

# Guelph Commercial Policy Review

## Public Workshop November 29, 2017



# Agenda

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- Introductions
- Post It Note Exercise
- Presentation of Study Purpose, Process and highlights of Stage 1 report
- Workshop
- Report back
- Wrap up and Next Steps



# Purpose of the Study



- The City of Guelph is undertaking a comprehensive Commercial Policy Review to develop an updated commercial policy framework for the City that provides:
  - refreshed planning objectives,
  - a commercial and mixed-use structure and updated policies to reflect provincial policy and the City's Official Plan,
  - sufficient amounts of appropriately designated lands, to meet future needs within the City.



# Study Process

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- This Commercial Policy Review is being conducted in three phases:
  - Stage 1: Commercial Analysis and Background Report
  - Stage 2: Policy Review and Development
  - Stage 3: Official Plan Amendment and Zoning By-Law Updates



# Workshop Purpose

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- Introduce the Study
- Present the findings of the Stage 1 Report dealing with the commercial analysis and the existing policy framework
- Obtain input on the strengths, weaknesses, opportunities and challenges in the commercial sector in the City

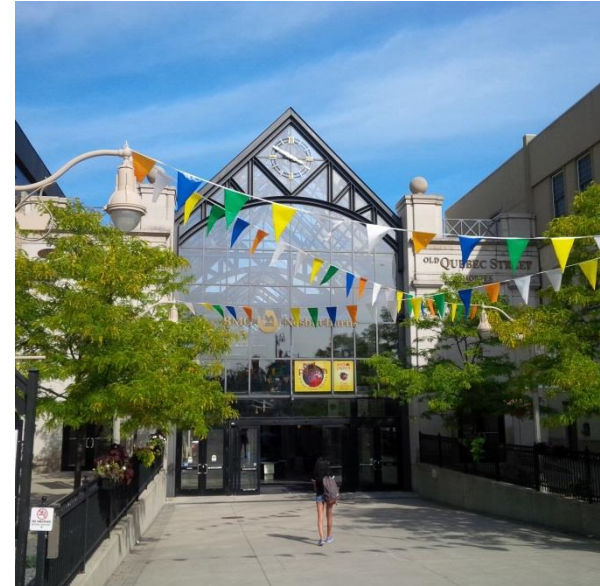


# Policy Framework

# Provincial Policy



- Planning system in Ontario is hierarchical so Guelph's Official Plan must be consistent with the Provincial Policy Statement (PPS) and conform to the Growth Plan for the Greater Golden Horseshoe (Growth Plan)
- Provincial policy requires a compact built form with a range of land uses that support a complete community
- The Growth Plan supports a structure of nodes and corridors. Downtown Guelph is designated an Urban Growth Centre





# City Official Plan



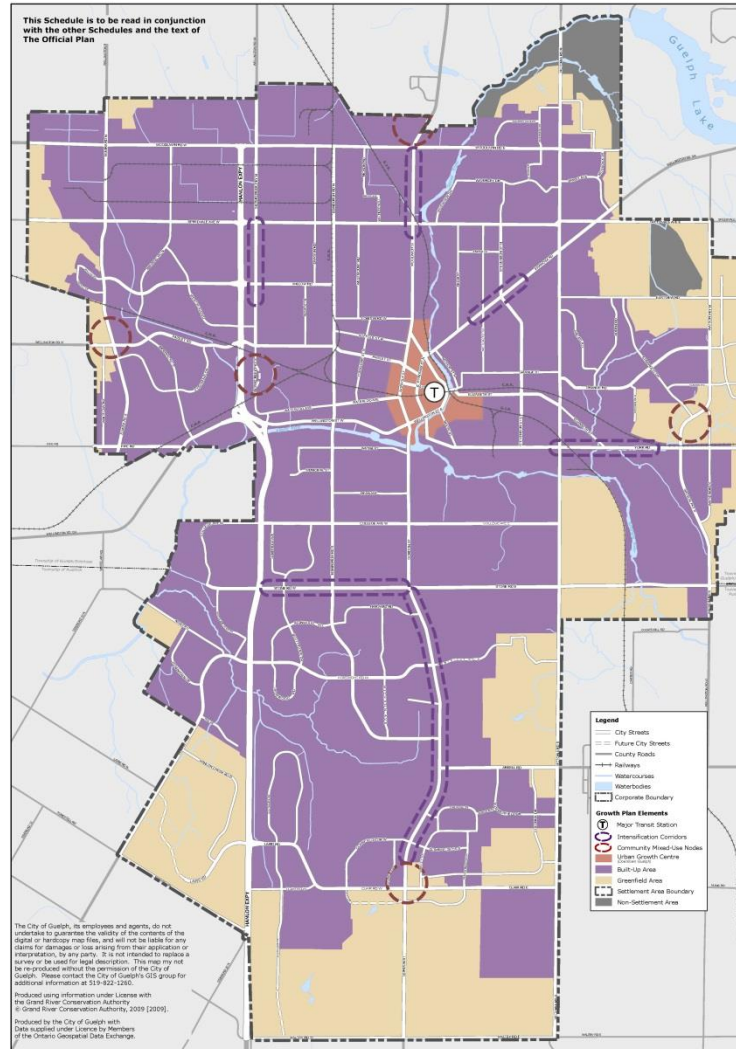
The Urban Structure and Growth Management framework for the City includes the following components:

- Urban Growth Centre (downtown);
- Major Transit Station Area;
- Intensification Corridors;
- Community Mixed-use Nodes;
- Built Up Areas; and,
- Greenfield Areas.





# City Official Plan Schedule 1



# City Official Plan



Five major commercial and mixed-use land use designations:

- **Community Mixed-use Centre**
  - Part of Community Mixed Use Nodes
  - Multi storey focal points with a City wide function
  - Strongly encouraged to develop main street type development in strategic locations
  - The mix of uses can occur vertically or horizontally
  - The floor space is capped to between 22,000 to 57,000 sq m (237,000 to 613,500 sq ft) depending on the centre
  - Limits on number of large retail uses permitted
  - Maximum height is 10 storeys
  - Examples: Clair/ Gordon, Woodlawn/ Woolwich



# City Official Plan



## Mixed-use Corridor

- Commercial corridors where intensification should occur with multi storey buildings fronting onto arterial or collector roads and coordinated with adjacent development
- Serves nearby residents and workers and the City as a whole
- The mix of uses can occur vertically or horizontally
- Maximum height is 6 storeys
- Examples: Eramosa/ Stevenson, Silvercreek corridor, Stone Road corridor



# City Official Plan



## Neighbourhood Commercial Centre

- Primarily serves the shopping needs of residents living and working nearby
- Neighbourhood Centres will not be more than 4,650 sq m (50,000 sq. ft.) of gross leasable floor area.
- Existing Neighbourhood Commercial Centres will be permitted a maximum of 10,000 sq m (108,000 sq. ft.)
- Individual retail uses are limited to a maximum gross leasable floor area of 3,250 sq m (35,000 sq. ft.)
- Examples: Kortright/ Edinburgh, Speedvale/ Stevenson



# City Official Plan



- **Service Commercial**
  - Highway-oriented and service commercial uses that do not normally locate within Downtown because of site area or highway exposure needs or commercial uses of an intensive nature that can conflict with residential land uses
  - Example: Woodlawn west of the Hanlon, York east of Victoria





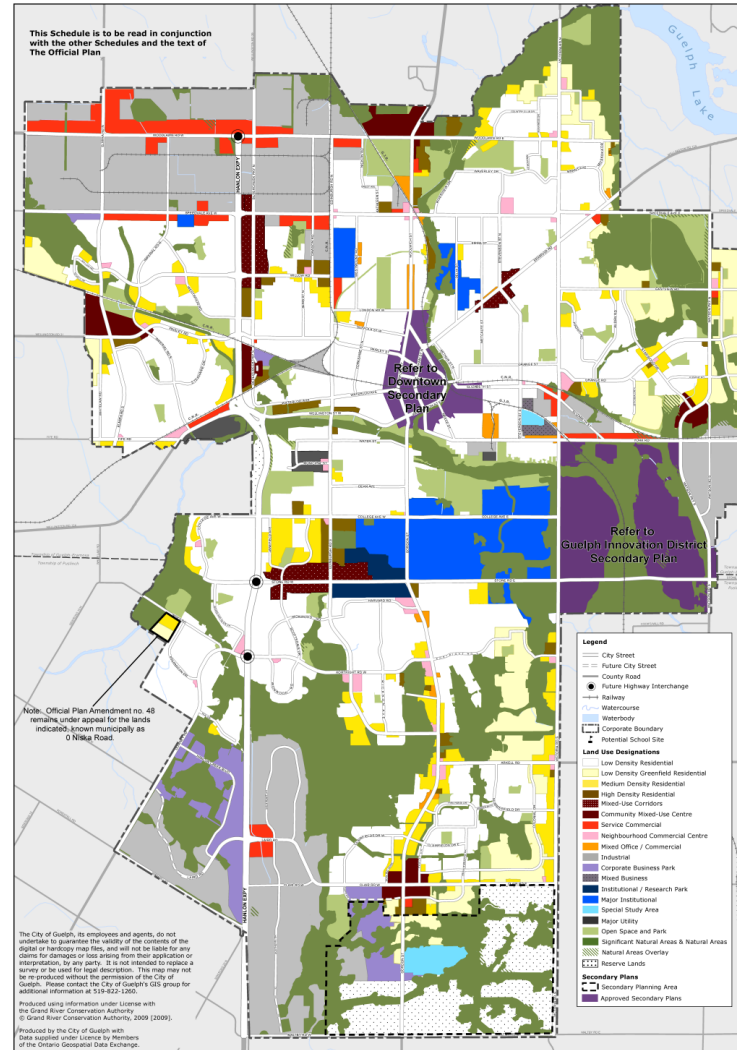
# City Official Plan



- **Mixed Office/ Commercial**
  - Recognizes and promotes historic areas of small-scale commercial operations or mixed commercial-residential uses outside the downtown
  - Street oriented uses
  - Maximum height 4 storeys
  - Example: Woolwich north of London



# Official Plan Schedule 2

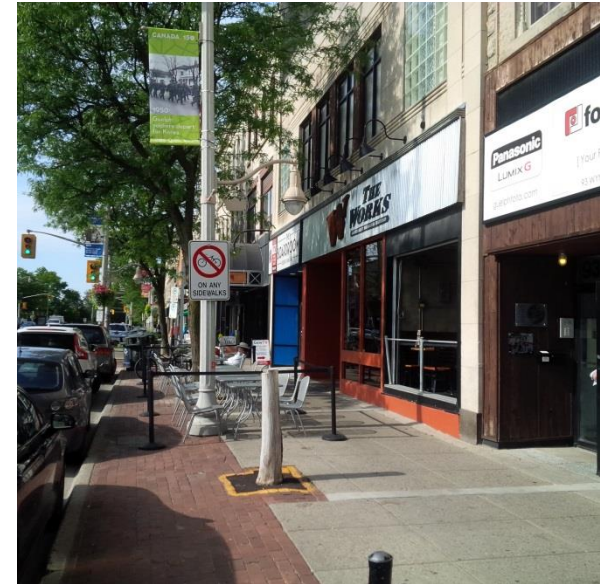




# City Official Plan



- The Commercial and Mixed-use designations in the Official Plan are intended to meet the needs of daily living, be dispersed throughout the City and evolve to include main street experiences
- The policies recognize that the evolution to achieve the desired built form will occur over the life of the Official Plan and beyond – policies have been provided to help guide that evolution.



# City Official Plan



- Convenience commercial can be located in residential areas up to a maximum of 400 sq m (4,300 sq ft)
- Commercial uses can also be permitted in Mixed Use Business, Industrial and Business Park designations where the focus is on complementary services for those areas

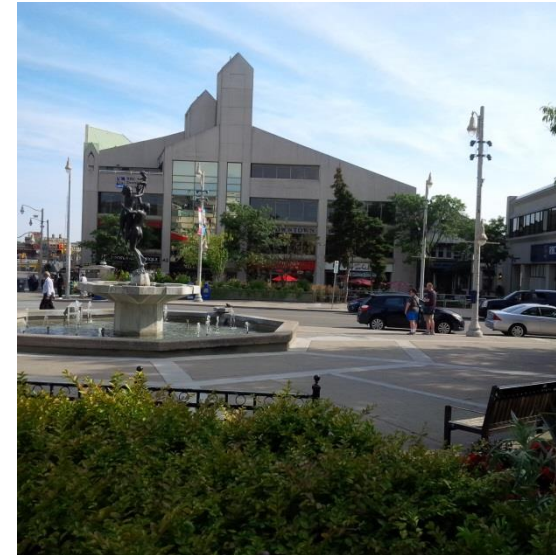


# Guelph Official Plan



## Guelph has two recent Secondary Plans:

- Downtown Secondary Plan notes it will be a focus for intensification. The intent is to reinforce and expand the role of Downtown as a retail, dining and entertainment destination. On key streets, retail or service uses are required on the ground floor.
- The Guelph Innovation District Secondary Plan (GID) is planned to be a new compact, mixed-use community that includes an urban village.



# Guelph Official Plan



## Market Impact Studies

Market impact studies are required for:

- Establishing a Community Mixed-use Centre or Mixed-use Corridor or expanding them beyond the boundaries of the designation;
- Exceeding the retail floor space caps or the number of large retail uses permitted within a Community Mixed-use Centre; and
- Extending or enlarging a Neighbourhood Commercial Centre to more than 10,000 sq m of gross floor area.

Must demonstrate:

- No detriment to the function of downtown
- No compromise to the strategic or commercial policy objectives
- Existing commercial and mixed use centres can maintain their planned function



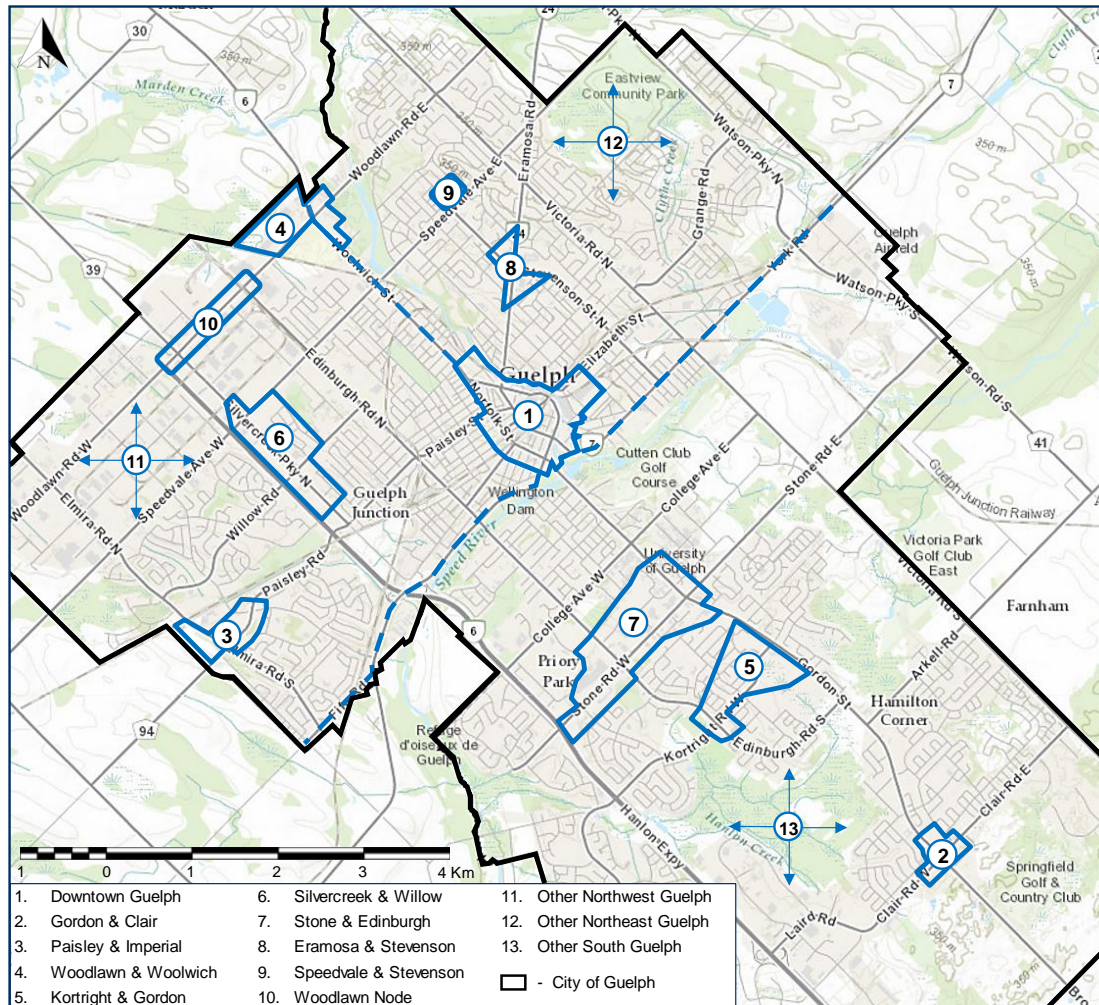
# Commercial Structure and Supply



# Commercial Structure and Supply



## City of Guelph Inventory Nodes

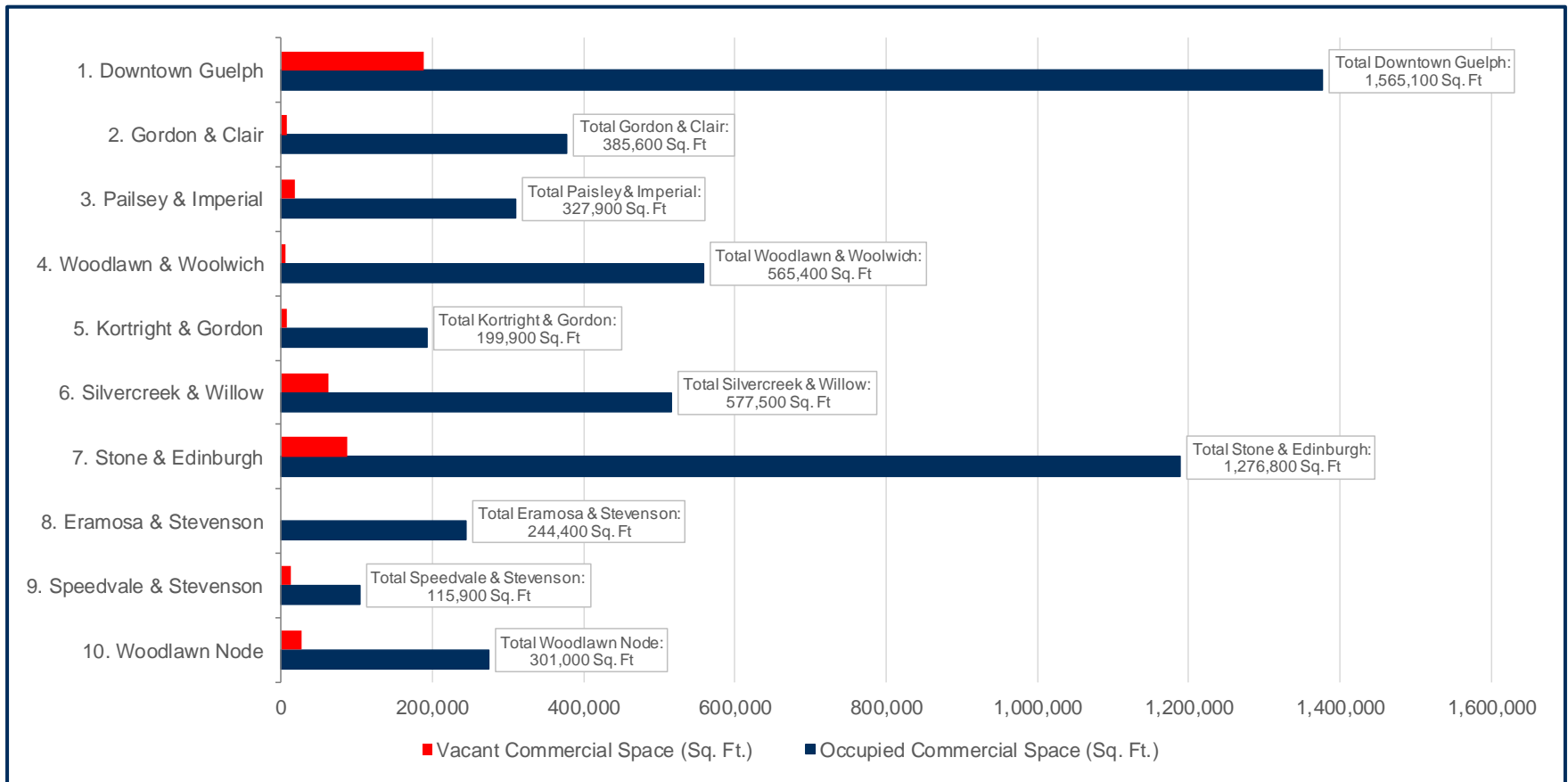


Source: Tate Economic Research Inc.; Basemap: ESRI ArcGIS.

# Commercial Structure and Supply



## Summary of Commercial Space within the City of Guelph



Source: Tate Economic Research Inc.

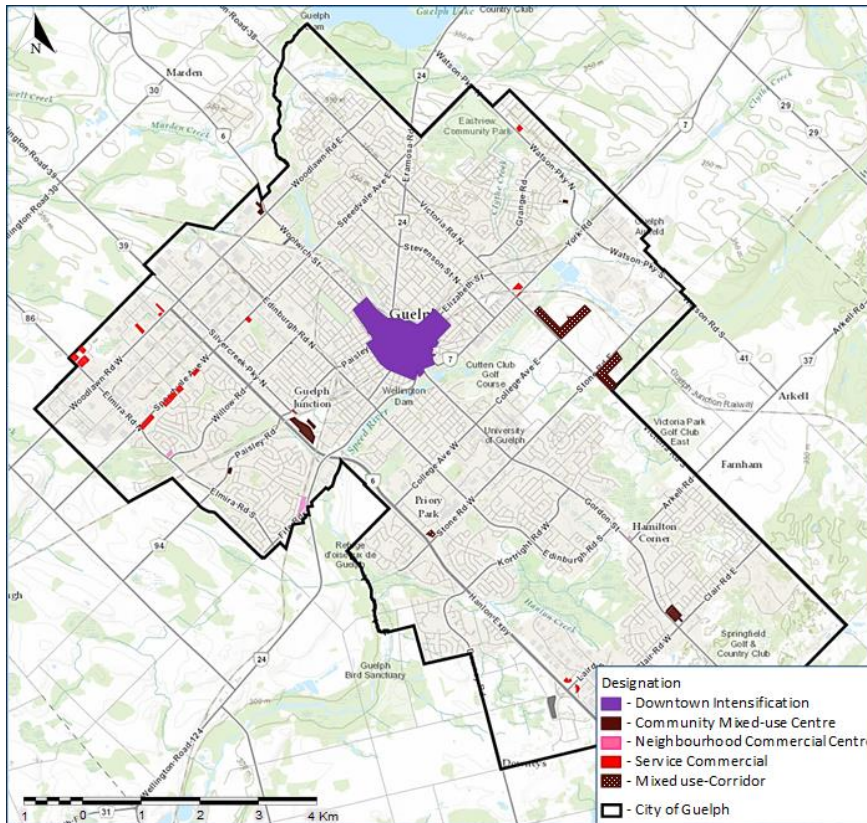
<sup>1)</sup> Based on inventory and site inspections completed by TER in June / July 2017. Rounded to the nearest 100 square feet.



# Commercial Structure and Supply



## Potential Future Development Intensification / Planned Undeveloped Commercial Land



Potential Future Development: Intensification / Planned and Undeveloped Commercial Land					
Designation	Potential Future Development: Intensification / Planned Amount (sq. ft.)	Undeveloped Commercial Land			
		Parcel Size			
		< 2 Acres	2 - 4 Acres	5-10 Acres	> 10 Acres
Community Mixed-use Centre	269,800	26.6	1	2	1
Neighbourhood Commercial Centre	0	9.1	1	1	1
Service Commercial	0	50.1	12	11	1
Corporate Business Park	0	12.0			1
Low Density Residential	0	1.0	2		
Mixed Office Commercial	0	1.9		1	
Mixed-use Corridor	0	1.8		1	
Downtown Intensification	301,700				
Mixed-use Corridor (GID)	200,000				
<b>Subtotal</b>	<b>771,500</b>	<b>102.4</b>	<b>16</b>	<b>16</b>	<b>2</b>

Source: Tate Economic Research Inc., based on data provided by the City of Guelph. Please see Appendix F, Figure F-1 for a description of the individual sites within each category.

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# Commercial Development Trends

# Retail Trends



## ❑ Consumer Preferences

- Price and Convenience
- Quality and Service
- Increasingly Urban
- More Experiential

## ❑ Public Policy

- Smart Growth
- Intensification

## ❑ Developer Strategy

- Urban Retail
- Mixed Use
- Shopping Centre Enhancement



# Retail Trends



## ❑ Retailers

- Blurring of Retail Channels
- Consolidation
- Category Killers
- Foreign Retailers
- High Fashion Department Stores
- Off Price Expansion
- Shrinking Stores
- E-Commerce

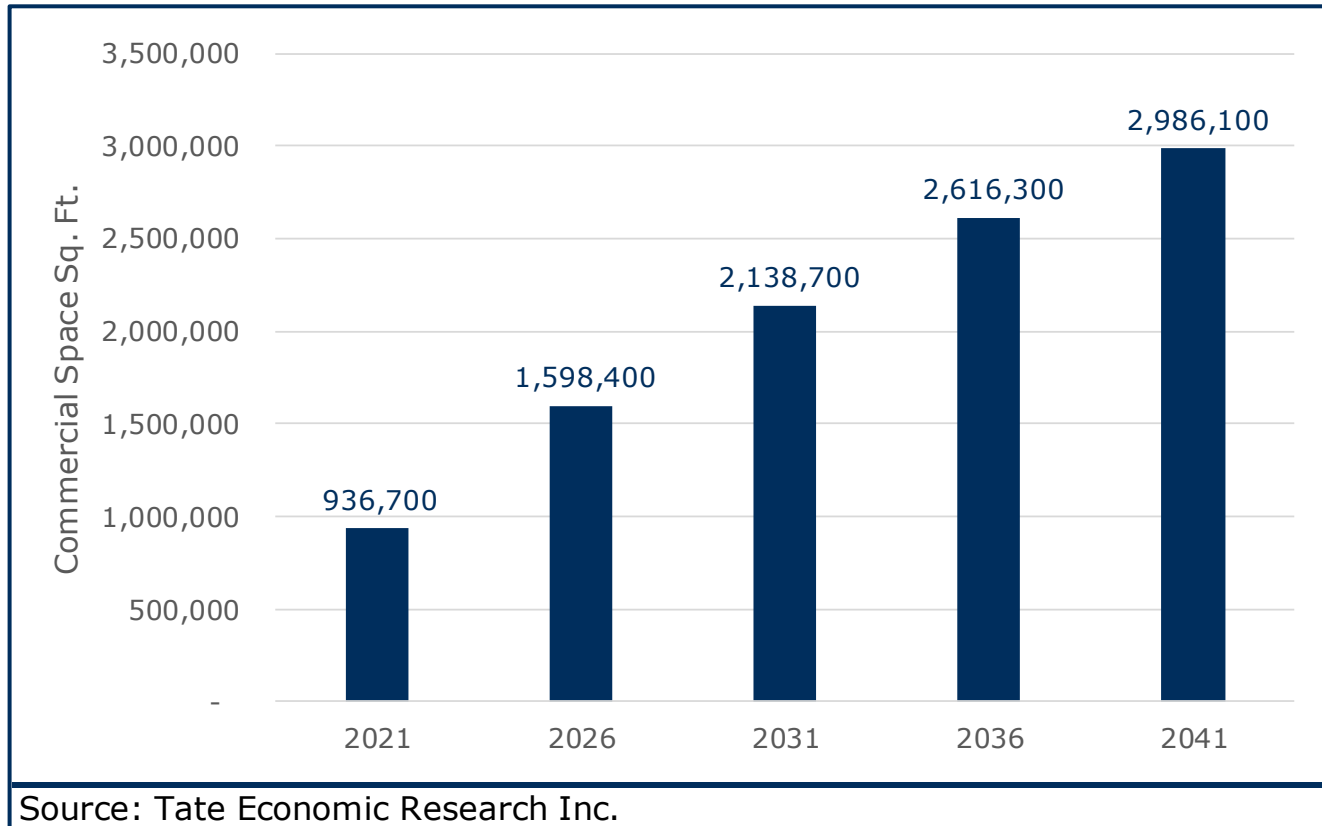


# Commercial Demand Analysis

# Commercial Demand Analysis



## Additional Warranted Commercial Space



# Commercial Demand Analysis



## City of Guelph Commercial Land Needs 2016 – 2041 <sup>(1)</sup> <sup>(2)</sup> <sup>(3)</sup>

	2016	2016 - 2021	2021 - 2026	2026 - 2031	2031 - 2036	2036 - 2041
Period Commercial Demand (sq. ft.) <sup>(1)</sup>		936,700	661,700	540,300	477,600	369,800
Active Development Applications		599,800				
Potential Future Development: Intensification / Planned						
Intensification: Community Mixed-Use Centre			269,800			
Intensification: Downtown				180,000	60,850	60,850
Planned: Mixed-Use Corridor Commercial (GID)				100,000	100,000	
Total Potential Supply (excl. Undeveloped Commercial Land) <sup>(2)</sup>		599,800	269,800	280,000	160,850	60,850
Surplus/Shortfall (sq. ft.)		336,900	391,900	260,300	316,750	308,950
Net Land Required - Acres (@25% coverage)		30.9	36.0			
Net Land Required - Acres (@30% coverage)				19.9		
Net Land Required - Acres (@35% coverage)					20.8	
Net Land Required - Acres (@40% coverage)						17.7
Cummulative Surplus/Shortfall (acres) <sup>(3)</sup>	102.4	71.5	35.5	15.6	-5.2	-22.9
Cummulative Unmet Demand (sq. ft.)		0	0	0	78,900	387,850

Source: Tate Economic Research Inc.

<sup>1)</sup> Replicated from Figure 6-5.

<sup>2)</sup> Totals from Figures 6-1 & 6-2. Phasing based on TER professional judgement and City of Guelph planning department.

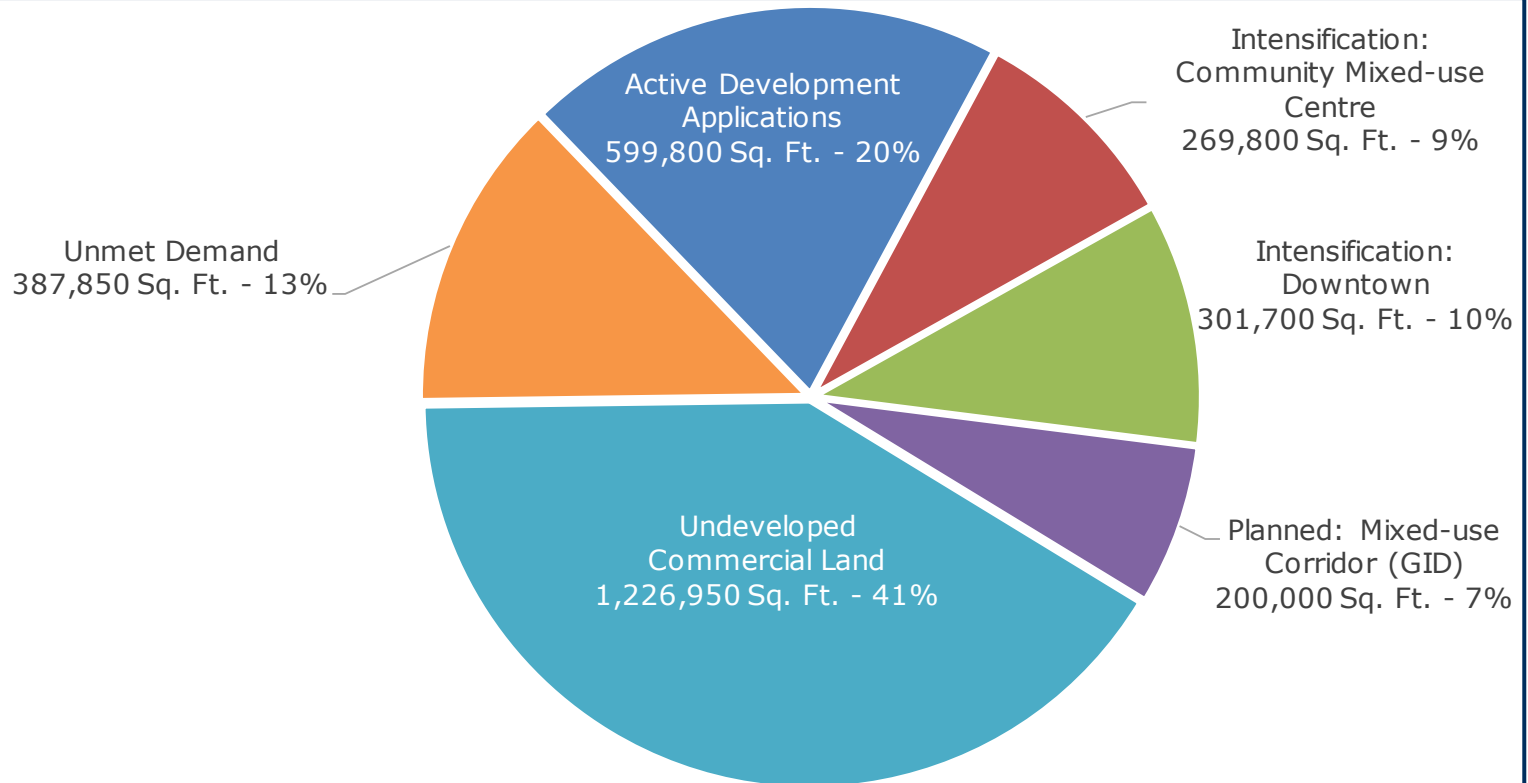
<sup>3)</sup> The base supply of 102.4 acres of undeveloped commercial land is from Figure 6-1.



# Commercial Demand Analysis



## Distribution of Commercial Demand 2016 – 2041

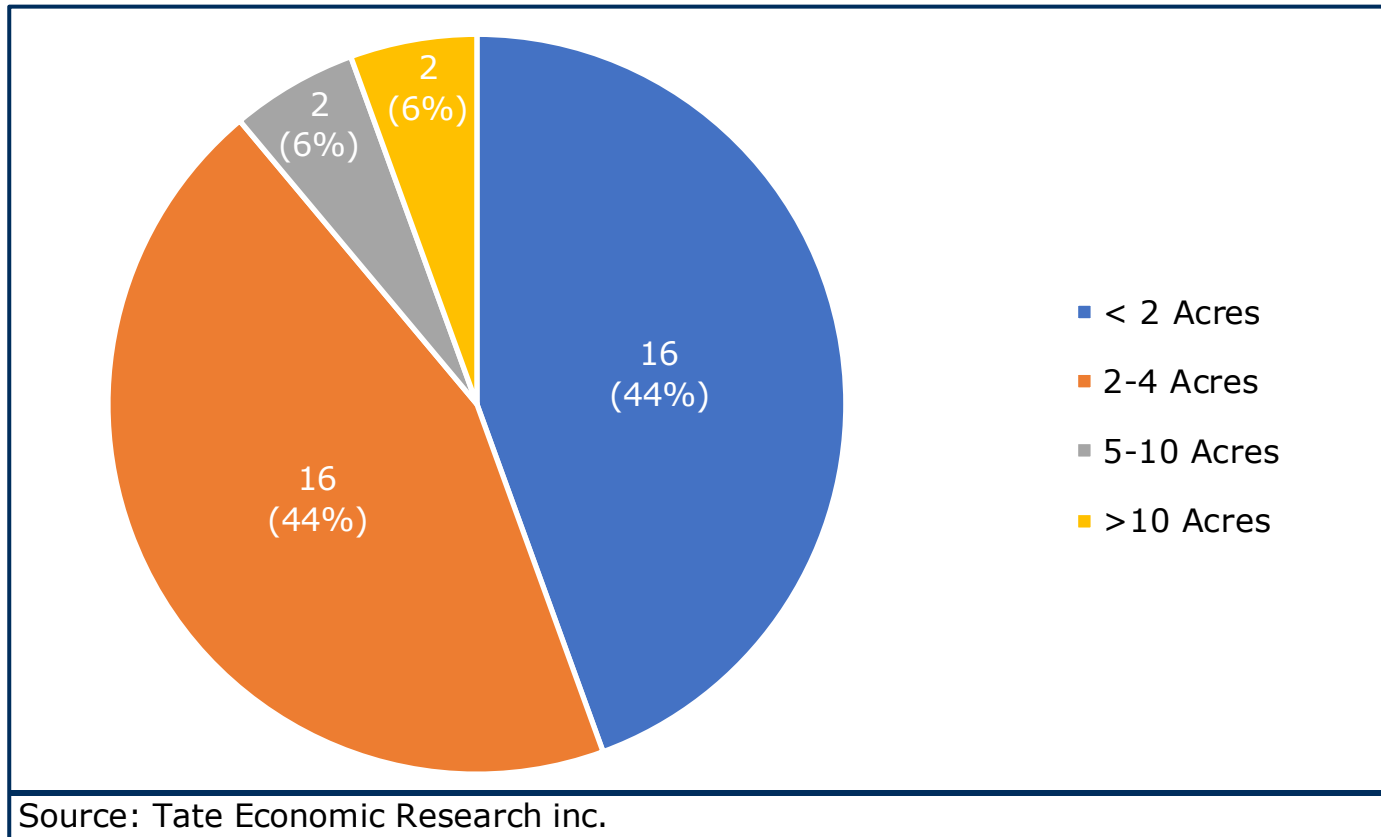


Source: Tate Economic Research Inc.

# Commercial Demand Analysis



## Distribution of Undeveloped Commercial Sites by Parcel Size



# Workshop

# Next Steps



- On-Line Survey available until Dec 15
- Prepare Vision Statement and Principles based on public input – December and January
- Prepare policy alternatives – First quarter 2018
- Public meeting to present policy alternatives - Second quarter 2018
- For comments or questions contact [commercialreview@guelph.ca](mailto:commercialreview@guelph.ca)
- For more information visit the project website: [guelph.ca/commercialreview](http://guelph.ca/commercialreview)

