the south end of the Glenwoods Urban Centre. This land or a portion of it could support local serving uses to support future population growth in south Keswick. The majority of the remaining vacant land in the Urban Centres is comprised of several smaller parcels within the Maskinonge Urban Centre. These parcels are generally small and some have constraints that may make commercial development difficult. One is currently used for marina boat storage. These parcels would likely be suitable for some commercial space as part of future infill development.

There is only one very small vacant site in the Uptown Keswick Urban Centre, situated between two residential dwellings, one of which is being used for a commercial office.

3.3 Urban Corridors

The KSP recommends that transit supportive and higher density forms of development will be concentrated along “Urban Corridors” – the interstitial areas that connect the three Urban Centres along The Queensway. Urban Corridor 1, which connect the three Urban Centres is largely built out by low density residential uses. Commercial uses are limited only to where current zoning permits them, which amounts to 30 acres (12 hectares) in total, of which 5 acres (2 hectares) are vacant. This is mainly concentrated in a single site across The Queensway from the Stephen Leacock Theatre. This site would be difficult to develop entirely as commercial, as it has only a small frontage on the Queensway and the lands in the back are surrounded by low density residential uses and a public school.

The Urban Corridor 2 designation, which extends south along the Queensway between the Glenwoods Urban Centre and Ravenshoe Road, permits retail and service commercial uses, as well as business and professional offices and sits adjacent to large tracts of future development land. Urban Corridor 2 contains 42 acres (17 hectares) of commercial land, which is comprised of a range of sporadically spaced uses, including commercial plazas, individual commercial uses, a service centre and other automotive uses. There is one vacant site of approximately 1 acre (0.4 hectare).

3.4 Neighbourhood Centres

Neighbourhoods are predominantly low-density residential areas built around common focal points called “Neighbourhood Centres”. Neighbourhoods Centres are intended to be positioned within a 5 to 10 minute walking distance for the residents which it serves. Convenience stores and personal services are permitted to provide a day-to-day service that encourages residents to walk or cycle for basic goods. Neighbourhood Centres would function at the lowest end of the retail hierarchy providing for very localized convenience-oriented shopping. There are currently no available sites for additional Neighbourhood Centres, although these could be designated as part of a residential subdivision plans.

3.5 Tourist Commercial

The Town of Georgina has designated a collection of parcels along the shoreline of Cook’s Bay as Tourist Commercial. Under this designation, the following commercial uses are permitted: hotels, motels, marinas, souvenir stores, boat sales and rentals, bait and tackle stores, marine equipment sales, and other similar tourist oriented commercial uses. The designation also allows for medium density residential development if it is part of a comprehensive tourist commercial development.

The total 8.76 acres of designated Tourist Commercial land is used to recognize individual existing tourist related properties, such as marinas, a motel, and a waterfront pub/restaurant, outside of other commercially designated lands. This land use designation is not a land use category containing vacant land capable of supporting new development. Currently, there is only one small (0.17 acre or 0.06 hectare) tourist commercial site that is vacant.

In addition to commercial and employment uses, the west side of Woodbine Avenue is the home of the Georgina Ice Palace/Georgina Library towards the northern part of Keswick and will be home to the new Multi-Use Recreation Centre towards the south end between Glenwoods Avenue and Ravenshoe Road. These two important recreational complexes will also draw persons to the area and assist in anchoring the retail cluster along Woodbine Avenue.

4.0 Trade Area

Key Findings

- The Trade Area served by the commercial facilities within the Keswick Secondary Plan Area (Study Area) has been defined as the Town of Georgina.
 - To the north and west, driving distances to Keswick are impeded by Lake Simcoe. To the south, the significant commercial competition in Newmarket and the Green Lane Area of East Gwillimbury would limit shopping by persons from south of the Town. To the east, beyond the Town boundary, the Town of Uxbridge would be a more convenient shopping destination.
 - In addition to persons living in the Town of Georgina, additional expenditure potential would be available from inflow, including: tourists, seasonal residents, non-residents working in Georgina; and transient traffic.
-

4.1 Trade Area Delineation

The total market influence attributed to a commercial concentration typically extends over a wide area beyond any precise boundary that can be drawn. In many cases, the shopping environment, competition, anchor tenants, and the range of goods and services offered in a commercial development will affect the extent of this market influence. However, for the purpose of making reliable estimates of available market support, a specific Trade Area has been defined. The Trade Area represents the geographic area from which proposed commercial facilities in the Study Area are likely to generate the majority of their customer support.

The delineation of the Trade Area was based on a number of factors, including:

- The existing market influence of competitive retail/service commercial facilities located near Keswick and elsewhere in the Town of Georgina;
- Distance and travel times to the area from various locations in the municipality;
- Local and regional access characteristics of the area; and,
- The location of natural and man-made barriers which could restrict the movement of customers to and from the area.

Commercial facilities in Keswick face their most direct competition from the retail uses on Green Lane, Yonge Street and Davis Drive in Newmarket and East Gwillimbury. The extent of retail facilities in this area is far beyond what would be required to serve the local population and indicate that these facilities also serve a regional base. As a result, the southern boundary of the Keswick Trade Area would be severely constrained by this commercial concentration. Travel towards the west is difficult owing to the lack of connecting points over Cooks Bay and the Holland Marsh. To the north and east,

there is limited commercial competition until Highway 12 whereby the commercial draw of Uxbridge, Orillia and southern Durham Region becomes more influential.

Based on the factors considered above, it is our professional opinion that the municipal boundaries of the Georgina form the appropriate Trade Area for retail/service commercial facilities in the Study Area. As illustrated in Figure 4-1, the Trade Area encompasses the built-up area of Keswick, and extends to include the communities of Sutton, Jackson’s Point, Pefferlaw, Udora, as well as the surrounding rural areas and villages along Lake Simcoe.

Although commercial facilities located in Keswick are expected to derive a significant portion of its sales volume from the expenditures made by the Trade Area residents, it is important to note that additional market support will ultimately result from expenditures made by non-Trade Area residents as well (e.g., local employees, seasonal residents, tourists, and other visitors). These expenditures represent “inflow” sales, which will be appropriately recognized in our detailed retail market analysis that follows as part of our comprehensive market demand study.

Figure 4-1: Trade Area



Source: urbanMetrics inc.

5.0 Market Characteristics

Key Findings

- The base year (2019) population of the Town of Georgina and Keswick has been estimated at 48,415 and 28,604 respectively. Between 2019 to 2041, Keswick will account for 66% of total growth within the Town; amounting to over 15,000 new residents within this period.
 - The Town’s seasonal population is estimated at 4,649 persons in 2019, approximately 10% of the total population. We have assumed that this modest seasonal population will not have a significant impact on inflow for retail and non-retail facilities.
 - The average per capita income in the Town of Georgina is nearly 25% below the Provincial average. The average Keswick income is slightly above that for the Town as a whole, but still over 20% below the Provincial average.
 - The Construction and Retail Trade industries employ the largest number of Georgina residents, with Manufacturing and Health Care/Social Assistance following closely behind.
-

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

It is important to note that Schedule 3 of the Growth Plan outlines a distribution of population and employment forecasts to 2041, and York Region is currently undertaking a Municipal Comprehensive Review (MCR) that includes population and employment forecasts for the Town of Georgina. We note that these forecasts may potentially conflict with the Town of Georgina’s 2016 Development Charge Bylaw Study, prepared by Hemson Consulting, which has been used in support of the growth forecasts included in this study.

5.1 Population & Residential Growth

Historic and Current Population

Figure 5-1 details the historic and current population for the Town of Georgina (Trade Area) and the Keswick Secondary Plan Area. (Study Area). Historical populations have been based on Statistics Canada Census data, adjusted for net undercoverage. The Trade Area saw modest population growth of some 4,211 persons between 2006 to 2019. The majority of this growth was located in Keswick – approximately 96% - amounting to 4,050 residents. Due to this growth, the Study Area saw an annual

growth rate of 1.3% within this period, compared to 0.7% for the entire Trade Area. According to population forecasts commissioned by the Region of York, the base year population for the Trade Area was estimated at 48,415 on July 30, 2019, of which an estimated 28,604 persons reside in the Keswick Study Area. The detailed historic and projected population and employment growth for Keswick and the Town of Georgina has been included in Appendix A and B.

Figure 5-1: Population: Historic and Current (2006-2019)

	Historical			Base Year	Period Growth
	2006	2011	2016	2019	2006 - 2019
Town of Georgina	44,204 ¹	44,906 ¹	47,373 ¹	48,415 ²	4,211
Annual Growth	140	493	347		324
Annual Growth Rate	0.3%	1.1%	0.7%		0.7%
Keswick	24,554 ¹	26,832 ¹	27,909 ¹	28,604 ³	4,050
Annual Growth	456	215	232		312
Annual Growth Rate	1.9%	0.8%	0.8%		1.3%

Source: urbanMetrics inc., based on the following data sources:

¹ Census of Canada – Adjusted for Census Undercount.

² York Region Population Estimate June 30, 2019 based on housing completions – Adjusted for Undercount.

³ Based on Keswick share of Georgina population growth of 66% as per Town of Georgina 2016 DCBS Study.

Projected Population Growth

Future projections for the Town of Georgina and Keswick have been based on the existing population and the projected growth forecasts in the Town of Georgina Development Charges Background Study (DSBS), completed by Hemson Consulting in April 2016. Once adjusted for undercoverage, forecasts indicate that the Trade Area population will grow at an average annual rate of 2.1%, adding 22,885 new residents between 2019 to 2041. Within the same period, Keswick is estimated to grow by 15,257 residents. The future Keswick population is based on share of growth percentages included in the Hemson study, which indicate that 66% of new growth will be located in Keswick.

Figure 5-2: Population: Current and Forecasted (2019-2036)

	Base Year		Forecast			Period Growth	
	2019	2021	2026	2031	2036	2041	2019 - 2041
Town of Georgina	48,415 ¹	50,882 ²	54,352 ²	58,923 ²	66,082 ²	71,300 ³	22,885
Annual Growth		1,234	694	914	1,432	1,044	1,039
Annual Growth Rate		2.5%	1.4%	1.7%	2.4%	1.6%	2.1%
Keswick	28,604 ⁴	30,248 ⁴	32,562 ⁴	35,609 ⁴	40,382 ⁴	43,860 ⁴	15,257
Annual Growth		822	463	609	955	696	693
Annual Growth Rate		2.9%	1.5%	1.9%	2.7%	1.7%	2.4%

Source: urbanMetrics inc., based on the following data sources:

¹ York Region Population Estimate June 30, 2019 based on housing completions – Adjusted for Undercount.

² Town of Georgina 2016 DCBS – Adjusted for Undercount.

³ York Region Preferred Growth Scenario, November 2015 – Adjusted for Undercount.

⁴ Based on Keswick share of Georgina population growth of 66% as per Town of Georgina 2016 DCBS.

Seasonal Population

It is important to note that the population growth forecasts for the Trade Area do not include population in unoccupied dwellings such as second/seasonal residences. In many municipalities in the Greater Golden Horseshoe (GGH), which are subject to the Growth Plan, only a small portion of dwellings are occupied as second/seasonal homes. However, the seasonal population in Georgina is modestly more significant as the Town is bordered by Cook’s Bay and Lake Simcoe; both of which are attractive to cottagers, boaters, cyclists, and outdoor recreation enthusiasts.

According to information retrieved from the Town of Georgina’s Tax and Water Utilities division, there are 1,722 seasonal dwelling units located in the Town of Georgina (Trade Area) as of December 2019. As shown in Figure 5-3, the estimated seasonal population is 4,649 persons – approximately 10% of the Trade Area’s 2019 population.

Figure 5-3: Estimated Seasonal Population, Trade Area

	TRADE AREA
Seasonal Dwellings ¹	1,722
Persons Per Unit (PPU) ²	2.70
Estimated Seasonal Population	4,649

Source: urbanMetrics inc.

¹ Town of Georgina Tax and Water Utilities Division, December 2019.

² Town of Georgina Development Charges Background Study (2016)

5.2 Income

Per capita income levels provide a reasonable guide for determining the expenditure habits of the local population living within a defined area. Although certain intervening variables, including age and geographic location, can influence consumer expenditure habits and shopping preferences, population groupings with similar income characteristics tend to exhibit similar expenditure habits for broad merchandise groupings.

As shown in Figure 5-4, we have calculated the 2015 per capita income levels for Trade Area residents. These calculations are based on 2016 Statistics Canada Census data.

Figure 5-4: Per Capita Income in 2015, Town of Georgina and Keswick

	Town of Georgina	Study Area
2016 Population ¹	45,418	26,757
Males 15 years and over with income	17,620	10,575
Male average income	\$42,960	\$43,550
Females 15 years and over with income	18,110	11,090
Female average income	\$28,748	\$29,472
Total Income	\$1,277,581,480	\$787,385,730
Average Per Capita Income	\$28,129	\$29,427

Source: urbanMetrics, inc. based on 2016 Statistics Canada Census data

¹ Excluding undercount.

The Town of Georgina had a per capita income level of \$28,129 in 2015, while Keswick had a moderately higher per capita income of \$29,427. Both are more than 20% lower than the Provincial average. The Construction and Retail Trade industries employ the largest number of Georgina residents, with Manufacturing and Health Care/Social Assistance following closely behind.

Despite the Georgina's weakness in attracting high-paying, highly-skilled jobs, the Town of Georgina Economic Development Strategy and Action Plan note that 70% of Georgina's employed labour force work outside the community. This indicates that residents could be potentially commuting to higher paying jobs in municipalities with significantly more office development and established companies – including Markham, Richmond Hill, and Toronto. With the development of the KBP, both Keswick and

the Town as a whole, have the potential to capture some of these commuters and create high-paying job opportunities; which could lead to an increased average per capita income in the future

6.0 Commercial Competition

Key Findings

- The Study Area has a total of 1,046,700 square feet (97,241 square metres) of retail/service commercial space. Nearly 50% (496,200 square feet or 46,098 square metres) of the space is located along the Woodbine Avenue corridor. The majority of remaining space is generally located in the three Urban Centres.
 - The retail/service commercial vacancy of the Study Area rate is 2%. This is below a healthy rate, and suggests that there may exist some unfulfilled demand at the present time.
 - Over 40% of retail/service commercial space in the Study Area is Non-Food Store Retail, and nearly 70% of that space is located on the Woodbine Avenue Corridor. Services and Food Store Retail account for 40% and 16% of total space, respectively.
 - The most significant competition for the Keswick retail sector is the commercial concentration existing at Green Lane and Yonge Street, and along Yonge Street and Davis Drive in Newmarket and East Gwillimbury. This cluster contains most of the major retail tenants operating in the GTA and would serve to attract spending from Keswick residents, as well as, limiting the retail draw of Keswick to the south.
 - There are five commercial development applications proposed in the Study Area that collectively amount to 6,500 square metres (70,000 square feet) of GFA. Over 60% of the proposed space is located on the Woodbine Avenue Corridor. This is a relatively small amount given the existing inventory and the future growth potential of Keswick and the Town of Georgina.
 - There is currently some 240 acres (97 hectares) of vacant commercially designated land, of which about 207 acres (83 hectares) is situated along the west side of Woodbine Avenue. A supply of 240 acres would accommodate some 2.6 million square feet (241,500 square metres) of retail space at traditional commercial densities. This is far in excess of what the future population of Keswick will require given the projected population to 2041.
-

An analysis of competitive commercial facilities is essential to understanding the roles and functions that existing stores in the Study Area currently fulfill for residents and visitors, as well as the potential competitive influences which could affect the market available for the proposed development.

An inventory of commercial space was conducted in the Study Area by urbanMetrics inc. in July 2019. Our inventory included all food store retail (FSR), non-food store retail (NFSR), and service commercial facilities. Based on the North American Industrial Classification System (NAICS), FSR and NFSR store types include the following:

- **FSR (Food Store Retail):**
 - Supermarkets and Grocery Stores.
 - Convenience and Specialty Food Stores – including meat markets, fish and seafood markets, fruit and vegetable markets, baked goods, confectionary and nut stores.
- **Beverage Stores:**
 - Wine, beer and liquor stores.
- **NFSR (Non-Food Store Retail):**
 - Department stores.
 - Building and Outdoor Home Supply Stores – includes home improvement centres, hardware stores, paint and wallpaper stores, nursery/garden centres, and a wide range of building material and supply stores.
 - Pharmacies and Personal Care Stores – includes drug stores, optical stores, health equipment stores, nutrition and cosmetic stores.
 - General Merchandise Stores – includes department stores (i.e. The Bay or Walmart), Canadian Tire, Costco, dollar stores and variety stores.
 - Clothing and Accessories Stores – including jewellery and luggage/leather goods stores.
 - Furniture, Home Furnishings and Electronics Stores – including appliances, computer, camera and photographic supply stores.
 - Miscellaneous Store Retailers – including other durable/semi-durable stores such as sporting goods, toy, hobby, book, florist, office supply, fabric/wool, gift stores, pet and pet supply, used merchandise stores and tobacco stores.

Our inventory fieldwork also included all commercial service establishments located in the Study Area.

Based on our inventory fieldwork, publicly available information, and discussions with the planning staff from the Town of Georgina, we have also identified any planned and/or proposed retail developments in the Study Area that could be competitive with the commercial space that is ultimately approved as part of the KSP. Each of the identified commercial developments have been recognized in our market analysis.

6.1 Existing Commercial Space

The existing retail space in the Study Area consists of a broad range of commercial functions, including automobile-oriented strip retail, main street retail, big box retail, and tourism retail, among others. As shown in Figure 6-1, **the Study Area includes a total of 1,046,700 square feet (97,241 square metres)**

of retail/service commercial space. This total excludes any retail space that is not occupied by traditional retail or service tenants. Nearly half of the retail/service commercial space in Keswick is located on Woodbine Avenue. The second largest proportion of space is located in the Glenwoods Urban Centre designation, most of which is located in the Glenwoods Centre located at 433 The Queensway South.

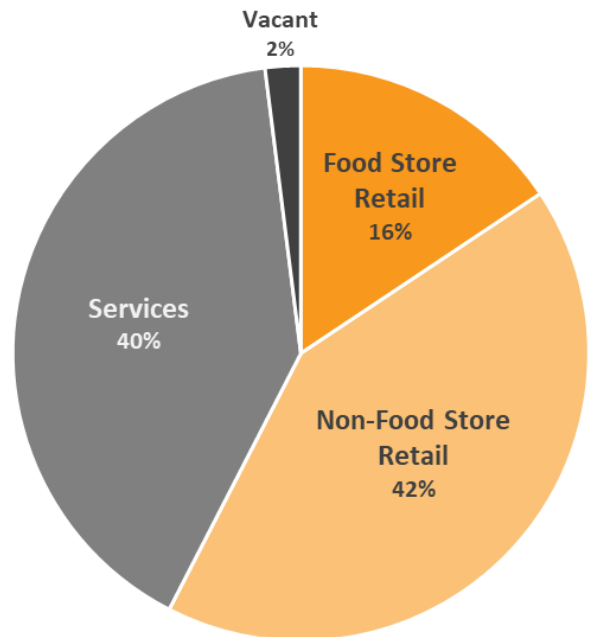
Figure 6-1: Retail Inventory Summary, Study Area (July 2019)

Node	Square Feet	Share of Total
Urban Centres		
Glenwoods Urban Centre	211,100	20%
Maskinonge Urban Centre	105,200	10%
Uptown Keswick Urban Centre	122,300	12%
Urban Corridor 1	18,100	2%
Urban Corridor 2	81,700	8%
Woodbine Corridor	496,200	47%
Remainder of Town	12,100	1%
Total	1,046,700	100%

Source: urbanMetrics inc.

Based on the results of our inventory, we estimate that the current retail/service commercial vacancy rate is 2%. This vacancy rate is below a healthy rate (between 4 to 8%), indicating that residents may be under-served in terms of access to retail/service commercial uses, and that additional space could be supported in the local market area. The majority of vacant space is located in older commercial buildings in the Urban Centres that have not been updated. We did not observe any vacant retail units in recently constructed commercial development space, particularly along Woodbine Avenue.

Based on these observations, we understand there is tenant demand to locate in the Keswick, however many retailers are interested in locating in newly constructed, high quality commercial units that are close to major transportation routes. To “fill the gap” and navigate the lack of available modern commercial space, we noticed that multiple single-detached houses along the Urban Corridors are being used as commercial facilities for a variety of retail/service uses.



Casa Autentica Mexican Restaurant (566 The Queensway South) is one of many examples along the Urban Corridors where retail/service commercial tenants are locating in single-detached houses.



Figure 6-2: Retail Inventory by Store Type, Study Area (July 2019)

Store Type <i>(all referenced in square feet: : gross leasable area)</i>	Glenwoods Urban Centre	Maskinonge Urban Centre	Uptown Keswick Urban Centre	Woodbine Corridor	Urban Corridor 1	Urban Corridor 2	Remainder of Town	TOTAL
FSR	33,300	16,900	30,300	71,700	4,800	6,700		163,700
Beer, Wine, and Liquor Stores	6,600		2,100	8,500				17,200
Convenience & Specialty Food Supermarkets	2,300	16,900	3,600	15,000	4,800	6,700		49,300
	24,400		24,600	48,200				97,200
NFSR	65,100	15,900	28,300	302,100	3,200	24,200		438,800
Automotive	8,900			1,800		8,800		19,500
Building and Outdoor Home Supplies Stores						13,500		13,500
Clothing Stores	2,100		2,300	8,400		1,000		13,800
Computer and Software Stores				2,100				2,100
Furniture Stores	2,000							2,000
General Merchandise Stores	8,200			234,000				242,200
Home Electronics and Appliance Stores	3,700							3,700
Home Furnishings Stores		700						700
Miscellaneous Store Retailers	5,500	2,600	18,800	25,800	1,200			53,900
Pharmacies and Personal Care Stores	21,500		7,200	27,900	2,000	900		59,500
Shoe, Clothing Accessories and Jewellery Stores	4,400			2,100				6,500
Specialized Building Materials and Garden Stores	2,800	2,500						5,300
Sporting Goods, Hobby, Music, and Book Stores	6,000	10,100						16,100
SERVICES	104,400	69,200	56,100	120,600	10,100	50,800	12,100	423,300
Automotive		1,700						1,700
Civic and Social Organizations			2,000	1,600				3,600
Cultural, Entertainment & Recreation	18,100					3,900		22,000
Finance	3,800	2,100	3,100	14,400				23,400
Food Services & Drinking Places	24,100	29,100	10,400	37,500		10,800	4,400	116,300
Health Care	18,700	3,200	5,300	39,900		17,100		84,200
Insurance and Real Estate	9,600	7,000	2,900		1,500			21,000
Personal and Household Goods Repair and Maintenance	2,900	800		10,100		3,100	7,700	24,600
Personal Care Services	4,700	6,300	8,900	11,300	1,500	7,800		40,500
Professional, Scientific, and Technical Services	8,600	4,100	11,500	3,800		1,200		29,200
Selected Educational Services	13,900	11,600	4,400	2,000	4,400	1,700		38,000
Selected Office Administrative Services		3,300						3,300
Social Services			2,700		2,700	5,200		10,600
Transportation			4,900					4,900
VACANT	8,300	3,200	7,600	1,800				20,900
TOTAL	211,100	105,200	122,300	496,200	18,100	81,700	12,100	1,046,700

Source: urbanMetrics inc.

Food Store Retail (FSR)

The existing FSR commercial facilities in the Keswick Study Area consist of a broad range of commercial functions, including large format grocery stores, boutique speciality stores, neighbourhood convenience stores, and other formats. **As shown in Figure 6-3, the Study Area has an approximately 163,700 square feet (15,208 square metres) of FSR commercial space.** This total includes 97,200 square feet (9,030 square metres) of Supermarket space and 49,300 square feet (4,580 square metres) of Convenience and Specialty Food Store space. The highest distribution of FSR facilities is located along the Woodbine Corridor – approximately 44% of all FSR space.

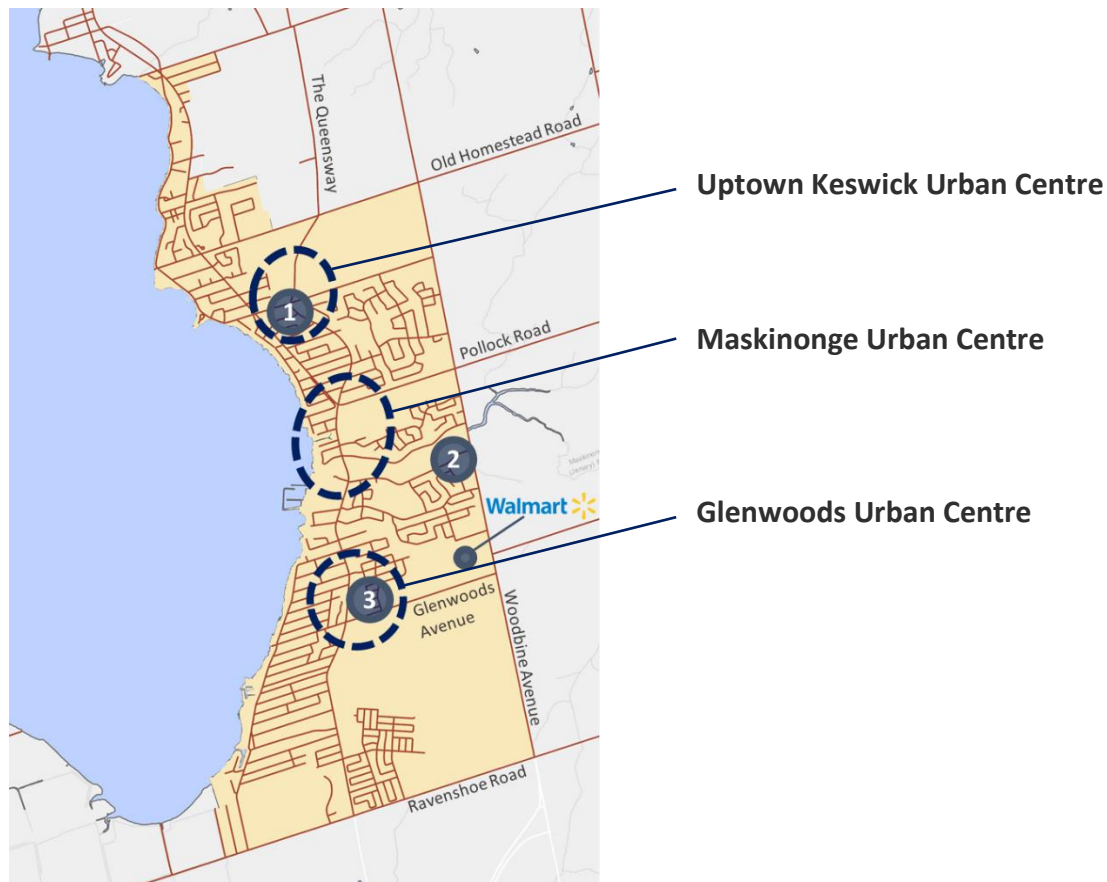
Figure 6-3: Food Store Retail Facilities, Study Area

Food Store Retail (FSR) <i>(all referenced in square feet: gross leasable area)</i>	Glenwoods Urban Centre	Maskinonge Urban Centre	Uptown Keswick Urban Centre	Urban Corridor 1	Urban Corridor 2	Woodbine Corridor	TOTAL
Beer, Wine, and Liquor Stores	6,600		2,100			8,500	17,200
Convenience & Specialty Food	2,300	16,900	3,600	4,800	6,700	15,000	49,300
Supermarkets	24,400		24,600			48,200	97,200
Total	33,300	16,900	30,300	4,800	6,700	71,700	163,700

Source: urbanmetrics inc.

As illustrated in Figure 6-4, there are three supermarkets operating within the Study Area, comprising a total of some 97,200 square feet (9,030 square metres). The largest supermarket, Zehrs, is located on the Woodbine Corridor. The remaining two supermarkets are located in Urban Centres. There is no existing supermarket in the Maskinonge Urban Centre. This total does not account for the large format Walmart Supercentre¹ located on the Woodbine Corridor that has a food component equivalent to that of a supermarket.

Figure 6-4: Supermarkets in the Study Area



¹ The Walmart Supercentre is considered a General Merchandise Store for the purpose of this analysis.

Source: urbanMetrics inc.

	Store Name	Node	Address	Square Feet
1	Food Basics	Uptown Keswick	199 Simcoe Ave	24,600
2	Zehrs	Woodbine Corridor	24018 Woodbine Ave	48,200
3	Fresh Co	Glenwoods	443 The Queensway	1,800
				74,600

Non-Food Store Retail (NFSR)

The Study Area includes some 438,800 square feet (40,765 square metres) of NFSR space, including 242,700 square feet (22,547 square metres) of general merchandise/department store space. The NFSR space in Keswick is overwhelmingly concentrated along the Woodbine Avenue Corridor, representing nearly 70% of total space. General Merchandise Stores (Walmart Supercentre and Canadian Tire) account for the largest amount of NFSR space. The Maskinonge Urban Centre has a notably low share of NFSR space and represents a potential opportunity for future retail development.

Figure 6-5: Non-Food Store Retail Facilities, Study Area

Non-Food Store Retail (NFSR) <i>(all referenced in square feet: gross leasable area)</i>	Glenwoods Urban Centre	Maskinonge Urban Centre	Uptown Keswick Urban Centre	Urban Corridor 1	Urban Corridor 2	Woodbine Corridor	TOTAL
Automotive	8,900				8,800	1,800	19,500
Building and Outdoor Home Supplies Stores					13,500		13,500
Clothing Stores	2,100		2,300		1,000	8,400	13,800
Computer and Software Stores						2,100	2,100
Furniture Stores	2,000						2,000
General Merchandise Stores	8,200					234,000	242,200
Home Electronics and Appliance Stores	3,700						3,700
Home Furnishings Stores		700					700
Miscellaneous Store Retailers	5,500	2,600	18,800	1,200		25,800	53,900
Pharmacies and Personal Care Stores	21,500		7,200	2,000	900	27,900	59,500
Shoe, Clothing Accessories and Jewellery Stores	4,400					2,100	6,500
Specialized Building Materials and Garden Stores	2,800	2,500					5,300
Sporting Goods, Hobby, Music, and Book Stores	6,000	10,100					16,100
Total	65,100	15,900	28,300	3,200	24,200	302,100	438,800

Source: urbanMetrics inc.

Services

Based on our inventory, we estimate the Study Area has 423,300 square feet (39,325 square metres) of service commercial space. Food Services & Drinking Places account for 116,300 square feet (10,804 square metres) and represents the largest proportion of service space in the Study Area. Most of the Food Services & Drinking Places located along the Woodbine Corridor are “grab and go” or “fast food” establishments which primarily serve the local resident population, as well as some weekend cottage-country traffic. In regard to service commercial distribution throughout the Study

Area, the majority of space is located along the Woodbine Corridor and within the Glenwoods Urban Centre.

Figure 6-6: Service Commercial Facilities, Study Area

Services <i>(all referenced in square feet: gross leasable area)</i>	Glenwoods Urban Centre	Maskinonge Urban Centre	Uptown Keswick Urban Centre	Urban Corridor 1	Urban Corridor 2	Woodbine Corridor	Remainder of Town	TOTAL
Automotive		1,700						1,700
Civic and Social Organizations			2,000			1,600		3,600
Cultural, Entertainment & Recreation	18,100				3,900			22,000
Finance	3,800	2,100	3,100			14,400		23,400
Food Services & Drinking Places	24,100	29,100	10,400		10,800	37,500	4,400	116,300
Health Care	18,700	3,200	5,300		17,100	39,900		84,200
Insurance and Real Estate	9,600	7,000	2,900	1,500				21,000
Personal and Household Goods Repair and Maintenance	2,900	800			3,100	10,100	7,700	24,600
Personal Care Services	4,700	6,300	8,900	1,500	7,800	11,300		40,500
Professional, Scientific, and Technical Services	8,600	4,100	11,500		1,200	3,800		29,200
Selected Educational Services	13,900	11,600	4,400	4,400	1,700	2,000		38,000
Selected Office Administrative Services		3,300						3,300
Social Services			2,700	2,700	5,200			10,600
Transportation			4,900					4,900
Total	104,400	69,200	56,100	10,100	50,800	120,600	12,100	423,300

Source: urbanMetrics inc.

6.2 Proposed Commercial Developments

Based on Town of Georgina’s current planning and development application data, there are currently five development applications that include retail/service commercial space, which have been initiated in Keswick. **These five development applications collectively include an approximate total of 6,500 square metres (70,000 square feet) of gross floor area (GFA).** These applications range in size from 418 square metres (4,499 square feet) to 3,612 square metres (38,879 square feet). Over 60% of the proposed commercial space is located along Woodbine Avenue, which is consistent with the Town’s intent to focus commercial and employment growth within that corridor. The remaining commercial space is proposed on infill sites within Maskinonge and Glenwoods Urban Centres.

The majority of applications for new retail/service commercial space proposed in the Study Area are standalone commercial projects on vacant parcels. The remaining applications propose commercial space as a component of a mixed-use residential and commercial project.

Each retail/service commercial development application in the Study Area has been summarized in Figure 6-7 and Figure 6-8.

Figure 6-7: Commercial Development Applications, Study Area



Source: urbanMetrics inc.

Note: Refer to Figure 6-8 for further information related to each application.

Figure 6-8: Summary of Proposed Commercial Development Applications, Study Area

	Address	Description	Proposed Commercial Space (sq.m.)
1	427 The Queensway S	Proposed Site Plan for 2 storey commercial building	573
2	295 The Queensway S	Proposed site plan for 3-storey medical office building with ground level retail and parking	1,170
3	263 The Queensway S	Proposed site plan for gas station, convenience store and 3-suite commercial	679
4	W/S Woodbine Ave.	Proposed 39 townhouse units and 3,612 sq.m. commercial floor space (8 buildings)	3,612
5	23250 Woodbine Ave.	Proposed 3-unit commercial building	418
			6,452

Source: urbanMetrics inc., based on information retrieved from the Town of Georgina’s Planning Division.

Additionally, The South Shore waterfront development located on Cameron Crescent in Keswick was originally approved by Council in 2014, and remains forthcoming. It is our understanding that the project is currently stalled with the current developer, however there could be the potential it is reinitiated in the future by another partner. As currently proposed, The South Shore includes mixed-use commercial space and a full service hotel.

6.3 Vacant Land Analysis

To understand where future retail/service commercial space could be potentially located in Keswick, we reviewed the Town of Georgina’s vacant land data. This dataset was collected, consolidated, and provided to us by the Town of Georgina planning department.

As shown in Figure 6-9, there is a total of 240 acres (97 hectares) of vacant commercial lands located in Keswick. Nearly 87% of these vacant lands are located in the areas designated Commercial/Employment along Woodbine Avenue. Based on a 25% land coverage assumption, we estimate the total potential commercial space that could be accommodated on currently vacant lands amount to approximately 2.6 million square feet (241,500 square metres), which is well beyond the amount required to support future growth projected in Keswick to 2041.

The vacant lands have been identified in relation to Keswick’s land use structure in Figure 6-10.

Figure 6-9: Potential Commercial Space in the Study Area

	Gross Vacant Land (acres)	Potential Commercial Space (square feet)
Commercial/Employment	207.36	2,258,150
Urban Centres - Uptown Keswick	0.16	1,742
Urban Centres - Maskinonge	6.42	69,914
Urban Centres - Glenwoods	19.77	215,295
Urban Corridor 1	4.56	49,658
Urban Corridor 2	1.44	15,682
Tourist Commercial	0.17	1,851
Neighbourhood Residential	0	0
Total	239.88	2,612,293

Source: urbanMetrics inc., based on data retrieved from the Town of Georgina.

Based on our analysis of the vacant land supply, the following summarizes the potential of each area to accommodate future commercial space.

Commercial/Employment – This would be the most likely candidate for the majority of space needs, owing to the fact that it contains a number of large (10 - 77 acres or 4 – 31 hectares) sites that could provide for both large scale regional retail facilities and smaller scale retail and services that would benefit from an arterial road location.

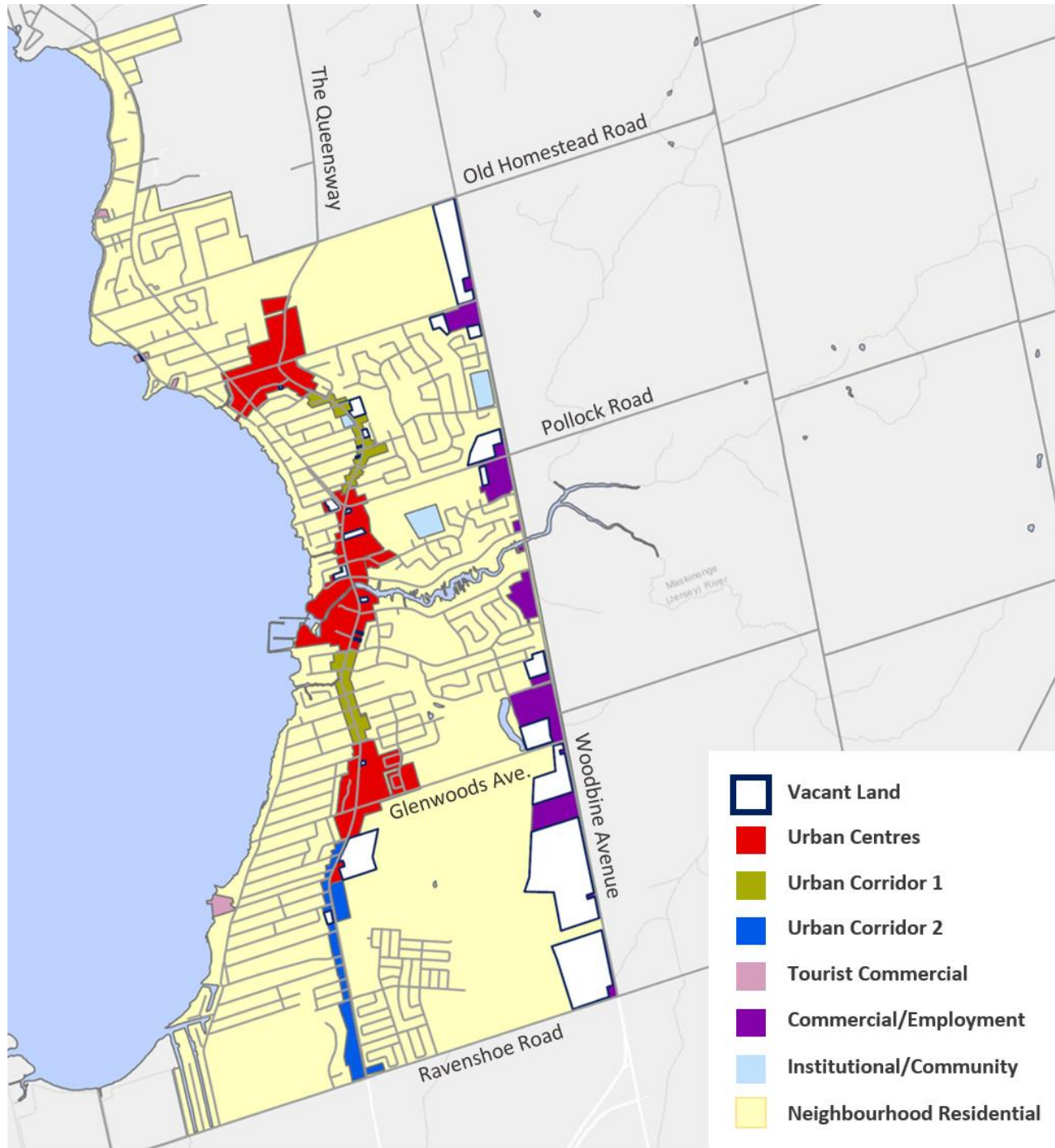
Urban Centres – There is a 20 acre (8 hectare) site in the Glenwoods Urban Centre that could support a supermarket scale shopping node to support population growth in South Keswick. The balance of sites in the Urban Centres are small scale and would primarily be comprised of infill and mixed-use residential and commercial projects to support intensification in these areas. Some sites are too small or not appropriately located to support commercial development.

Urban Corridors – These sites tend to be small and would support minimal new space. The exception is a 4 acre (1.5 hectare) site across from the Stephen Leacock Theatre. However, this site does not have much street frontage and development as a purely commercial project may be difficult owing to the abutting low-density residential land uses and an elementary school.

Tourist Commercial – There is only one tiny 0.17 acre (0.06 hectare) site that could likely only accommodate a single use.

Neighbourhood Residential – There are currently no vacant Neighbourhood Residential sites. These sites are intended to provide for highly localized shopping to enable and encourage active transportation modes (i.e. walking and cycling). These sites would be small (under 1 acre) and we would expect that, as required, these can be designated as part of future plans of subdivision.

Figure 6-10: Existing Vacant Land in the Study Area



Source: urbanMetrics inc., based on data retrieved from the Town of Georgina.

6.4 Commercial Competition Outside of Keswick

Retail facilities in Keswick must compete with broader regional scale retail nodes for a share of Keswick residents' expenditures. These regional scale nodes contain many stores and services that could not exist given the smaller population of a community such as Keswick, but which nonetheless derive a portion of their support from Keswick residents. Over time, the need for Keswick residents to leave the community will be reduced as the population grows, but it is unlikely that it can be eliminated.

The following nodes will compete with Keswick for a share of resident and visitor expenditures.

- **Newmarket/East Gwillimbury** – A very significant retail node has evolved along Yonge Street – extending from north of Green Lane to south of Davis Drive and extending east along Davis Drive. This cluster is far greater than required to serve the local population, but rather serves a much broader market extending throughout the northern GTA. This cluster contains Upper Canada Mall – an enclosed regional shopping centre, together with most of the major retailers serving the GTA market, including:
 - Costco Warehouse Membership Club
 - Lowes Home Improvement Centre
 - Home Depot
 - Silver City Multi-plex Theatre
 - Freshco Supermarket
 - Real Canadian Superstore
 - Walmart Supercentre
 - The Brick
 - HomeSense
 - Winners
 - Staples
 - Canadian Tire
 - Ashley Home Store
 - Hudsons Bay

With the recent opening of the 404 extension to Ravenshoe Road, this cluster is now less than 25 minutes from Keswick.

Additionally, there is a notable retail node along Leslie Street that extends south from Green Lane to past Davis Drive. Known as 404 Town Centre, this node contains a mix of major retailers and population-serving local retail, as well as industrial and flex-space employment users. Major retailers include:

- Princess Auto

- Walmart Supercentre
 - Shoppers Drug Mart
 - Metro
 - Leon’s Furniture
 - Dollarama
 - National Sports
-
- **Sutton/Jackson’s Point** - Although much smaller in terms of a retail concentration than Keswick, these communities are better positioned with respect to the seasonal resident base along the southern shore of Lake Simcoe. In addition, the “Main Street” feel of these communities make them popular with visitors to the area.

 - **Town of Uxbridge** - Of a similar scale to Keswick, the Uxbridge regional retail cluster does not draw significantly from Keswick residents, but would serve to reduce its influence for persons living in the eastern portion of Georgina.

7.0 Commercial Needs Analysis

Key Findings

- Keswick currently supports some 34.6 square feet of retail and services space per person, which is below average for similar sized communities. This is indicative of the fact that much of shopping by local residents occurs outside of the community – in part because the relatively small population of Keswick and the large number of daily commuters will not support the full range of commercial uses.
 - Keswick is projected to grow by over 15,000 persons between 2019 and 2041. This growth would support approximately 559,500 square feet (51,979 square metres) of additional retail and service space.
 - However, recognizing the scale of the community, and the opportunity to reverse outflow spending by the existing population, the total warranted additional commercial space within Keswick by 2041 has been estimated at 1,648,000 square feet (152,175 square metres).
-

7.1 Per Capita Space Analysis

Utilizing an approach commonly used to estimate the future retail/service commercial needs of a community, we have completed a high-level per capita space analysis in order to assess the retail/service needs of existing and future residents in the Study Area, as shown in Figure 7-1.

Existing Space Per Capita Ratios

Columns A and B of Figure 7-1 indicate the current space by category and the space per person or space per capita in the Study Area. In total, there are some 34.6 square feet of retail and services space per person in Keswick. This is low compared to levels seen in comparable communities, which are closer to 41 square feet per capita. This is largely due to a very low ratio of non-food retail space. Many retailers in these categories tend to gravitate to regional commercial nodes, such as the Newmarket/Green Lane area, which attracts considerable spending by Keswick residents. At the same time, the General Merchandise store category which includes department stores (i.e. Walmart), is over represented in the community and would also provide many retail items and categories, that would otherwise be sold by specialty stores. The services and food categories are only modestly under-represented and reflect the larger retail nodes outside of Keswick and out-commuting by the local population.

Projected Space Needs

For this analysis, we have used typical per capita space ratios that we have developed based on a large number of commercial inventories carried out in similar sized Ontario markets. These ratios

have been shown for each retail and service category and in total comprise just over 41 square feet of space per person.

Columns C through H of Figure 7-1 provide the analysis of the space that would be required to support the future residents of the Study Area to 2041. These space estimates are based on a growth of 15,257 residents between 2019 and 2041.

Column C identifies typical space per capita requirements for similar sized Ontario communities. In total this amounts to 41.4 square feet per capita compared with the 34.6 square feet per capita existing in Keswick.

Column D identifies the total space that would be supported by residents based on typical space per capita requirements.

Column E identifies the share (target capture share) of Keswick residents expenditures estimated to be made within the KSP. These have been based on our analysis of the inventory and outside competition. These range from 85% for supermarket spending, which tends to be done locally and for which there is a good local supply, to 50% for clothing, which tends to be made in major retail nodes such as shopping centres. For the lower share totals, it is estimated that there is a large gravitational pull from outside commercial nodes – such as Newmarket/Green Lane.

Column F is simply the target capture share multiplied by the total space required and indicates the space in Keswick supported only by Keswick residents (excluding inflow).

Column G provides an estimate of expenditure inflow for each category, and has been based on our evaluation of the stores within the inventory, the outside markets (i.e. other Georgina residents, seasonal residents, tourists, employees from outside the area, etc.) and competing retail facilities.

Column H identifies the total retail space warranted by category after accounting for inflow. This represents the amount of space that would be required to support the projected new population in the Study Area. In total, this amounts to 559,500 square feet (51,979 square metres).

In addition to this space, as the population reaches differing thresholds, additional businesses will be attracted to the community. As a result, the potential for stores not currently in Keswick will materialize which will be supported by the redirection of existing residents' expenditures currently made outside of the community. Of particular note is that by 2041 or earlier, there will be sufficient population in Keswick to support a full-scale home-improvement outlet, such as Home Depot or Lowes.

Column I identifies the total space that will be required to serve the total population of Keswick by 2041, including both the space needed to support growth and the additional space that could be supported by the current population. This amounts to 1,638,000 square feet (152,175 square

metres). Deducting the existing inventory from this total, it amounts to some 648,000 square feet (60,200 square metres) of new space that would be required in the community by 2041.

In our opinion, planning should not be based on a detailed store category basis, but should recognize the total space required, with the space allocation by format and location undertaken recognizing the general distribution of space by category.

Figure 7-1: Study Area Per Capita Commercial Needs Analysis (2019)

Commercial Needs - Retail Category	Warranted Space to Support Population Growth								Total Warranted Space		
	Existing Retail Space in Study Area (Sq Ft)	Existing Space Per Capita (Sq Ft)	Typical Space Per Capita (Sq Ft)	Space Required by New Residents (Sq Ft)	Study Area Target Capture	Local Space Required by New Residents (Sq Ft)	Inflow	Total Warranted Space Required by New Residents in Keswick (Sq Ft)	Warranted Space to Support Growth and Existing Population	Net Space Required Net of Existing Space	
Study Area Population (2019)	28,604	A	B	C	D	E	F	G	H	I	J
Study Area Population Growth (2019-2041)	15,257										
2041 Study Area Population	43,860										
Food Store Retail (FSR)											
Supermarket	97,200	3.4	3.5	53,398	85%	45,388	20%	56,700	163,100	65,900	
Specialty Food	49,300	1.7	1.5	22,885	80%	18,308	20%	22,900	65,800	16,500	
SUB TOTAL	146,500	5.1	5.0	76,283	84%	63,696	20%	79,600	228,900	82,400	
Beer/Wine/Liquor (BWL)	17,200	0.6	0.4	6,103	75%	4,577	30%	6,500	18,800	1,600	
Non-Food Store Retail (NFSR)											
Selected Automotive	19,500	0.7	2.5	38,141	60%	22,885	10%	25,400	73,100	53,600	
Furniture, Home Furnishings & Electronics	8,500	0.3	3.0	45,770	70%	32,039	10%	35,600	102,300	93,800	
Building & Outdoor Home Supplies	18,800	0.7	3.0	45,770	70%	32,039	20%	40,000	115,100	96,300	
Pharmacy & Personal Care	59,500	2.1	1.5	22,885	85%	19,452	20%	24,300	69,900	10,400	
Clothing & Accessories	20,300	0.7	2.0	30,513	50%	15,257	10%	17,000	48,700	28,400	
Department Store	146,500	5.1	3.5	53,398	80%	42,718	30%	61,000	175,400	28,900	
Other General Merchandise	111,800	3.9	3.0	45,770	70%	32,039	15%	37,700	108,400	-3400	
Miscellaneous Retail	53,900	1.9	2.0	30,513	55%	16,782	15%	19,700	56,800	2,900	
SUB TOTAL	438,800	15.3	20.5	312,759	68%	213,210	18%	260,700	749,700	310,900	
SERVICES											
Automotive	1,700	0.1	1.0	15,257	60%	9,154	10%	10,200	29,200	27,500	
Finance, Insurance & Real Estate	48,400	1.7	2.0	30,513	50%	15,257	15%	17,900	51,600	3,200	
Business Services ¹	42,700	1.5	1.5	22,885	60%	13,731	15%	16,200	46,400	3,700	
Health Care	61,600	2.2	1.5	22,885	80%	18,308	20%	22,900	65,800	4,200	
Cultural, Entertainment & Recreation	31,500	1.1	2.0	30,513	55%	16,782	30%	24,000	68,900	37,400	
Food Service & Drinking Places	78,400	2.7	3.5	53,398	75%	40,048	35%	61,600	177,100	98,700	
Personal Care	68,000	2.4	2.0	30,513	85%	25,936	20%	32,400	93,200	25,200	
Other ²	56,900	2.0	3.0	45,770	70%	32,039	15%	37,700	108,400	51,500	
SUB TOTAL	387,500	13.5	15.5	236,476	69%	162,100	24%	212,700	640,600	253,100	
TOTAL	990,000	34.6	41.4	631,620	70%	443,583	21%	559,500	1,638,000	648,000	

Source: urbanMetrics inc.

- Notes: A urbanMetrics retail inventory (July 2019) F = D x E
- B = A / Study Area Population G = Professional Judgement
- C Professional judgement from other communities H = F / (1-G)
- D = Population Growth x C I = (2041 Study Area Population x C x E) / (1- G)
- E Professional Judgement H = I - A

¹ Includes: Professional, Scientific & Technical Services; Selected Office Administration

² Includes: Civic & Social Organizations; Selected Educational Services; Social Services; Personal & Household Goods Repair & Maintenance; Transportation

8.0 Employment Land Analysis

Key Findings

- The lands within the KBP may not be sufficient to accommodate the projected employment land employment to 2041. Until a more detailed employment Land Needs Analysis is conducted – which is beyond the scope of the study – it may be necessary to protect the Commercial/Employment designation to accommodate some future employment uses.
 - There are a number of commercial and quasi-industrial uses that require larger sites and good arterial road access that would be restricted from locating within the KBP. In many municipalities, some or all of these uses would be permitted within certain employment areas. These would include: automotive sales and services; private indoor recreation uses; public storage; stand-alone banquet halls; home furnishings, home improvement and supply outlets; and a range of stand-alone retail and service outlets. As the KBP would not permit these uses, the most likely location for them would be the Commercial/Employment designation within the KSP.
 - There will be up to 8,500 new employment land employees added to Keswick between 2019 and 2041². This is a very significant growth for a community the size of Keswick and will generate a need for specific goods and services, including: eating and drinking establishments, personal services, and all types of business and professional offices that are permitted within the KBP. Some of this demand would be best located within the Commercial/Employment designation, owing to commercial restrictions within the KBP.
 - In addition, this significant growth in employment will likely assist in changing commuting patterns and redirecting retail and service expenditures currently leaving the community.
-

Although the focus of this study is on the commercial structure of Keswick, the future development of the KBP will influence both the supply and market for commercial uses in the community. In this regard, there are three questions that need to be addressed as part of this study:

- 1. Are there sufficient lands within the KBP to support projected employment in the community and if not, will there be a need for the Commercial/Employment Area on the west side of Woodbine Avenue to accommodate a portion of future employment land employment?**
- 2. Are there uses that cannot be accommodated within the KBP due to land use permissions or other reasons, and which will need to be accommodated within the Commercial/Employment Area or other parts of the community?**

² This forecast is not endorsed by York Region Council.

3. What commercial needs will be generated by the KBP that will need to be accommodated within the Commercial/Employment Area or elsewhere in the community?

1. Are there sufficient lands within the KBP to accommodate projected land employment?

As noted in Figure 8-1, the KBP extends along the east side of Woodbine Avenue generally from north of Ravenshoe Road to the Maskinonge River and would be bounded on the east by the future Highway 404 extension. Due to the recent Highway 404 extension to Ravenshoe Road, the planned northward extension of Highway 404 and the planned Bradford By-pass, these lands will be well connected to the 400 series highway network and will be well positioned to attract industrial users seeking a location in the northern GTA.

The KBP comprises 200 gross hectares (approximately 500 acres), all of which have been designated for employment uses. With services available at the road frontage, approximately 80 hectares (200 acres) have received zoning approval and is draft plan approved. There is currently a plan of subdivision for the northern portion of these lands comprising some 114 gross hectares (280 acres) or 89 hectares (220 acres) of industrial lots. Assuming similar land efficiencies in the southerly portion of the business park, the KBP could accommodate approximately 160 hectares (395 acres) of new employment lands.

Based on data compiled in the 2016 Development Charges Background Study and the York Region Preferred Growth Scenario, employment in the Town of Georgina is estimated to grow by approximately 13,000 employees between 2019 and 2041³. Some 91% of this growth is anticipated to be attracted to Keswick, with about 70% being comprised of employment lands related employment.

There will be a need by 2041 to accommodate an employment land workforce of approximately 8,500 persons⁴ in Keswick. The Development Charges Background Study relies on an employment density of 80 square metres (per employee, which would result in the need for some 680,000 square metres (7,319,459 square feet) of industrial space. At typical employment land coverage ratios of between 30% and 35%, this amount of space (i.e. 680,000 square metres or 7,319,459 square feet of industrial space) would require some 194 to 227 net hectares (479 to 560 acres) of employment land. This would exceed the total future supply of about 160 net hectares (395 acres) in the KBP.

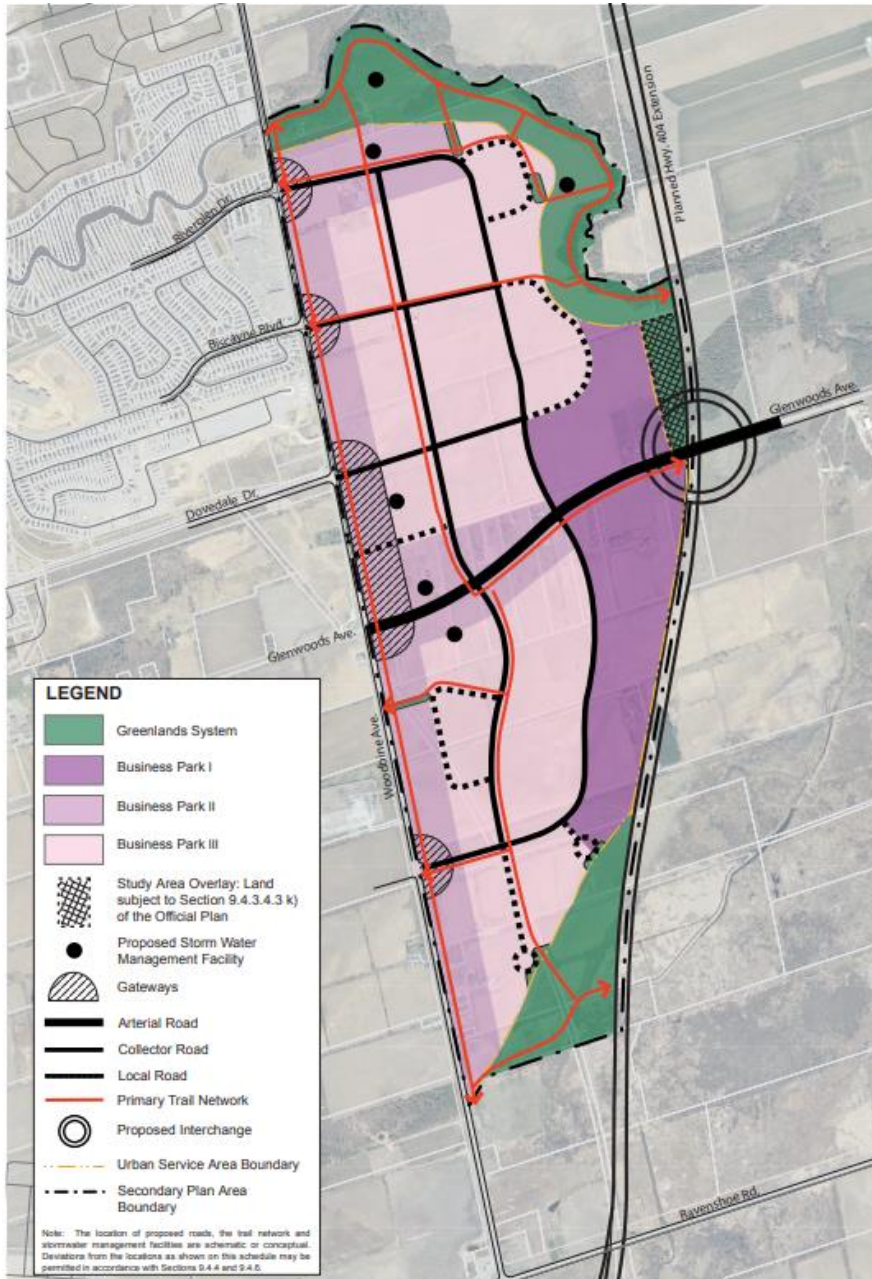
³ The Development Charges Background Study projects an employment growth of 9,820 between 2019 and 2036. Assuming annual growth of approximately 800 employees between 2036 and 2041 based on the later periodic growth projected in the Background Study, this would result in overall growth in Georgina of approximately 14,000 employees.

⁴ The Development Charges Background Study projects employment land employment growth at 6,943 persons between 2019 and 2036. Assuming annual growth of approximately 500 employees between 2036 and 2041 based on the later periodic growth projected in the Background Study, this would result in overall growth in Georgina of 9,443 employees. Assuming 91% were attracted to Keswick, this would result in 8,600 employment land employees in the community.

In our opinion, there is sufficient evidence to suggest that employment densities in comparable municipalities are much lower than the 80 square metres (860 square feet) assumed in the Georgina Background Study. This is because of a preponderance of low intensity industrial uses, such as logistics and warehousing, and data centres in many peripheral employment areas. For example, the 2019 Bradford-West Gwillimbury Development Charges Background Study relies on a ratio of approximately 120 square metres (1,290 square feet) per employee. There may be some rationale to support this higher ratio owing to the limited permissions for commercial uses within the KBP. At this higher ratio, there would be a need for some 295 to 344 hectares (728 to 850 acres).

It is important to recognize that this study is not intended to be a comprehensive employment land needs assessment. **However, based on York Region’s current MCR process with municipal input and employment projections assumed in the Georgina Development Charge Background Study, it would appear as though, there might be a need for additional employment lands to serve growth to 2041 beyond those contained in the KBP.** For this reason, it may be prudent to maintain the supply of potential lands within the Commercial/Employment designation, until a more detailed employment Land Needs Analysis for the Town has been completed.

Figure 8-1: Land Use and Transportation Map (Schedule L1), Keswick Business Park



KESWICK BUSINESS PARK - SECONDARY PLAN
 Schedule 'L1' - Land Use + Transportation
 July 15, 2008



Source: Keswick Business Park Secondary Plan

2. Are there uses that cannot be accommodated within the KBP that will need to be accommodated elsewhere?

In many communities, there are a wide range of commercial uses that are permitted within business parks and employment areas. These would include uses such as:

- Hotels and motels;
- Automotive sales and repair facilities;
- Public storage outlets;
- Private indoor recreation uses, such as martial arts studios, climbing gyms, paint ball facilities, indoor golf ranges, dance studios, social clubs;
- Stand alone-banquet halls;
- Home furnishings, home improvement and supply outlets, such as flooring, kitchen and bath outlets, lighting, windows and doors, pool and spa outlets, etc.;
- Restaurants and fast food outlets;
- Banks and credit unions;
- Professional and local serving offices, such as medical and wellness practitioners, real estate, insurance, and financial services, etc.
- Business supplies and services – e.g. mailbox, printing and office supply outlets; and
- Others.

These uses often have difficulty locating in traditional commercial areas because they require large land areas and large indoor/outdoor storage or showroom areas; cannot afford commercial rents; and generate a large volume of truck or other vehicle traffic; or a combination of these reasons.

In our experience, in some municipalities up to 15% of the commercial inventory is found in employment areas.

In the case of the KBP, however, the KBPSP is very restrictive in terms of commercial land use permissions. As per Figure 8-2, many of the above commercial uses, would not be permitted within the business park and would have to be accommodated elsewhere. These would include:

- Automotive sales and services;
- Public storage uses;
- Private indoor recreation uses;
- Stand alone-banquet halls;
- Home furnishings, home improvement and supply outlets;
- Stand-alone restaurants and fast food outlets
- Stand-alone banks and credit unions; and,
- Stand-alone business supplies and services.

Figure 8-2: Keswick Business Park Land Use Permissions by Designation

Business Park I	Business Park II	Business Park III
<ul style="list-style-type: none"> ○ All types of Business and Professional Offices, including retail and services when integrated as a component of an office building ○ Hotels and Hotel/Convention Centres, including retail and services when integrated as a component of a hotel or convention centre ○ Institutional Uses, including government, research, and retail and services when integrated as a component of the institutional building ○ Prestige Industrial, including enclosed warehousing, distribution, research and development, communications facilities, and manufacturing and processing operations deemed not to be obnoxious ○ Community Facilities including public parks and open space ○ Public or Private Sector Utilities, storm water management and transportation facilities 	<ul style="list-style-type: none"> ○ All types of Business and Professional Offices ○ Prestige Industrial, including enclosed warehousing, distribution, research and development, communications facilities, and manufacturing and processing operations deemed not to be obnoxious ○ Private Sector Commercial or Trade Schools ○ Community Facilities including public parks, open space, day nurseries, places of worship ○ Public or Private Sector Utilities, storm water management and transportation facilities. ○ Hotels and Hotel/Convention Centres, including retail and services when integrated as a component of a hotel or convention centre or office use 	<ul style="list-style-type: none"> ○ Industrial Uses, including manufacturing, fabrication, assembly and processing, warehousing, storage tanks, service and maintenance, research and development laboratories and facilities, distribution, and communications facilities ○ Public Parks and Open Space Linkages ○ Public or Private Sector Utilities, storm water management and transportation facilities ○ Ancillary Open Storage is permitted in conjunction with any permitted use ○ Ancillary retail sales show room and/or ancillary office as an integrated component of any other permitted land use provided that: the ancillary retail/office component is directly related to the primary use, and the retail and/or office component does not constitute more than 25% of the building’s GFA

The most logical location for these uses would be the Commercial/Employment designation on the west side of Woodbine Avenue, where they would generally be permitted and would have access to larger sites with excellent arterial road access. Additionally, they would generally be permitted within the Urban Centres, however, the lack of large sites and accessibility would pose an issue for most of these uses.

The other potential location would be the Urban Corridor 2 lands on The Queensway South, north of Ravenshoe Road. This area permits retail and service commercial uses and does offer some vacant

sites. However, the predominantly residential character of this part of The Queensway, the distance from the KBP and the greater access afforded by Woodbine Avenue, would make this area less desirable than the Commercial/Employment designation for many of these uses. In addition, as noted above, The Queensway South between Ravenshoe Road and Glenwoods Avenue may be appropriate for neighbourhood commercial uses serving new residential development in southern Keswick.

3. What commercial needs will be generated by the KBP that will need to be accommodated elsewhere in the community?

The anticipated 8,500 employment land employees that would be added to Keswick will generate significant demand for a variety of retail and service commercial uses, including: eating and drinking uses; personal services; banks and financial services; and business services. These uses would be permitted within the KBP, but only if they are integrated as part of an office building. This may restrict some potential tenants that require drive through access; restaurant uses that rely on meal delivery services; and uses that rely on larger floor plates, among others. Furthermore, the ability to accommodate these uses would depend on the existence of suitable office buildings, in the KBP.

In the absence of creating more flexibility within the use permissions in the business park, some of these uses would need to be accommodated on the west side of Woodbine Avenue in the Commercial/Employment area.

In addition, it is also important to note that the very significant increase in employment in Keswick will likely change commuting patterns by community residents. In other words, fewer residents will need to leave the community to work, and would also likely shop more within Keswick. This will also assist in bolstering demand beyond that currently being generated by Keswick residents.

Conclusion

Beyond the need to accommodate typical retail and service commercial uses required by the growing population of Keswick, there will be a need for the vacant Commercial/Employment designated lands to accommodate:

- Potential overflow industrial land needs that cannot be accommodated within the KBP;
- Quasi-industrial and commercial uses that cannot be accommodated within the KBP; and,
- Services and retail uses generated by future business park employees and businesses that may not be able to locate within the KBP.

9.0 Commercial Demand and Supply Reconciliation

Key Findings

- There will be a need for approximately 648,000 square feet (60,200 square metres) of new commercial space in the Study Area by 2041.
 - There is currently 70,000 square feet (6,500 square metres) of commercial space proposed to be developed in the Study Area. Excluding this space, there will be a net requirement to accommodate approximately 580,000 square feet (53,883 square metres) of commercial space by 2041.
 - At typical commercial densities, this will require approximately 53 acres (21 hectares). This could be less if commercial uses are introduced as part of mixed-use formats or are developed at higher densities through reduced parking requirements.
 - Overall there is some 240 acres (97 hectares) of vacant commercial lands, of which 207 acres (83 hectares) are located within the Employment/Commercial lands. Some 26 acres (10 hectares) are situated within the Urban Centres – primarily in the Glenwoods Urban Centre, while the remaining 7 acres (3 hectares) is located within the Urban Corridors.
 - There is an excess supply of some 187 acres (75 hectares) of commercial land to meet commercial needs by 2041. While it is recognized that some of the small-scale sites in the Urban Centres and Urban Corridors may not develop for retail uses, this will not reduce the supply by any significant amount. As a result, the vast majority of this surplus will exist within the Commercial/Employment designation.
 - If the employment projections in the Development Charges Background Study are realized, there may be a need for lands on the west side of Woodbine Ave. to accommodate overflow industrial uses that may not be accommodated within the KBP.
 - The Commercial/Employment Area along the west side of Woodbine Ave. may also be required to support commercial and quasi-industrial uses that are not permitted within the KBP, and which have not been accounted for in the commercial space analysis (e.g. stand-alone banquet halls; public-storage units; automotive sales establishments; marine sales establishments; and others).
 - We would recommend that the Town of Georgina be cautious with regards to re-designating any lands within the Commercial/Employment designation to non-employment uses, until a more comprehensive assessment of its employment land needs is conducted.
-

9.1 Commercial Demand Summary

As analyzed in Section 7, There will be a need for approximately 648,600 square feet (60,800 square metres) of new commercial space in the Study Area by 2041.

By 2041, there will likely be sufficient population to warrant a large-scale home improvement centre that would require approximately 10 to 15 acres (4 to 6 hectares). The most likely location would be on one of the large vacant parcels designated Commercial Employment on the west side of Woodbine Avenue.

There will also be demand for some 66,000 square feet (6,131 square metres) of additional supermarket space, which would represent two additional supermarkets. Typically, supermarkets in suburban settings are developed as part of a commercial centre rather than free-standing. In a community, such as Keswick, these types of centres would serve the surrounding neighbourhoods with a range of food and other weekly/day-to-day services and retailers. These types of centres would typically require between 7 and 10 acres (3 to 4 hectares). Two centres of this size would require some 14 to 20 acres (5 to 8 hectares). There are only two areas where developments of this size could locate – the vacant parcel at the south end of the Glenwoods Urban Centre and one of the large-scale sites on the west side of Woodbine Avenue.

There is also some 70,000 square feet (6,500 square metres) of commercial space proposed to be developed in the Study Area. Excluding this space, there will be a net requirement to accommodate approximately 580,000 square feet (53,883 square metres) of commercial space by 2041. At a contemporary retail coverage of 25%, this will require approximately 53 acres (21 hectares). This may be reduced if some of this space is accommodated within mixed use projects or subject to higher than typical densities with lower than typical parking ratios.

9.2 Vacant Commercial Land Supply

Overall there is some 240 acres (97 hectares) of vacant commercial lands, of which 207 acres (83 hectares) are located within the Employment/Commercial designation. Some 26 acres (10 hectares) are situated within the Urban Centres – primarily in the Glenwoods Urban Centre while the remaining 7 acres (3 hectares) is located within the Urban Corridors.

9.3 Reconciliation

With a need for only 53 acres (21 hectares), this means that there is an excess supply of some 187 acres (75 hectares) of commercial land. While it is recognized that some of the small-scale sites in the Urban Centres and Urban Corridors may not develop for retail uses, this will not reduce the supply by

any significant amount. As a result, the vast majority of this surplus will exist within the Commercial/Employment designation.

However, it is important to recognize that while the majority of lands on the west side of Woodbine Avenue will not be needed for typical commercial uses, they may still be required to support commercial and quasi-industrial uses that are not permitted within the KBP, and have not been accounted for in the commercial space analysis (e.g. stand-alone banquet halls; public-storage units; automotive sales establishments; marine sales establishments; and others). More importantly, if the employment projections in the Development Charges Background Study are realized, there may be a need for lands on the west side of Woodbine to accommodate overflow industrial uses that may not be accommodated within the KBP.

As noted in Section 8, the KBP will accommodate approximately 160 net hectares (395 acres) of employment land employment. The Keswick employment land needs inferred by the employment projections in the Town's Development Charges Background Study would amount to between 194 and 227 net hectares (480 to 560 acres) – a potential shortfall of 34 to 67 hectares (84 to 165 acres). This shortfall may be understated depending on the actual employment densities realized in the business park. It is important to recognize that the Development Charges Background Study was intended to determine future building area for the purposes of determining development charges and not employment land needs. We would therefore, recommend that the Town undertake a more comprehensive employment land study to determine whether employment lands in Keswick beyond those designated for the KBP are required.

This analysis suggests that there may be an excess commercial land supply of some 187 acres (75 hectares). However, the Town of Georgina should be cautious with regards to re-designating any lands within the Commercial/Employment designation to non-employment uses, until a more comprehensive assessment of its employment land needs is conducted.

10.0 Summary of Key Findings

10.1 Keswick Study Area

- The Study Area is the Keswick Secondary Plan area (“Keswick”). Keswick is the largest urban community in the Town of Georgina and is anticipated to attract approximately two-thirds of the population growth for the Town as a whole over the next 20 years.
- Keswick has seen a significant boost to its regional accessibility with the expansion of Highway 404 to Ravenshoe Road. The planned Highway 404 extension to Highway 12 and the planned Bradford By-Pass would further enhance the accessibility of the community. With continued housing price escalation in the GTA, Keswick is well positioned to accommodate future housing and business growth.
- Owing to restrictive commercial land use permissions in the Keswick Business Park (KBP), there would be minimal competitive overlap with the commercial uses that could be accommodated within the KBP and those that would be required to serve the broader Keswick Community. This overlap would be limited to office uses that might otherwise locate in retail centres (e.g. real estate, financial, insurance and similar local serving offices) and ancillary retail and services that would be part of KBP office buildings.

10.2 Land Use Policy Context

- There are five land use designations that can accommodate future commercial development within the Study Area.
 - **Employment/Commercial designation on the west side of Woodbine Avenue** – These lands comprise some 316 acres (127 hectares), of which 207 acres (83 hectares) are vacant and are intended for large scale retailing, retailing that relies on arterial road access and a range of prestige industrial uses. This designation permits a very broad range of commercial and prestige industrial uses.
 - **Urban Centres** – Three Urban Centres are designated to encourage mixed-use development at strategic locations. Commercial uses in these areas generally support local shopping. Available site sizes would generally limit the size of uses that could be accommodated within the Urban Centres.
 - **Urban Corridors** – Two Urban Corridors are designated along The Queensway to connect the Urban Centres. Commercial uses are permitted, however, there is limited land availability to accommodate future commercial space in the corridors.
 - **Neighbourhood Centres** – Neighbourhood Centres can be designated in residential areas to provide for a 5 to 10 minute walk of convenience retail and services. These

are intended to be small sites. There are no vacant Neighbourhood Centre sites at present.

- **Tourist Commercial** – This designation exists to recognize individual tourist commercial properties outside of established commercial areas. There is only one very small site of vacant land with this designation in Keswick.

10.3 Trade Area

- The Trade Area served by the commercial facilities within the Study Area has been defined as the Town of Georgina.
- To the north and west, driving distances to Keswick are impeded by Lake Simcoe. To the south, the significant commercial competition in Newmarket and the Green Lane Area of East Gwillimbury would limit shopping from persons from south of the Town. To the east, beyond the Town boundary, the Town of Uxbridge would be a more convenient shopping destination.
- In addition to persons living in the Town of Georgina, additional expenditure potential would be available from inflow, including: tourists, seasonal residents, non-residents working in Georgina; and transient traffic.

10.4 Market Characteristics

- We have estimated the base year (2019) population of the Town and the Study Area at 48,415 and 28,604, respectively, based on Statistics Canada Census data and more recent information provided by the Town. Between 2019 to 2041, the Study Area is expected to account for 66% of total growth within the Town; amounting to over 15,000 new residents within this period.
- The Town's seasonal population is estimated at 4,649 persons in 2019, approximately 10% of the total population. We have assumed that this modest seasonal population will not have a significant impact on inflow for retail and non-retail facilities.
- The average per capita income in the Town of Georgina is nearly 25% below the provincial average. The average Keswick income is slightly above that for the Town as a whole, but still over 20% below the provincial average.
- The Construction and Retail Trade industries employ the largest number of Georgina residents, with Manufacturing and Health Care/Social Assistance following closely behind.

10.5 Commercial Competition

- The Study Area has a total of 1,046,700 square feet (97,240 square metres) of retail/service commercial space. Nearly 50% (496,200 square feet or 46,098 square metres) of the space is located along the Woodbine Avenue corridor. The majority of remaining space is generally located in the three Urban Centres.
- The retail/service commercial vacancy rate of the Study Area is 2%. This is below a healthy rate, and suggests that there may exist some unfulfilled demand at the present time.
- Over 40% of retail/service commercial space in the Study Area is Non-Food Store Retail, and nearly 70% of that space is located on the Woodbine Avenue corridor. Services and Food Store Retail account for 40% and 16% of total space, respectively.
- The most significant competition for the Keswick retail sector is the commercial concentration existing at Green Lane and Yonge Street, and along Yonge Street and Davis Drive in Newmarket and East Gwillimbury. This cluster contains most of the major retail tenants operating in the GTA and would serve to attract spending from Keswick residents, as well as, limiting the retail draw of Keswick to the south.
- There are five commercial development applications proposed in the Study Area that collectively amount to some 6,500 square metres (70,000 square feet) of GFA. Over 60% of the proposed space is located on the Woodbine Avenue corridor. This is a relatively small amount given the existing inventory and the future growth potential of Keswick and the Town.
- There is currently some 240 acres (97 hectares) of vacant commercially designated land, of which about 207 acres (83 hectares) is situated along the west side of Woodbine Avenue. A supply of 240 acres (97 hectares) would accommodate some 2.6 million square feet (241,500 square metres) of retail space at traditional commercial densities. This is far in excess of what the future population of Keswick will require given the projected population to 2041.

10.6 Commercial Needs Analysis

- The Community of Keswick currently supports some 34.6 square feet of retail and services space per person, which is below average for similar communities. This is indicative of the fact that much of shopping by local residents occurs outside of the community – in part because the relatively small size of Keswick does not support the full range of commercial uses.
- Keswick is projected to grow by approximately 15,000 persons between 2019 and 2041. This growth would support approximately 559,500 square feet (51,979 square metres) of additional retail and services space.

- However, recognizing that Keswick is the largest urban community in the Town of Georgina, and the opportunity to reverse outflow spending by the existing population, the total warranted additional space by 2041 has been estimated at approximately 648,000 square feet (60,200 square metres).

10.7 Employment Land Analysis

- The lands within the KBP may not be sufficient to accommodate the projected employment land employment to 2041. Until a more detailed employment Land Needs Analysis is conducted, it may be necessary to protect the Commercial/Employment designated lands to accommodate some future employment uses.
- There are a number of commercial and quasi-industrial uses that require larger sites and good arterial road access that would be restricted from locating within the KBP. In many municipalities, some or all of these uses would be permitted within certain employment areas. These would include: automotive sales and services; private indoor recreation uses; public storage; stand-alone banquet halls; home furnishings, home improvement and supply outlets; and a range of stand-alone retail and service outlets. As the KBP would not permit these uses, the most likely location for them would be the Commercial/Employment designation.
- There will be up to 8,500 new employment land employees added to Keswick between 2019 and 2041. This is a very significant growth for a community the size of Keswick and will generate a need for specific goods and services, including: eating and drinking establishments, personal services, business services and financial services. Some of this demand would be best located within the Commercial/Employment designation, owing to commercial restrictions within the KBP.
- In addition, this significant growth in employment will likely assist in changing commuting patterns and redirecting retail and service expenditures currently leaving the community.

10.8 Commercial Demand and Supply Reconciliation

- There will be a need for approximately 648,000 square feet (60,200 square metres) of new commercial space in the Study Area by 2041.
- There is also some 70,000 square feet (6,500 square metres) of commercial space proposed to be developed in the Study Area. Excluding this space, there will be a net requirement to

accommodate approximately 580,000 square feet (53,883 square metres) of commercial space by 2041.

- At typical commercial densities, this will require approximately 53 acres (21 hectares). This could be less if commercial uses are introduced as part of mixed-use formats or are developed at higher densities through reduced parking requirements or pre-zoned as part of larger parcels.
- Overall there is some 240 acres (97 hectares) of vacant commercial lands, of which 207 acres (83 hectares) are located within the Employment/Commercial designation. Some 26 acres (10 hectares) are situated within the Urban Centres – primarily in the Glenwoods Urban Centre while the remaining 7 acres (3 hectares) are located within the Urban Corridors.
- There is an excess supply of some 187 acres (75 hectares) of commercial land to meet commercial needs by 2041. While it is recognized that some of the small-scale sites in the Urban Centres and Urban Corridors may not develop for retail uses, this will not reduce the supply by any significant amount. As a result, the vast majority of this surplus will exist within the Commercial/Employment designation.
- If the employment projections in the Development Charges Background Study are realized, there may be a need for lands on the west side of Woodbine Avenue to accommodate overflow industrial uses that may not be accommodated within the KBP.
- The west side lands may also be required to support commercial and quasi-industrial uses that are not permitted within the KBP, and have not been accounted for in the commercial space analysis (e.g. stand-alone banquet halls; public-storage units; automotive sales establishments; marine sales establishments; and others)
- We would recommend that the Town of Georgina be cautious with regards to re-designating any lands within the Commercial/Employment designation to non-employment uses, until a more comprehensive assessment of its employment land needs is conducted.

Appendix A Population & Employment Projections

Town of Georgina	Population	Employment	Activity Rate
2006	44,204	¹	
2011	44,906	¹	
2016	47,373	¹	⁵ 0.19
2019	48,415	²	⁵ 0.21
2021	50,882	³	⁵ 0.23
2026	54,352	³	⁵ 0.24
2031	58,923	³	⁵ 0.27
2036	66,082	³	⁵ 0.30
2041	71,300	⁴	⁶ 0.33

Keswick (Study Area)	Population	Employment	Activity Rate
2006	24,554	¹	
2011	26,832	¹	
2016	27,909	¹	⁸ 0.16
2019	28,604	⁷	⁹ 0.20
2021	30,248	⁷	⁹ 0.22
2026	32,562	⁷	⁹ 0.25
2031	35,609	⁷	⁹ 0.30
2036	40,382	⁷	⁹ 0.35
2041	43,860	⁷	⁹ 0.40

Source: urbanMetrics inc.

¹ Census of Canada – Adjusted for Census Undercount.

² York Region Population Estimate June 30, 2019 based on housing completions – Adjusted for Undercount.

³ Town of Georgina 2016 Development Charges Background Study – Adjusted for Undercount.

⁴ York Region Preferred Growth Scenario, November 2015 – Adjusted for Undercount.

⁵ Town of Georgina 2016 Development Charges Background Study

⁶ urbanMetrics estimate based on trends from the Town of Georgina 2016 Development Charges Background Study.

⁷ Based on the Keswick share of Town of Georgina population growth of 66% as per the Town of Georgina 2016 Development Charges Background Study.

⁸ Based on the ratio of employment in Keswick to Town of Georgina .4875 based on the Town of Georgina Official Plan.

⁹ Based on the share of Town of Georgina employment growth attracted to Keswick of 91% as per the Town of Georgina 2016 Development Charges Background Study.

Appendix B Projected Employment by Type

Town of Georgina	Total Employment		Population Related		Employment Land Employment
2016	9,037	¹	7,531	¹	1,506
2019	10,340	¹	7,869	¹	2,471
2021	11,543	¹	8,103	¹	3,440
2026	13,265	¹	8,588	¹	4,677
2031	15,904	¹	9,281	¹	6,623
2036	19,670	¹	10,632	¹	9,038
2041	23,670	²	12,032	³	11,638

Keswick (Study Area)	Total Employment		Population Related		Employment Land Employment
2016	4,406		4,406	⁴	0
2019	5,591		5,591	⁴	0
2021	6,686		5,919	⁵	767
2026	8,253		6,390	⁵	1,863
2031	10,655		7,110	⁵	3,545
2036	14,082		8,138	⁵	5,943
2041	17,722		9,230	⁵	8,491

Source: urbanMetrics inc.

¹ Town of Georgina 2016 Development Charges Background Study

² urbanMetrics estimate based on trends from the Town of Georgina 2016 Development Charges Background Study and the York Region Preferred Growth Scenario, November 2015.

³ urbanMetrics estimate based on 35% population related employment as per Town of Georgina 2016 Development Charges Background Study

⁴ 100% of employment is population related as Keswick Business Park is undeveloped as of 2019.

⁵ Assumes 70% of employment growth is employment land employment as per Town of Georgina 2016 Development Charges Background Study.