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urban Metrics

TOWN OF EAST GWILLIMBURY NEW COMMUNITIES SECONDARY PLAN

Commercial Land Needs and Market Analysis

East Gwillimbury, Ontario

Prepared for The Town of East Gwillimbury

November 17, 2025

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November 17, 2025

Ron Palmer, BES MCIP, RPP
Principal
The Planning Partnership
rpalmer@planpart.ca

Dear Mr. Palmer:

RE: Town of East Gwillimbury New Communities Secondary Plan – Commercial Land Needs and Market Analysis (East Gwillimbury, Ontario)

urbanMetrics Inc. is pleased to submit this Commercial Land Needs and Market Analysis report, which has been prepared as background to the preparation of the New Communities Secondary Plan for the Town of East Gwillimbury.

The Town of East Gwillimbury's Secondary Plan includes six CDPs which are composed of various land use designations including *Residential*, *Mixed-use Centres* and *Mixed-used Corridors*. Estimated population targets for each of these CDPs have been prepared by the Planning Partnership.

The analysis herein summarizes our research findings regarding each of the CDPs warranted amount, type, and distribution of retail and commercial services to aid in creating complete communities within East Gwillimbury. The amount of existing retail commercial space within East Gwillimbury, as well as other factors including proximity to major retail in the Town of Newmarket, active development applications and customer origin data were considered in the final recommendations.

Respectfully submitted,

Rowan Faludi,
Partner,
urbanMetrics inc.

Daniel Bailey
Project Manager
urbanMetrics inc.

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Executive Summary

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- urbanMetrics inc. has been retained as part of a consortium led by the Planning Partnership which is conducting the Town of East Gwillimbury Complete Communities Secondary Plan. urbanMetrics was specifically engaged to complete a Retail/Commercial Needs Analysis as a background component to the plan.
- The Complete Communities Secondary Plan pertains to a non-contiguous area within East Gwillimbury that is approximately 1,200 hectares, spread around the existing communities of Holland Landing, Sharon and Queensville. Within this plan, there are six Community Design Plan Areas ("CDP"), referred to as the Yonge Corridor CDP, Walnut Farms CDP, Sharon Heights CDP, Sharon East CDP, Holland Landing East CDP and Green Earth CDP.
- The Secondary Plan CDP Areas have a combined target buildout population of 46,000 residents.
- The purpose of this Study was to determine the retail and service commercial needs of the Town, as well as the most appropriate locations for various retail and service commercial uses within the CDP areas. This was done while considering the Fundamental Principles of the Town's Complete Communities Secondary Growth Plan.
- Other than portions of a retail power node at the intersection of Green Lane and Yonge Street, there are minimal retail and service facilities within the Town of East Gwillimbury. For this reason, town residents rely heavily on the retail uses and services within the Town of Newmarket to the south, and to a lesser extent the Town of Bradford West Gwillimbury to the northwest.
- The competitive retail inventory in this report has been conducted in an area that includes East Gwillimbury and a section of Newmarket that borders the Town.
- As illustrated in Figure E-1, the buildout population for the Secondary Plan Area warrants approximately 250,000 to 325,000 square feet of food retail space (e.g. supermarkets and other food stores, as well as beer, wine, and alcohol), 250,000 to 325,000 square feet of non-food store retail space, and 350,000 to 450,000 square feet of service space (e.g. restaurants, personal services, financial services, medical/dental services, and others) for a total of approximately 850,000 to 1,100,000 square feet.
- The Town of East Gwillimbury is currently underserved by the existing retail commercial space. The above projections assume that in part this will be alleviated by redirecting sales currently leaving the Town to new retail facilities in the Secondary Plan.
- Within the Town of East Gwillimbury there are development applications currently under review and already approved which would add retail commercial space to the Town. These applications would add up to an additional 485,000 square feet, and would also be serving the

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future residential developments outside the SPA. The recommendations found in this report take these development applications into account.

- The warranted space has been divided between four types of commercial locations or nodes.
    - Large commercial nodes: would be approximately 250,000 square feet or greater and typically contain a full-service grocery or supermarket as an anchor tenant, together with other large format stores. This type of node draws customers from a larger area (Town-wide and beyond) and serves the regular and comparison-shopping needs of residents. Due to the high number of visitors required to support this amount of space, this type of node should be located near major roads (e.g. regional roads) with good visibility to both attract sufficient visitors and to accommodate the corresponding volume of traffic.
    - Medium commercial nodes: are up to approximately 100,000 square feet, and typically contain a grocery store or supermarket as an anchor tenant together with a variety of other non-food retail and service tenants. Their market area would include the surrounding neighbourhoods within approximately two to three kilometres radius. This type of node serves the convenience and weekly commercial needs of local residents, and would require good road access and visibility, but does not require the same volume of passing traffic or road capacity as a large node. These nodes function well at logical gateways into neighbourhoods where a large share of local residents must pass either entering or leaving the community, as well as at major intersections which can attract both east-west and north-south traffic.
    - Small commercial nodes: would be up to approximately 50,000 square feet, and could contain a pharmacy, small food/convenience store or other retailers as an anchor tenant. This type of node serves the convenience commercial needs of local residents. Close proximity and convenient access to a large enough number of local residents is critical for this type of node, as ease of access is one of the primary reasons customers will frequent this type of node instead of a more distant but larger node. Small convenience nodes have the potential to draw a higher share of pedestrian and cycling traffic due to their proximity to their nearby customer base and their smaller scale which allows them to be more easily integrated into active transportation routes.
    - Dispersed commercial space: is made up of individual stores or small clusters of stores that do not necessarily lend themselves to locations in a planned commercial node. This type of commercial space is expected to make up a small share of the total commercial floor area in the Complete Communities Secondary Plan area, and to be primarily occupied by smaller independent businesses. The locational requirements of this type of commercial space are often specific to the individual business. It may

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include commercial businesses in traditional industrial areas (e.g. automotive repair facilities, specialty home improvement outlets, pool/spa/hot tub dealers, etc.), agricultural businesses, home occupations, corner stores, and others. These types of uses may be difficult to plan for, but flexibility should be provided for in the policies to accommodate commercial uses which cannot easily fit in a traditional commercial hierarchy or mixed-use setting.

Figure E - 1: Warranted Square Footage Summary

Commercial Needs - Retail Category	Warranted Space for Buildout CCSP Population (Sq Ft)	Range	
Store Categories			
Food Store Retail	**294,300**	**250,000**	**325,000**
Convenience and Speciality Food	98,100		
Supermarkets & Grocery	171,700		
Beer, Wine Liquor	24,500		
Non-Food Store Retail	**284,100**	**250,000**	**325,000**
Apparel and Accessories	23,000		
Building and Outdoor Home Supply	92,000		
Furniture, Home Furnishings & Electronics Store	40,300		
General Merchandise	36,800		
Miscellaneous Retailers	23,000		
Pharmacies & Personal Care Stores	69,000		
Services	**420,600**	**350,000**	**450,000**
Food Services & Drinking Places	122,700		
Finance, Insurance and Real Estate	30,700		
Health Care	76,700		
Personal Care	98,100		
Local Office Services[1]	17,300		
Other[2]	75,100		
Total	**999,000**	**850,000**	**1,100,000**

SOURCE: urbanMetrics Inc., Retail Inventory Data.

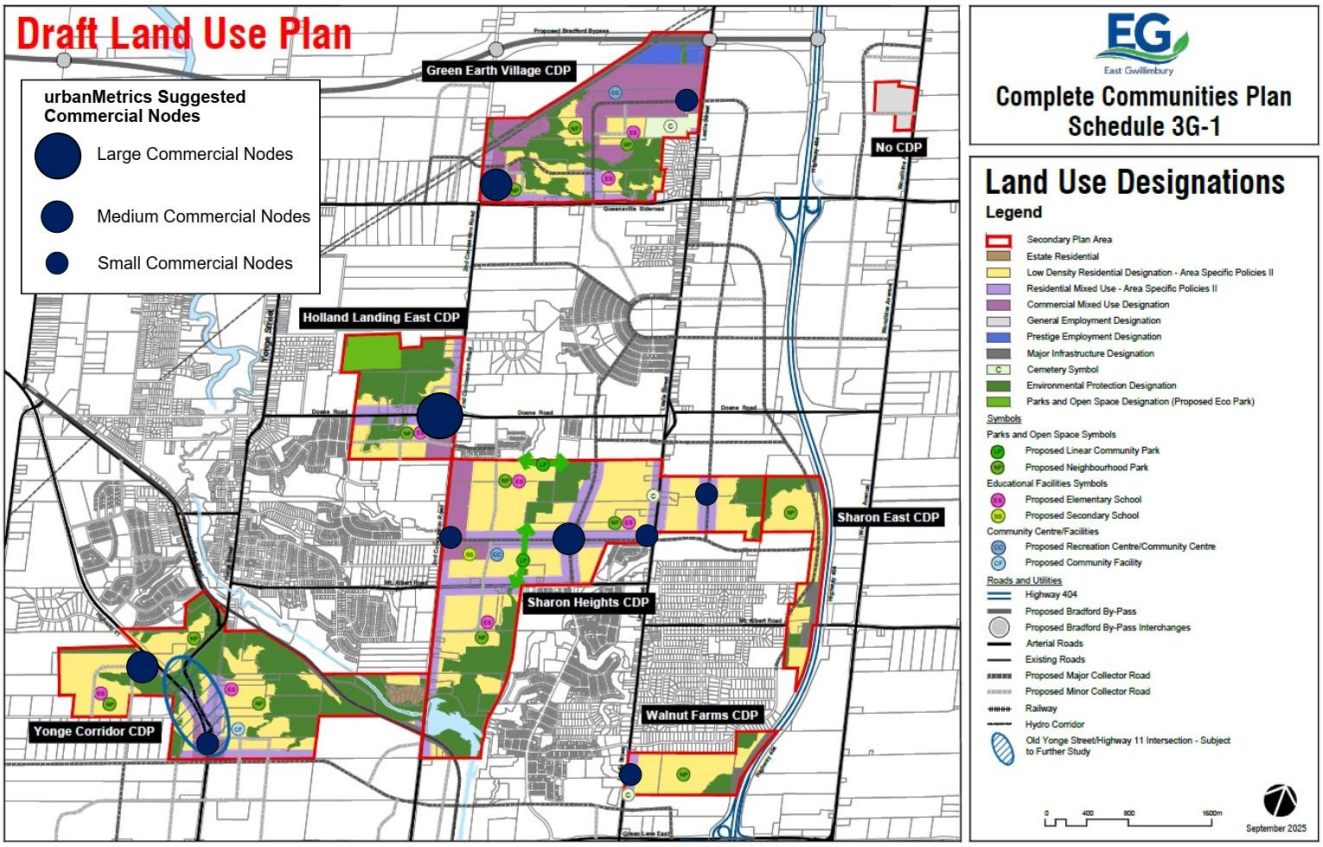
[1] Includes: Professional, Scientific and Technical Services, Select Civic and Social Organizations, Select Office Administrative Services

[2] Includes: Cultural, Entertainment and Recreation, Personal & Household Goods Repair and Maintenance, Select Educational Services, Social Services, Consumer Goods Rental

- Figure E - 2 Displays the recommended locations for retail within the SPA. The locations identified on the map were determined based on a number of factors, including the population of the CDP; accessibility to both the SPA and the Town as a whole; and location with respect to existing retail facilities. In all cases, these nodes were incorporated within

either a proposed Mixed-Use Centre or a Mixed-Use Corridor. These locations are intended to guide future planning but are not meant to be definitive. We anticipate that modifications to the commercial structure shown on the map will be inevitable, once more detailed planning occurs, including an analysis of individual development parcels.

Figure E - 2: Recommended Location and Size of Warranted Commercial Nodes



SOURCE: Map from Town of East Gwillimbury, March 2025, Complete Communities Secondary Plan, with commercial node locations added by urbanMetrics Inc.

1.0 Project Background

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1.1 Scope & Terms of Reference

urbanMetrics Inc. ("urbanMetrics", "uMi") has been retained by The Planning Partnership ("TPP") on behalf of The Town of East Gwillimbury ("the Town") to conduct a Retail and Commercial Market Analysis in support of the Town's Complete Communities Secondary Plan ("the Secondary Plan", "Subject Site"). This study is one of several studies required to support the Secondary Plan, with the overall project led by TPP and Town Staff. The Town's requirements for this analysis are outlined in section 4.2.1.6 of the *Town of East Gwillimbury Complete Communities Secondary Plan Terms of Reference* document, which states:

> *"This study will determine the total amount, type, role, and function of retail commercial space to properly serve residents in the Secondary Plan area. Further, the study will recommend the distribution of retail space within a retail structure/hierarchy, consistent with the warranted space and the community vision. The study will also recommend the most appropriate locations for designating retail commercial land. The study will account for the potential that retail commercial development may not reflect traditional automobile-oriented shopping centre forms. The analysis of demand will recognize a retail/commercial development pattern within the context of a transit supportive community, including "main street" principles and neighbourhood centres."*

The findings and recommendations from this retail and commercial market analysis, alongside the findings of the other background studies, will inform the development of a preliminary Community Structure Plan and Land Use Options for the Complete Communities Secondary Plan. These will be further refined based on feedback from agencies and stakeholders and will culminate in the drafting of an Official Plan amendment for consideration by the Town's Planning and Development Committee and Council for adoption.

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1.2 Approach

The following outlines the various work steps we have carried out to complete the required scope of the Retail/Commercial Analysis as identified in the Town's Terms of Reference:

- **Review of Site and Access Characteristics of the Secondary Plan Area**

  We have examined the Community Design Plan Areas ("CDPs") and assessed their suitability for various types of retail commercial uses, compatibility with existing and proposed surrounding land uses and accessibility for potential customers.

- **Quantification of Market Draw**

  We have used customer origins data to gain insights on visitation to existing commercial nodes in the Inventory Area, and used this information to understand the inflow and shopping patterns of consumers in East Gwillimbury and beyond.

- **Study Area Delineation**

  For the purposes of this study, the Study Area has been defined as the Secondary Plan Area. We have also considered the Town of East Gwillimbury as a whole and reviewed market data relating to the entire Town.

- **Inventory of Existing and Proposed Retail/Commercial Establishments**

  We have carried out an inventory of existing and proposed retail and service commercial uses by store type within the Inventory Area, which includes all of East Gwillimbury and a portion of Newmarket south of the Study Area. As part of this inventory, we have also identified the location and size of major commercial nodes.

- **Review of Retail and Commercial Trends**

  We have undertaken a review of recent retail and commercial trends and how they will influence the demand and need for future commercial space in the area. Some trends to be considered include online shopping and delivery services, *Mixed-use* development, making commercial development more attractive for active transportation, and lifestyle and social trends.

- **Market Analysis**

  Using a per capita analysis approach, which is a standard approach to market analysis used in Secondary Plan studies, we have determined the amount and type of commercial space and land that will be required to serve the future Study Area population

- **Identification of Planned Functions and Market Draw of Secondary Plan Area**

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We have conducted a preliminary review of the function and market draw of potential commercial facilities which may locate in the Secondary Plan Area. We have considered the extent of competition for new retail facilities, the amount and location of future population growth in and in vicinity to the Secondary Plan Area, and potential gaps in the inventory of retail and services space.

- **Recommendations**

  Based on the above analysis we have provided recommendations with

  regards to:

  - The amount of commercial space warranted by type of use;
  - The distribution of space by area;
  - The most appropriate formats for commercial space (Free standing, mixed use, neighbourhood shopping centre, convenience centre, etc.);
  - Input on potential commercial planning policies.

1.3 Assumptions & Limitations

Multiple base assumptions were made to conduct this Commercial Land Needs and Market Analysis. 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. Undoubtedly, deviations from historical and current trends will occur in the future. However, basic assumptions are required regarding the possible extent of such deviations.

These basic assumptions are:

- During the forecast period discussed in this report, a reasonable degree of economic stability will prevail in the Province of Ontario, specifically in the York Region and Town of East Gwillimbury markets;
- Estimates of future population in the Secondary Plan Study Area are assumed to be sufficiently accurate and are based on long-term population forecasts prepared by the Town of East Gwillimbury;[1]

[1] It should be noted that the Minister of Municipal Affairs and Housing has posted to the Environmental Registry of Ontario a "Proposed Updates to the Projection Methodology Guideline to support the implementation of the Provincial Planning Statement, 2024 (PPS, 2024)". As this posting is still in draft, is not active policy, may be revised significantly based on the comments received, and deals only with municipal-wide population projections, it would be premature for to apply a specific change to the CCSP population based on this.

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- It is assumed that the current development applications on the Town of East Gwillimbury and the Town of Newmarket's webpages are accurate and up to date.

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

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2.0 Secondary Plan Context

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2.1 Complete Communities Secondary Plan

The Planning Partnership has prepared an outline for a draft of the Complete Communities Secondary Plan ("CCSP" Figure 2-1), which was released through a Development Services staff memo to the Committee of the Whole Council on May 6, 2025. This outline identifies the intended development areas and their various uses. There are six Community Design Plan Areas ("CDP") including the Yonge Corridor CDP, Walnut Farms CDP, Sharon Heights CDP, Sharon East CDP, Holland Landing East CDP and Green Earth Village CDP. For reference, the CDPs will provide greater detail on how to implement the Secondary Plan's vision and will be developed after the approval of the Secondary Plan.

The preliminary land uses for the Complete Communities Secondary Plan include a range of *Estate Residential, Neighbourhood Areas, Mixed-use Corridors, Mixed-use Centres, Employment Areas, Major Infrastructure, Cemetery, Environment Protection Areas* and new *Roadways*. The *Mixed-use Corridors* and *Mixed-use Centres* land use designations are expected to contain most retail and service commercial uses in the Plan area. While these uses are shown below on the Northern side of the Green Earth Village, the area along 2nd Concession & Doane Road, and the Southern end of the Yonge Corridor development, the exact location, format, and amount of retail is expected to continue to be adjusted as the Plan progresses.

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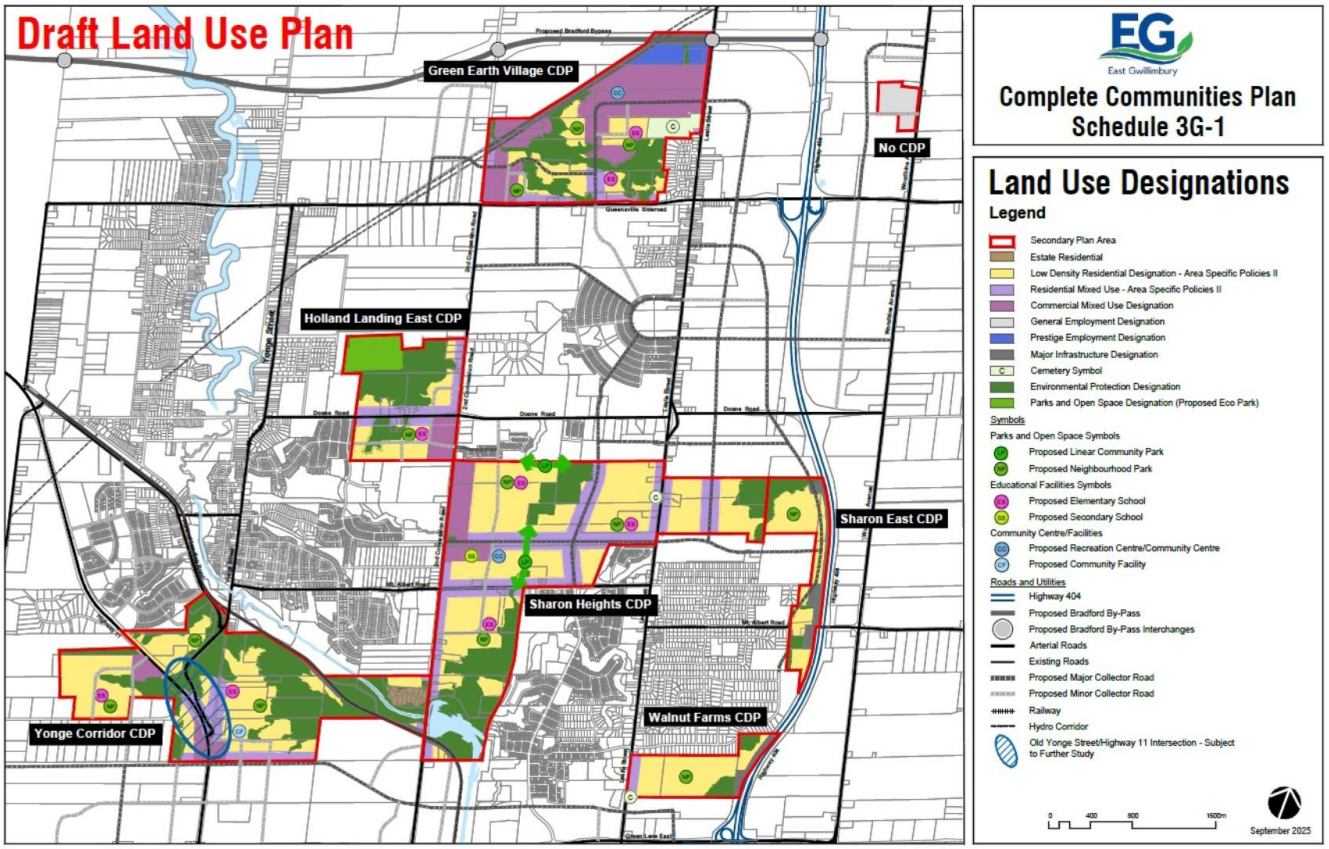
Figure 2-1: East Gwillimbury Complete Communities Secondary Plan Draft Land Use Schedule



SOURCE: Town of East Gwillimbury, September 2025, Complete Communities Secondary Plan

The preliminary outline of the Plan also included population and employment targets for each CDP (see Figure 2-2). The population targets formed the basis for the retail and commercial demand analysis in subsequent sections of this report.

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Figure 2-2: Complete Communities Secondary Plan Population and Employment Targets

Community Design Plan	Population Target	Employment Target	Density Target (people + jobs/ha)
Holland Landing East	3,500	400	70
Green Earth Village	11,000	1,000	80
Sharon East	1,500	550	50
Sharon Heights	19,000	1,500	65
Walnut Farms	2,500	150	65
Yonge Corridor	8,500	900	65
Total	**46,000**	**4,500**	**65**

SOURCE: The Town of East Gwillimbury, May 6, 2023, Development Services Memo, p. 3.

The Complete Communities Secondary Plan Draft Discussion of September 25th, 2025, contained the following vision statement which includes 6 fundamental principles.

> *East Gwillimbury will evolve as a balanced, sustainable and complete community, with a mixture of housing options to meet the needs of a diverse population and a range of employment opportunities, public service facilities and commercial uses supported by appropriate municipal infrastructure and a well-connected multimodal transportation network.*
>
> *The Town's unique villages will be supported as they grow and diversify with new compatible development and a mix of uses, while character giving natural areas and farmland are protected for the long-term.*
>
> *East Gwillimbury will continue to support and celebrate a high quality of life for current and future residents of all backgrounds and abilities and will ensure that health, accessibility, safety, equity, prosperity and resilience are prioritized.*

With respect to commercial development, the most relevant principles are:

> *Principle 1: Ensure new development contributes to the creation of complete communities.*
>
> *Principle 4: Create cohesive, vibrant and connected urban communities through mixed-uses and excellent urban design.*
>
> *Principle 6: Provide opportunities for economic growth.*

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In assessing commercial needs, it is therefore important to consider the role in which retail and commercial development will play in terms of achieving this vision and principles. Future retail uses within the Secondary Plan, should, therefore, ensure that day-to-day and weekly shopping needs can be largely met locally and should support opportunities for mixed-use development with high urban design standards. As discussed later in this study, retail and commercial development within the Secondary Plan areas also provide a unique opportunity to assist in reversing the current expenditure outflow to surrounding communities by existing East Gwillimbury residents, and thus, enhancing the Town as a complete community.

In terms of land use designations, the draft Secondary Plan proposes two designations, which would contain the bulk of future retail and commercial development:

> ***Mixed Use Corridor*** *– locations for mid-rise development, including residential and commercial opportunities.*
>
> ***Mixed Use Centre*** *– locations for mid to high-rise development, including residential and commercial opportunities.*

2.2 Updated East Gwillimbury Official Plan

The current Official Plan was adopted in by Council 2010 and has undergone various amendments, with some sections still under appeal to the Ontario Land Tribunal as of the October 2018 consolidation. The Town Council approved the Updated Official Plan in June, 2022, which was then sent to the Region of York for approval. With planning authority removed from the Region, the Updated Official Plan would require approval from the Minister of Municipal Affairs and Housing.

It is expected that the Complete Communities Secondary Plan would form an amendment to the Updated Official Plan, once it has been approved. The Updated Official Plan contains a number of commercial designations, including *Village Core Areas, Commercial Mixed Use. Residential Mixed Use, Community Commercial and Neighbourhood Commercial*.

In addition to these areas, the Urban Structure for the Town is provided in Schedule 2 of the Updated Official Plan (Figure 2-3). In terms of commercial land uses, Schedule 2 would provide for six Local and Major Centres, which could provide for new or expanded commercial concentrations. One is situated in Mount Albert, which would be well beyond the Secondary Plan area. The remaining five comprise either existing or planned future commercial concentrations close to or adjacent to the Secondary Plan lands. These include:

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- Green Lane and Yonge Street – an existing large format retail concentration with some vacant land available. It is also part of the Green Lane Major Transit Station Area;
- The East Gwillimbury GO Station MTSA on Green Lane and 2nd Concession, around which lands are undeveloped;
- Mount Albert Road and Leslie Street, which contains an existing commercial plaza, with lands on the west side of Leslie designated for *Residential Mixed-Use* development;
- Queensville Centre on Leslie Street, which is currently largely vacant, but is intended to become the primary commercial focus for the Queensville Community;
- Thompson Drive and Yonge Street in within the Holland Landing Village Core.

These potential commercial nodes will need to be acknowledged when allocating commercial space within the Secondary Plan.

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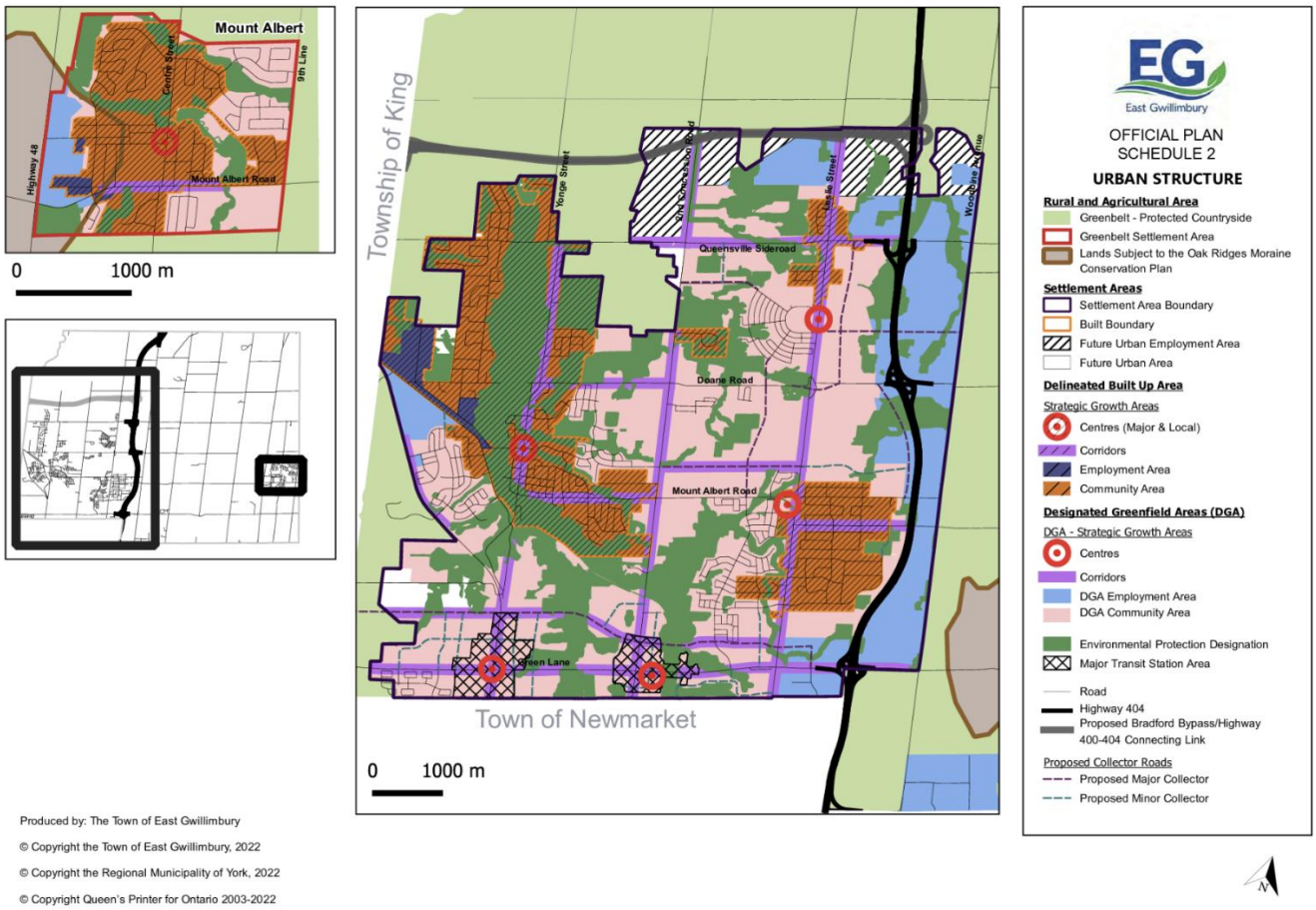
Figure 2-3: Updated East Gwillimbury Official Plan Urban Structure



SOURCE: Town of East Gwillimbury, June 2022, Schedule 2A: Urban Structure from the Updated Official Plan

2.3 York Region Official Plan

The York Region Official Plan was approved in 2022, but as of July 1, 2024, its implementation has been transferred to the local municipalities. It is now effectively part of the East Gwillimbury Official Plan.

York Region Official Plan **Policy 4.4.7** outlines the required proximity of major residential development to locations which provide services such as social services, retail, employment, parks, transit and more:

> *That the majority of residential intensification shall be directed to locations which provide access to human, educational and social services, retail, employment, arts, culture, parks,*

recreational facilities and transit within a 15 minute walk and in a manner that is consistent with the policies in Section 2.3 the Plan.

Section **4.4.24.** outlines the need for a range of land uses and active and attractive year-round ground floor services:

> *That secondary plans or other equivalent comprehensive planning studies and/or development contemplated within strategic growth areas address the following criteria, as appropriate, to the satisfaction of York Region:*
>
> *…*
>
> *d. A range of residential and commercial land uses, including retail uses, office, mixed-use, human services and other amenities;*
>
> *…*
>
> *i. An urban built form that is massed, designed and oriented to people, and creates active and attractive streets for all seasons with ground-floor uses such as retail, human and personal services.*

The principal conclusion from these policies is that the *Mixed-use Corridors* and *Mixed-use Centres* should support development that complements pedestrian and transit plans.

2.4 Access Characteristics

Access characteristics are important for the viability and success of commercial uses. They also influence the built form and design requirements for successful commercial spaces. For example, in auto-oriented communities visibility and ease of access to passing traffic is important to attract customers, as is providing sufficient parking. Similar to the vast majority of municipalities in Southern Ontario, East Gwillimbury is an auto-oriented community. As discussed above, the Complete Communities Secondary Plan aims to shift towards a broader range of uses and more multimodal transportation. In complete communities with high rates of active transportation, commercial uses require good street front visibility to passing pedestrians and cyclist along with safe and pleasant pedestrian access, as well as sufficient parking and vehicle access to serve customers arriving by car. As residents will typically only consider using active transportation to access shopping or services for trips of a few hundred metres, both the number of residents within a few hundred metres of a store and good active transportation infrastructure are critical to achieving significant mode shares.

StatCan 2021 Commuting data shows that 86.5% of East Gwillimbury residents who commute to work were driving themselves in a car, truck or van, with an additional 6.3% typically commuting as passengers in a car, truck or van. This means that some 92.8% of residents relied on a private vehicle to commute to work. This level has not changed significantly since 2016. The same data shows that just 2.6% of residents who regularly commute were using public transport and 2.3% were using some

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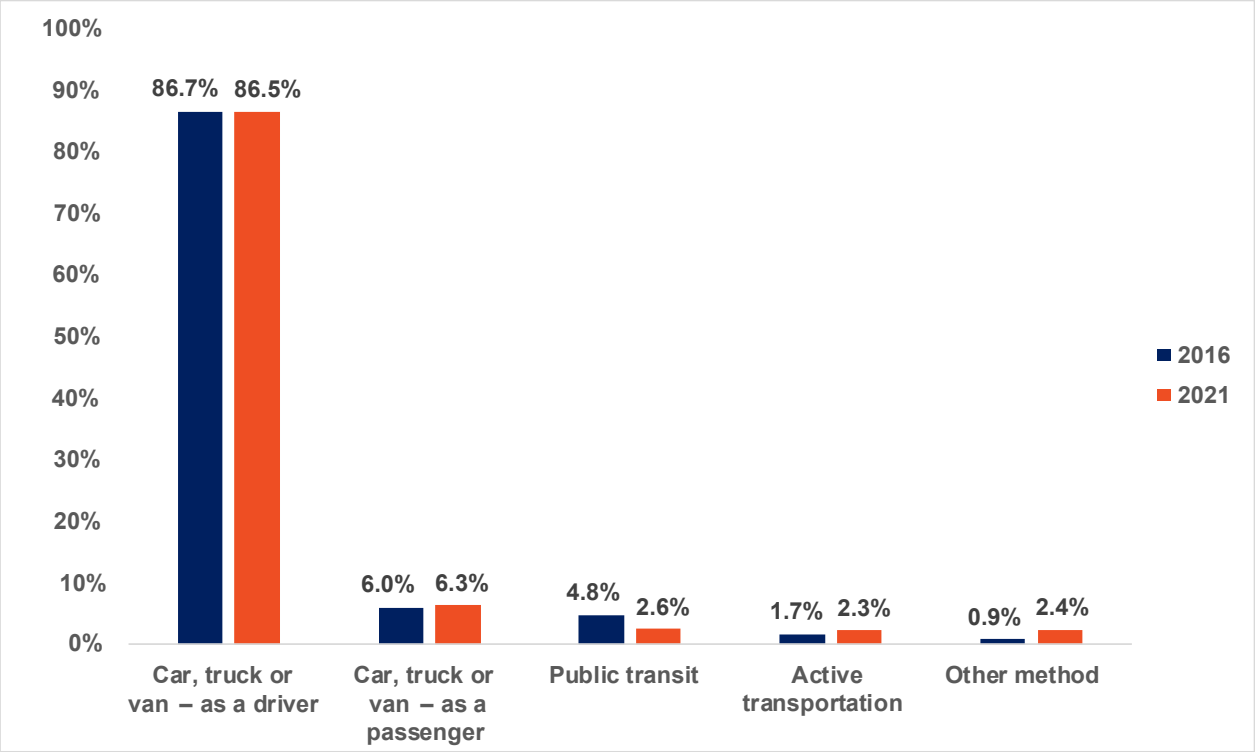
form of active transportation (i.e. bike/walking). The remaining 2.4% of commuting residents use other methods of transport. This data is presented in a visual form in Figure 2-4. There appears to be a decline in persons relying on public transportation from 4.8% to 2.6% between 2016 and 2021.

Figure 2-4: 2021 East Gwillimbury Resident Commuting Data



SOURCE: urbanMetrics inc., Data from Statistics Canada 2021 census and 2016 census censuses.

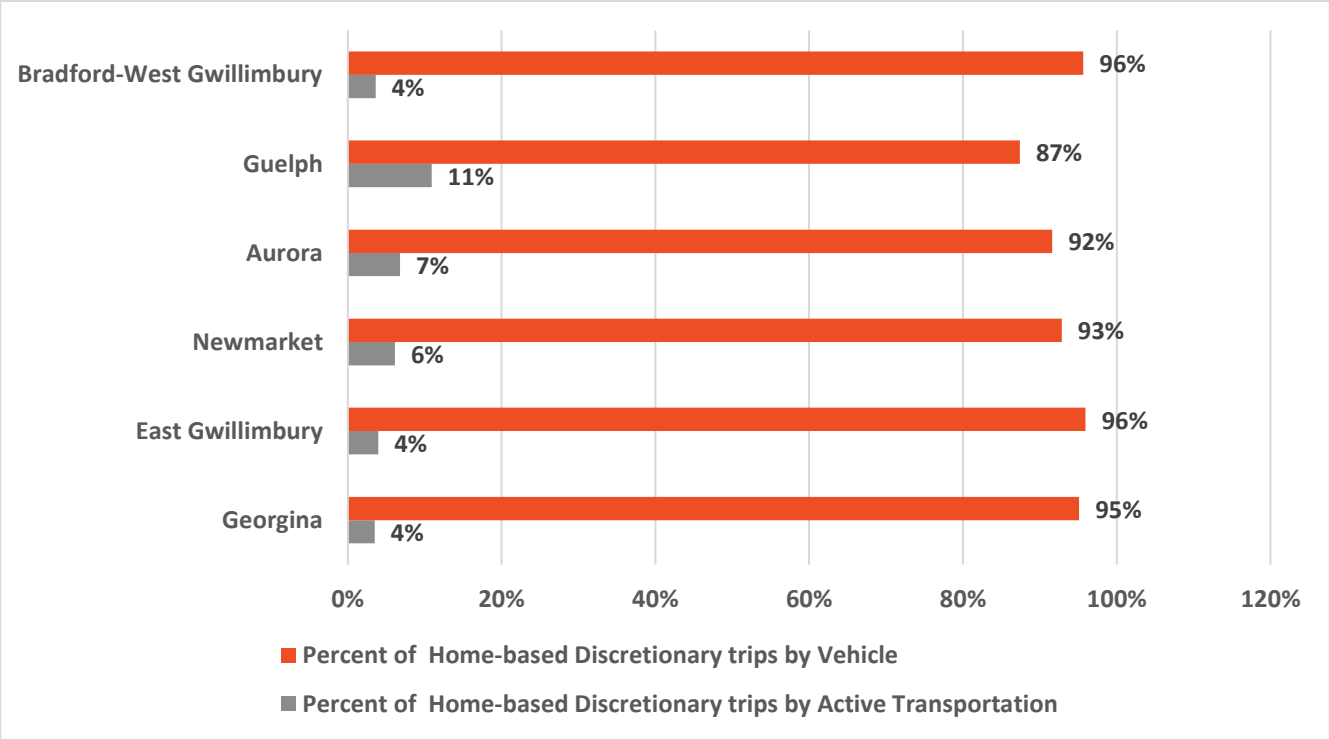
The number of residents from East Gwillimbury who carpool in 2025 may be higher than the numbers shown in Figure 2-4 from 2021. This is due to the societal norms that were present from 2020-2023 surrounding the COVID-19 pandemic. Similarly, the current values for public transportation likely align more closely with the 2016 values as a result of the impact of COVID-19 in 2021.

While the 2021 public transit values may likely be lower than those of 2025, there is still potential to increase the use of public transit within East Gwillimbury. The Metrolinx GO Transit Barrie line is scheduled for updates which will bring more frequent trains through the East Gwillimbury Go station, up to every 15 minutes seven days a week, both to and from Union Go (Metrolinx, 2025).

In terms of non work or school-related trips (“discretionary trips”) even in areas of the GTA with extremely high levels of active transportation, a large share of discretionary trips are still done by private vehicle, and as a result vehicle access is still important for commercial space in walkable

communities.[2] As shown in Figure 2-5, in East Gwillimbury as well as comparable communities, there are a low rates of active transportation and a high rate of vehicle use for trips to and from destinations other than work or school. A successful shift towards active transportation for commercial trips in East Gwillimbury would be a shift to the rates found in Guelph, which has higher rates than most other GTA municipalities.

Figure 2-5: Home-Based Discretionary Trips by Mode of Transport, 2022

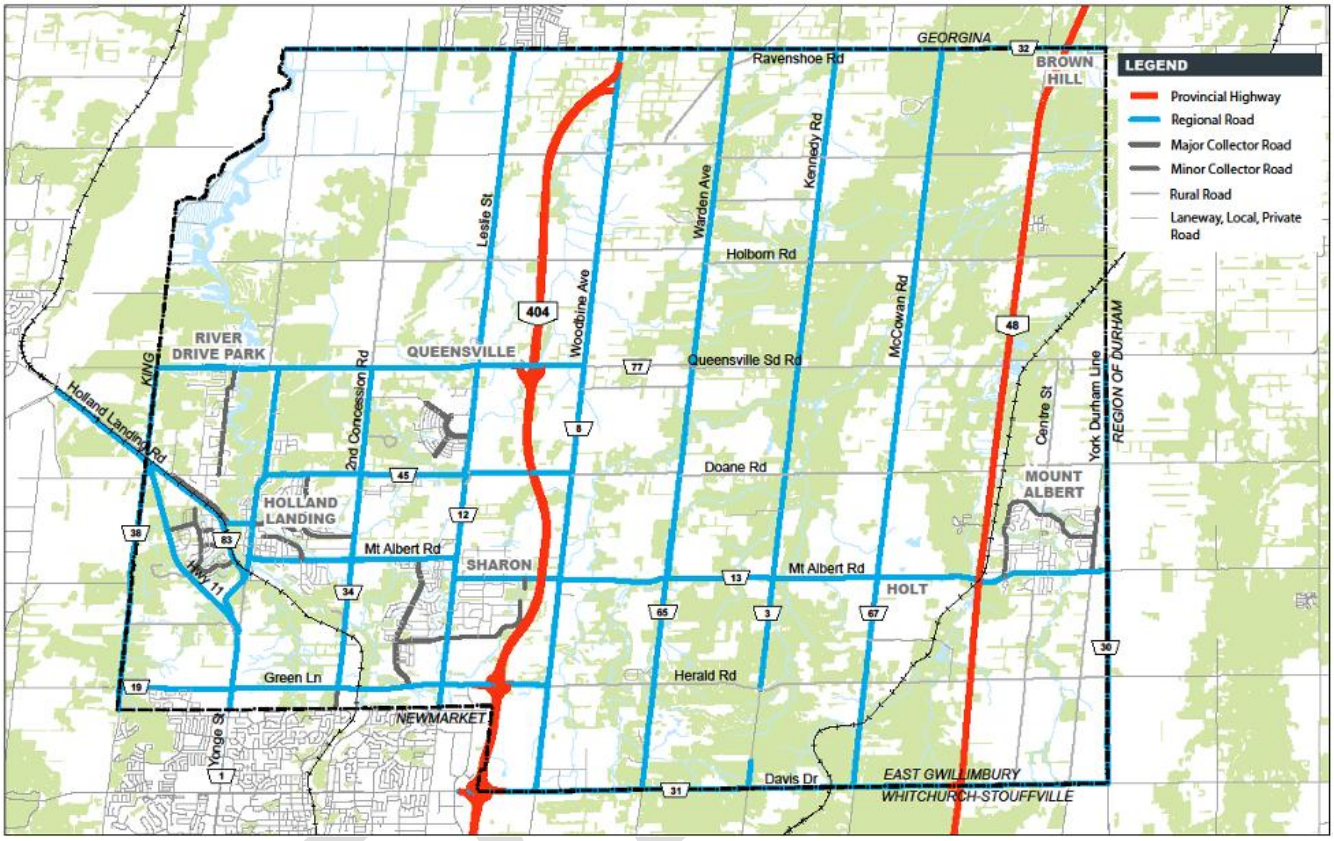


SOURCE: urbanMetrics Inc., data from Data Management Group, University of Toronto, 2022, Transportation Tomorrow Survey.

The road network in East Gwillimbury consists of primarily regional roads, with local roads within the Community Areas as seen in Figure 2-6. This contributes to the predominance of private vehicles as a mode of transport seen within the Town. As the Town grows, creating a well-connected network will be imperative to the goal of having complete communities in order to allow access to nearby amenities, retail and services, and jobs. This concern was addressed in both the 2024 East Gwillimbury Transportation Master Plan and will be addressed in the Secondary Plan as well.

[2] For example, in downtown Toronto (Planning District PD1) 29% of home-based discretionary trips were made by private vehicle in 2022, as per 2022 Transportation Tomorrow Survey provided by the Data Management Group at the University of Toronto. Home based discretionary trips are trips that are not to or from school or work, and start or end from a home. Private vehicle in this context includes auto driver, auto passenger, motorcycle, taxi or rideshare.

Figure 2-6: Existing Road Network (2024)



SOURCE: Town of East Gwillimbury, Sept 23, 2024, Figure 4-7: Existing Road Network from the Transportation Master Plan Update Final Report

All the CDPs within the Secondary Plan are readily accessible by vehicle, with arterial roadways for each as follows:

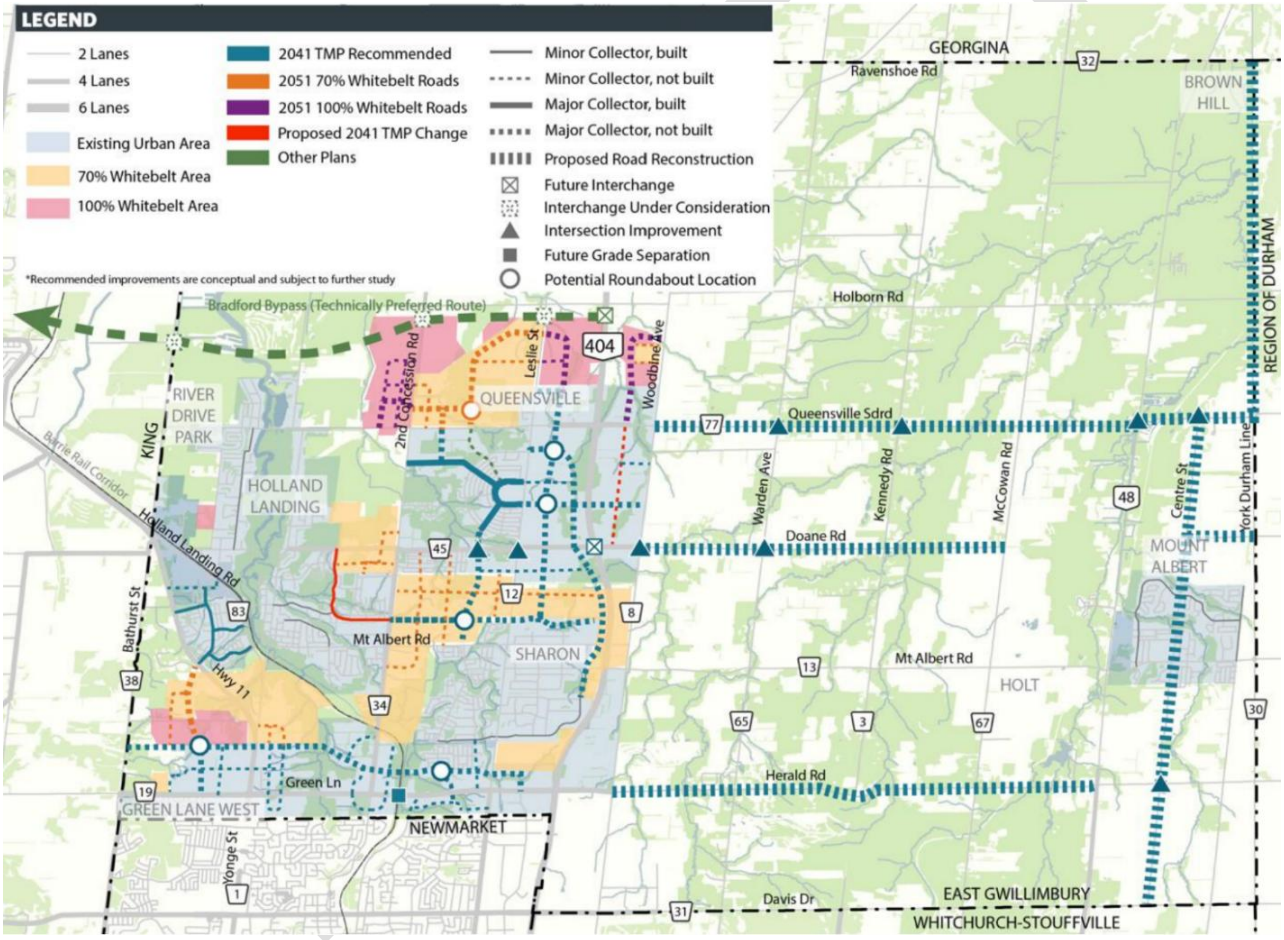
- Yonge Corridor CDP: Yonge Street, Highway 11
- Walnut Farms CDP: Leslie Street
- Sharon Heights CDP: Leslie Street, 2nd Concession Road, Mt. Albert Road
- Sharon East CDP: Mt. Albert Road
- Holland Landing East CDP: Doane Road, 2nd Concession Road,
- Green Earth Village CDP: Leslie Street, 2nd Concession Road, Queensville Sideroad

Additional major and minor collector roads have been proposed in the Secondary Plan, which will aid the accessibility of the CDPs while mitigating vehicle congestion along the arterial roadways listed

below (see Figure 2-7). Private vehicle access is currently the primary mode of access for commercial space given the existing location and built form of commercial space. As the Complete Communities Secondary Plan develops it is expected that the mode share of active transportation to access commercial uses will rise, however private vehicles will likely remain the primary way residents access retail and service commercial spaces.

The 2024 East Gwillimbury Transportation Master Plan presents recommended changes to roadways, bike routes and trails, sidewalks and public transit to be implemented by 2051. This is aligned with the displayed road network changes seen in the Secondary Plan, with a few minor differences.

Figure 2-7: Proposed 2051 Road Network

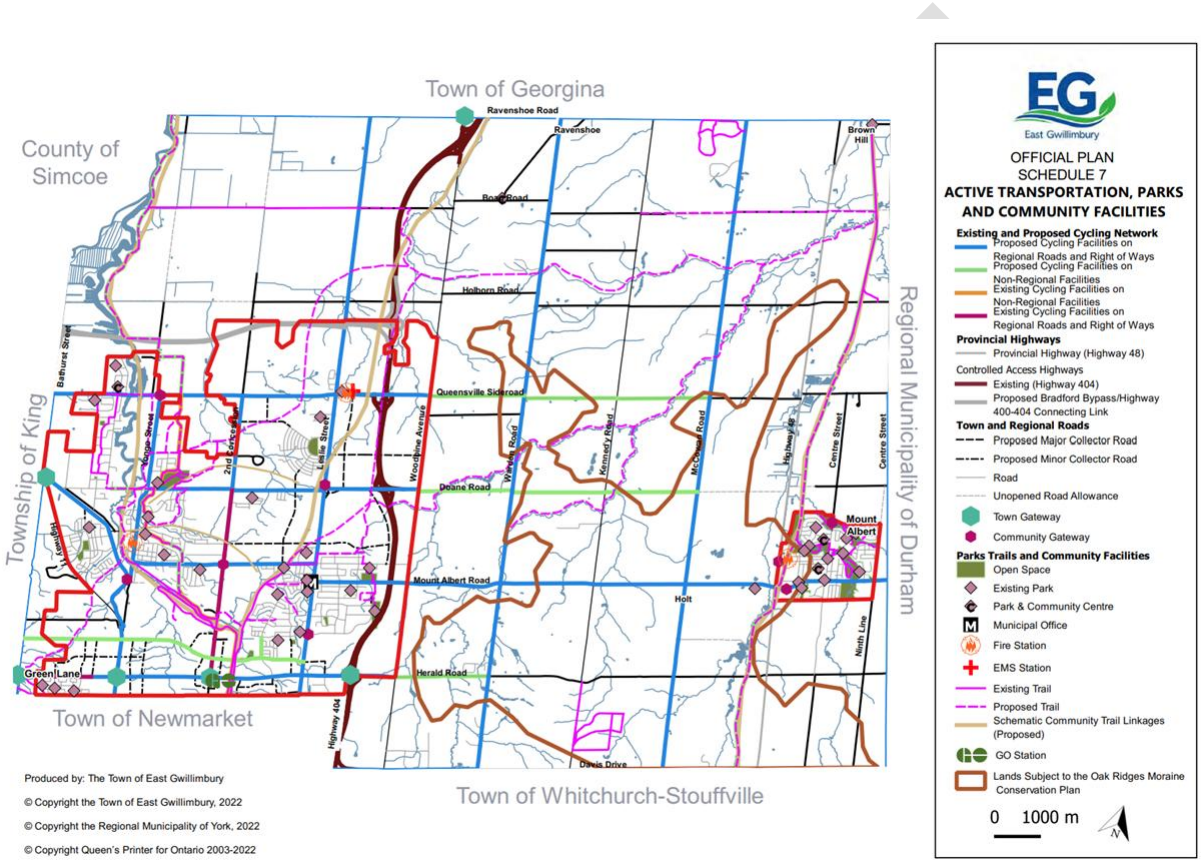


SOURCE: Town of East Gwillimbury, Sept 23, 2024, Figure 8-1: Proposed 2051 Road Network from the Transportation Master Plan Update Final Report

Figure 2-8 presents the 2024 Transportation Master Plan Update recommendations for improved cycling and trail networks. Many of the identified cycling network additions align with the road

improvement recommendations seen in Figure 2-7. Some trail additions were suggested to increase connectivity between areas of Sharon and Holland Landing, with minimal additions made in the Queensville area.

Figure 2-8: Recommended Cycling Improvements (2024)

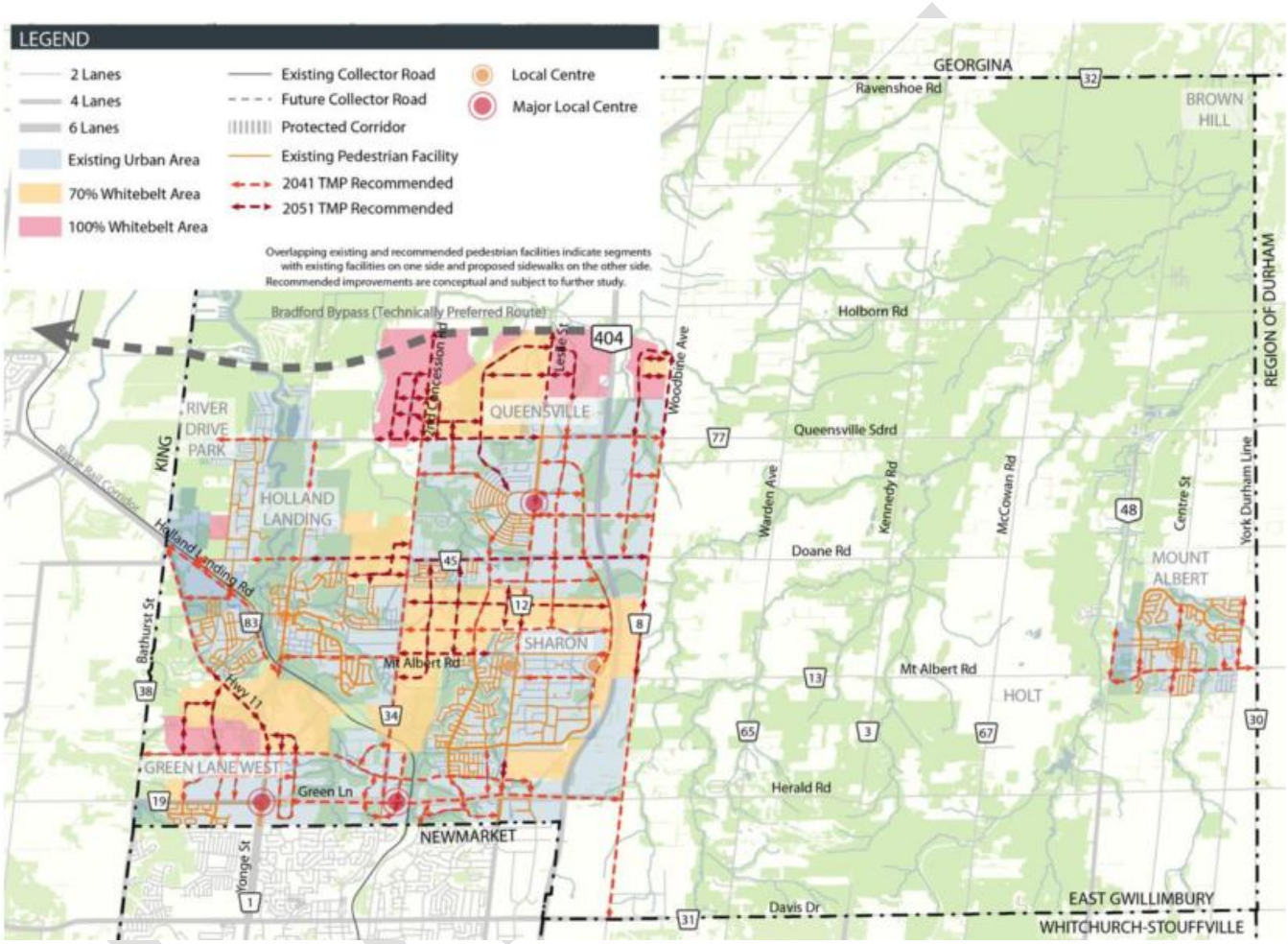


SOURCE: Town of East Gwillimbury, Sept 23, 2024, Figure 4-22: Recommended Cycling Improvements from the Transportation Master Plan Update Final Report

Figure 2-9 displays recommended sidewalk improvements from the 2024 Transportation Master Plan Update, which aims to increase the accessibility of the communities within the Holland Landing, Sharon and Queensville communities. Slight additions to sidewalks in Mount Albert are also shown in Figure 2-9. Within the CDPs, Sharon Heights has the most proposed sidewalks which will be a key factor in connecting the core Sharon area to the Holland Landing East CDP, the remainder of Holland Landing as well as communities in Queensville. Additionally, improving walkability along Green Lane will link the Yonge Corridor to the Sharon area, while increasing accessibility to the proposed major local centres. As previously mentioned, pedestrian access to commercial space is limited to short distances, and both suitable infrastructure and close proximity of residential and commercial uses are

necessary to encourage active transportation. As private vehicles will remain a major mode of transport to retail and services even with these strategies, both pedestrians and vehicles will need to be accommodated simultaneously.

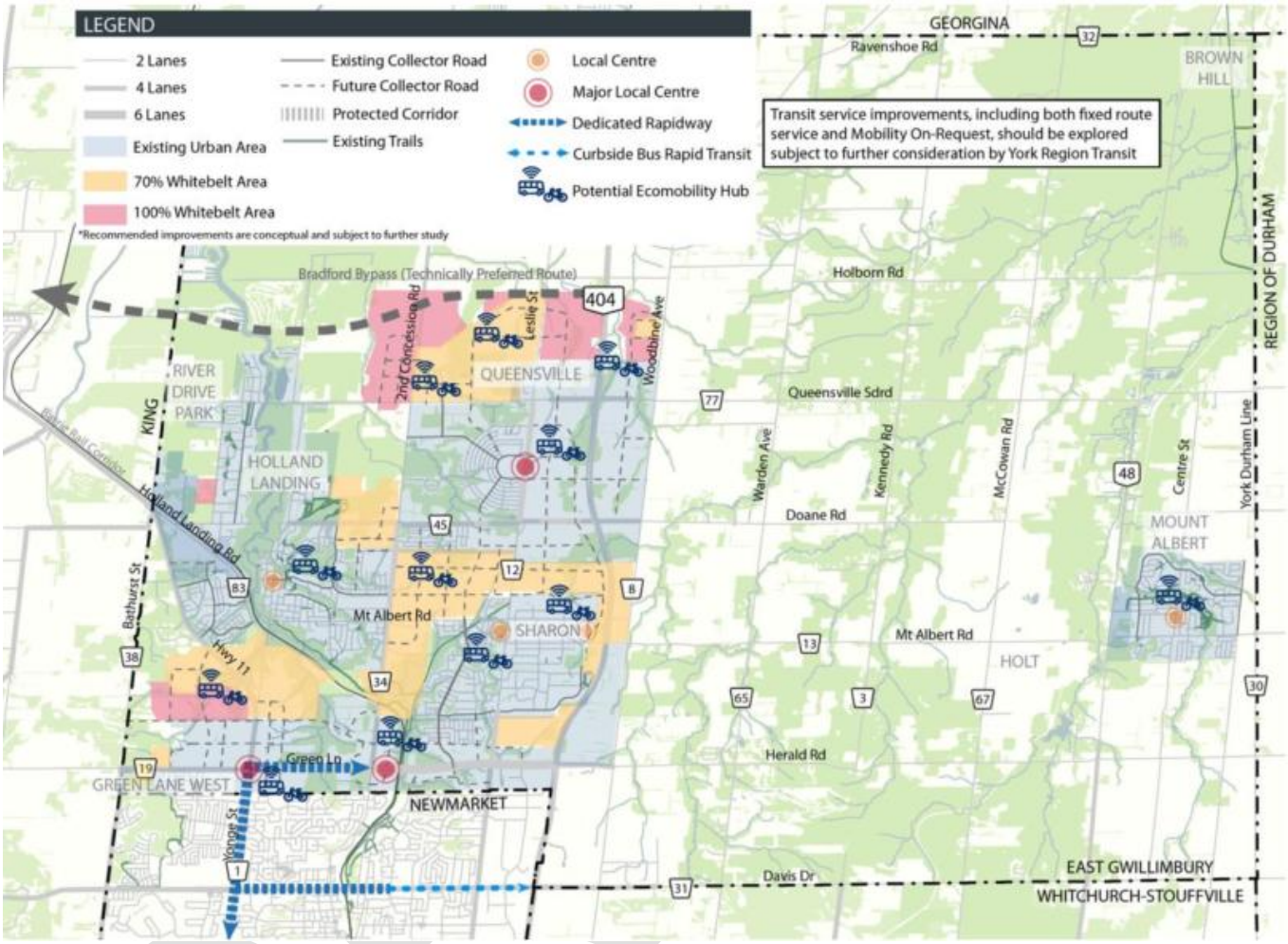
Figure 2-9: Proposed 2051 Sidewalk Network



SOURCE: Town of East Gwillimbury, Sept 23, 2024, Figure 8-2: Proposed 2051 Sidewalk Network from the Transportation Master Plan Update Final Report

Figure 2-10 Figure 2-10presents the proposed EcoMobility hubs from the 2024 Transportation Master Plan Update. EcoMobility hubs will promote sustainable transportation within East Gwillimbury and neighbouring communities such as Newmarket and Keswick by integrating public transit options (buses), bicycle parking and carpool parking. These hubs would also include supportive infrastructure such as electric vehicle charging stalls while ensuring convenience for residents by locating the hubs near residential and mixed-use areas.

Figure 2-10: 2051 Transit and Ecomobility Hub Network



SOURCE: Town of East Gwillimbury, Sept 23, 2024, Exhibit F: 2051 Transit and EcoMobility Hub Network from the Transportation Master Plan Update Final Report

An example of a large scale EcoMobility hub concept from the Town is shown in Figure 2-11.

Figure 2-11: Large Scale EcoMobility Hub



SOURCE: Town of East Gwillimbury, Sept 23, 2024, Figure 8-4: Large Scale EcoMobility Hub from the Transportation Master Plan Update Final Report

East Gwillimbury currently has limited transit service provided primarily by York Region Transit (YRT) in the vicinity of Yonge Street in Holland Landing. In addition, the Town is served by the East Gwillimbury GO Train Station at Green Lane and 2nd Concession. This station connects to the Barrie line, which generally operates an hourly service on weekends and weekdays, with additional trains during rush hour. The Barrie Line connects to Barrie in the north and Union Station in the south.

Future plans call for a YRT Route along Green Lane between Yonge Street and the East Gwillimbury GO Train Station. It is likely that as population growth occurs in East Gwillimbury, additional YRT service will be provided in currently underserved parts of the community.

It should be noted that residents in the GTA do not generally use public tranportation for stand-alone trips to access retail or services, particulary for day to day and weekly shopping. However, commercial space near transit stops can capture residents travelling to or from the transit stop.

With the potential of increased public transit use in the future within East Gwillimbury, it is important to note the location of the East Gwillimbury GO station. This station is located at the Green Lane and Main Street intersection, along the Nokiidaa trail. This trail runs through the designated areas for both

the Yonge Corridor CDP and the Sharon Heights CDP. An increase in both active transport and public transport will likely bring higher traffic to the Yonge Corridor and Sharon Heights CDPs.

This being said, East Gwillimbury is very much a community dependent on automobile transportation. While planning can shift the modal split more in favour of active transportation and transit, shopping centres and retailers in the community will still rely on a very large share of automobile-oriented shopping. Retail planning should, therefore, seek to make new shopping destinations more accessible for walking, cycling and transit, while at the same time not neglecting the need for a high degree of automobile travel from core customers.

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3.0 Study Areas

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Several Study Areas were considered in undertaking our analysis, shown in Figure 3-1.

Secondary Plan Area

For the principal purpose of examining market demand, we considered the new population which will reside within the Secondary Plan area lands. This provides us with an understanding of the amount of retail and service facility space that will be required in these new growth areas.

Town of East Gwillimbury

It is also recognized that the Town is underserved in terms of local retail and service facilities and residents must travel out of the community, primarily to Newmarket and, to a lesser extent, Bradford, in order to shop at all levels of the retail hierarchy. For this reason, we have also considered the entire Town of East Gwillimbury, recognizing that some of the spending outflow from the Town could be recaptured by new facilities within the Secondary Plan area.

Inventory Study Area

Finally, we have considered a third study area, recognizing the existing competition for retail goods and services in East Gwillimbury, as well as the major competition in neighbouring Newmarket along Yonge Street and along Davis Drive.

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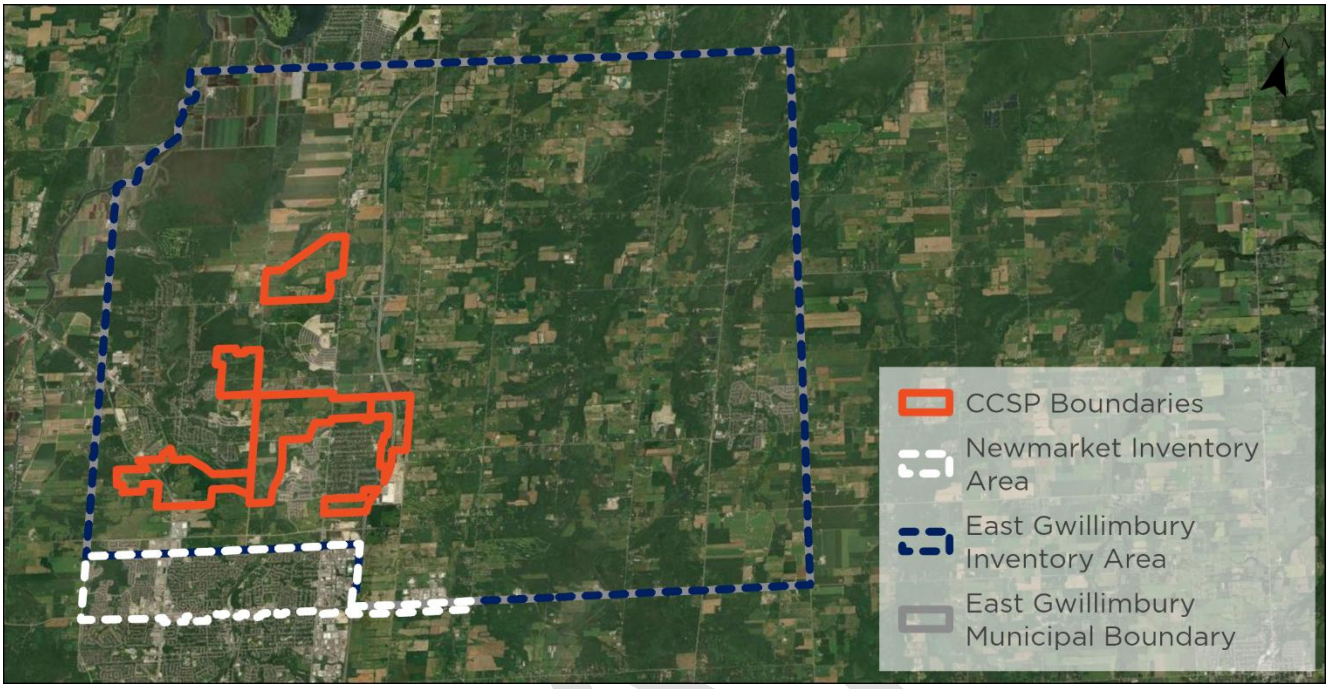
Figure 3-1: Study Area Boundaries



SOURCE: urbanMetrics Inc., with Municipal Boundary shapefile from York Region Open Data and CCSP boundary shapefile from MGP.

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4.0 Commercial Inventory

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urbanMetrics conducted an in-person inventory of the retail and services space in the Inventory Study Area in May 2025 based on previously conducted inventories in the area. The Inventory Study Area includes the entire Town of East Gwillimbury and the commercial areas in Newmarket along Yonge Street, Leslie Street and Davis Drive.

We have adapted the North American Industrial Classification System (NAICS) and structured the following categories as such in this report:

- Food Service 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)
    - Building and Outdoor Home Supply Stores – including home improvement centres, hardware stores, paint and wallpaper stores, nursery / garden centres, and a wide range of building material and supply stores.
    - General Merchandise Stores – including department stores (i.e., Wal-Mart), 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.
    - Pharmacies and Personal Care Stores – includes drug stores, optical stores, health equipment stores, nutrition, and cosmetic stores.
- Services
    - Personal Care – including hair salons, spas, dry cleaning, pet care, among others.

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- Health Care – including doctors, dentists, chiropractors, diagnostic laboratories, mental health centres, and other health practitioners.
- Finance – including banks, credit unions, and financial institutions.
- Food Services & Drinking Places – including full- and limited-service restaurants and bars.
- Professional, Scientific, and Technical Services – including law offices, accountants, architects, management consulting, marketing, and other specialized design services.
- Insurance and Real Estate – including insurance agencies and real estate brokers.
- Cultural, Entertainment, and Recreation – including amusement arcades, fitness, recreational sports centres, movie theatres, among other recreation facilities.
- Social Services – including individual / family services, child services, and day care.
- Selected Civic, Social, Educational, and other Administrative Services.
- Personal & Household Goods Repair – including automotive, electronics, furniture, footwear, jewellery, and household goods repair.
- Consumer Goods Rental – including electronics, equipment, clothing, and video rentals.
- Transportation Services – including the post office and other transportation services.

See Appendix A for full NAICS codes.

4.1 Commercial Inventory

Figure **4-1** displays the distribution of service types within the Inventory Study Area. This figure includes Non-Food Service Retail (NFSR), Services, and Food Service Retail (FSR). It includes vacant units and non-retail in retail locations, resulting in a breakdown for both active and inactive retail spaces within the Inventory Study Area.[3] Major retailers such as department stores and malls contribute largely to the NFSR category, while personal care retailers, professional services, restaurants and health care services lead the Services category. The FSR category is made up solely of

[3] Non-retail in retail space is predominantly offices of contractors, places of worship, other office uses, and some government offices.

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grocery stores, convenience stores and specialty food stores (e.g. butchers, bakeries, cheese shops, etc.). Warehouse clubs (Costco) fall under the NFSR category, as does the food components of Walmart Superstores.

It is worth noting that while East Gwillimbury makes up the majority of the land area in the Inventory Study Area, the Newmarket section of the Inventory Study Area holds 72% of the total retail square footage.

Figure 4-1: Total Inventory Study Area Existing Commercial Composition

Category	East Gwillimbury	Newmarket	Total (SF)	% of Total Inventory
Beer, Wine, Liquor (BWL)	20,200	16,200	36,400	**73%**
Food Store Retail (FSR)				
Convenience & Specialty Food	24,800	59,600	84,400	**1.7%**
Supermarkets & Grocery	216,600	132,200	348,800	**7.0%**
Non-Food Store Retail (NFSR)				
Apparel and Accessories	29,800	483,400	513,200	**10.3%**
Building and Outdoor Home Supply	220,000	266,000	486,000	**9.7%**
Furniture, Home Furnishings & Electronics Store	93,800	349,400	443,200	**8.9%**
General Merchandise	150,300	531,800	682,100	**13.7%**
Miscellaneous Retailers	78,700	332,500	411,200	**8.2%**
Pharmacies & Personal Care	30,800	105,100	135,900	**2.7%**
Services				
Selected Civic and Social Organizations	0	1,000	1,000	**0.0%**
Consumer Goods Rental	0	1,500	1,500	**0.0%**
Cultural, Entertainment & Recreation	142,200	120,100	262,300	**5.3%**
Finance	23,400	83,100	106,500	**2.1%**
Food Services & Drinking Places	135,800	249,700	385,500	**7.7%**
Health Care	49,500	203,200	252,700	**5.1%**
Insurance and Real Estate	3,100	38,100	41,200	**0.8%**
Personal & Household Goods Repair & Maintenance	0	13,600	13,600	**0.3%**
Personal Care	35,900	95,900	131,800	**2.6%**
Professional, Scientific & Technical Services	26,400	113,300	139,700	**2.8%**
Selected Educational Services	6,800	84,700	91,500	**1.8%**
Selected Office Administrative Services	6,000	15,400	21,400	**0.4%**
Social Services	53,400	35,900	89,300	**1.8%**
Vacant	15,400	177,800	193,200	**3.9%**
Non-Retail in Retail Space	13,200	101,100	114,300	**2.3%**
Grand Total	**1,376,100**	**3,610,600**	**4,986,700**	**100.0%**
Vacancy Rate (%)	1.1%	4.9%	3.9%	

SOURCE: urbanMetrics Inc., May 2025, East Gwillimbury Retail Inventory. Values are Rounded.

The retail inventory does not include automobile repair shops, automobile sales centers, automotive parts shops or tire shops, as these buildings are typically designed for specific auto purposes and cannot be easily transitioned for other retail use.

Retail within East Gwillimbury is predominantly located at the Yonge Street and Green Lane intersection. A breakdown of retail within East Gwillimbury by general location can be seen in Figure 4-2. The Holland Landing Plaza's includes three small retail plazas within Holland Landing. Mount Albert includes all retail within the built-up area of Mount Albert. Yonge St and Green Ln includes retail on all corners of the intersection which fall within the Town. Other retail is anything else that does not fall within these locations.

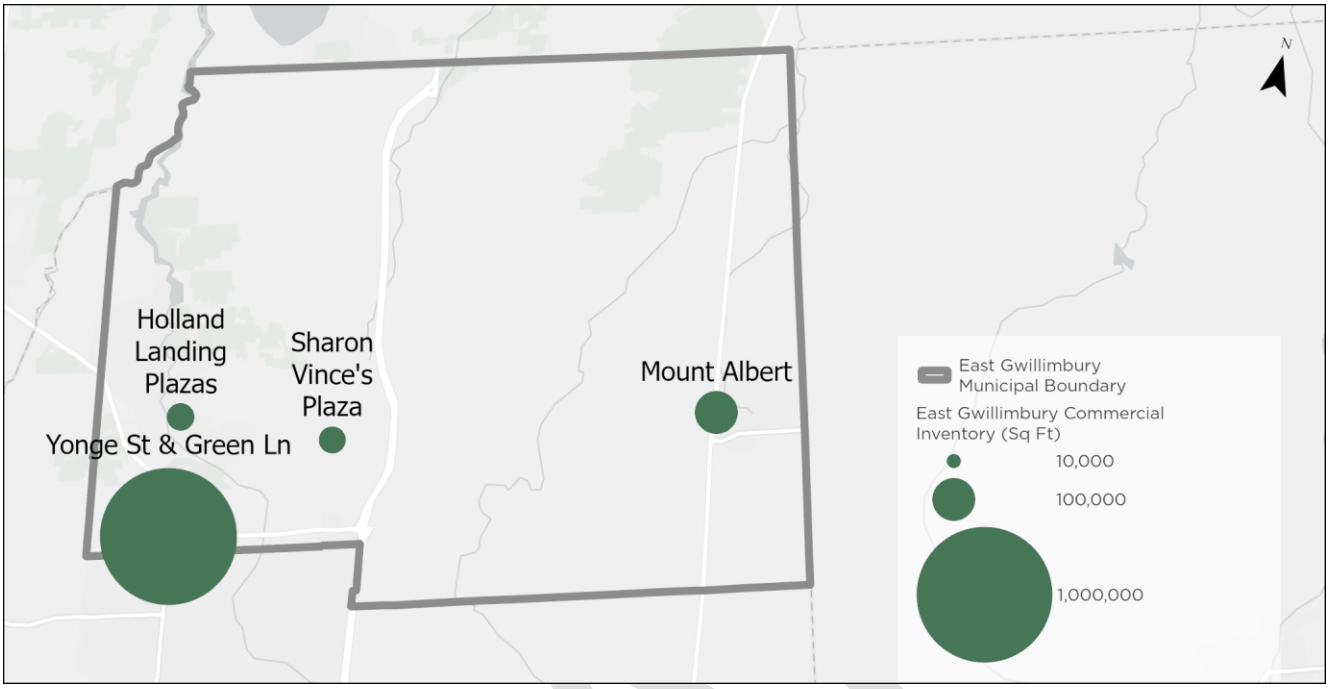
Figure 4-2: Retail Within East Gwillimbury

Category	Holland Landing Plaza's	Mount Albert	Sharon Vince's Plaza	Yonge St & Green Ln	Other Retail	Total (SF)	% of Total Inventory
Beer, Wine, Liquor (BWL)	0	1,500	0	18,700	0	20,200	**1.5**
Food Store Retail (FSR)							
Convenience & Specialty Food	3,700	3,800	0	6,800	10,500	24,800	**1.8**
Supermarkets & Grocery	3,000	22,400	14,700	176,500	0	216,600	**15.7**
Non-Food Store Retail (NFSR)							
Apparel and Accessories	0	0	0	29,200	600	29,800	**2.2**
Building and Outdoor Home Supply	0	13,100	0	145,000	61,900	220,000	**16.0**
Furniture, Home Furnishings & Electronics Store	0	0	0	75,800	18,000	93,800	**6.8**
General Merchandise	0	0	0	145,700	4,600	150,300	**10.9**
Miscellaneous Retailers	800	7,300	0	66,900	3,700	78,700	**5.7**
Pharmacies & Personal Care	4,700	1,600	0	20,400	4,100	30,800	**2.2**
Services							
Cultural, Entertainment & Recreation	0	0	0	138,000	4,200	142,200	**10.3**
Finance	0	1,800	900	19,000	1,700	23,400	**1.7**
Food Services & Drinking Places	11,900	18,500	6,300	83,300	15,800	135,800	**9.9**
Health Care	8,100	2,500	7,200	18,900	12,800	49,500	**3.6**
Insurance and Real Estate	0	2,000	0	0	1,100	3,100	**0.2**
Personal Care	4,500	5,900	2,800	22,600	100	35,900	**2.6**
Professional, Scientific & Technical Services	0	5,500	0	11,200	9,700	26,400	**1.9**
Selected Educational Services	0	3,600	2,300	900	0	6,800	**0.5**
Selected Office Administrative Services	0	1,200	0	2,000	2,800	6,000	**0.4**
Social Services	0	5,500	4,800	16,000	27,100	53,400	**3.9**
Vacant	0	1,400	0	11,400	2,600	15,400	**1.1**
Non-Retail in Retail Space	2,900	300	0	10,000	0	13,200	**1.0**
Grand Total	**39,600**	**97,900**	**39,000**	**1,018,300**	**181,300**	**1,376,100**	**100**
Vacancy Rate (%)	0.0	1.4	0.0	1.1	1.4	1.1	

SOURCE: urbanMetrics inc., East Gwillimbury Retail Inventory. Values are Rounded.

The general locations and amount of commercial space of the retail areas presented above are displayed in a map below (Figure 4-3).

Figure 4-3: Map of East Gwillimbury Retail



SOURCE: urbanMetrics Inc., with East Gwillimbury Municipal Boundary Shapefile from York Region Open Data

4.2 Commercial Nodes

Four major commercial nodes were identified within the Inventory Study Area and are shown in

Figure 4-4. These nodes have been used to collect consumer origin data, which provides context to how far residents are regularly travelling to meet their consumer needs. Data was collected from a one-year period starting on May 25th, 2024, and ending on May 25th, 2025. This data helps to inform what retail and commercial spaces are needed in specific locations to promote convenience for residents while ensuring businesses have a steady, local customer base.

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Figure 4-4: Four Identified Commercial Nodes in Inventory Study Area



SOURCE: urbanMetrics Inc., with CCSP boundary shapefile from MGP.

The four commercial nodes identified by urbanMetrics are:

1. The Sharon Vince's Plaza at Leslie Street and Farr Avenue (Node 1)
    - This plaza currently houses a Vince's Market, the Sharon House Tap & Kitchen, the Eh to Zed Preschool, Edward Jones Financial Advisors, Sharon Dental, Subway, Sharon Medical Clinic, Taboo Hair Studio, Queen's Nail Spa, Pizza Hut, Code Ninjas and One Vision Eye Care.
2. The commercial strip along Yonge Street and Green Lane East (Node 2)
    - This commercial strip includes all corner plazas at the Yonge Street and Green Lane intersection, the Farmboy Plaza, the Yonge Crest Centre and all retail on the West side of Yonge Street from the Woodlands Plaza to the Canadian Tire Plaza.
3. The Upper Canada Mall (Node 3)
    - The Upper Canada Mall houses a food court with 17 food retail businesses, a Market & Co. with 18 various food and non-food retail businesses and 184 other storefronts within the remainder of the two-story shopping mall.
4. The 404 Plaza at Leslie Street and Davis Drive (Node 4)

- This Plaza Currently houses a wide range of commercial businesses, with notable contributors being Walmart, Shoppers Drug Mart, Metro, Chick-fil-A, Harvey's, Dollarama, BMO and SVP Sports.

For the Sharon Vince's Plaza, Node 1, exact boundaries are outlined in Figure 4-5. Since the arial image used was taken, the Eh to Zed Preschool has been completed and opened for use in the top left corner of the node.

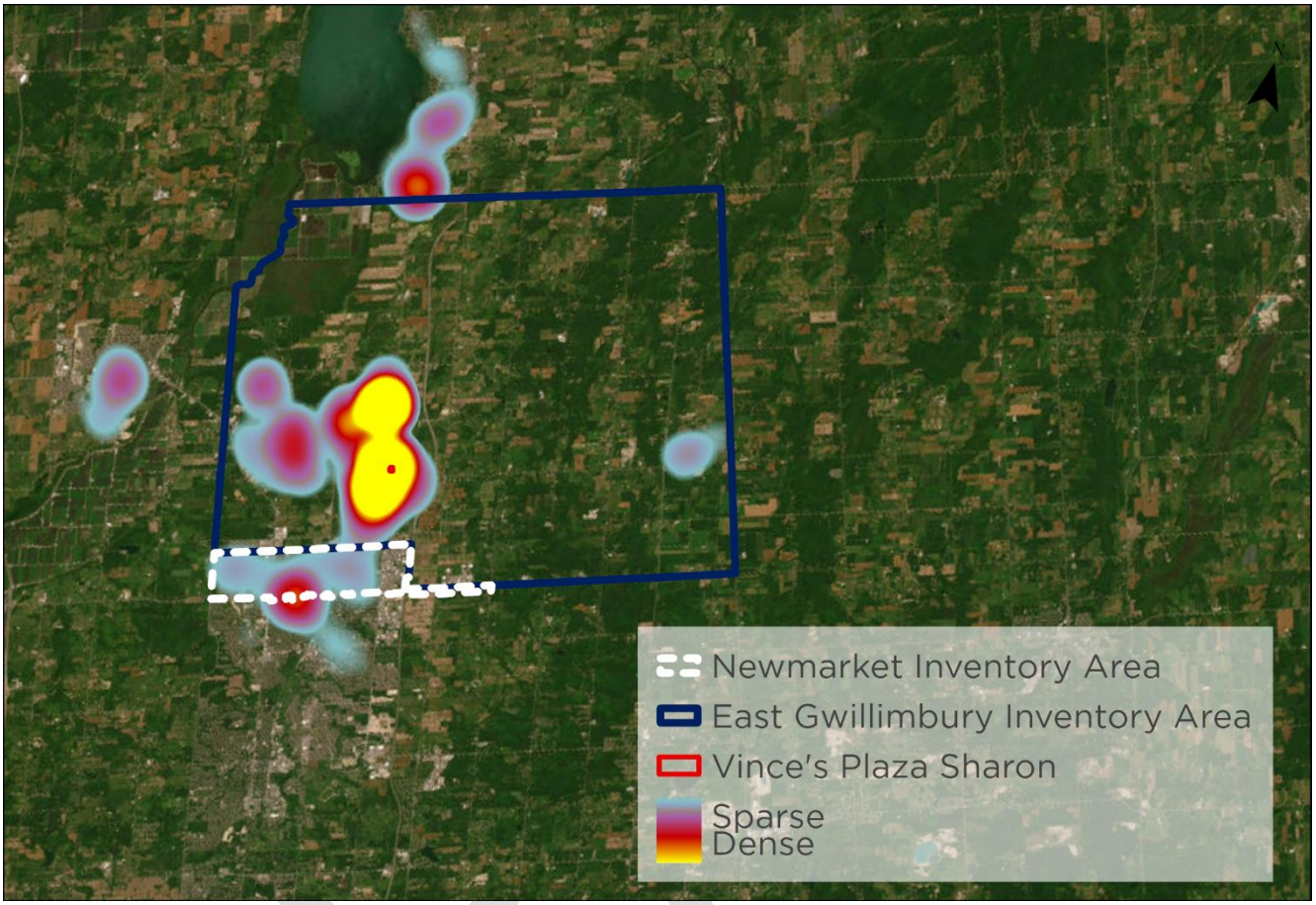
Figure 4-5: Node 1 - Sharon Vince's Plaza



SOURCE: urbanMetrics Inc.

Figure 4-6 shows the customer origin data for the Sharon Vince's Plaza. This data is presented in a heat map to help visualize where shoppers are coming from. Most of the business for this node is originating within Sharon and Queensville, from areas next to this node. Many residents from Keswick also visit this node, likely as they pass through East Gwillimbury towards Newmarket and further South. The market draw for this node is extremely local, with high local visitation rates. As this node contains a full-size grocery store along with small-scale retail and services, the customer draw for this node would be expected for new commercial nodes developed in the Secondary Plan area. This node has the most local customer base of all four commercial nodes examined.

Figure 4-6: Node 1 - Sharon Vince's Plaza Customer Origin Heat Map



SOURCE: urbanMetrics Inc., with CCSP boundary shapefile from MGP and Customer Origin data from Azira LLC.

Boundaries of the Yonge Street and Green Lane Plaza's, Node 2, are identified in Figure 4-7. This node is the largest of the four, sitting on the municipal boundary of the Town of East Gwillimbury and the Town of Newmarket.

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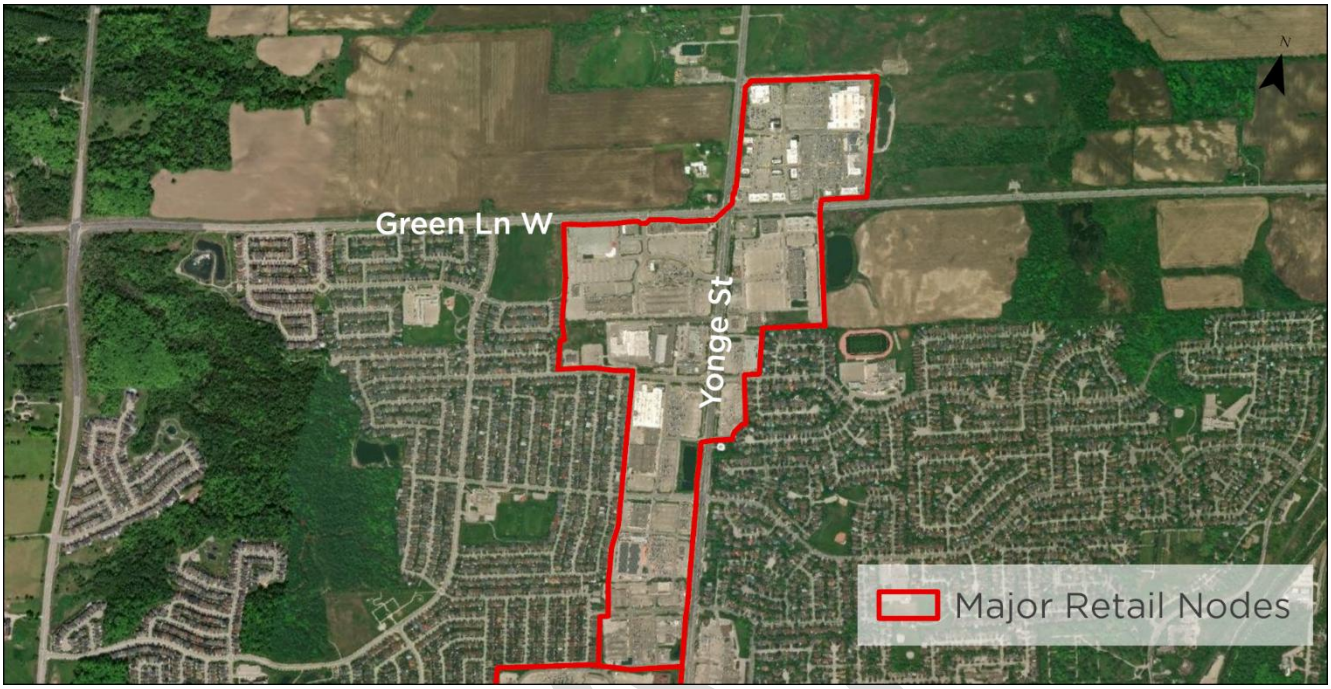
Figure 4-7: Node 2 - Yonge & Green Lane Plaza's



SOURCE: urbanMetrics Inc.

The heat map for Node 2, Figure 4-8, shows that the customer base is most concentrated around the Newmarket area, with many customers also coming from all of the East Gwillimbury communities as well as Bradford and Keswick.

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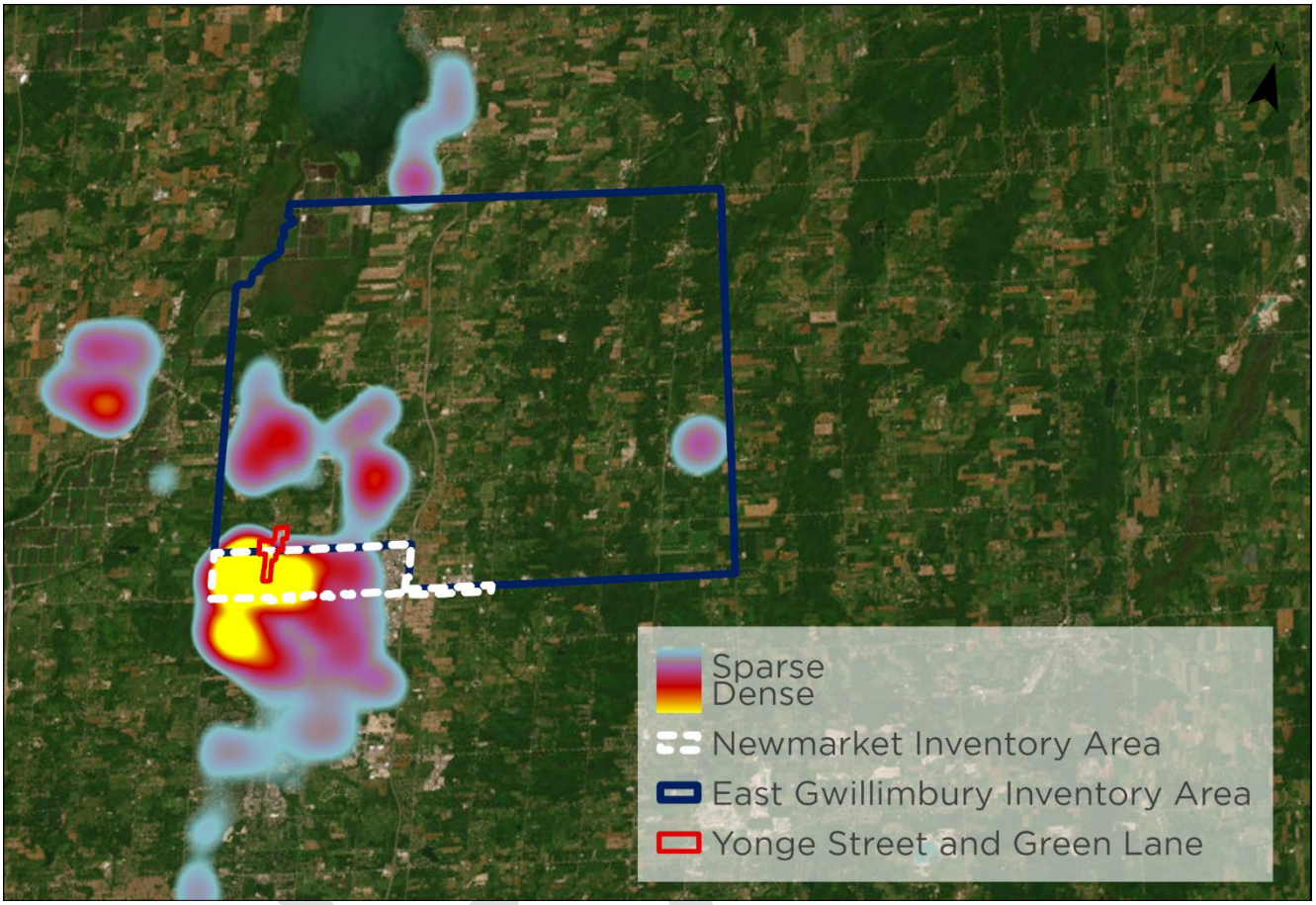
Figure 4-8: Node 2 - Yonge & Green Lane Plaza's Customer Origin Heat Map



SOURCE: urbanMetrics Inc., with CCSP boundary shapefile from MGP and Customer Origin data from Azira LLC.

The Upper Canada Mall, Node 3, is outlined in Figure 4-9. This includes the Ashley HomeStore that sits on the Upper Canada Mall property. The corresponding heat map, Figure 4-10, displays that the Upper Canada Mall primarily serves the Newmarket area on a regular basis with some customers coming from East Gwillimbury and surrounding communities; the customer base for the Upper Canada Mall is similar to that of Node 2.

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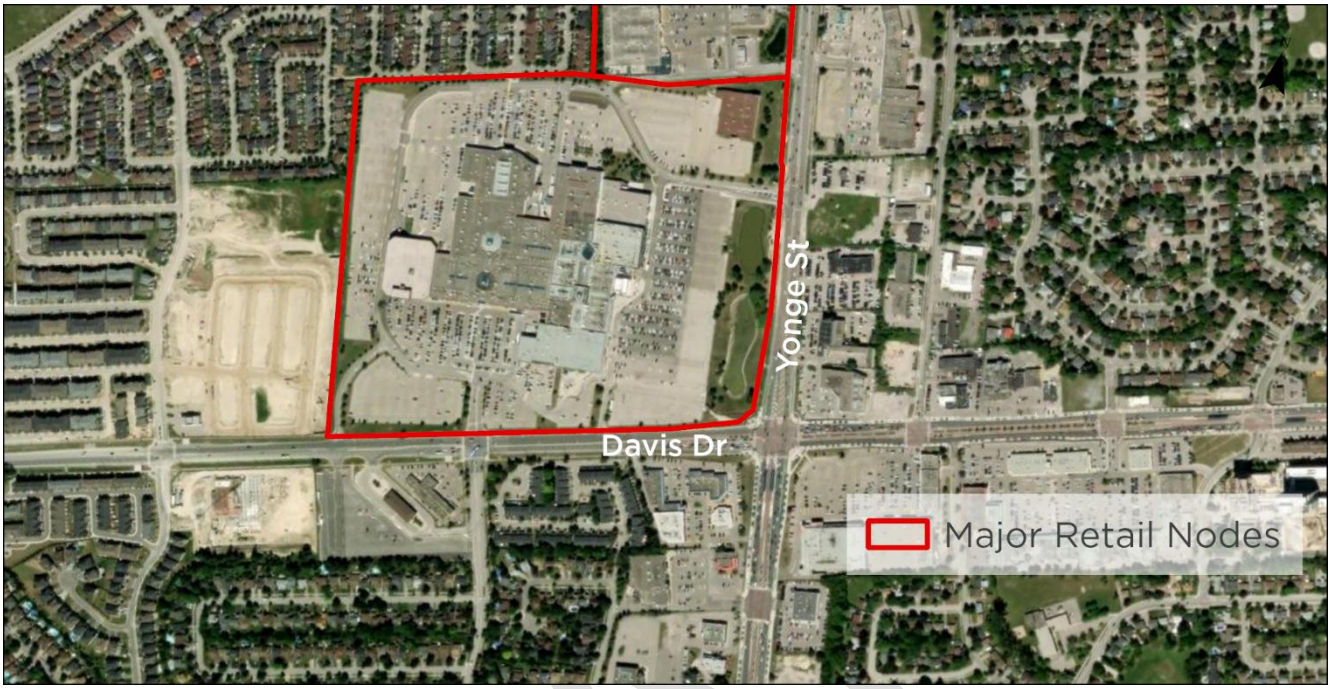
Figure 4-9: Node 3 - Upper Canada Mall



SOURCE: urbanMetrics Inc.

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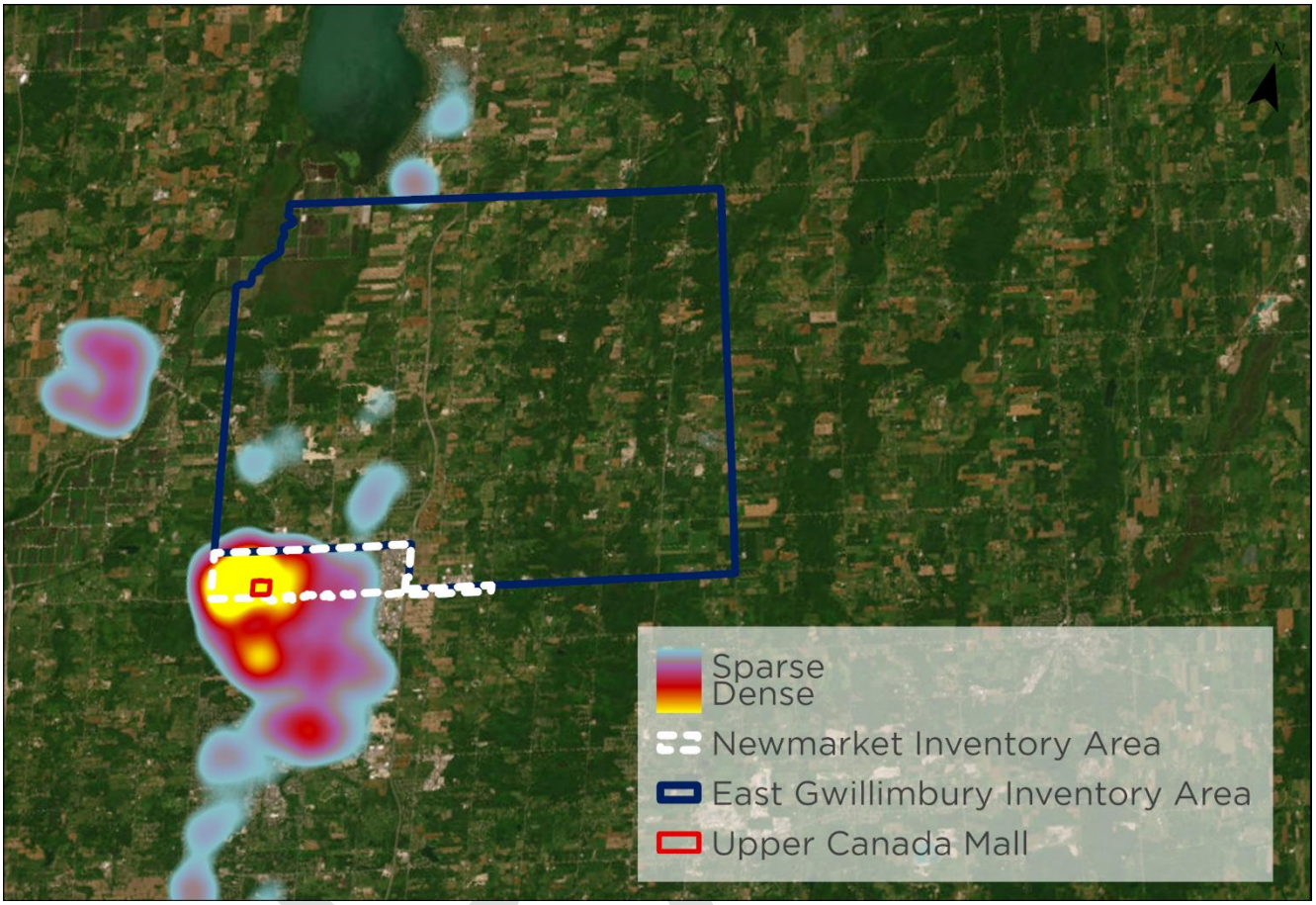
Figure 4-10: Node 3 - Upper Canada Mall Customer Origin Heat Map



SOURCE: urbanMetrics Inc., with CCSP boundary shapefile from MGP and Customer Origin data from Azira LLC.

The 404 plaza located at Davis Drive and Leslie Street outlined in Figure 4-11 attracts residents from the immediate area as well as up Leslie Street into Queensville, as seen in Figure 4-12. The bulk of shoppers appear to be from the Newmarket area.

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Figure 4-11: Node 4 - 404 Plaza



SOURCE: urbanMetrics Inc.

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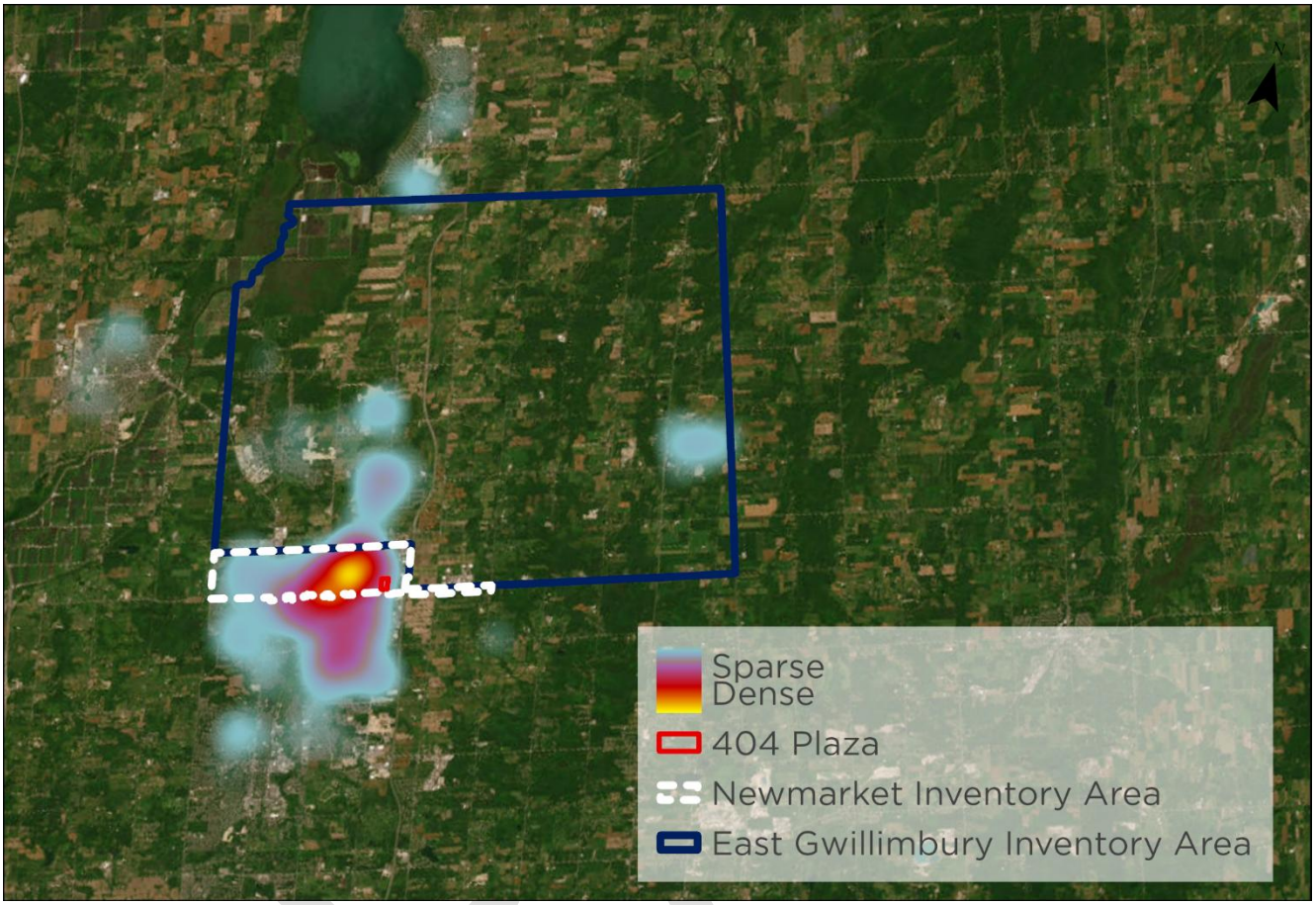
Figure 4-12: Node 4 - 404 Plaza Customer Origin Heat Map



SOURCE: urbanMetrics Inc., with CCSP boundary shapefile from MGP and Customer Origin data from Azira LLC.

Figure 4-13 presents a breakdown of the square footage of each node and all other retail within the study area by type. This includes the Newmarket portion of the Inventory Study Area as well as the East Gwillimbury portion.

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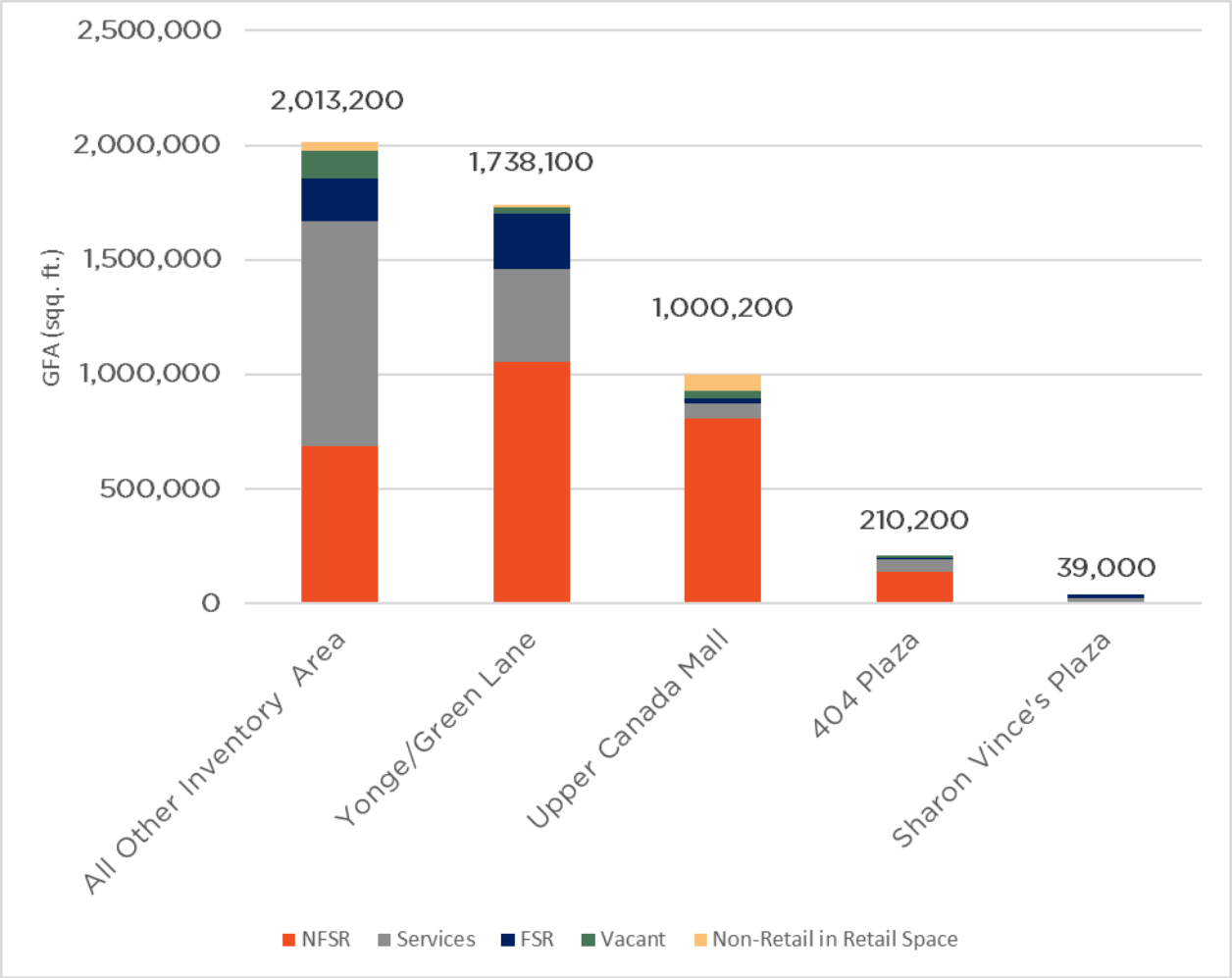
Figure 4-13: Commercial Node Summary (Total Inventory Area)

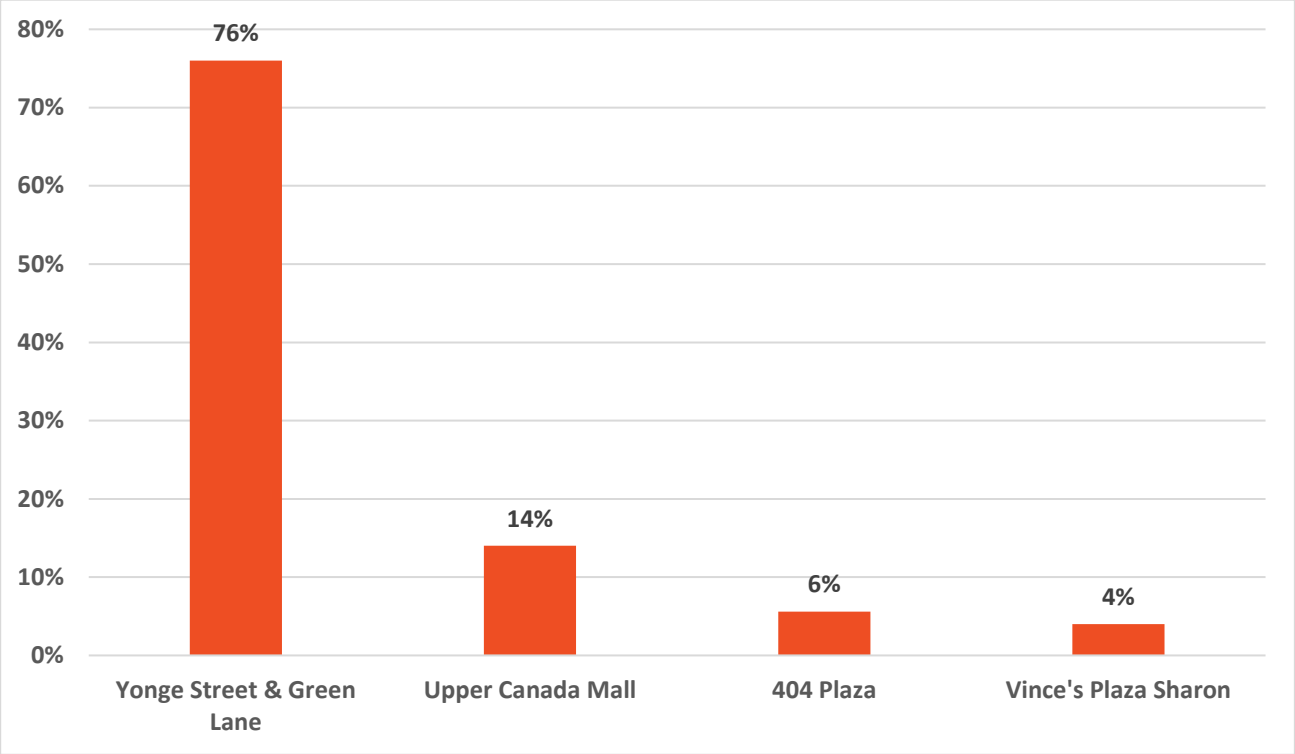


SOURCE: urbanMetrics Inc., East Gwillimbury Retail Inventory. Values are Rounded.

The Yonge Street and Green Lane node contributes the largest amount of commercial square footage within the East Gwillimbury boundaries at approximately 1,018,300 square feet out of the Town's approximate total of 1,376,100 square feet. If the Yonge and Green Lane node were not to be considered, the remainder of East Gwillimbury would only hold about 357,800 square feet of retail space. This provides existing residents with around 8 square feet per capita without the Yonge and Green Lane node. As the Yonge and Green Lane node sits on the border of East Gwillimbury, the low retail per capita without this node of just 8 square feet leaves the remainder of East Gwillimbury residents underserved. New retail space within the Secondary Plan will need to account for this shortfall in addition to creating enough retail space for the population increase from the proposed developments.

For East Gwillimbury residents, the Yonge Street and Green Lane Node is the most visited out of the four nodes. The Upper Canada Mall is next for most visits, with the 404 Plaza and the Vince's Plaza coming in last. This is visualized in Figure 4-14.

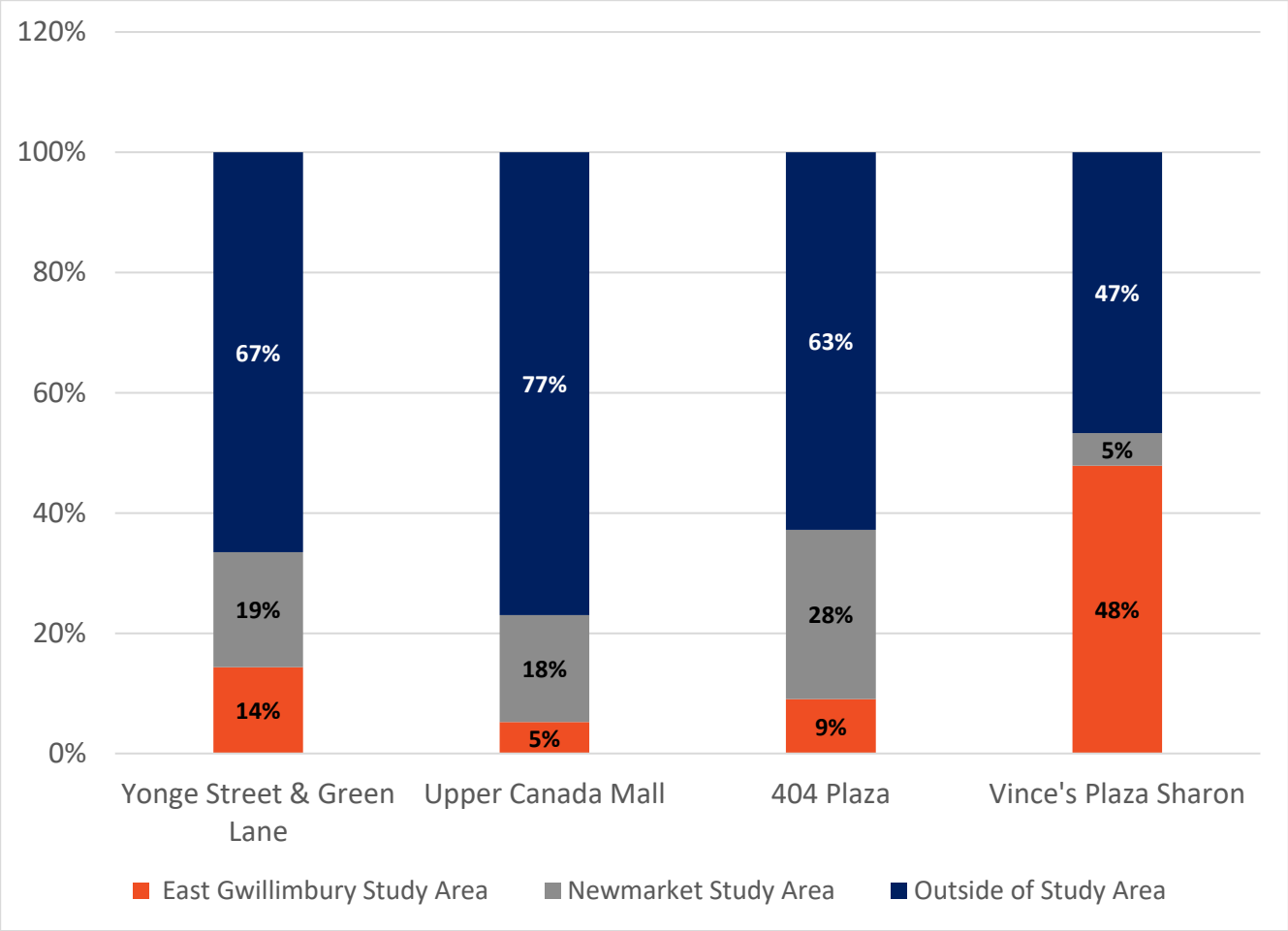
Figure 4-14: Percent of overall node visits from residents within East Gwillimbury (May 2024 – May 2025)



SOURCE: urbanMetrics Inc., with Customer Origin data from Azira LLC.

However, when considering which node receives the most visits from East Gwillimbury residents it is important to consider the square footage and services offered in each. While the Yonge Street and Green Lane Node is most visited, it is also the largest in size with the greatest variety of stores. A helpful comparison can be found in Figure 4-15, which outlines the percentage of visitors from within the East Gwillimbury portion of the Inventory Study Area, the Newmarket portion of the Inventory Study Area and visitors from outside of the Inventory Study Area. This reveals that only 14% of shoppers at the Yonge and Green Lane Node come from East Gwillimbury. Whereas 48% of shoppers at the Vince's Plaza Node come from East Gwillimbury.

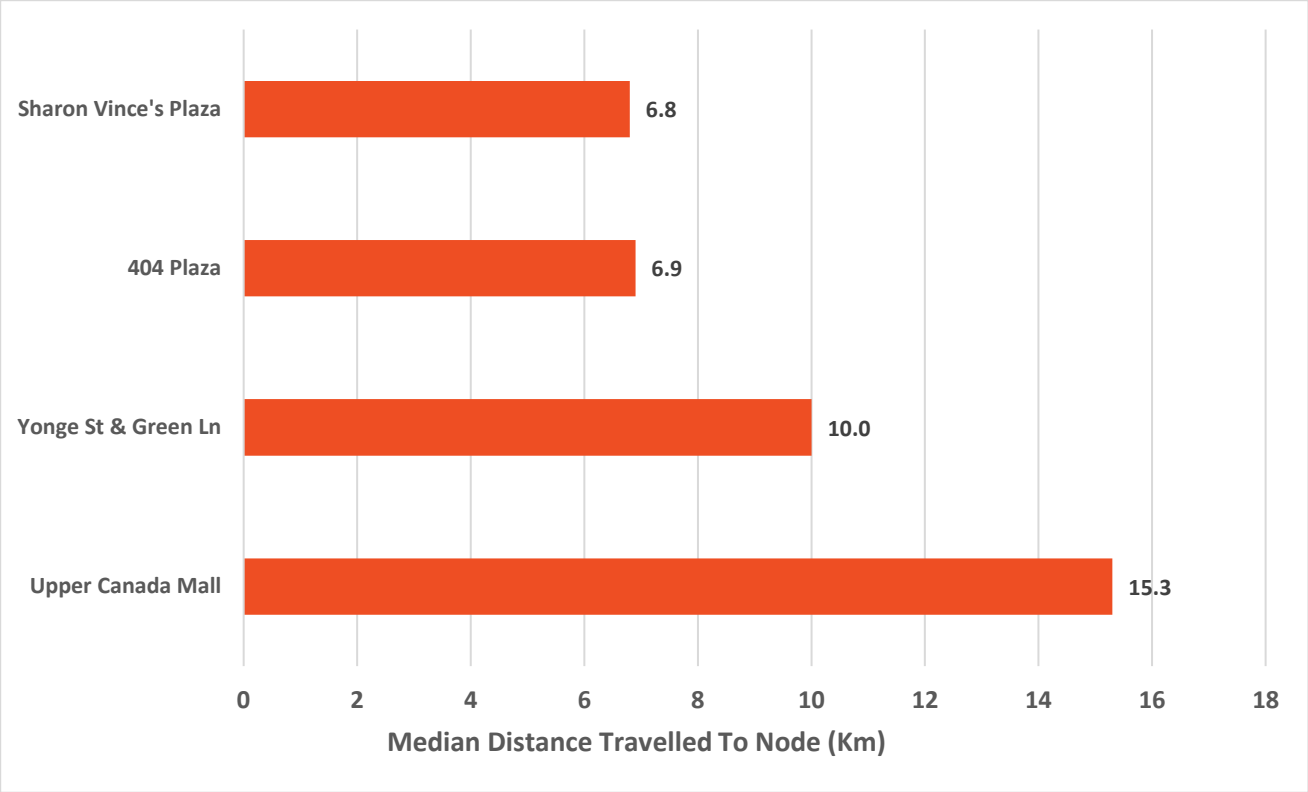
Figure 4-15: Percentage of Visits by Area (May 2024 – May 2025)



SOURCE: urbanMetrics Inc., with Customer Origin data from Azira LLC.

Out of the four Nodes, the Upper Canada mall attracts shoppers from the furthest with a median distanced travelled at 15.3 km. A median distance travelled of 10 km is recorded from the Yonge Street and Green Lane Plaza's; 6.9 km for the 404 Plaza and 6.8 km for the Sharon Vince's Plaza. This data is presented in Figure 4-16Figure 4-16: Median Distance Travelled to Node (Km) below.

Figure 4-16: Median Distance Travelled to Node (Km) (May 2024 – May 2025)



SOURCE: urbanMetrics Inc., with Customer Origin data from Azira LLC.

Overall, the information gathered from both the retail inventory and the consumer cell data suggest a need for a wider variety of retail commercial space within the CDPs along with anchoring retail including grocery stores, department stores and banks. These needs are explored in the following section, Market Analysis.

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5.0 Active Development Applications

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5.1 East Gwillimbury

Within the Town of East Gwillimbury, there are currently twelve development applications listed on the Town's Active Applications website which list potential retail/commercial spaces.

These applications are listed in Figure 5-1 below and mapped in Figure 5-2. Not all applications included information on the square footage of retail commercial spaces. The following estimates were made for the applications missing spatial information based on manual measurements of site plans:

- 18477 Yonge Street (OPA.23.02 & ZBA.23.03) is estimated to have around 7,000 square feet of retail commercial space;
- 574 Green Lane East (19T-20201 & ZBA.20.06) is estimated to have a maximum of around 80,000 square feet retail commercial space including a grocery store;
- 18326 Leslie Street (OPA.20.01 & ZBA.20.02) is estimated to have one grocery store of 50,000 square feet with five smaller office/commercial buildings totaling around 25,000 square feet for a site total of around 75,000 square feet.

An additional retail development which is of interest to this study can be found at 19259 Centre Street in Mount Albert. This development is not listed on the Town's website; this may be due to the status of the development. Currently, the building has been constructed, and the interior is being completed. This development is a mixed-use townhouse building with at grade retail. There are ten retail storefronts at approximately 765 square feet each for a total retail space of around 7,650 square feet. The map ID in Figure 5-2 for this development is 13.

The total square footage from all of these development applications combined is approximately 486,000 square feet However, a large portion of these developments are positioned next to proposed residential developments and are designed to serve those future populations. The amount of proposed retail commercial space outside of the Secondary Plan Area will not impact the space required for the CDP buildout populations. The important information to be drawn from this section is where major retail will be located as this will affect where certain types of retail is recommended within the Secondary Plan Area.

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Figure 5-1: East Gwillimbury Active Applications

Map ID	Application Type	Address	File	Proposal Details	Status	Total Commercial Sq.Ft
1	Mixed Use	18477 Yonge Street	OPA 23.02 & ZBA 23.03	The Official Plan and Zoning By-law Amendment proposes to permit a multi-phased mixed-use residential development on an on-site privately owned and operated wastewater treatment facility.	Application is currently under review. A Public Meeting was held on November 21, 2023.	7,000
2	Mixed Use	NW Green Lane CDP	CDP 25.01	Community Development plan containing residential, mixed-use (commercial/residential), institutional, parkland, natural heritage and infrastructure lands. Approximately 135,000 sq.ft of retail commercial space.	Application Currently Under Review	135,000
3	Non-Residential	Southeast Corner of Highway 11 & Crimson King Way	ZBA 25.07	Six buildings including a gas station convienience store, a drive through restaurant, a car wash and three employment use buildings. 4,966 sq.ft of retail commercial space + 73,934 sq.ft of employment space.	Application Currently Under Review	4,966
4	Mixed Use	Highway 11 & Dogwood Boulevard	SPA 22.04	522 residential units (apartments). Eight buildings in total, including a place of worship and a community centre. 53,882 sq.ft of ground floor retail. Total site size is 3.77 Ha.	Application Approved - awaiting servicing allocation	53,882
5	Mixed Use	19349, 19357, 19365 & 19399 Yonge Street	OPA 22.01, ZBA 22.02, 19T-22001 & SPA 22.08	Overall lot size 0.6174 Ha, with 97 residential units and 1,200 Sq.ft of commerical ground floor space.	OLT Appeal	1,200
6	Mixed Use	574 Green Lane East	19T-20201 & ZBA 20.06	Subdivision with 260 dwelling units, one mixed use block (containing one multi-tenant commercial building, one grocery store, one office building (4 storey) and one parking garage), one medium density block, one apartment block, one mixed use apartment block, an elementary school, and a park. (3.1 Ha of mixed use)	Application approved, awaiting registration	80,000
7	Non-Residential	18960 Leslie Street	SPA 22.06	Proposal to convert the existing residential dwelling into a medical office (dental office). 1,539 sq.ft of usable office space.	Application Under Review. Awaiting resubmission.	1,539
8	Non-Residential	18326 Leslie St	OPA 20.01 & ZBA 20.02	To permit a commercial mixed use plaza consisting of 6 buildings that will provide for a range of uses including office, retail, restaurant and service commercial.	Application Approved.	75,000
9	Mixed Use	Block 173	OPA 20.04 & ZBA 20.08	4,230 sq.ft of retail/commercial space within block with 208 residential units.	Second submission currently under review	4,230
10	Mixed Use	19086 Leslie Street	SPA 18.10	The purpose of the proposed site plan application is to propose a mixed-use development, including commercial, retail, office and residential uses. Commercial Building A: 18,000 sq.ft. Commercial Building B: 19,980.5 sq.ft.	Application Approved	37,980.50
11	Non-Residential	17611 Woodbine Ave	SPA 18.06	The application proposes a number of industrial, office and ancillary restaurant and services commercial uses over 3 phases. 62,950 sq.ft of retail commercial space.	Application approved. Awaiting execution of the Site Plan Agreement.	62,950
12	Non-Residential	2 Don Rose Boulevard	SPA 16.01	2 commercial retail buildings. Building A: 5,614 sq.ft. Building B: 8,199 sq.ft	Application Approved and agreement is in progress	13,813

SOURCE: Data retrieved from the Town of East Gwillimbury Active Developments Webpage (2025)

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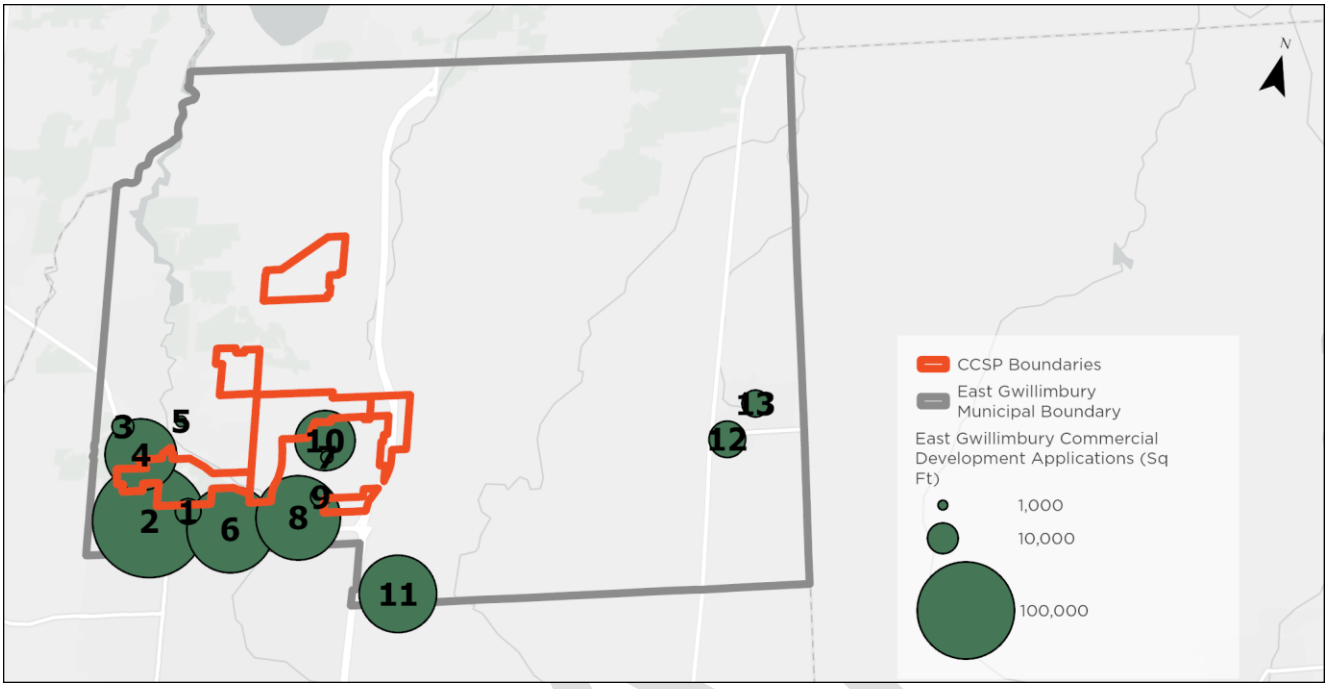
Figure 5-2: East Gwillimbury Development Applications Map



SOURCE: urbanMetrics Inc., with Municipal Boundary shapefile from York Region Open Data and CCSP boundary shapefile from MGP.

5.2 Newmarket

The active development applications in Newmarket will have less of an impact on the needs of the Town of East Gwillimbury. However, they provide context as to what is within a short drive for the Town's residents.

The Town of Newmarket only has two development applications which pertain to this study, these are listed in Figure 5-3 below. It should also be noted that a new Costco opened in August 2025 just south of the Inventory Study Area at Highway 404 and Davis Drive. The existing Costco at Green Lane and Yonge Street is closed and will be reopened as a business Costco. This is expected to only have a minor effect on the commercial outflow from the CCSP, as residents already had access to a Costco store near the Newmarket boundary.

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Figure 5-3: Newmarket Active Applications Within Newmarket Inventory Study Area

Application Type	Address	File	Proposal Details	Status
Mixed Use	17615 Yonge Street	PLN-OPZS-2022-015	To permit a building of office, retail, storage and 215 residential units	Pre-Application Submission
Mixed Use	514 Davis Drive	PLN-SPA-2025-001	To permit construction of a 6-storey mixed-use building to be comprised of office, retail, and self-storage	Pre-Application Submission

SOURCE: Data retrieved from the Town of Newmarket Current Applications Webpage (2025)

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6.0 Market Analysis

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The total amount of retail space that is warranted within the Secondary Plan CDPs was determined for each category by considering the typical space per capita, the predicted population of the CDPs, the target capture and the estimated inflow. The typical space per capita, target capture and estimated inflow are based on previous projects within the area completed by urbanMetrics as well as industry expertise.

It is also recognized that there is a significant undersupply of commercial space in East Gwillimbury, particularly for communities towards the east and northern portions of the Town. This has led to considerable outflow to Newmarket and to a lesser extent Bradford and Keswick. Through higher "inflow" estimates, our analysis assumes that the new commercial space in the Secondary Plan Area will redirect a portion of this expenditure leakage back to East Gwillimbury.

Figure 6-1 displays a breakdown of the total warranted retail space within the CDPs. A buildout population of 46,000 is expected within the six CDPs. A total of approximately 1,000,000 square feet of retail space is warranted based on this analysis. Based on an understanding of the geography of the area, as well as, the competition in nearby municipalities, we have assumed that most of the space developed in the Town is intended to serve daily and weekly shopping, including food, pharmacy, services and selected other non-food retailing. We would expect that shopping for a large share of high order comparison items (e.g. clothing and accessories, furnishings and electronics, and specialty retail) will continue to be done within regional shopping nodes, such as Upper Canada Mall and Yonge/Green Lane.

We have estimated that food related retailing would require some 294,300 square feet, including beer/liquor/wine sales. Recognizing that the retail landscape is changing for alcohol sales in Ontario, the beer/liquor/wine space space could be take the form of freestanding stores or could be added to the space for supermarkets and convenience stores.

Warranted Non-food retail space is estimated at 284,100 square feet. The most important categories in terms of serving the local needs of the secondary plan area would be pharmacies; general merchandise (e.g. dollar stores) square feet and home improvement space.

The need for services space has been estimated at some 420,600, wth the largest categories being food services, personal care and health care.

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Figure 6-1: Total Warranted Retail Space in CDPs

Commercial Needs - Retail Category				Typical Space Per Capita (Sq Ft)		Total Space Required by Residents (Sq Ft)		Target Capture		Space Required (Sq Ft)		Estimate of Inflow from outside EG	Total Warranted Space (Sq Ft)
Buildout Population	[(	**46,000**	x	A	=	B)	x	C	=	D]	/	(1-E)	F
Store Categories													
Food Store Retail				**5.5**									
Convenience and Speciality Food				2.0		92,000		80%		73,600		25%	98,100
Supermarkets & Grocery				3.5		161,000		80%		128,800		25%	171,700
Beer, Wine Liquor				**0.5**		23,000		80%		18,400		25%	24,500
Non-Food Store Retail				**16.0**									
Apparel and Accessories				2.0		92,000		20%		18,400		20%	23,000
Building and Outdoor Home Supply				3.0		138,000		50%		69,000		25%	92,000
Furniture, Home Furnishings & Electronics Store				3.5		161,000		20%		32,200		20%	40,300
General Merchandise				4.0		184,000		15%		27,600		25%	36,800
Miscellaneous Retailers				2.0		92,000		20%		18,400		20%	23,000
Pharmacies & Personal Care Stores				1.5		69,000		75%		51,750		25%	69,000
Services				**14.5**									
Food Services & Drinking Places				4.0		184,000		50%		92,000		25%	122,700
Finance, Insurance and Real Estate				1.0		46,000		50%		23,000		25%	30,700
Health Care				2.5		115,000		50%		57,500		25%	76,700
Personal Care				2.0		92,000		80%		73,600		25%	98,100
Local Office Services[1]				1.5		69,000		20%		13,800		20%	17,300
Other[2]				3.5		161,000		35%		56,350		25%	75,100
Total				**36.5**		**1,679,000**				**754,400**			**999,000**

[1] Includes: Professional, Scientific and Technical Services, Select Civic and Social Organizations, Select Office Administrative Services

[2] Includes: Cultural, Entertainment and Recreation, Personal & Household Goods Repair and Maintenance, Select Educational Services, Social Services, Consumer Goods Rental

SOURCE: urbanMetrics Inc., East Gwillimbury Retail Inventory, Values rounded to nearest hundred, Buildout population retrieved from East Gwillimbury Secondary Plan.

Figure 6-2 summarizes the total warranted space that can be accomodated within the SPA, accounting for the current total vacant retail space as well as the current total non-retail in retail space. In total, we have projected a need for some 850,000 to 1,100,000 square feet of new commercial space within the Secondary Plan areas. A range has been employed to provide for flexibility in terms of accomodating space within the Secondary Plan area.

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Figure 6-2: East Gwillimbury Retail Needs Summary

Commercial Needs - Retail Category	Warranted Space for Buildout CCSP Population (Sq Ft)	Range	
Store Categories			
Food Store Retail	**294,300**	**250,000**	**325,000**
Convenience and Speciality Food	98,100		
Supermarkets & Grocery	171,700		
Beer, Wine Liquor	24,500		
Non-Food Store Retail	**284,100**	**250,000**	**325,000**
Apparel and Accessories	23,000		
Building and Outdoor Home Supply	92,000		
Furniture, Home Furnishings & Electronics Store	40,300		
General Merchandise	36,800		
Miscellaneous Retailers	23,000		
Pharmacies & Personal Care Stores	69,000		
Services	**420,600**	**350,000**	**450,000**
Food Services & Drinking Places	122,700		
Finance, Insurance and Real Estate	30,700		
Health Care	76,700		
Personal Care	98,100		
Local Office Services[1]	17,300		
Other[2]	75,100		
Total	**999,000**	**850,000**	**1,100,000**

SOURCE: urbanMetrics inc., East Gwillimbury Retail Inventory. Values are Rounded.

The folllowing sections will explore how the current retail shortage can potentially be mitigated and where the most impactful locations for the various categories would be within the CDPs.

6.1 Food Store Retail

Food stores, particularly supermarkets are the cornerstone of the retail space required to support a complete community. Apart from the Green Lane/Yonge Street area, there is only one supermarket serving the Town west of Highway 404, including the communities of Queensville, Sharon and Holland Landing. We also assume that another supermarket could be developed on Leslie Street in Queensville as part of the Major Local Centre. A population of some 46,000 in the SPA could support four new full-service supermarkets of between about 30,000 and 40,000 square feet each. We have assumed that these stores would anchor the medium and large nodes and should be well positioned to serve both the population of the secondary plan area, as well as the underserved parts of the existing Town.

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6.2 Non-Food Store Retail

The Non-Food Store Retail group holds several categories which are:

- Apparel & Accessories
- Building & Outdoor Home Supply
- Furniture, Home Furnishings & Electronics Stores
- General Merchandise
- Miscellaneous Retailers
- Pharmacies & Personal Care Stores

A total of **between 250,000 and 325,000 square feet** of NFSR is warranted in the Secondary Plan Area when considering the existing population and existing retail in addition to the buildout population. The key categories in terms of serving the secondary plan area population would be pharmacies, general merchandise (dollar stores) and home improvement stores. Pharmacies, both large (10,000 to 15,000 square feet and smaller format stores could locate in large, medium and small commercial nodes and will be important in terms of providing day to day and specialized goods needed by the community. Many larger format pharmacies also function as small grocery stores carrying a range of dairy, frozen and non-perishable food items. With the demise of many discount retail chains in Canada, dollar stores have filled the gap in terms of providing low-cost retail items needed on a regular basis. Stores like Dollarama and Dollar Tree can represent anchor stores, particularly for small and medium sized nodes. Home improvement stores represent both general DIY stores, such as Home Depot, Home Hardware and Rona, as well as, specialized outlets, including flooring, electrical, plumbing, kitchen cabinetry, etc. These types of stores are very important in areas with large numbers of owner-occupied ground related homes, such as East Gwillimbury. Often times they gravitate to traditional industrial areas due to their need for large building footprints and the fact that they sell large volumes to construction professionals. The remaining store types in this category will round out the retail mix and be less important in terms of defining the planned function of the commercial nodes.

6.3 Service Commercial

Some 350,000 to 450,000 square feet of services space would be warranted in the secondary plan area. Similar to the NFSR group, there are multiple categories within the Services group. These categories are listed below:

- Food Services & Drinking Places

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- Finance, Insurance and Real Estate
- Health Care
- Personal Care
- Local Office Servies
- Other

The key categories in terms of supporting the local population are food services, including restaurants, fast food outlets, cafes and bars/pubs. In recent years, these types of outlets have generally seen their dining-in footprints decline in size, while increasing delivery and pick-up sales. When locating food service outlets, it will be important to accommodate space for short term parking for pick-up and delivery vehicles. Food service outlets represent both entertainment/gathering spaces for the local population, as well as, an alternative to home-cooked meals. Food service outlets often draw from a wider area than other stores in the commercial nodes in which they are located and rely on locations with a high degree of accessibility and visibility.

Personal services include hair, nail, beauty treatment, spas, dry cleaning, shoe repair, pet care and other outlets. They are typically small-scale establishments operated by independent owners. They are important both in terms of providing services to the nearby population and as opportunities for local entrepreneurs.

The health care category includes a wide range of services such as doctors, dentists, chiropractors, wellness practitioners, physiotherapists, mental health practitioners, public health clinics and diagnostic laboratories. In this category, we have considered only those health services that locate in retail commercial outlets. Excluded are health services located in medical buildings, office buildings and hospitals.

Due to the amount of variety in these categories and the difference in spatial needs for each, only general recommendations will be made for each CDP.

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7.0 Recommendations

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7.1 Amount of Commercial Space Warranted

As discussed in Section 6.0, the Complete Communities Secondary Plan ("CCSP") area will warrant approximately between 850,000 and 1,100,000 square feet of additional commercial space, as shown in Figure 7-1. This commercial space will primarily serve the population of the CCSP area, with some space warranted for the currently underserved existing population of East Gwillimbury. There is currently no existing commercial space within the CCSP area.

For a full list of the categories and what types of stores fall under each, see figure A- 1 in the Appendix.

Figure 7-1 :Warranted Commercial Space Summary

Commercial Needs - Retail Category	Warranted Space for Buildout CCSP Population (Sq Ft)	Range	
Store Categories			
Food Store Retail	**294,300**	**250,000**	**325,000**
Convenience and Speciality Food	98,100		
Supermarkets & Grocery	171,700		
Beer, Wine Liquor	24,500		
Non-Food Store Retail	**284,100**	**250,000**	**325,000**
Apparel and Accessories	23,000		
Building and Outdoor Home Supply	92,000		
Furniture, Home Furnishings & Electronics Store	40,300		
General Merchandise	36,800		
Miscellaneous Retailers	23,000		
Pharmacies & Personal Care Stores	69,000		
Services	**420,600**	**350,000**	**450,000**
Food Services & Drinking Places	122,700		
Finance, Insurance and Real Estate	30,700		
Health Care	76,700		
Personal Care	98,100		
Local Office Services[1]	17,300		
Other[2]	75,100		
Total	**999,000**	**850,000**	**1,100,000**

[1] Includes: Professional, Scientific and Technical Services, Select Civic and Social Organizations, Select Office Administrative Services

[2] Includes: Cultural, Entertainment and Recreation, Personal & Household Goods Repair and Maintenance, Select Educational Services, Social Services, Consumer Goods Rental

SOURCE: urbanMetrics Inc.

7.2 Distribution of Warranted Commercial Space

The majority of commercial space in the CCSP area is expected to locate in clusters, referred to here as commercial nodes, though commercial businesses are expected throughout the plan area. The economic reason for the formation of these commercial nodes is that they enable businesses to benefit from the customer traffic generated by the other nearby stores. The number of commercial nodes that can be supported depends to a significant degree on the number of "anchor tenants" that can be supported. Anchor tenants are larger retailers which draw significant customer traffic to a commercial node, which in turn supports a variety of smaller retailers in the node. For the purpose of recommending commercial node locations, urbanMetrics has divided the commercial space of the CCSP into large commercial nodes, medium commercial nodes, small commercial nodes, and dispersed commercial space, as these each serve different functions and have different requirements:

- **Large commercial nodes**: would be approximately 250,000 square feet or greater and typically contain a full-service grocery or supermarket as an anchor tenant, together with other large format stores. This type of node draws customers from a larger area (Town-wide and beyond) and serves the regular and comparison-shopping needs of residents. Due to the high number of visitors required to support this amount of space, this type of node should be located near major roads (e.g. regional roads) with good visibility to both attract sufficient visitors and to accommodate the corresponding volume of traffic.
- **Medium commercial nodes**: would be approximately 100,000 square feet and typically contain a grocery store or supermarket as an anchor tenant together with a variety of other non-food retail and service tenants. Their market area would include the surrounding neighbourhoods within approximately two to three kilometres radius. This type of node serves the convenience and weekly commercial needs of local residents, and would require good road access and visibility, but as it does not require the same volume of passing traffic or road capacity as a large node. These nodes function well at logical gateways into neighbourhoods where a large share of local residents must pass either entering or leaving the community, as well as at major intersections which can attract both east-west and north-south traffic.
- **Small commercial nodes**: would be up to approximately 50,000 square feet, and feet and could contain a pharmacy, small food/convenience store or other retailer as an anchor tenant. This type of node serves the convenience commercial needs of local residents. Close proximity and convenient access to a large enough number of local residents is critical for this type of node, as ease of access is one of the primary reasons

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customers will frequent this type of node instead of a more distant but larger node. Small convenience nodes have the potential to draw a higher share of pedestrian and cycling traffic due to their proximity to their nearby customer base and their smaller scale which allows them to be more easily integrated into active transportation routes.

- **Dispersed commercial space:** is made up of individual stores or small clusters of stores that do not necessarily lend themselves to locations in a planned commercial node. This type of commercial space is expected to make up a small share of the total commercial floor area in the CCSP, and to be primarily occupied by smaller independent businesses. The locational requirements of this type of commercial space are often specific to the individual business. It may include commercial businesses in traditional industrial areas (e.g. automotive repair facilities, specialty home improvement outlets, pool/spa/hot tub dealers, etc.), agricultural businesses, home occupations , corner stores, and others. These types of uses may be difficult to plan for, but flexibility should be provided for in the policies to accommodate commercial uses which cannot easily fit in a traditional commercial hierarchy or mixed-use setting.

Supermarket and grocery stores usually range between 30,000 to 40,000 square feet, although some chains operate outside of these general size limits. Larger supermarkets tend to augment their grocery inventory with non-food items (e.g. Loblaws Superstore with Joe Fresh) and smaller stores tend to provide a more limited selection of brands and merchandise often geared to a more specialized market (e.g. Rabba or Brunos). A population of 46,000 would warrant 4 or 5 supermarkets and grocery stores. Based on the distribution of population and road connectivity, urbanMetrics has recommended that one large commercial node, three medium commercial nodes, and six small commercial nodes be planned for, along with commercial permissions to accommodate selected commercial space elsewhere within mixed-use centres and corridors, employment areas, and neighbourhood areas as appropriate. The suggested location and size of warranted commercial nodes in the CCSP area is shown in Figure 7-2. The locations shown are intended to be general locations only, with the precise location and lands in each node expected to be determined as more detailed planning progresses.

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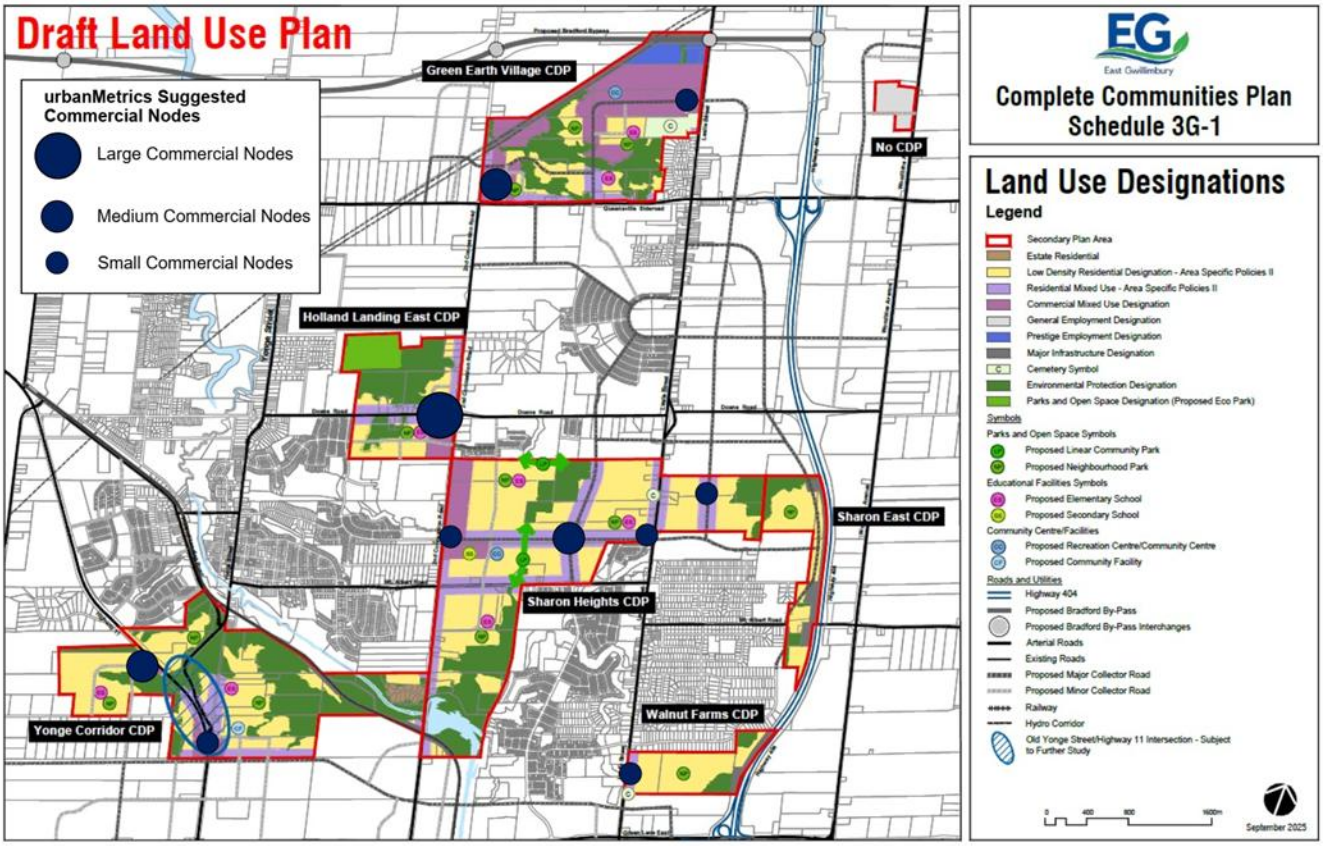
Figure 7-2: Recommended location and Size of Warranted Commercial Nodes



SOURCE: Map from Town of East Gwillimbury, March 2025, Complete Communities Secondary Plan, with commercial Node locations added by urbanMetrics Inc.

A description of the commercial nodes in each CDP is listed below, along with the warranted space and additional information on the factors influencing the commercial environment. Of note, the warranted space listed below for each CDP is not intended to be used to create a strict commercial space target enforced by policy, as residents can easily travel between the CDPs as site specific characteristics and shifting market trends lead to certain areas having a larger or smaller share of the CCSP commercial space.

Our recommendations should be considered flexible in terms of the size and format depending on available sites and strengths and limitations. The following summarizes recommended guidelines for siting and designing individual retail nodes.

- The vast majority of customers to all retail nodes will still rely on automobile travel. While high quality urban design elements, a mixing of land uses and pedestrian/cycling visitors should be important in creating an inviting shopping experience, surface parking will continue

to be important to serving future residents. In some cases, site sizes may be reduced with a combination of surface and structured parking, depending on the site characteristics.

- We would recommend that creative design approaches be used to soften the impact of surface parking for pedestrians, cyclists and persons using e-scooters and mobility scooters. For example, safe pedestrian routes and cycling lanes should be in place to allow customers using active transportation to move from public roadways and sidewalks to retail stores in a manner which separates them from parking lot traffic. Secure and visible bike lock facilities should be provided in close proximity to retail store entrances.
- In some locations, mixed retail/residential projects would be desirable, however, the economics of retail development will likely require the flexibility to develop some retail uses, particularly large-scale stores, such as supermarkets, in single-floor buildings.
- Where mixed-use retail is required, we would recommend that lay-by parking be provided on fronting streets. In addition, mixed-use retail should be enhanced with wide sidewalks to accommodate patios, street amenities, and an active pedestrian/active transportation environment. Mixed-use retail should avoid fronting on to high-speed arterial roadways that detract from a comfortable pedestrian experience.
- To encourage pedestrian and cycling shopping, where feasible, retail nodes should be accessible from safe bike and pedestrian routes, such as multi-use trails.

In summary, retail nodes should be designed to facilitate the needs of the core auto-oriented customer. However, creative urban design approaches should still be used to accommodate and encourage more travel by pedestrians, cyclists, and persons on scooters and mobility scooters.

Sharon East CDP

This CDP has a target population of 1,500 persons which is not sufficient to warrant a retail node. In addition, the Sharon East CDP does not have any land designated for *Mixed-Use* purposes and it has only a single major collector road without any intersections. Due to all of these factors, no commercial nodes have been recommended for this CDP.

The warranted commercial space in this CDP will instead be accommodated in the adjacent Sharon Heights CDP. That being said, some very small scale retail uses could potentially be accommodated in this CDP, such as a corner store, at-home daycares or temporary commercial uses (e.g. market booths) in the neighbourhood park. These types of uses could be permitted through the zoning by-law.

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Sharon Heights CDP

The Sharon Heights CDP has a population target of 19,000 which could accommodate several commercial nodes.

One medium commercial node and three small commercial nodes are recommended for this CDP, with the potential for other dispersed commercial space in the mixed-use areas in between the nodes.

The medium commercial node with a grocery store is suggested at the intersection of two major collector roads which provides easy access to the rest of this CDP, as well as the residential neighbourhoods to the north and south. Three small commercial nodes are suggested at prominent intersections. A medium or large commercial node has not been suggested on 2nd Concession due to the close proximity to the large commercial node recommended in the Holland Landing CDP.

Holland Landing East CDP

The Holland Landing East CDP has a population target of only 3,500. However, its central location and accessibility provide an opportunity to develop a retail node serving the entire Town.

One large commercial node has been recommended near 2nd Concession Road and Doane Road, which could contain a large grocery store. This commercial node is expected to capture passing traffic, and the central location allows easy access to large volumes of residents from across East Gwillimbury. This node is expected to accommodate a larger share of businesses that have a large catchment area and less frequent customer visits, which requires excellent visibility and road access. The recommended size is therefore larger than what is warranted by the population of the CDP. In addition to the grocery store, this node could contain other large scale uses that would rely on a large catchment area.

Yonge Corridor CDP

The Yonge Corridor CDP has a population target of 8,500, which on its own is smaller than could support a supermarket. However, Yonge Street which bisects this area is a major thoroughfare connecting large populations outside of the Town. In addition, it is also in relatively close proximity to the Yonge and Green Lane power node, which attracts large volumes of shopping traffic.

One medium node and one small node have been recommended for this CDP. The medium node is located along Highway 11 in the *Mixed-Use Centre* designated area, while the small node is located at the Yonge Street and Proposed Green Lane East Intersection. The medium node would tailor to the residential population in the surrounding areas as well as the through traffic from Highway 11, while the small node would act as an extension of the existing Yonge Street and Green Lane node.

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Walnut Farms CDP

The Walnut Farms CDP has a small population target of 2,500.

One small node is recommended in this CDP, tailoring to the buildout population from the CDP as well as the existing population from Sharon Hills and surrounding areas. This node would cater to the day-to-day convenience needs of the surrounding neighbourhoods.

Green Earth Village CDP

The Green Earth Village CDP has a population target of 11,500. While its population is relatively large, its location at the north end of the Town means that it is not as central as other CDPs. It is, however, near to the developing Queensville community and has the opportunity to draw from the Keswick community to the north.

One medium node and one small node are recommended within this CDP. The medium node could be located at the Queensville Sideroad and 2nd Concession Intersection and the small node at the designated *Mixed-Use Centre* area on Leslie Street. As the Queensville Sideroad and 2nd Concession area is a more major intersection, there will most likely be a higher amount of through traffic to this location. The two sides of this CDP are connected by trails to promote active transportation.

7.3 Commercial Space Format and Policy Recommendations

Fostering a vibrant and dynamic commercial environment requires a flexible policy framework to accommodate changing market conditions, an expected development phasing spanning multiple decades, and site-specific constraints and opportunities which may not become apparent until the specific development application is submitted. urbanMetrics has provided a number of recommendations on policy directions to support a range commercial uses and formats.

Support Both Vehicle and Pedestrian Access to Commercial Nodes

While the CCSP will support complete communities and a greater share of active transportation trips for commercial uses, the majority of commercial trips are expected to be made by private vehicle. As a result, policies should support good access for both private vehicles and active transportation, while minimizing conflicts.

- Provide sufficient onsite parking and access from major roads for vehicles.

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- Provide continuous pedestrian access by having sidewalks/bike lanes lead directly to store entrances. Sidewalks should connect seamlessly to an extensive sidewalk/bike path network as well as to any nearby trails.
- Pedestrians should not have to cross parking lots to access stores. Flexibility in how this is achieved should be permitted, as depending on site conditions, different approaches may be most suitable (directly fronting onto the street sidewalk, having an entrance facing the parking lot and another on a different street, having a parking lot across a local road etc.).
- Pedestrian cut-throughs between streets should be added where appropriate within adjacent neighbourhoods to minimize pedestrian path length. Cut throughs to commercial sites should also be considered for stores which front away from residential neighbourhoods.

Commercial Format

- Commercial space on a second storey should not be required anywhere in the CCSP. Second storey commercial space is often very challenging to lease, and the focus in the CCSP should be on creating quality commercial space. However, second storey commercial space should generally be permitted as of right across the mixed-use areas of the CCSP in the event a specific development can make that format viable.
- Policies should permit small scale uses as of right in *Neighbourhood Areas*, such as corner stores, at-home daycares, ice cream counters, coffee shops etc. This can promote community safety by providing children and youth access to retail without crossing busy collector streets or regional roads. Of note, permitting these uses as-of-right is expected to result in only a few commercial locations in *Neighbourhood Areas* due to the limited market demand for the specific categories of permitted commercial uses, and as a result the intended function of *Neighbourhood Areas* will be maintained.
- Areas with commercial space should have benches, waste receptacles, lighting, and trees to foster a comfortable pedestrian and retail experience.
- The ability to accommodate street front patios should be planned in advance to ensure they can be added into the streetscape at a later date if there is demand without interrupting pedestrian traffic, and they are located along pleasant streetscapes (e.g. are not facing a high-traffic road).
- Where possible negative externalities such as noise, odours, or traffic should be dealt with by regulating the design, permitted hours, and community infrastructure, rather than specific use restrictions. While this can be more challenging from a planning and enforcement perspective, it reduces the risk of a mismatch in supply and demand in specific commercial categories and

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the need for costly and time-consuming changes to planning regulations every time market conditions and trends shift.

Phasing of Commercial Space

- Commercial uses should not be required to be built before residential uses. In general, commercial uses will not open without a sufficient existing population to support them, and requiring commercial uses first can often delay any development by rendering it infeasible.
- Connectivity of commercial space must be considered when designing the residential space of the CCSP, and in designing the overall transportation network. It is often very difficult or impossible to provide good vehicle, pedestrian, or cycling access to commercial uses after the fact if they are not planned from the start of a community's development.

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8.0 Conclusions

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Warranted Space

- Approximately **250,000 to 325,000 square feet** of Food Store Retail (FSR) is warranted within the CDPs (including beer, wine, and liquor).
- Approximately **250,000 to 325,000 square feet** of Non-food Store Retail (NFSR) is warranted within the CDPs.
- Approximately **350,000 to 450,000 square feet** of Services Space is warranted within the CDPs.
- Active development applications within the Town may provide up to about 486,000 square feet of additional retail commercial service space which would help close the existing service gap while serving the future populations of residential developments outside the SPA.
- In total, between 850,000 to around 1,100,000 square feet of new retail and service commercial space could be supported within the CDPs from the current and buildout populations.

Distribution of Retail and Service Commercial Space

- The distribution of services warranted was determined by considering the following:
    - Projected populations of each CDP;
    - The amount of *Mixed-Use Centre* and *Mixed-Use Corridor* space designated for each CDP;
    - The amounts of each type of retail and commercial service warranted;
    - Each CDPs proximity to existing and proposed commercial space;
    - The current population and a per capita retail analysis;
    - Balance in the types of retail commercial services between the CDPs to promote complete communities.

In conclusion, the CDPs could support a total of 850,000 to around 1,100,000 square feet of retail commercial services. The largest portion of this growth is recommended to be located within the Holland Landing CDP and the Sharon Heights CDP. The Holland Landing CDP has the most potential for major stand-alone retailers, while the Sharon Heights CDP has the largest capacity for local serving along the *Mixed-Use Corridors*.

Upon the completion of the Commercial Land Needs and Market Analysis, it is of our professional opinion that the addition of retail as outlined in this report will help close the existing service gap

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within the Town while providing for the buildout population and reducing the Town's reliance on the Town of Newmarket's retail commercial services.

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Appendix A North American Industry Classification System (NAICS)

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

urbanMetrics Code	NAICS	Category Description
FOOD STORE RETAIL (FSR)		
90	**Supermarkets**	
	44511	Supermarkets and Other Grocery (except Convenience) Stores
100	**Convienience and Spacialty Food Stores**	
	445131	Convenience Stores
	44524	Meat Markets
	44525	Fish and Seafood Markets
	44523	Fruit and Vegetable Markets
	44529	Other Specialty Food Stores, including Baked Goods Stores, & Confectionary & Nut
BEVERAGE STORES		
110	**Beer, Wine and Liquor Stores**	
	44532	Beer, Wine and Liquor Stores
NON-FOOD STORE RETAIL (NFSR)		
Automotive		
20	**Used and Recreational Motor Vehicle Parts Dealers - Tires, Batteries, Automotive Accessories**	
	44131	Automotive Parts and Accessories Stores
	44134	Tire Dealers
Furniture, Home Furnishings and Electronics Stores		
30	**Furniture Stores**	
	44911	Furniture Stores
40	**Home Furnishing Stores**	
	44221	Floor Covering Stores (excludes retailers or only ceramic or only hardwood
	449129	Other Home Furnishings Stores (e.g. window treatments, fireplace/accessories, kitchen and tableware, bedding and linens, brooms and brushes, lamps and shades, and prints and picture frames).
50	**Computer Software Stores**	
	449212	Computer and Software Stores (includes retailing new computers, computer peripherals, pre-packaged software, game software and related products)
60	**Home Electronics and Appliance Stores**	
	449211	Appliance, Television and other Electronics Stores
	449213	Camera and Photographic Supplies Stores
Building and Outdoor Home Supplies Stores		
70	**Home Centres and Hardware Stores**	
	44411	Home Centres
	44413	Hardware Stores (includes tool stores & PRINCESS AUTO)
80	**Specialized Building Materials and Garden Stores**	
	44412	Paint and Wallpaper Stores
	44418	Other Building Material Dealers (excluding manufacturing and construction firms) (includes doors, windows, kitchen cabinets, electrical, glass, plumbing,
	44423	Outdoor Power Equipment Stores (lawn mowers, tractors, hedge trimmers,
	44424	Nursery Stores and Garden Centres
Pharmacies and Personal Care Stores		
120	**Pharmacies and Personal Care stores**	
	45611	Pharmacies and Drug Stores
	45612	Cosmetics, Beauty Supplies and Perfume Stores
	45613	Optical Goods Stores
	45619	Other Health and Personal Care Stores (includes stores retailing health and personal care items, such as vitamin supplements, hearing aids, and medical equipment and supplies)

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urbanMetrics Code	NAICS	Category Description
NON-FOOD STORE RETAIL (NFSR) (Continued)		
Clothing and Accessories Stores		
140	**Clothing Stores**	
	458111	Men's Clothing Stores
	458112	Women's Clothing Stores
	458113	Children's and Infant's Clothing Stores
	458114	Family Clothing Stores
	458119	Other Clothing Stores
150	**Shoe, Clothing Accessories and Jewellery Stores**	
	458115	Clothing Accessories Stores
	45821	Shoe Stores (includes athletic shoe retailers)
	45831	Jewellery Stores
	45838	Luggage and Leather Goods Stores
General Merchandise Stores		
170	**Department Stores**	
	45511	Department Stores
175	455110	Department Stores (with food)
180	**Other General Merchandise Stores**	
	455211	Warehouse Clubs and Superstores
	455219	All Other General Merchandise Stores (including Canadian Tire, variety, dollars stores)
Miscellaneous Retailers		
160	**Sporting Goods, Hobby, Music and Book Stores**	
	45911	Sporting Goods Stores (excludes athletic shoe retailers)
	45912	Hobby, Toy and Game Stores (excludes computer games and software)
	45913	Sewing, Needlework and Piece Goods Stores
	45914	Musical Instrument and Supplies Stores
	45921	Book Stores and News Dealers
	449214	Pre-Recorded Tape, Compact Disc and Record Stores
190	**Miscellaneous Store Retailers**	
	45931	Florists
	45941	Office Supplies and Stationery Stores
	45942	Gift, Novelty and Souvenir Stores
	45951	Used Merchandise Stores
	45991	Pet and Pet Supplies Stores
	45992	Art Dealers (excludes art galleries)
	45999	All Other Miscellaneous Store Retailers (e.g. tobacco supplies, artist supplies, collectors items, beer & wine making, swimming pool/spas/accessories, religious goods and accessories)

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urbanMetrics Code	NAICS	Category Description
SERVICES		
200	**Consumer Goods Rental**	
	53221	Consumer Electronics and Appliance (Appliance rental and leasing, rental of consumer audio-visual equipment (including rent-to-own), Television rental and leasing, Video recorder and player rental and leasing, Washers and
	532280	Formal Wear and Costume Rental
	532280	Video Tape and Disc Rental
	532280	Other Rental (sporting goods, garden equipment, home health, fitness etc.)
	532310	General Rental Centres (including contractors' and builders' tools and equipment, home repair tools, lawn and garden equipment, moving
210	**Finance**	
	52211	Banks
	52213	Credit Unions
215	52239	Other Financial (including cheque cashing, mortgage brokers, other financial services (e.g. Edward Jones))
220	**Insurance and Real Estate**	
	52421	Insurance Agencies and Brokerages
	53121	Offices of Real Estate Agents and Brokers
	53132	Office of Real Estate Appraisers
230	**Professional, Scientific & Technical Services**	
	54111	Offices of Lawyers
	54119	Other Legal Services (eg. Paralegal, Title search, immigration consultation,
	54121	Offices of Accountants, Tax Preparation Services, Bookings, Payroll
	54131	Architectural Services
	54132	Landscape Architecture (includes urban planners, industrial deveopment
	54134	Drafting Services
	54137	Survey and Mapping Services
	54138	Testing Labs (excluding medical, auto, veterinary)
	54141	Interior Design Services
	54143	Graphic Design Services (includes art studios)
	54149	Other Specialized Design Services (e.g. clothing, jewellery, fashion)
	54151	Computer Systems Design and Related Services (e.g. computer consulting
	54161	Management Consulting Services
	54162	Environmental Consulting Services
	54169	Other Scientific and Technical Consulting (e.g. economic, hydrology, safety)
	54171	Research & Development in the Physical, Engineering and Life Sciences
	54172	Research & Development in the Social Sciences and Humanities (eg.
	54181	Advertising Agencies
	54182	Public Relations Services (e.g. lobbyists, political consultants)
	54191	Marketing Research & Public opinion polling
	54192	Photographic Services (e.g. passport photography, photo studios portrait
	54193	Translation and Interpretation Services
	54194	Veterinary Services (excludes pet care (81291))
	54199	All Other Professional, Scientific and Technical Services (includes consumer
240	**Selected Office Administrative Services**	
	56131	Employment Services (includes placements, executive search, casting
	56141	Document Preparation Services (proofreading, word processing, desktop
	56142	Telephone Call Centres
	56143	Business Service Centres (eg. printing, copying, mail centres) (excludes
	56144	Collection Agencies
	56145	Credit Bureaus
241	56151	Travel Agencies
	56159	Other Travel Arrangement & Reservation Services (eg. ticket sales agency,
	56162	Security Systems (includes security system sales, installation and monitoring;
	49111	Postal Service (post office)
245	**Selected Educational Services**	
	61161	Fine Arts Schools (e.g. dance, drame, music, art, handicrafts)
	61162	Athletic Instruction (e.g. aerobic dance, gymnastics, juo, karate, martial arts,
	61163	Language Schools
	61169	All Other Schools and Instruction (e.g. Kumon, Oxford Learning, driving

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urbanMetrics Code	NAICS	Category Description
SERVICES (Continued)		
250	**Health Care**	
	62121	Offices of Dentists
	62131	Offices of Chiropractors
	62132	Offices of Optometrists (excludes eyeglass stores - 45613)
	62133	Offices of Mental Healh Practioners (psychologists, psychiatric social workers)
	62134	Offices of Physical, Occupational, Speech Therapists and Audiologists
	62139	Offices of Other Health Practitioners (eg. acupunturists, dental hygienists,
	62141	Family Planning Centres
	62142	Outpatient Mental Health and Substance Abuse Centres
	621499	Other Outpatient Care Centres (e.g. public health clinics, hearing testing,
	62151	Medical and Diagnostic Laboratories (e.g. medical, x-ray, dental lab
	62111	Offices of Physicians
255	**Social Services**	
	62149	Other Individual and Family Services (eg. AA, marriage counselling, outreach)
	62411	Child and Youth Social Services (e.g. Children's aid, youth centres, adoption)
	62441	Child care facilities
260	**Cultural, Entertainment & Recreation**	
261	71312	Amusement Arcades (e.g. indoor play areas, pinball arcades, video game
262	71394	Fitness & Recreational Sports Centres (includes athletic clubs, spas (w/o
263	71395	Bowling Centres
264	71399	All other Amusement and Recreation Industries (includes billards parlours)
265	51213	Motion Picture and Video Exhibition (includes cinemas)
270	**Food Services & Drinking Places**	
271	722511	Full-Service Restaurants
272	722512	Limited-Service Eating Places
273	72232	Caterers (includes banquet halls)
274	72241	Drinking Places (Alcoholic Beverages) -(includes night clubs, bars (including
280	**Personal and Household Goods Repair and Maintenance**	
281	81111	Automotive Mechanical & Electrical Repair & Maintenance (includes engine
	81112	Automotive Body, Paint, Interior and Glass Repair (includes collision repair,
	81119	Other Automotive Repair & Maintenance (includes auto detail, washing,
282	81121	Electronic and Precision Equipment Repair and Maintenance (includes ink jet
	81141	Home and Garden Equipment and Appliance Repair & Maintenance (e.g.
	81142	Reupholstery and Furniture Repair
	81143	Footwear and Leather Goods Repair (e.g. shoe repair)
	81149	Other Personal and Household Goods Repair and Maintenance (includes key
290	**Personal Care**	
	81211	Hair care and Esthetic Services (includes barber, beauty, hair salons)
	81219	Other Personal Care services (includes day spa, diet centres, hair removal,
	81231	Coin-operated Laundries and dry cleaners (self service)
	81232	Dry Cleaning and Laundry services (except coin operated) - no work clothing
	81291	Pet Care (except veterinary)
	81292	Photofinishing Services
	81299	All other Personal Services (e.g. fortune tellers, dating services, psychic
295	**Civic and Social Organizations**	
	81341	Civic and Social Organizations (includes clubs)
	81391	Business Associations (includes board of trade, real estate boards etc.)
300	**9999**	**VACANT RETAIL/SERVICE SPACE**
400	**9998**	**Non-Retail in Retail Space (e.g., church in retail plaza)**
500		Office
999		Excluded

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