

# Retail Gap Analysis

## Town of East Gwillimbury

*For the communities of Mount Albert and Holland Landing*

November 2022





## **Land Acknowledgment**

The Town of East Gwillimbury recognizes and acknowledges the lands originally used and occupied by the First Peoples of the Williams Treaties First Nations and other Indigenous Peoples, and we would like to thank them for sharing this land.

We would also like to acknowledge the Chippewas of Georgina Island First Nation as EG's closest First Nation community and recognize the unique relationship the Chippewas have with the lands and waters of this territory. They are the water protectors and environmental stewards of these lands, and we join them in these responsibilities.

Adapted from The Town of East Gwillimbury's National Day for Truth and Reconciliation (2021) webpage

# Table of Contents

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<i>Executive Summary</i> .....	v
<i>1.0 Introduction</i> .....	1
<i>2.0 Regional and Local Context</i> .....	2
<i>3.0 Trends and Research</i> .....	11
<i>4.0 Trade Area</i> .....	17
<i>5.0 Commercial Supply</i> .....	32
<i>6.0 Resident and Consumer Survey</i> .....	45
<i>7.0 Market Demand Analysis</i> .....	46
<i>8.0 Retail Gap Strategy &amp; Action Plan</i> .....	53
<i>Appendix A - Select Large Font Trade Area and Market Demand Tables</i> .....	57
<i>Appendix B - Detailed Inventory Tables for Mount Albert and Holland Landing</i> .....	68
<i>Appendix C - Downtown Revitalization Resident Survey Result Extracts</i> .....	70

## List of Tables

---

Table 3-1.	Storefront Improvement Programs Overview	15
Table 4-1.	Trade Area Demographic Summary	19
Table 4-2.	CanaCode Lifestyle Cluster Segmentation for Mount Albert & Holland Landing	20
Table 4-3.	Trade Area Populations Projections Summary 2021 to 2031	22
Table 4-4.	Trade Area Population Breakdown	23
Table 4-5.	Trade Area Household Income Breakdown	24
Table 4-6.	Labour Force Information	25
Table 4-7.	Labour Force Industry and Occupation	26
Table 4-8.	Trade Area Retail Spending Potential 2021 for Mount Albert and Holland Landing	28
Table 4-9.	Mount Albert Miscellaneous Inflow Spending	29
Table 4-10.	Trade Area Retail Spending Potential 2026	30
Table 4-11.	Trade Area Retail Spending Potential 2031	31
Table 5-1.	Mount Albert Commercial Retail Inventory	35
Table 5-2.	Holland Landing Commercial Retail Inventory	42
Table 7-1.	Estimated Market Share Retention of Retail Spending in Mount Albert 2021	47
Table 7-2.	Estimated Retail Demand by 2031 Maintaining Current Market Share	48
Table 7-3.	Estimated Retail Demand Summary 2021 to 2031 Maintaining Current Market Share	49
Table 7-4.	Estimated Land Needs Summary 2021 to 2031 Maintaining Current Market Share	49
Table 7-5.	Estimated Retail Demand by 2031 Increasing Market Share	51
Table 7-6.	Estimated Retail Demand Summary 2021 to 2031 Increasing Market Share	52
Table 7-7.	Estimated Land Needs Summary 2021 to 2031 Increasing Market Share	52

# List of Figures

Figure P-1.	Retail Merchandise Category Sorting Breakdown	ii
Figure P-2.	Dominant CanaCode Lifestyles in Mount Albert and Holland Landing	iv
Figure 2-1.	York Region Context Map	2
Figure 2.2.	Oak Ridges Moraine Boundary Map	3
Figure 2-3.	Mount Albert Commercial Structure (2014)	4
Figure 2-4.	Mount Albert Revitalization Strategy Proposed Improvements (2014)	4
Figure 2-5.	Example of Think Green Targets for Designing Complete & Connected Communities	6
Figure 2-6.	Mount Albert Land Use Plan	8
Figure 2-7.	Holland Landing Land Use Plan	8
Figure 2-8.	York Region Employment Projections for East Gwillimbury	9
Figure 2-9.	York Region Employment Land Density Forecasts	9
Figure 2-10.	East Gwillimbury Construction Activity (Y/E 2021)	10
Figure 2-11.	Drive Times from Mount Albert & Holland Landing	11
Figure 3-1.	Women's share of employment by occupation and job loss in Canada (2021)	13
Figure 4-1.	Mount Albert and Holland Landing Trade Areas	18
Figure 4-2.	Dominant CanaCode Lifestyle Cluster in Mount Albert Trade Area	21
Figure 4-3.	Dominant CanaCode Lifestyle Cluster in Holland Landing Trade Area	21
Figure 4-4.	Population Breakdown	23
Figure 4-5.	Population Income Breakdown	24
Figure 4-6.	Mode of Transportation to Work	26
Figure 4-7.	Trade Area Retail Spending Potential 2021 - Mount Albert and Holland Landing	28
Figure 5-1.	Mount Albert Commercial Inventory by Category & Store Type/Business Mix	33
Figure 5-2.	Mount Albert Village Core & Highway Commercial Retail Inventory	35
Figure 5-3.	Mount Albert Representative Commercial Retail Inventory Imagery	36
Figure 5-4.	Notable Commercial Retail Vacancies in Mount Albert	37
Figure 5-5.	Mount Albert Retail Space Per Capita	39
Figure 5-7.	Holland Landing Village Core Retail Inventory	43
Figure 5-8.	Holland Landing Representative Commercial Retail Inventory Imagery	44
Figure 5-9.	Notable Commercial Retail Vacancies in Holland Landing	44

# Preface

Fowler Bauld & Mitchell Ltd. ("FBM") and MDB Insight Inc. ("MDB") was commissioned by the Town of East Gwillimbury to conduct a Retail Gap Analysis for the communities of Mount Albert and Holland Landing as part of the concurrent, but separate Mount Albert Revitalization Strategy. Note that shortly after the project award, MDB Insight Inc. was acquired by Deloitte LLP on April 18, 2022 and therefore references to Deloitte will be synonymous with MDB.

The study was carried out over the period of March through November 2022. On-the-ground fieldwork in the study communities was carried out in April 2022.

The objective of this study is to thoroughly document current retail inventories and define the realistic Retail Trade Areas for which they serve. The purpose of this research was to establish a solid foundation and baseline for determining the depth of retail opportunity, associated gaps in the market provision of shops and services, and to determine what type of retail could fill these gaps over the next 10 years. The end result is to bolster the retail market in retail areas by retaining or attracting greater market share of resident, visitor and passing motorists' spending in the community.

FBM does not warrant that any estimates contained within the study will be achieved over the identified time horizons, but that they have been prepared conscientiously and objectively on the basis of information obtained during the course of this study.

Also, any tenant references made in the report are for illustrative purposes only and should not be taken as guarantees that they will locate in the study communities but rather that they could represent compatible "target" category types to pursue either for local businesses or external regional businesses over the next decade.

This analysis was conducted by FBM as an objective and independent party, and is not an agent of any municipality or the Town of East Gwillimbury.

As is customary in an assignment of this type, neither our name nor the material submitted may be included in a prospectus, or part of any printed material, or used in offerings or representations in connection with the sale of securities or participation interest to the public, without the expressed permission of the Town of East Gwillimbury or FBM.

FBM  
2022

## HOW TO READ THIS DOCUMENT

This document represents a technical analysis and therefore there may be certain aspects that may not be intuitive to the general public.

Overall, this report is structured so that the background framework and an understanding of the area from which the retail users originate is presented first. The origin of consumers is synonymous with the term "retail trade area", which is used frequently in this report. A retail trade area is the geographic area from which a retail store draws and is often the longest drive a customer is willing to make. However, people will travel different distances for different types of products. There are some types of products that consumers will drive farther to get. For instance, below is another way to differentiate trade areas:

**Local convenience trade areas**, which are areas defined by ease of access, travel time, and distance. For example, with few exceptions, people will stay within a certain area for things like gas and groceries.

**Comparison shopping trade areas**, in which people will venture further out for items with large price tags or when they want to compare price, style, or quality. Items like furniture and appliances fall into this category.

As the reader progresses through report, they will notice that expenditure tables, also known as spending, are not sorted alphabetically. Rather, we have sorted these categories to correspond more accurately with the nature of broad spending categories. This is visually shown and colour-coded for ease of understanding in **Figure P-1**.

## INDUSTRY & CATEGORY TERMINOLOGY

Throughout this document, various acronyms and retail industry terminology may have been used. For advance clarity, these are defined below.

DSTM - Department Store Type Merchandise

F&B - Food & Beverage

sf - square feet

psf - per square foot

\$ psf - dollars per square foot (an industry standard measure of annualized retail sales productivity)

**Figure P-1. Retail Merchandise Category Sorting Breakdown**



**Comparison Merchandise** - Comparison Merchandise is an industry term often synonymous with Department Store Type Merchandise (DSTM) and includes categories such as Fashion, Home Decor, Appliances and Electronics, Sporting Goods etc or categories that are typically found in more traditional “mall” or shopping centre environments.

**Quick Service F&B** - This represents typically fast food, grab-and-go, or drive through types of restaurants, such as Tim Hortons etc, or other cafe/ coffee shops.

**Full Service F&B** - This represents restaurant or pubs that included table service seating or servers for meals and beverages.

**Specialty Retail** - This category of retail typically is a “catch-all” for a wide range of store types such as pet foods, arts & crafts, cellular phones, office supplies/ stationery etc.

**General Merchandise** - This category of retail typically represents stores like Walmart, Giant Tiger, Canadian Tire and Dollarama as they carry multiple product types across an array of categories. Similarly, Shoppers Drug Mart and Jean Coutu also offer much more than pharmacy and as such could also be classified as general merchandisers.

## Accessibility Text

This document contains a number of tables and figures that contain small text. To enable accessibility, we have also provided larger font copies of applicable tables and figures in **Appendix A**.

For easy identification and navigation, the following symbol is noted beside applicable figures and tables. For those viewing the digital version of this document, you may click on the icon to bring you to **Appendix A** so that you may view the appropriate Figure/Table. Click the icon again to return to the main report text.



## CanaCode Lifestyle Clusters Descriptions

CanaCode Lifestyles is a customer segmentation that combines demographic, household spending, consumer lifestyle, attitude and behavioural databases, with a view of a target market’s choices, preferences and shopping patterns. Sometimes these Lifestyle Clusters are referred to as Psychographics.

The two-tier lifestyle segmentation system works at the six-digit postal code level and classifies Canada’s consumer landscape into 18 distinct lifestyle segments. The data for the Lifestyles is sourced to Statistics Canada and its purpose is to compare how a respective Trade Area (in this study Mount Albert or Holland Landing), compares to the typical Canadian profile.

The two lifestyles presented (**Figure P-2**) are the dominant CanaCode Lifestyle Clusters that prevail in the Town of East Gwillimbury. Dominant lifestyles in Mount Albert and Holland Landing are summarized in the respective demographic sections of this document.

A full listing of the CanaCode Lifestyle Clusters can be viewed at [www.polarisintelligence.com/canacode/](http://www.polarisintelligence.com/canacode/)

## Demographic Benchmarking

When viewing the Demographic Tables in Section 4 of this report, the reader will notice that values are benchmarked or indexed against the Province of Ontario Average. The colour coding used for this benchmarking index is as shown below:

Index Legend: Compared to Benchmark (%)		Colour
>=180	Extremely High	
>=110 and <180	High	
>=90 and <110	Similar	
>=50 and <90	Lower	
<50	Extremely Low	

Figure P-2. Dominant CanaCode Lifestyles in East Gwillimbury





# Executive Summary

## Regional & Local Context Summary

Town of East Gwillimbury is one of nine municipalities in the Regional Municipality of York, and in 2021 was the fastest growing municipality in Canada with a population of 5,000 or more. As an upper tier municipality, York Region manages public transit, water, emergency medical services and policing, while East Gwillimbury provides a number of municipal services and resident programs throughout including for the smaller communities of Mount Albert and Holland Landing.

The Town of Newmarket to the south is a major regional commercial centre boasting a range of day-to-day and convenience retail goods and services, including the Upper Canada Mall, Walmart and Home Depot along Yonge Street. Costco Wholesale lies just north of Newmarket near Yonge St and Green Ln West in East Gwillimbury.

York Region is the second largest business centre in Ontario, and is the fastest growing large municipality in the province. Expected to reach a population of

2.04 million (from 1.2 million in 2021) and 999,000 jobs by 2051 (from 665,000 in 2021), York Region is currently finalizing a Regional Official Plan to guide growth and development. East Gwillimbury is expected to absorb 6.2% of the projected population growth (compared to 3% in 2021) and 4.4% of the employment growth (compared to 1.6% in 2021) by 2051. This would result in a total population of 127,700 and 43,600 jobs by 2051.

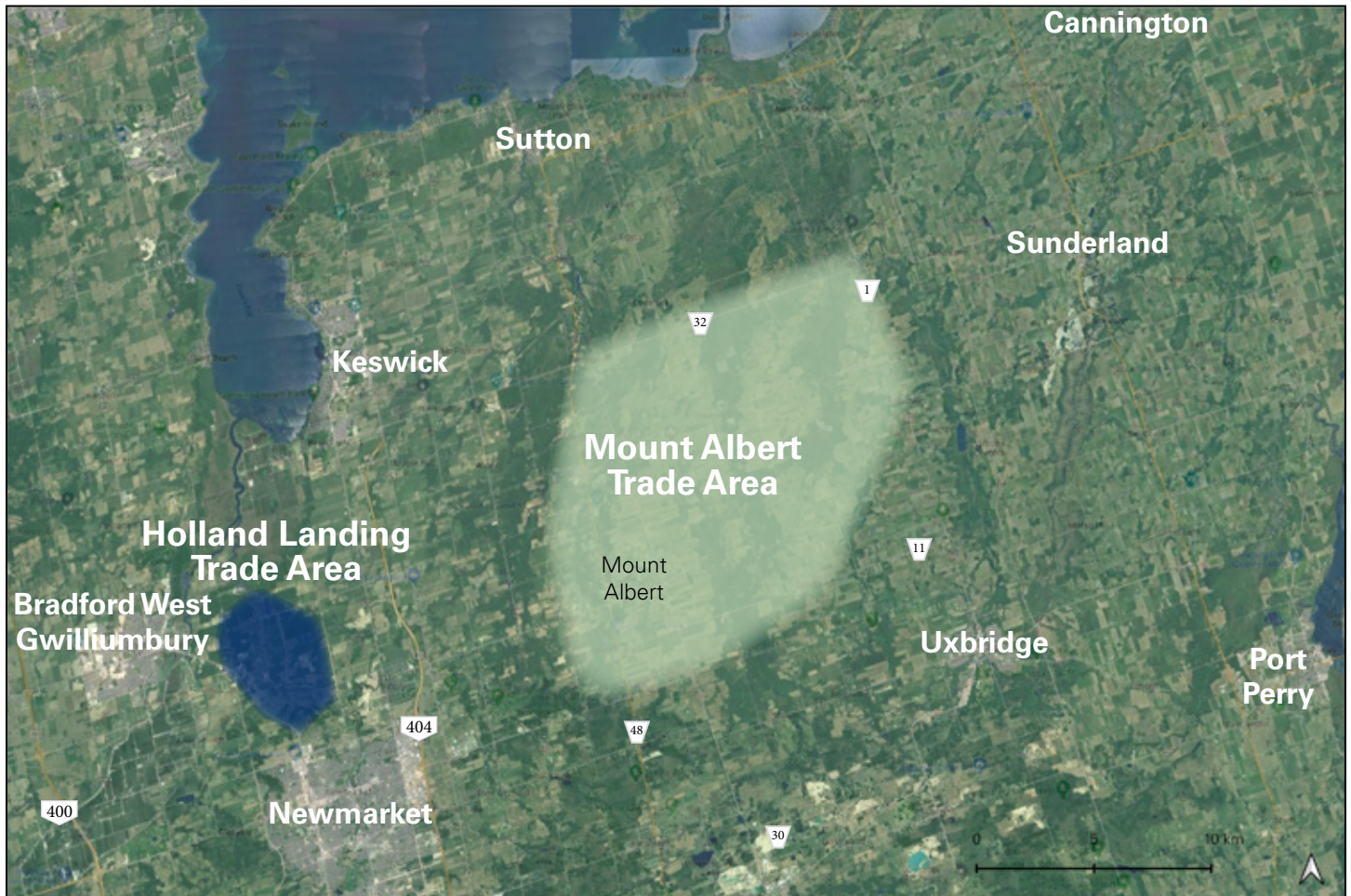
These projections reflect the rapid residential growth East Gwillimbury has seen in recent years. As one of the country's fastest growing municipalities, over the past five years, the Town grew in population by 44.4% to 32,637 persons. Despite this significant population growth, retail development in Mount Albert particularly has not kept pace with population growth resulting in a disparity between the amount of retail space and the amount of retail spending captured.

**Mount Albert's location context in East Gwillimbury highlights a lack of commercial within a 15 to 20 minute drive time, and a corresponding opportunity for greater capture of resident spending.**

## Drive Times To/From Mount Albert and Holland Landing, and Surrounding Communities



## Mount Albert & Holland Landing Trade Areas



### Trade Area Summary

For this particular study, Retail Trade Areas are delineated utilizing a combination of drive times and competitive forces including similar sized communities to the north and northeast, as well as the Town of Newmarket and the Greater Toronto Metropolitan Area as major commercial centres to the south. Recognizing the regional draw of these larger centres, Mount Albert's Trade Area is oriented towards the northeast and captures residents within a 5 minute drive south and south east of the community. The trade area also includes rural residents within a 35 minute drive northeast including the small community of Udora. In contrast, Holland Landing's Trade Area is centered around the village core of the community and includes residential to the north.

### Mount Albert

Estimated for the end of year 2021, Mount Albert's Trade Area population is 9,904. Using the province as a benchmark, the population in this Trade Area also tends to be similar to Ontario's with a slightly higher portion of children and youth, and a higher household income (\$151,052 vrs \$132,186 Ontario average).

Unlike many smaller Ontario communities which struggle with declining populations, the population in the Mount Albert Trade Area is anticipated to increase by 1.18% per year over the next three years.

### **Holland Landing**

Estimated for the end of year 2021, Holland Landing's Trade Area population is 12,172. Using the province as a benchmark, the population in this Trade Area also tends to be slightly older with an increasing population of 0.67% per year over the next three years. Household income (\$147,522) is also higher than the Ontario average (\$132,186).

## **Trade Area Spending Summary**

### **Mount Albert**

Mount Albert's Trade Area spending is estimated at \$143 million (2021 year-end estimate). If excluding Health Care and Auto Categories (including Auto Fuel), the total available retail spending in Mount Albert's Trade Area is \$111 million.

By 2031, based on conservative forecasts for population growth, Mount Albert's Trade Area spending potential could increase by just over \$41 million to \$152 million, excluding Health Care and Auto categories.

### **Holland Landing**

Holland Landing's Trade Area spending is estimated at \$170 million (2021 year-end estimate). If excluding Health Care and Auto Categories (including Auto Fuel), the total available retail spending in Holland Landing's Trade Area is \$132 million.

By 2031, based on conservative forecasts for population growth, the Holland Landing Trade Area spending potential could increase by almost \$38 million to \$170 million, excluding Health Care and Auto categories.

## **Retail Inventory Summary**

Mount Albert, as its own retail area has been documented and profiled and has a total ground level business inventory of approximately 112,888 sf. Excluding Medical & Wellness, Professional Services & Vacant space, the net occupied retail inventory in Mount Albert is 74,124 sf or 66% of the total ground level business floorspace inventory.

Not surprisingly, as a smaller local serving area, the top inventory categories in Mount Albert are:

1. Grocery & Conveniences (28,644 sf)
2. Professional & Financial Services (14,933 sf)
3. Home Improvement & Gardening (12,986 sf)
4. Quick Service Food & Beverage (12,197 sf)

In total, Mount Albert's "retail only" storefronts comprise a business mix by store count of 71% local to 29% branded. When examining this same business mix by floorspace, the ratio works out to 38% local to 62% branded.

It is worth noting that both the Foodland and Home Hardware, while branded are actually franchise-operated/locally owned businesses and therefore represent a strong local connection to the community. On this basis it can be seen that presently Mount Albert has a strong local business culture. However, it is expected that because of the under-served nature of the local area that more traditional branded businesses will increasingly be looking at Mount Albert as a future high prospect location.

## **Consumer Survey Summary**

Newmarket was the most popular place for residents to shop for daily conveniences as well as larger purchases. The main reason was the relatively lower availability of goods and services in East Gwillimbury, as expressed by survey respondents. While most residents preferred shopping in Newmarket, many residents reporting using the shops and services in other parts of East Gwillimbury.

When asked about which types of event would encourage them to visit downtown Mount Albert, most individuals mentioned seasonal/holiday family friendly activities. Most residents' perception of 'downtown revitalization' envisioned a cleaner, more attractive appearance of the community, containing more family friendly activities and seasonal events.

When asked their favorite things about downtown Mount Albert, the local restaurants were the feature that was mentioned most often by residents. On the contrary, when residents were asked about the reasons they visit downtown, restaurants were not frequently mentioned.

Residents were asked to rank various revitalization priorities for Mount Albert. The top 3 included improvements to building exteriors and storefront appearance, streetscaping, and enhanced marketing of downtown businesses. Residents were also asked what they would like to see within the downtown revitalization design project in Mount Albert, with an understanding that current revitalization project is only covering streetscaping and infrastructure realignment.

## Mount Albert & Holland Landing Commercial Business Mix Inventory Summary

MERCHANDISE CATEGORY	MOUNT ALBERT FLOORSPACE (sq. ft.)	MOUNT ALBERT MIX (%)	HOLLAND LANDING FLOORSPACE (sq. ft.)	HOLLAND LANDING MIX (%)
AUTO PARTS & ACCESSORIES	0	0.0%	0	0.0%
FASHION & FOOTWEAR	0	0.0%	0	0.0%
BEAUTY & PERSONAL CARE	0	0.0%	0	0.0%
TOYS & HOBBIES	0	0.0%	0	0.0%
SPORTING GOODS	0	0.0%	0	0.0%
BOOKS, MEDIA & COMPUTERS	0	0.0%	0	0.0%
APPLIANCES & ELECTRONICS	0	0.0%	0	0.0%
JEWELRY & ACCESSORIES	0	0.0%	0	0.0%
ARTS & ENTERTAINMENT	0	0.0%	0	0.0%
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%	0	0.0%
FURNITURE & DÉCOR	1,000	0.9%	0	0.0%
SPECIALTY RETAIL	1,739	1.5%	0	0.0%
PHARMACY	2,309	2.0%	0	0.0%
PERSONAL & HOME SERVICES	2,391	2.1%	0	0.0%
FITNESS & LEISURE	2,500	2.2%	0	0.0%
ALCOHOL, TOBACCO & CANNABIS	3,000	2.7%	0	0.0%
RESTAURANTS & PUBS	7,357	6.5%	4,423	7.3%
AUTO SERVICE	7,558	6.7%	5,269	8.7%
VACANT	7,727	6.8%	5,487	9.1%
MEDICAL & WELLNESS SERVICE	8,545	7.6%	6,638	11.0%
QUICK SERVICE F&B	12,197	10.8%	6,980	11.6%
HOME IMPROVEMENT & GARDENING	12,986	11.5%	7,124	11.8%
PROFESSIONAL & FINANCIAL SERVICE	14,933	13.2%	8,886	14.7%
GROCERY, CONVENIENCE & SPECIALTY FOODS	28,644	25.4%	15,590	25.8%

**TOTAL** **112,888**

**60,398**

**Retail Floorspace (excluding Auto Service, Medical & Wellness, Professional Services, Public Service & Education, & Vacant)** **74,124** **66%**

**32,197** **53%**

**Total Estimated Retail Sales (excluding Professional, Finance, Public Service & Vacant)** **\$23,752,162**

**\$8,993,656**

**Estimated Retail Sales Productivity (\$/sf)** **\$320**

**\$279**

## Mount Albert Future Retail Demand Summary 2021 to 2031 by Major Spending Categories (Based on Increasing Market Share Scenario)

Retail Merchandise Category	2021	2026	2031	Current Retail Inventory (sf)	Total Future NEW Demand (sf)
	Current Floorspace Supply (sf)	Cumulative NEW Floorspace Demand (sf)	Cumulative NEW Floorspace Demand (sf)		
Convenience & Day-to-Day Goods/Services	36,344	24,377	55,608	36,344	55,608
Comparison or Department Store Type Merchandise (DSTM)	15,725	20,471	50,027	15,725	50,027
Leisure, Recreation & Entertainment Goods/Services	22,054	4,935	15,256	22,054	15,256
Automotive Goods (excluding repair)	0	4,472	13,662	0	13,662
<b>Total (sf)</b>	<b>74,123</b>	<b>54,255</b>	<b>134,553</b>	<b>74,123</b>	<b>134,553</b>

Bakeries and Restaurants were the two leading businesses and shops respondents noted they wished to see with the revitalization.

### Retail Demand Summary

In most typical urban or suburban market scenarios, forecasting retail demand would largely be predicated and have a close correlation with population growth and the inherent opportunities that would naturally come from a growing trade area. Mount Albert is a community that upon first glance might be seen as a rural community with limited growth, but in fact the community has experienced significant residential development against which retail growth has not kept pace. With trade area population growth rate forecasts at just under 2.0% per annum over the next decade, Mount Albert is exhibiting strong signs for unmet, near term retail opportunities, particularly in and around the Village Core as part of ongoing revitalization efforts.

With this understanding of the retail market dynamic and population growth and the results of the consumer survey, the key to forecasting new floorspace demand must look at the notion of achieving a greater market share of the existing spending for categories that

represent strength today. In particular, as will be shown, this greater market share will need to apply to the local and surrounding trade area, given what seems to be a below average retention of household retail spending.

### Future Allocation Of Demand To Year 2031

Since the status quo of low market share is not realistic nor desirable for Mount Albert, an alternative direction for defining retail opportunity lies in noticeably increasing the overall market share of sales, realizing that Newmarket and to a lesser degree Uxbridge will still continue to be notable factors in attracting spending in the Department Store Type Merchandise (DSTM) categories.

On this basis, future demand in terms of floorspace and land is based on applying an increase from 20% overall market share across all categories to almost 37% by 2031. While the reality may dictate that some categories may not increase their market share significantly, while others could well seek to increase more noticeably, the overall impact of the increase is that which is considered important in this analysis.

## Mount Albert Future Allocation of Demand to year 2031 based on increasing market share

Retail Node	Total 10-yr New Demand by 2031 with INCREASED Market Share (sf / acres)		MOUNT ALBERT			
			% Share of Demand	Share of Demand (sf)	Land Utilization Factor	Net Land Area (acres)
<b>Total</b>	<b>134,553</b>	<b>5.7</b>	<b>100%</b>	<b>134,553</b>	<b>0.54</b>	<b>5.7</b>
Mixed Use MU-1			50%	67,276	0.7	2.2
Community Commercial C3			10%	13,455	0.3	1.0
Neighbourhood Commercial C4			40%	53,821	0.5	2.5

If market shares were to increase to more realistic levels for a community of Mount Albert's size with the amount of new residential development, income levels and household sizes, the total demand by the year 2031, combining population growth with spending growth and increased retail sales market share capture could result in incremental new space of approximately 134,553 sf, or more than 100,000 sf than if current market shares are maintained.

Although future demand shows a noticeable bump from the current market share scenario, it is important to note that this demand does not necessarily have to be accommodated. Rather, the other way to view an increasing market share is that existing businesses and some new additions could perform at higher levels of productivity which would lead to more successful businesses in the community.

The future merchandise offering in Mount Albert over the next decade should therefore be ideally premised around bolstering the day-to-day convenience offering as well as complementary basic comparison or DSTM type merchandise including personal and home fashion. Similarly, there is an opportunity to boost the amount of Quick Service Food & Beverage establishments both in the Village Core and possibly along Highway 48, pending some infrastructure servicing capacity improvements. Based on current market voids and survey responses, immediate "low hanging fruit" target branded retailers along Highway 48 could include Tim Hortons or Starbucks drive thru concepts. In the Village Core, opportunities exist for more local businesses that could support the critical mass and awareness of an existing business like Lighthouse Cafe.

The amount of demand would suggest a need for approximately 5.7 acres of potential land. Of this 5.7 acres, the Mixed-Use MU-1 lands could require approximately 2.2 acres as part of the Downtown Revitalization Strategy where parking would be provided on-street. Similarly, the Neighbourhood C4 lands could need 2.5 acres of small development not necessarily premised on surface parking, but rather a higher site building utilization and local pedestrian connectivity. Overall land needs are not as big a factor as identifying the business types that fill the voids in an effort to stem the current retail sales outflow and support an active and vibrant community retail scene.

The goal should also be to ensure that existing businesses can increase their market share and resulting sales and profitability while accommodating new businesses in the local market for greater overall market penetration. Retail growth need not always be about adding new retail, but creating an environment for stronger retention and performance of existing businesses. This latter statement is important for the Village Core area, but also does not discount the opportunity to increase the critical mass and critical mix of businesses.

Mount Albert has a unique opportunity where local entrepreneurial activity can be promoted in an environment in which competition from brands is limited and not likely over the foreseeable future. Add to this the fact that local demographics are represented by healthy population growth, high incomes, large household sizes and a limited offering. When applied in concert with the ongoing Downtown Revitalization, there is no reason why more local businesses as well as existing businesses cannot thrive as part of a retail collective and destination.

The single biggest challenge for retail in Mount Albert, and specifically in the Village Core is a lack of awareness of new residents about current businesses. Therefore, a major component for increasing market share is to increase the awareness of new residents whose current mobility patterns (by vehicle) often take them away from the Village Core leading to an “out-of-sight, out-of-mind” mentality.

Local businesses should be much more proactive using modern and more traditional means of marketing. This marketing should go hand-in-hand with the current revitalization efforts to reinforce that change is happening and that businesses are open.

The municipality should also look at improving local directional signage and work towards creating a consistent brand for the Village Core, which currently suffers from an identity conflict; is it a Village, Downtown, Main Street or Town Centre? From the perspective of the study, it is recommended that Mount Albert focus on a Village identity.

In the absence of any noticeable commercial changes and the perception that the Village Core has not evolved in tandem with the changing development patterns and local demographics, the result has been an easily overlooked node.

Mount Albert would be well served by promoting compact and clustered commercial growth. Future land needs at approximately 5 acres is a 10-year planning window, but East Gwillimbury should look to ensure future land allocation is appropriately identified, sized and serviced to accommodate growth that may very well exceed the conservative forecasts presented in this study, but not in a way that requires encroachment into the Oak Ridges Moraine Conservation lands.

Mount Albert may not have the ability to significantly curb its sales outflow, but it can and should strive for a better retention of local spending than currently exists.

In summary, critical findings of future demand suggest:

- » Increased market share of spending is critical
- » Improve servicing on Highway 48 for possible small scale infill development adjacent to Home Hardware and Foodland.

- » Improve local signage and marketing awareness of Village Core businesses
- » Establish a familiar brand for the Village Core
- » Promote Mount Albert as a complete community
- » Work with retailers to find spaces that maximize their floorspace utilization

## Action Plan Summary

In conjunction with ongoing residential development, strong household demographics and an increase in overall market share of trade area spending, Mount Albert could add to its retail inventory by as much as 135,000 sf in specifically targeted categories/business types by 2031. In reality, this magnitude of demand cannot be accommodated because of limitations from the Oak Ridges Moraine. That said, the focus of future retail growth should be a combination of some portion of demand, but increasing market share from local and new businesses, and a resulting environment of thriving, well performing local businesses. If the local businesses perform at high productivities, then the property owners and landlords will have equal success in their achievable lease rates. This is the ultimate win-win for the community.

An important aspect of the overall messaging for Mount Albert’s Village Core is that retail demand is not simply predicated on adding new space, but specifically targeting new businesses that have the capacity to succeed and working with existing businesses so that they can better market themselves to the local population that are either not aware of the Village Core or of the businesses in general.

**New demand will require concerted effort at allocating appropriately sized and serviced land in areas most beneficial, such as Highway 48 for highway commercial infill and the Village Core for smaller spaces into which local independent businesses can locate and grow.**

There are also current businesses in the Village Core that are outgrowing their current space and it will be equally important that the Downtown Revitalization Strategy create a framework for creating buildings and spaces that can accommodate expansions, rather than risk losing well-established local businesses.

Although vacancies are not high in Mount Albert or Holland Landing, the Municipality and business-serving organizations should work with landlords in the respective Village Core areas to actively promote and utilize vacant spaces. This could include adaptive interim uses such as Community Market weekend pop-ups. The goal should be to create daily activation of available spaces by looking at ways to create rotating “main street pop-ups.”

In a secondary market like Mount Albert and to a lesser degree Holland Landing, the key to attracting businesses lies not only in presenting a good market and business case, but will likely fall under two (2) approaches; securing franchise partners and succession planning.

For many businesses with recognized brands, the likelihood of attracting a corporate run store is limited, but the franchise or licensee model is a distinct possibility. The optimal approach for this target is to look at a market like Newmarket, Richmond Hill or even Uxbridge to see if existing franchise holders would be interested in additional locations as part of an overall locational network strategy in Mount Albert. This approach is preferred by franchisers as there is a built in relationship with the franchisees who understand the business model.

The second approach for succession planning is often overlooked in smaller or secondary markets, where a successful local business may be family run and is of value to the community, but its future is up-in-the-air because no one is able to take over.

An organization such as Succession Matching provides a road map for businesses to ensure they can continue in their respective communities. Succession planning looks to understand the Consumer Segment, Value Proposition, Revenue Streams, Distribution Channels and Key Partnerships.

Smaller communities and those with essential village cores, downtowns or main streets, must continue to cultivate an environment in which local independent stores can succeed. In Mount Albert as well as Holland Landing, the following independent store types could be considered as compatible with the demographic profiles and anticipated development.

Additionally, there are opportunities to cultivate local independent store types that would be equipped to fit within the downtown as either pop-up incubators or full-time tenants.

Mount Albert is currently undergoing a major Downtown Revitalization Strategy that will dramatically fix and upgrade the street activity and ambiance. This Commercial Gap Analysis Study is advocating for the growth of local retail entrepreneurial activity that will support the investment in the Downtown (Village Core) streetscape.

The fact that the Oak Ridges Moraine Conservation area in essence prevents larger branded retailers from coming to Mount Albert is a positive that can and should benefit local businesses. While this has not yet proven to be the case, the Revitalization Strategy and increased marketing to new residents who are not fully aware that the Village core even exists must be a priority. Mount Albert has a unique opportunity that many comparable communities do not have; limited threat of larger competition and a growing, affluent, high spending local population.

### **Independent Store Types (Village Core)**

- » Personal and Medical Services
- » Recycled/Upcycled Fashions
- » Cidery/Cider House/Craft Brewery
- » Delicatessen/Butcher
- » Bakery/Patisserie
- » Specialty Beef Jerky/Hot Sauces
- » Community Food Coop-Deli
- » Community Kitchen
- » Co-working office/café
- » Bicycle Accessories & Repairs
- » 50s Diner (Burgers & Shakes)
- » Florist
- » Creperie
- » Candy Shop
- » Mobile Phone Repairs
- » Comic Shop/Novelties/Used Books
- » Old Style Barber Shop
- » Ethnic fare (Filipino, Indian, Vietnamese, Korean etc)
- » Pet Supplies and Pet Foods
- » Indigenous Arts & Crafts
- » Billiards or Pool Hall



Mount Albert's Village Core should work towards becoming a "main street" so that it could potentially be supported by the Ontario My Main Street Community Activator (placemaking) and Local Business Accelerator programs (<https://mymainstreet.ca/>).

This would require a concerted effort at creating a consistent identity as to what Mount Albert's Village Core actually is. Is it a Downtown, Village or Main Street? The manner in which the community perceives the area varies between those that have lived in the community a long time versus those who have moved to the area from larger cities and for whom a smaller town feel is more desired, or even visitors viewing current signage which simply says "Business Centre".

It is critical that the municipality, its businesses and residents through the Downtown Revitalization Strategy and other community-wide planning efforts resolve this disparity and consider how the Village Core area is defined. This is ultimately how signage, wayfinding and marketing will need to be portrayed to locals and newcomers. Collaborating with a business-serving organization to participate in the My Main Streets program can further this transition while supporting the Downtown Revitalization. Most members of the MyMain Street program have Ambassadors that serve a collective of 100 to 200 businesses, so it may be an opportunity for East Gwillimbury to consider sharing an Ambassador with other communities in East Gwillimbury.

Other intangible aspects of the Mount Albert Village core area, as it relates to the concurrent revitalization efforts pertains to businesses like automotive. While not a traditional retail use, a building housing this use was recently purchased and it is not reasonable to foresee this use changing any time soon. However, this does not mean that the building nor use can benefit the revitalization or local businesses. The mere presence of the auto repair can create a captive audience for potential customers who may need shops and services during smaller, quicker repairs.

From a streetscape perspective, the corner location of the building at a critical crosswalk location could present a unique opportunity to create a pocket park with seating out front of the building area.

Additionally, if an option were available for an alternate location off-site for parking vehicles, perhaps the front bays of the building could be more visible for some creative art on the bay doors while closed. These are all interventions that could enhance the building and streetscape while harnessing the value of the use as a constant generator of customers.

The ability to work with a business for external building improvements would be contingent on establishing a municipal facade improvement program and/or becoming a participant in the My Main Street initiative with the Community Activator Program. There are also other federal funding programs that could also be pursued such as the Canada Healthy Communities Initiative.

Other non-traditional streetscape planning considerations that could have a positive impact on customer behaviour such as dwell times could include an electrical vehicle charging station, bike repair station as part of a pocket park concept, or mobile/ moveable parklet.

Lastly, from the perspective of the Village Core area, it is important that local businesses stress the economic, social, cultural and environmental reciprocal benefit that shopping local has on a community.

## Summary Action Items

	Community	Now <1yr	Next 1-5yr	Ongoing
<b>Enable Supportive Policy and Concentrate Development in Established Commercial Nodes</b>				
» Undertake an infrastructure servicing review and identify the necessary requirements to enable development along Highway 48	Mount Albert		X	
» Identify and confirm properties that could be prioritized for infill commercial development along Highway 48.	Mount Albert	X		
» Consider allocating approximately 5 ac for future longer-term, C-3 zoning commercial	Mount Albert	X		
» Consider implementing commercial facade improvements through a Community Improvement Plan as enabled in the Official Plan	Mount Albert		X	
» Determine My Main Street Activator Program application requirements and identify inter-community collaborators. Explore additional Federal programs for placemaking and business support funding	Both	X	X	
<b>Increase Market Share and Businesses Supports</b>				
» Strategically target developments that have the ability to benefit the greater community rather than impacting existing businesses.	Mount Albert		X	
» Prioritize Mount Albert's Village Core/Downtown area for business attraction and small infill development	Both			X
» Cultivate local independent store types in Village Cores by creating indoor incubator pop up comprising local home-based vendors	Both	X		
» Host an entrepreneurial marketing workshop to assist local businesses in exposing the village core to new residents	Mount Albert	X		
» Support new retail opportunities in the range of 500- 1,000 sf concentrated in and around Mount Albert's Village Core	Mount Albert		X	
» Encourage redevelopment of underused properties and/or work with property owners to create select spaces capable of meeting expansion needs of local businesses	Mount Albert		X	
» Collaborate with the business-serving organizations and landlords to actively promote and utilize vacant spaces with the goal of activating the spaces.	Both			
» Engage with local and regional commercial real estate agencies to proactively share the market opportunities	Both			X
» Introduce a parklet or patio grant program for local businesses in the Village Core to animate the non-building frontage.	Mount Albert		X	
<b>Attract Visitors and Residents</b>				
» Develop a consistent identity for Mount Albert's Village Core/ Downtown/Main Street	Mount Albert	X		
» As part of the revitalization strategy create appealing wayfinding and pop-up placemaking features to increase dwell times	Mount Albert	X	X	
» Continued event programming including periodic, yet regular street closures	Mount Albert		X	X





# 1.0 Introduction

## 1.1 Scope of Study

Fowler Bauld & Mitchell Ltd. ("FBM") and MDB Insight Inc. ("MDB") was commissioned by the Town of East Gwillimbury to conduct a Commercial Demand Analysis for the communities of Mount Albert and Holland Landing as part of the Mount Albert Revitalization Survey.

The study was carried out over the period of March through July 2022. On-the-ground fieldwork in the study communities was carried out in April 2022.

The objective of this study is to thoroughly document current retail inventories and define the realistic Retail Trade Areas for which they serve. The purpose of this research was to establish a solid foundation and baseline for determining the depth of retail opportunity, associated gaps in the market provision of shops and services, and to determine what type of retail could fill these gaps. The end result is to bolster the retail market in retail areas by retaining or attracting greater market share of resident, visitor and passing motorists' spending in the community.

## 1.2 Report Structure

**Section 1 – Introduction:** Introduces the study process and structure.

**Section 2 - Regional and Local Context:** Lays out the important regional and local context of East Gwillimbury, Mount Albert and Holland Landing in terms of geographic location, regional access and traffic counts, including relevant plans, studies and initiatives.

**Section 3 - Trends and Research:** Provides an overview of retail and commercial trends that are shaping consumer, tenant and investor sentiment and actions. Outlines municipal facade improvement program research and details applicable funding options.

**Section 4 - Trade Area:** Identifies and defines Mount Albert's and Holland Landing's respective Retail Trade Areas and demographics including retail spending.

**Section 5 - Commercial Supply:** Provides a detailed documentation, tabulation and summary of Mount Albert and Holland Landing's predominantly ground oriented retail and commercial business mix. This section also assesses the location and characteristics of Mount Albert's current nodes of retail activity ("supply"), including developing or future planned retail sites. Fieldwork assessments included identifying and documenting in detail Mount Albert and Holland Landing's retail inventory by retailer, merchandise category and NAICS industry classification.

**Section 6 - Resident and Consumer Survey:** Introduces and analyzes the results of the resident and consumer survey for Mount Albert.

**Section 7 - Market Demand Assessment:** Based on an extensive assessment of the current "supply" and Trade Area spending, the current demand is then estimated and measured against the market potential. Quantifies future retail demand over the next 10 years.

**Section 8 - Infill Strategy and Action Plan:** Synthesizes gaps and opportunities for the retail and commercial market, and identifies strategic action steps ranging from now to short term and medium term that could be undertaken to strengthen existing businesses, while cultivating new businesses and investment activity.

## 2.0 Regional and Local Context

### 2.1 Introduction

Location factors are an essential foundation to retail success, and an understanding of these factors can help create the necessary conditions for attracting and retaining businesses in a community. This section identifies the regional and local characteristics of Mount Albert and Holland Landing as they relate to the attraction and retention of retail businesses and merchandise categories.

### 2.2 Regional Context

Town of East Gwillimbury is one of nine municipalities in the Regional Municipality of York (**Figure 2-1**). As an upper tier municipality, York Region manages public transit, water, emergency medical services and policing, while East Gwillimbury as a lower tier municipality manages curb-side garbage collection, local parks and libraries<sup>1</sup>. Mount Albert and Holland Landing are small communities within the Town of East Gwillimbury.

The Town of Newmarket to the south is a major regional commercial centre boasting a range of day-to-day and convenience retail goods and services, including the Upper Canada Mall, Walmart and Home Depot along Yonge Street. Costco Wholesale lies just north of Newmarket near Yonge St and Green Ln West in East Gwillimbury.

York Region is the second largest business centre in Ontario, and is the fastest growing large municipality in the province. Expected to reach a population of 2.04 million (from 1.2 million in 2021) and 999,000 jobs by 2051 (from 665,000 in 2021), York Region is currently finalizing a Regional Official Plan to guide growth and development<sup>2</sup>. East Gwillimbury is expected to absorb 6.2% of the projected population growth (compared to 3% in 2021) and 4.4% of the employment growth (compared to 1.6% in 2021) by 2051<sup>3</sup>. This would result in a total population of 127,700 and 43,600 jobs by 2051.

These projections reflect the rapid residential growth East Gwillimbury has seen in recent years. In 2021, the Town was the fastest growing municipality in Canada with a population of 5,000 people or more<sup>4</sup>. In five years, the Town grew in population by 44.4% to 32,637 persons.

1 York Region Local Municipalities Webpage

2 York Region Proposed Official Plan (June 2022)

3 Ibid

4 Canada's fastest growing and decreasing municipalities from 2016 to 2021, Statistics Canada, 2022

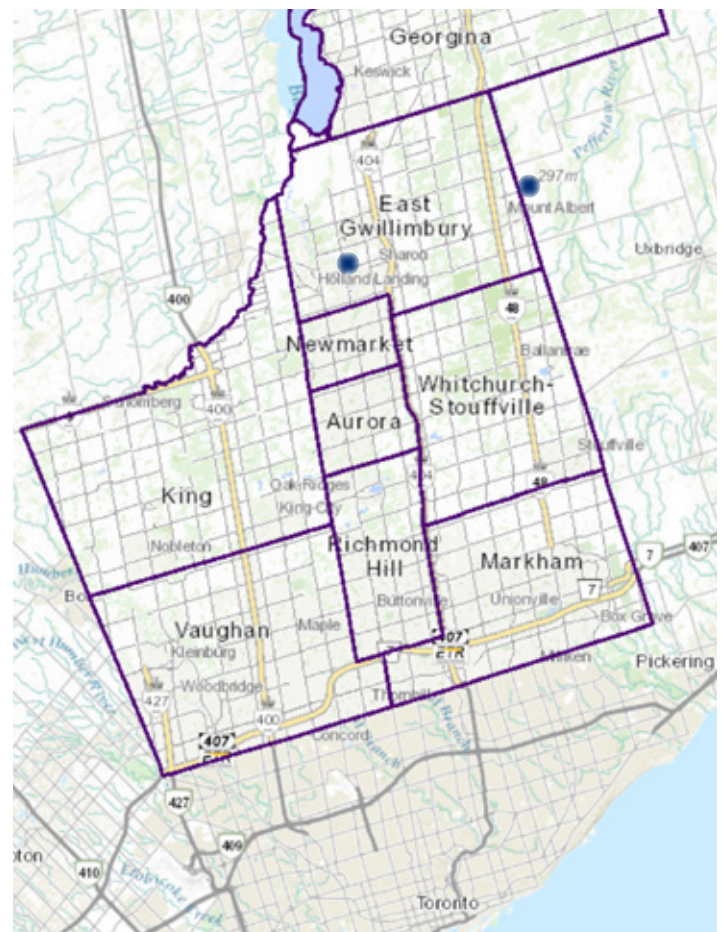
### 2.3 Local Context

Mount Albert is unique in that it is restricted from growing west towards the centre of East Gwillimbury by the Oak Ridges Moraine (ORM). The ORM is an ecologically significant landscape of environmental, geological and hydrological features stretching across 190,000 hectares of land and water in southern Ontario. The **Oak Ridges Moraine Conservation Plan** (2017) was established in 2002 to limit urbanization within its boundaries and to protect the agricultural land base and vital water resources and natural areas.

The policies of the ORM Conservation Plan are applied in conjunction with all other applicable land use planning policy, including Official Plans and Zoning Bylaws. Municipal policies in turn must align with the Conservation Plan as a provincial policy. Therefore planning and development in Mount Albert is guided by both levels of policy.

Figure 2-1. York Region Context Map

Emphasis added to Mount Albert and Holland Landing  
(Source: The Regional Municipality of York Community Services Map, 2022)



All development west of Victoria St, south of Shannon Park and west of Arthur Case Cres (approximately) in Mount Albert is restricted by the ORM Settlement Area and to a lesser extent, the Countryside Area (**Figure 2-2** and **Figure 2-6**). Within each of the ORM areas, the Plan aims to ensure “that only land and resource uses that maintain, improve or restore the ecological and hydrological functions of the Oak Ridges Moraine Area are permitted” while simultaneously “providing for land and resource uses and development that are compatible with the other objectives of the Plan”<sup>5</sup>. To that end, the Settlement Area restricts encroachment on the hydrological and ecological features of the Plan Area while encouraging complete communities, low-carbon development, efficient land use, connectivity, and the provision of compatible local goods and services.

The Conservation Plan includes Settlement Area policies for protecting ecological and hydrological integrity (Sections 21 to 30 including minimum

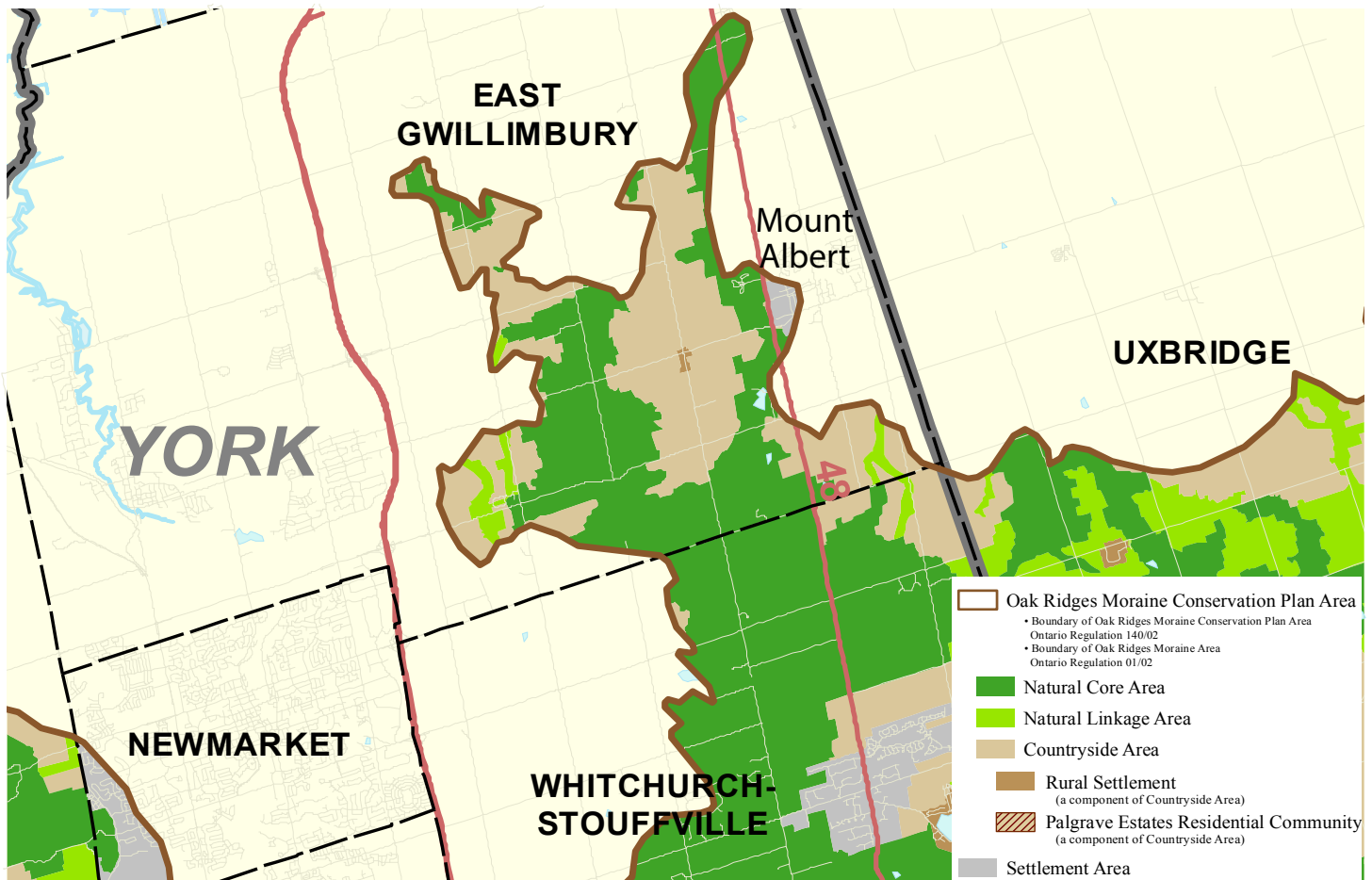
5 Oak Ridges Moraine Conservation Plan, Ontario Ministry of Municipal Affairs, 2017, p 11

vegetation zones, protecting natural heritage features, water conservation, wellhead protection, aquifer vulnerability, and landform conservation), and specific land use policies (Sections 41 to 47 including infrastructure, official plan provisions, sewage and water services, and stormwater management). Within the Mount Albert Settlement Area, lands south of Princess St and East of Highway 48 are classified by the East Gwillimbury Official Plan as areas of high aquifer vulnerability, while lands to the North of Princess St along the eastern edge of Highway 48 are low aquifer vulnerability. The majority of the Settlement Area is also classified as a Significant Groundwater Recharge Area.

The protection of Mount Albert’s unique ecological and hydrological assets requires development to be restricted with the ORM Settlement Area. While this discourages large commercial developments from locating in this area, it simultaneously benefits local businesses by allowing the community to define itself as a self contained local market which is separate and distinct from nearby commercial centres.

**Figure 2-2. Oak Ridges Moraine Boundary Map**

Label added to Mount Albert.  
(Source: Oak Ridges Moraine Conservation Plan, Government of Ontario, 2017)



## 2.4 Relevant Plans & Studies

### Mount Albert Revitalization Strategy and Community Improvement Plan (2014)

This Strategy sought to revitalize and restore Mount Albert’s downtown core “as a vibrant and successful business area and incentivize private sector investment and re-development” through design interventions and public and private investment. The strategy recognized the downtown as a traditional Village Core Area with a commercial mix of services, retail, food and entertainment (**Figure 2-3**). The neighbourhood commercial node along Mount Albert Road and community commercial node along Highway 48 were recognized as distinct areas outside of the Village Core, which have the potential to draw development away from the downtown, thereby undermining its viability. The Strategy suggested limiting the range and size of permitted uses in these nodes and refining the extent of the Village Core designation to reflect the core commercial area.

Additionally, restricted commercial space downtown and limited service and business variety, were viewed as key challenges to be addressed through the Strategy. Guiding Community Improvement Plan (CIP) principles aimed to increase the amount of time residents and visitors spent downtown by making it a pedestrian friendly destination with high quality commercial and residential uses. The urban design concept proposed in the Strategy recognized the value of street-oriented and pedestrian-scaled redevelopment and infill in the Village Core and downtown areas. Successful downtowns were recognized as supporting sustainable development through infill which optimizes existing infrastructure and services and active living. Specific parcels encouraged for infill development included lands currently occupied by Mount Albert Dental Centre, Canada Post, Kicks Dance Studio, the Cleaning Centre, the Twisted Fork and Main Milk (**Figure 2-4**). While not explicitly clear in the Strategy, it is presumed that infill on these lands or redevelopment of existing buildings would happen over many years as opportunities arose.

Figure 2-3. Mount Albert Commercial Structure (2014)

(Source: Mount Albert Revitalization Strategy, 2014)



Figure 2-4. Mount Albert Revitalization Strategy Proposed Improvements (2014)

(Source: Mount Albert Revitalization Strategy, 2014)





## **Sustainable Development Incentive Program (SDIP, 2015)**

The intent of the Program is to encourage more residential, industrial, commercial and institutional (ICI) sustainable development by providing additional service allocation incentives for meeting sustainability requirements. The program is aimed at reducing wastewater production, increasing infrastructure efficiency, reducing waste, and increasing the number of energy efficient developments in order to support more residential growth in the Town. Specific requirements of the Program for all developments are:

- » Improved water efficiency;
- » Improved energy efficiency;
- » Improved indoor air quality;
- » Use of renewable energy;
- » Enhanced monitoring programs;
- » Improved resource management; and
- » Enhanced home owner education.

For ICI developments in particular, the Program ensures new developments incorporate energy and water efficiency and conservation best practices. The Program outlines best practices in each of these areas and more to support developers in meeting the criteria.

## **Think Green! Development Standards (2018)**

As outlined in the Official Plan, the Town's Think Green! Development Standards Program (TGDS) supports their triple bottom line approach by evaluating the sustainable performance of new developments through three themes:

- » Protection and enhancement of the natural environment (by minimizing the impact of development on the natural environment and encouraging green infrastructure and naturalization of the landscape);
- » Conservation of energy and water (to increase climate resiliency and reduce the Town's environmental footprint including reducing greenhouse gas emissions); and
- » Designing for complete and connected communities (by reducing automobile dependency and supporting compact community design and active lifestyles).

All new subdivision and site plan applications (except for single detached dwellings in the Oak Ridges Moraine) are required to address the Town's TGDS in the pre-consultation and complete application stages. The TGDS outlines minimum applicable targets for each application (level 1), as well as two additional target options (level 2- improved and level 3- excellent) which provide developers with the flexibility to exceed the minimum standard. The TGDS provides specific guidance and measurable targets to assess the overall sustainability of residential and non-residential developments alike. For the 'Designing for Complete and Connected Communities' theme in particular, street-oriented developments which connect to and support pedestrian and active transportation networks, and provide streetscape amenities, are encouraged (**Figure 2-5**).

## **Town of East Gwillimbury 2019-2022 Strategic Plan (2019)**

The Town of East Gwillimbury's Strategic Plan envisions their future to be that of a balanced community which evolves to meet the changing needs of their residents. Four strategic priorities were identified in the plan:

- » Responsible growth and environmental protection
- » Quality programs and services
- » Build complete communities
- » Culture of municipal excellence

Notable strategic actions include attracting and supporting business development and job creation, protecting resident and business quality of life, advocating for a variety of housing and employment options for residents in every stage of life, and improving telecommunications servicing. The focus on revitalizing key downtown areas to increase the community's sense of place supports this Market Analysis and the broader Mount Albert Revitalization Strategy.

## **East Gwillimbury Broadband Strategy 2020-2025 (2021)**

The aim of East Gwillimbury's Broadband Strategy is to enable access to competitive, affordable and reliable Broadband for all residents, businesses and public entities to support service delivery, economic growth and community participation. The Broadband Working Group was established to assist the Town in achieving this vision. As of the writing of the Strategy, some areas of the Town

were unable to access the minimum service levels mandated by the Canadian Radio-Television and Telecommunications Commission (CRTC) of 50 Mbps download and 10 Mbps upload speeds. A series of funding announcements in 2021 have supported the expansion of broadband in the community, including fibre installations in Mount Albert.

### Town of East Gwillimbury Economic Development Strategy 2021-2026 (2021)

The Economic Development Strategy is intended to support the Town in achieving its vision for sustainable growth through the identification of economic opportunities and actions in alignment with the Town's corporate strategic values. The Strategy recognized that the Town has a highly skilled and educated workforce and well as a supply of competitively priced land, however infrastructure challenges have limited the availability of 'shovel-ready' serviced lands and much of the town is automobile-focused. A number of opportunities were also identified, including:

- » investing in broadband infrastructure;
- » attracting Highway 48 commuters to spend money locally;
- » maintaining large land parcels for future anchor tenants;

- » applying a 'Green Economy Lens' to business expansion and attraction efforts;
- » refreshing the East Gwillimbury story to be more inclusive and welcoming to new residents and investors; and
- » leveraging outmigration from the Greater Toronto Area (GTA).

Notable threats included restricted water supply and a mismatch between population skill sets and demand for workforce skills.

Manufacturing food processing and supply chain, construction products/service, healthcare, and industry supply and wholesale distribution were primary target sectors for near term investment in the Strategy. Secondary target sectors requiring longer-term planning included post-secondary education, tourism, and film location development. The strategic themes and objectives outlined in the plan are aimed at encouraging growth in these sectors while strengthening business-supports. An objective of the business retention and expansion action plan is to support downtown revitalization and placemaking. Commercial and retail infill in the community cores, remediation of derelict properties, placemaking initiatives, façade improvement, and enabling a broader range of development options (including mixed-use and multi-unit residential) through official plans and policies was encouraged in the Strategy.

Figure 2-5. Example of Think Green! Targets for Designing Complete and Connected Communities

(Source: Think Green! Development Standards Site Plan Assessment, 2018)

**THINKING GREEN!**  
DEVELOPMENT STANDARDS



**SITE PLAN ASSESSMENT**

MEASURE	TARGETS			TARGET LEVEL ACHIEVED			COMMENTS (Explain how the measure is met and to which Target Level, why it is not met, or why it is not applicable)	REFERENCE PLAN NUMBER OR REPORT NAME	FOR STAFF USE ONLY STAFF COMMENT AND/OR SIGN OFF
	Level 1 (Minimum - Address all Targets AND either Level 2 OR Level 3)	Level 2 (Improved - Address 2 Targets under each Theme OR achieve Level 3)	Level 3 (Excellent - Address 1 Target under each Theme OR achieve Level 2)	L1	L2	L3			
29. Carpool and Efficient Vehicle Parking Spaces	<b>For mid to high-rise (4 storeys and greater) residential and non-residential development:</b> a minimum of 3% of parking spots are dedicated to carpool and/or car share parking located in preferred areas close to building entrances on site.								Reviewed By: <b>Planning</b>
30. Electric Vehicle Parking Spaces and Charging Systems	<b>For grade related (3 storeys or less) residential development:</b> a minimum of one (1) vehicle parking space per unit provided in a garage, carport, or driveway is designed to permit the future installation of electric vehicle supply equipment. <b>For mid to high-rise (4 storeys and greater) residential development:</b> a minimum of 20% of parking spaces located in a building are designed to permit the future installation of electric vehicle supply equipment. <b>For non-residential development:</b> a minimum of 20% of parking spaces located in a building are provided with electric vehicle supply equipment, and the remainder of spaces designed to accommodate the future installation of electric vehicle supply equipment.	<b>For grade related (3 storeys or less) residential development:</b> a minimum of one (1) vehicle parking space per unit provided in a garage, carport, or driveway is provided with electric vehicle supply equipment. <b>For mid to high-rise (4 storeys and greater) residential development:</b> a minimum of 20% of parking spaces located in or outside of a building are provided with electric vehicle supply equipment, and the remainder of spaces designed to accommodate the future installation of electric vehicle supply equipment. <b>For non-residential development:</b> a minimum of 30% of parking spaces located in or outside of a building are provided with electric vehicle supply equipment, and the remainder of spaces are designed to accommodate the future installation of electric vehicle supply equipment.							Reviewed By: <b>Building</b>
31. Location of Vehicle Parking Spaces	Surface vehicle parking spaces provided on site are located to the side or rear of buildings.	A minimum of 40% of vehicle parking spaces provided on site are located in above-grade parking structures.	A minimum of 40% of vehicle parking spaces provided on site are located in below-grade parking structures.						Reviewed By: <b>Planning</b>

## Town of East Gwillimbury Official Plan (2022)

In June 2022, East Gwillimbury Town Council approved their new official plan in line with the proposed York Region Official Plan. East Gwillimbury's Plan outlines how the community will accommodate significant growth to 2051 with consideration for environmental, social and economic sustainability. Decisions made by the Town are intended to support the needs of today without compromising the ability of future generations to meet their own needs.

This intent is reiterated in the Plan vision (emphasis added):

*“East Gwillimbury will evolve as a balanced, sustainable, and complete community, with a mix 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 multi-modal 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.”*

Supporting this vision are eight guiding principles related to supporting live-work and local employment opportunities for all ages, abilities, and incomes, whilst simultaneously promoting mixed-use development on historic main streets and encouraging green infrastructure and building technologies. To that end, sustainable development policies and practices (namely energy conservation and efficiency, complete community growth, and active transportation) are strongly encouraged through the Plan. The Plan also enables the development of the Thinking Green Development Standards (TGDS) to evaluate and measure the impact of new developments in line with the Town's social, economic and environmental objectives. Local Improvement Charges and Community Improvement Plans are noted as potential options for the Town to assist with the implementation of sustainable development design standards.

## Land Use Designations

As outlined in the Plan, Mount Albert lies within the Greenbelt Settlement Area while Holland Landing is located within the larger Central Growth Area. Both communities are within Designated Built-Up Areas (DBA) and include Strategic Growth Areas (namely the Village Cores) and Employment Areas which are intended for further intensification. The Employment Areas outlined in the plan include industrial and office uses, community areas as living, shopping and learning hubs, and centres and corridors as high-density areas where major streets and community cores converge. The Town of East Gwillimbury has Major Local Centres (such as Yonge Street and Green Lane Centre) which accommodate high density housing and employment, and Local Centres (Mount Albert, Holland Landing and Sharon) which are traditional mainstreet areas which serve as compact mixed use (commercial and residential) areas for adjacent communities.

The Plan identifies Village Cores Areas in each of these Local Centres as hubs of activity which provide a wide range of goods and services (as warranted by the community) in a dense rural form which supports transit and walkability. Intensification of the Village Core through development or redevelopment which respects existing historical and/or architectural character is supported, while automobile-oriented uses (including gas bars, car washes and self-storage) are prohibited.

Additional land use designations in the Local Centres enabled by the Plan include Community Commercial and Neighbourhood Commercial. Neighbourhood Commercial areas offer limited convenience retail aimed at serving neighbourhoods within walking distance and may include offices and multi-unit dwellings. Community Commercial areas house anchor commercial tenants such as department stores (with the exception of major retail uses) alongside financial institutions, food and beverage, and entertainment uses, while supporting active pedestrian-oriented streetscapes. Mount Albert as a Local Centre has a Village Core Area as its downtown or main street area, as well as Community Commercial along Highway 48 and Neighbourhood Commercial along Mount Albert Road (**Figure 2-6**). Notably, all of the Highway Commercial node and a portion of the Neighbourhood Commercial node are within the Oak Ridges Moraine Settlement Area.

Figure 2-6. Mount Albert Land Use Plan

(Source: Town of East Gwillimbury Official Plan)

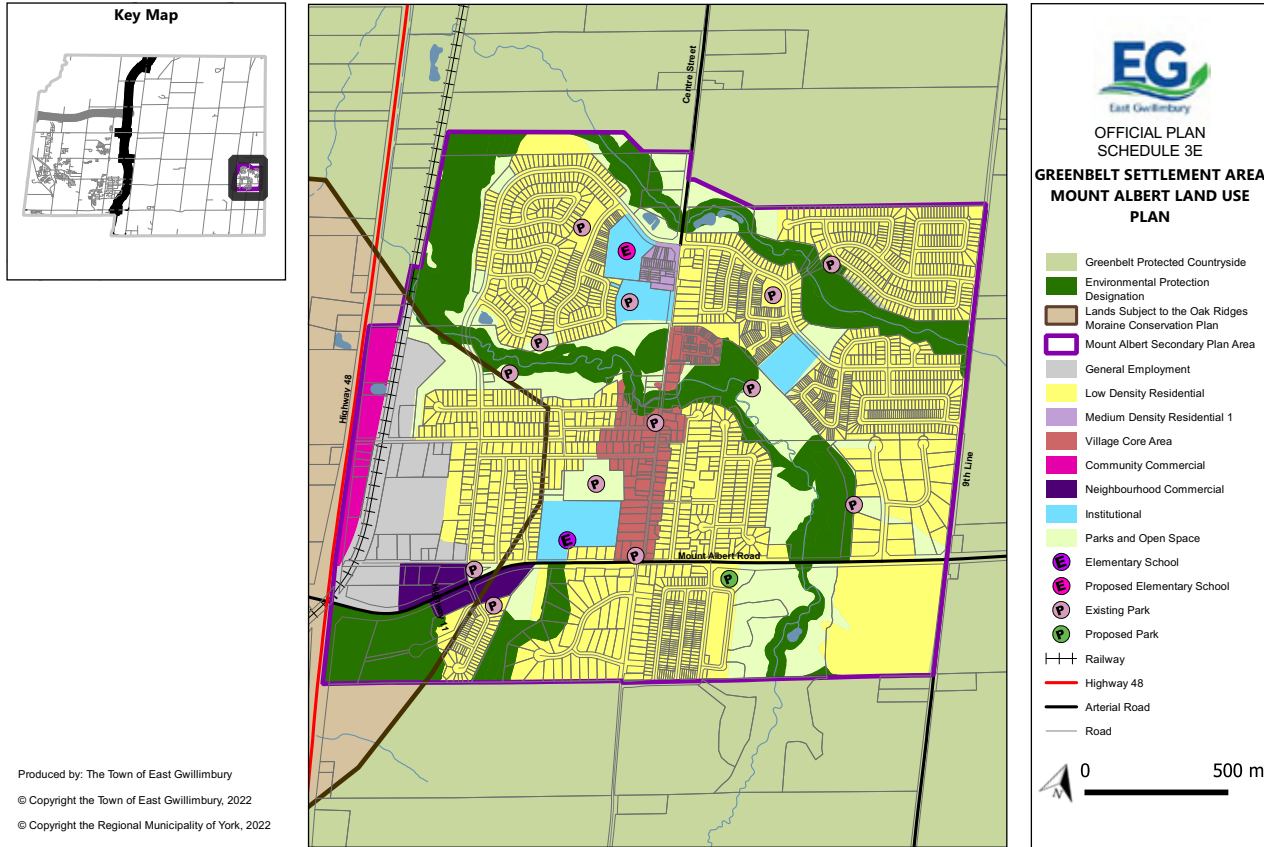
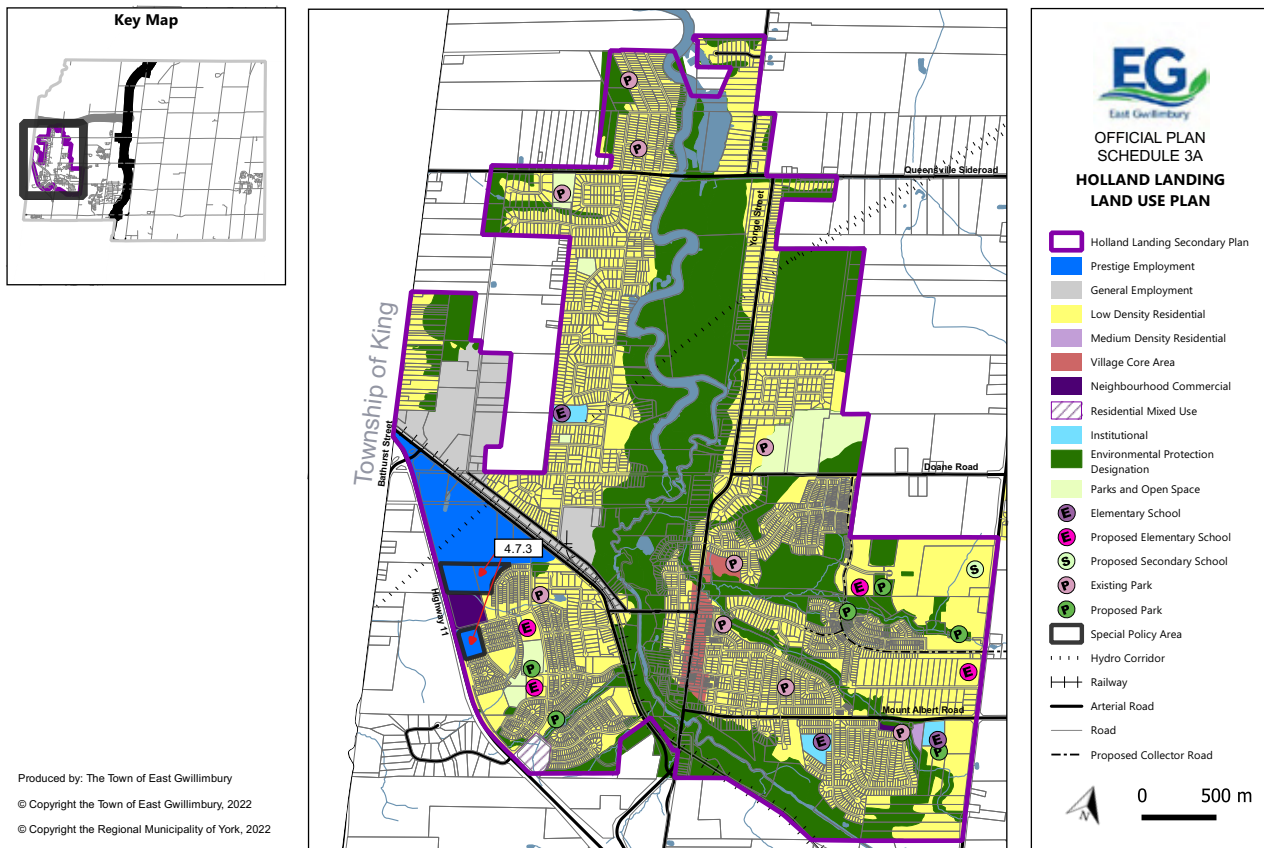


Figure 2-7. Holland Landing Land Use Plan

(Source: Town of East Gwillimbury Official Plan)



Holland Landing has a Village Core Area along Yonge Street and Neighbourhood Commercial area along Highway 11 (adjacent to Prestige Employment Areas) (Figure 2-7).

### Growth Projections

As part of the Official Plan Review process, the Town in collaboration with NBLC and the Planning Partnership completed a **Capacity Analysis and Land Needs** assessment in December 2020. York Region’s baseline data and projections for the Town was reviewed, including anticipated population and number of residential units, and employment projections to 2041. Notably, population-related employment (PRE) (including retail, health care, work from home and other jobs serving resident populations) was expected to provide 16,700 jobs across the Town by 2041 (Figure 2-8) with an overall employment density of 45 jobs per net hectare in designated growth area (DGA) employment lands (Figure 2-9). The assessment found the anticipated number of PRE jobs and employment land density to be reasonable given the health of the market and as compared to other municipalities in the Greater Toronto Area.

With regard to Mount Albert and Holland Landing, the report notes that both communities have experienced employment decline over the past decade in their respective employment areas (EA) which are separate from each village core area. For Mount Albert, the report notes a strong concentration in retail with Home Hardware and Foodland, and approximately 6 hectares of small-parcel vacant land available within the EA.

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Figure 2-8. York Region Employment Projections for East Gwillimbury

Note: Numbers shown are total number of jobs per employment type. (Source: Town of East Gwillimbury Official Plan Review Process - Capacity Analysis and Lands Needs, 2020)

Projected Employment Growth by Type East Gwillimbury, 2016 to 2041			
Employment Type	2016	2041	Change 2016 - 2041
Major Office	0	500	500
Employment Area	3,400	16,700	13,300
Population-Related	4,400	16,700	12,300
Rural	1,700	2,200	500
<b>Total</b>	<b>9,500</b>	<b>36,100</b>	<b>26,600</b>

Source: York Region

Figure 2-9. York Region Employment Land Density Forecasts

Note: Numbers shown are total number of jobs per net hectare. (Source: Town of East Gwillimbury Official Plan Review Process - Capacity Analysis and Lands Needs, 2020)

Employment Land Density Assumptions East Gwillimbury			
Employment Area	Current Density	Forecast Density for Vacant Lands	Vacant Capacity (Jobs)
Holland Landing	18	20	450
Mount Albert	27	25	100
Bales Drive	29	30	630
Green Lane	45	50	980
Highway 404/Queensville	-	50	7,100
ROPA 1	-	50	5,060

Source: York Region MCR Assumptions

The assessment found the anticipated number of PRE jobs and employment land density to be reasonable given the health of the market and as compared to other municipalities in the Greater Toronto Area.

With regard to Mount Albert and Holland Landing, the report notes that both communities have experienced employment decline over the past decade in their respective employment areas (EA) which are separate from each village core area. For Mount Albert, the report notes a strong concentration in retail with Home Hardware and Foodland, and approximately 6 hectares of small-parcel vacant land available within the EA.

## 2.5 Building Permits

Building Permit activity can provide empirical evidence of growth dynamics necessary to support commercial and retail opportunities.

East Gwillimbury has been distinguished as the fastest growing municipality in Canada from 2016 to 2021 for municipalities having populations greater than 5,000. The largest contribution to this population growth resulted from the permitting of over 2,600 building permits in 2016 and 2021 (it is fair to assume that building permit activity in 2021 did not significantly contribute to these numbers due to the delays between permit issuance and occupancy). From 2019 to 2021, East Gwillimbury experienced a steady and consistent increase in the number of building permits issued (**Figure 2-10**).

Between 2017-2022, the estimated construction value of permits issued in East Gwillimbury totaled \$947 million, with building activity in Holland Landing and Mount Albert accounting for at least \$26 million and \$4.8 million respectively.

At the time of writing, current ongoing and proposed developments include

### Mount Albert

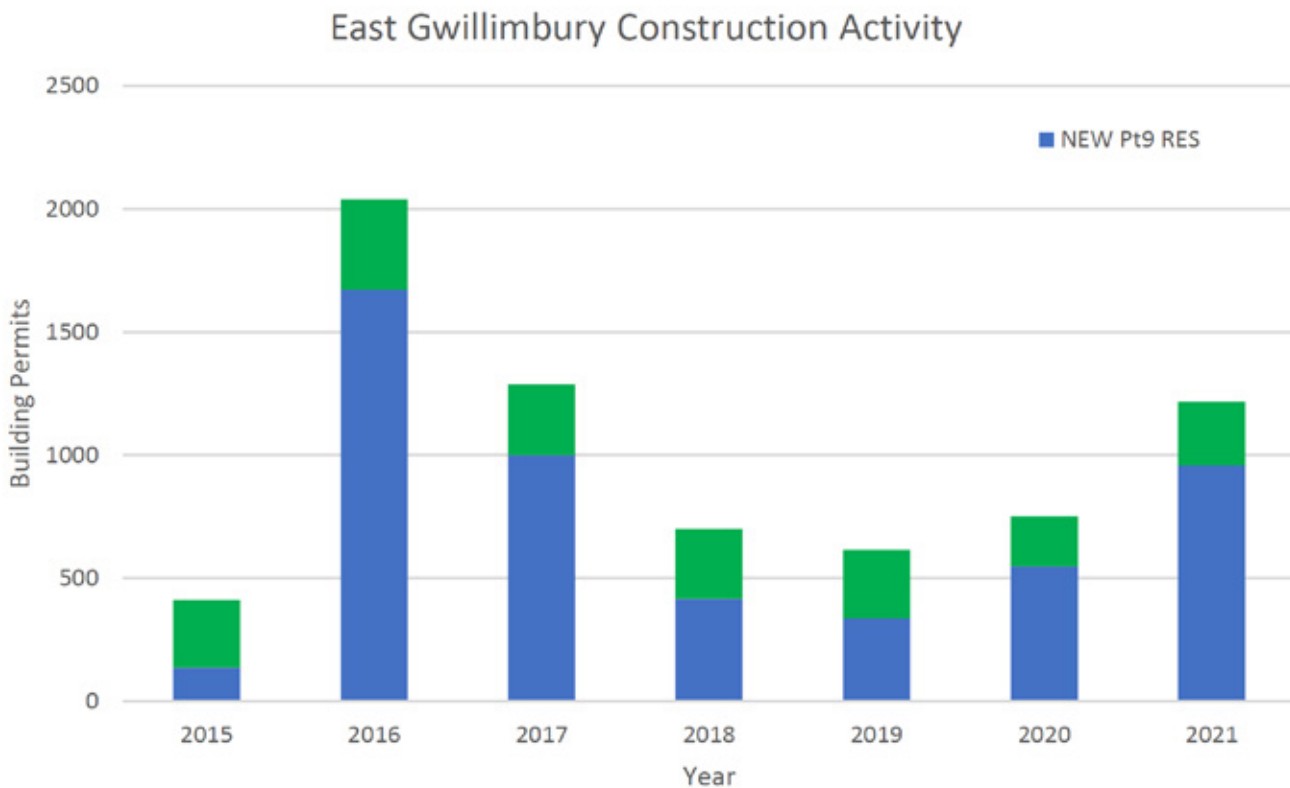
- » Commercial: 2 Don Rose Boulevard (2 retail buildings) - Skarn Resources Inc.
- » Mixed-use: 19267 Centre Street (10 commercial and 74 residential units) - Averton
- » Residential: Village Green - Averton; S/W Corner of 9th Line & Mount Albert Road (235 units) - Oxford Homes.

### Holland Landing

- » Residential: South of Doane Rd between Yonge St and 2nd Con (653 units)- Winged Foot Developments; West of 2nd Con, North of Mount Albert Rd (689 units) - Valley Brook Investments Inc.

Figure 2-10. East Gwillimbury Construction Activity

(Source: 2021 Building Activity, Year End Summary, May 17, 2022)



## 2.6 Transportation Context

Mount Albert and Holland Landing are separated by the Oak Ridges Moraine and a 20 minute drive time along Mount Albert Road and Yonge Street. **Figure 2-11** provides an illustration of drive times from Mount Albert and Holland Landing to their respective resident and shopping nodes. This map clearly illustrates how Mount Albert in particular is an isolated and underserved market where many destinations for shops and services are at minimum 15 minutes drive time.

York Region Transit (YRT) and GO Transit provide regular bus service to Holland Landing, and North-South train service is available via the East Gwillimbury GO station (Green Lane East) for residents of both communities.

Additionally, Mobility On-Request (MOR) service enables local residents within the defined service area to be picked up from their residence and to be

dropped off at one of four or six locations for Holland Landing (and Mount Albert service, respectively. For Mount Albert residents, the MOR service enables residents to visit the local Foodland, the library and downtown area, while also connecting residents to the shops and services offered in Sharon and Newmarket.

While Holland Landing is at the urban edge of Newmarket, Mount Albert is in a very unique position of being a somewhat rural community that cannot grow beyond its current geographic size because of environmentally sensitive lands. The unique location attributes are in fact one of the most distinct assets for the community as it still has proximity to urban markets, yet cannot sprawl in its development. From a retail perspective, this means that competition that would normally be drawn to the growing community will likely not choose to locate, and this should lead to greater support of entrepreneurial activity by residents and a stronger mix and concentration of viable businesses and services in the village core.

**Figure 2-11. Drive Times from Mount Albert and Holland Landing**  
 (Source: FBM with data from Google)



## 3.0 Trends and Research

### 3.1 Introduction

The following section provides a high level overview of the impact that the COVID-19 Pandemic has had on small to mid-size communities, as well as some of the trends that have become more prevalent and likely to continue shaping the retail landscape.

### 3.2 COVID-19

Over the past two years, the novel Coronavirus (COVID-19) has changed the way many Canadians work, shop, travel and trade. More people are working from home, shopping online, and vacationing and traveling locally, while companies invest in technology and encourage consumers to buy local goods<sup>1</sup>. Lockdowns and travel restrictions meant Canadians were spending less time in brick and mortar establishments and many were opting to travel on foot, on wheels, or via a personal vehicle instead of using public transit. Nationwide, retail sales dropped in 2020, and rebounded in 2021 as vaccines became available, restrictions began to ease, and consumer confidence increased. Trends include strong spending in home-related categories, job growth in professional services, government and technology, and continued pressure on the hospitality and food/beverage sectors<sup>2</sup>. This created an encouraging environment for retail spending which contributed to record high overall sales in Q4 2021<sup>3</sup>.

Canadian businesses continue to face a number of challenges and opportunities in 2022, including:

- » Significant supply chain backlogs and disruptions impacting the movement of goods<sup>4</sup>.
- » Rising interest rates and inflation leading to increases in the cost of living and cost of goods<sup>5</sup>.
- » Shortage of retail talent encouraging retailers to improve retail jobs, wages and benefits<sup>6</sup>.
- » Renewed focus on “conscious consumerism”<sup>7</sup> by providing sustainable products and following triple bottom line (people, planet, profit) businesses models<sup>8</sup>.

- » Retail vacancy rates continue to decline<sup>9</sup> and new and established businesses are using pop-ups to activate vacant spaces<sup>10</sup>
- » Growth of e-commerce and consumer demand for flexible shopping and order fulfillment<sup>11</sup>.

As of June 2022, approximately 1/3 of Canadian businesses have not recovered from the pandemic, with smaller and minority owned businesses recovering slowest<sup>12</sup>. However, business owners are cautiously optimistic about increasing sales, hiring and investment over Q3.

### E-Commerce and Omnichannel Trends

COVID-19 has accelerated many existing retail trends that retailers have been seeing for years<sup>13</sup>. E-commerce sales in Canada grew from 6.8% of retail sales in 2019<sup>14</sup> to ~11% in 2021<sup>15</sup> representing increased consumer interest in online shopping throughout the pandemic. The majority of purchases still occur in brick and mortar establishments, with consumer preference toward smaller, free-standing stores over enclosed shopping malls<sup>16</sup>. The pandemic quickened the structural decline of malls, which were struggling even before the pandemic, while bolstering automation and the technological revolution<sup>17</sup>.

Demand for e-commerce, omnichannel retail and delivery services is expected to continue to grow<sup>18,19</sup>. In 2021, 11% of total retail sales and 19% of accommodation and food services were made online, with retail and wholesale businesses most likely to invest in ecommerce capabilities in 2022<sup>20</sup>.

1 Eight Ways COVID Will Transform the Economy and Disrupt Every Business, Stackhouse, 2020

2 Canadian Retail Marketbeat Report, Cushman Wakefield, Q42021

3 Ibid

4 Headwinds and Tailwinds, Avison Young, 2022

5 Top Trends that will Shape the Near-and Long-Term State of the Retail Industry in Canada (Part 1), S., Terry, Retail Insider, 2022

6 Top Trends.... Part 1, Retail Insider, 2022

7 2022 Retail Outlook, Colliers, 2022

8 Top Trends.... Part 2, Retail Insider, 2022

9 2022 Retail Outlook, Colliers, 2022

10 Pop-Up Retail in Canada Grows Significantly Amid COVID-19: Experts, M., Toneguzzi, Retail Insider, 2020

11 Consumer Demand for Greater Flexibility and Options Leading to Increasing Retail Innovation, S., Terry, Retail Insider, 2022

12 Canadian Trends and Insights, Canadian Chamber of Commerce, Q2 2022

13 Accelerating shifts driving a radical rethink of the customer journey, PWC, 2020

14 The Top Retail Trends in Canada in 2020 to Watch, McKinnon, 2020

15 Canada Retail Marketbeat....., Q4 2021

16 Four Trends Reshaping the Future of Retail, B., Peterson, Forbes, 2021

17 Top Trends that will Shape the Near-and Long-Term State of the Retail Industry in Canada (Part 2), S., Terry, Retail Insider, 2022

18 Ibid

19 Canadian Trends and Insights.... Q2 2022

20 Canadian Trends and Insights.... Q2 2022



## Inclusive Economic Growth

COVID-19 highlighted systemic health, income and employment disparities in Canada and across the globe. For example, women in Canada are overrepresented in sectors hit hardest by the pandemic with women accounting for more than half of employees in Accommodations and Food Services, Retail Trade, Other Services, and Health Care and Social Assistance (**Figure 3-1**). Additionally and globally, high risk occupations which require close personal contact and which can not be done remotely employ more low-wage workers, young people, low educated, migrants and ethnic minorities<sup>21</sup>.

The disproportionate impacts of COVID-19 on racialized individuals and women<sup>22</sup>, coupled with concerns about the increasing cost of living<sup>23</sup>, rising income inequality, a global recession, and economic resilience in the face of climate change<sup>24</sup>, have ignited renewed interest in inclusive economic growth. Inclusive economic growth is defined as “economic growth that is distributed fairly across society and creates opportunities for all”<sup>25</sup> and can involve investing in education and essential public services, addressing inequalities in workplaces, ensuring livable wages, and preparing for changing workforce demographics and emerging markets. Support for inclusive economic growth is increasingly becoming main stream through uptake with organizations like the Federation of Canadian Municipalities<sup>26</sup> and the

21 The unequal impact of COVID-19: A spotlight on frontline workers, migrants and racial/ ethnic minorities, OECD, 2022

22 Why COVID-19 is an inequality virus, Z. Liagat, 2021

23 Rising prices are affecting the ability to meet day-to-day expenses for most Canadians, The Daily - Statistics Canada, 2022

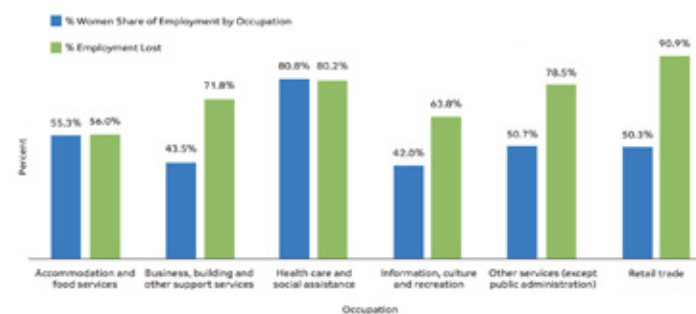
24 A Healthy Environment and a Healthy Economy, Government of Canada, 2022

25 Inclusive Growth (Webpage), OCED

26 Inclusive Communities (Webpage), Federation of Canadian Municipalities

**Figure 3-1. Women’s share of employment by occupation and job loss in Canada (2021)**

(Source: *Women in a COVID-19 Recession, Gender & COVID-19, 2021*)



Notes: Data refers to total employment of men and women in the age group (15 and above).

Source: Statistics Canada, Table 16-10-0022-01 Labour force characteristics by industry, monthly, unadjusted for seasonality.

Author's calculations

Government of Canada<sup>27</sup> which recognize the value in addressing integrating together economic, social, and environmental objectives.

Notable resources for local governments include:

- » *A Healthy Environment and a Healthy Economy (Government of Canada, 2022)* is the federal government’s latest climate action plan which outlines five action areas including building Canada’s clean industrial advantage through low-carbon products, services and technologies.
- » *Getting hybrid work right: Creating and sustaining inclusive economic growth in Canada (Deloitte, 2022)* identifies equity, wellbeing, and flexibility as core aims of hybrid work which can support inclusive economic growth. Recommendations for government bodies include modernize caregiving systems through flexible child and elder care, investing in broadband affordability and access, and proving funding for upskilling.
- » *Policies to support sustainable, inclusive, and digital economic development in rural and smaller communities in Canada (Canada2020, 2021)* discusses the connection between rural well-being, and place-based and inclusive economic success. A variety of approaches are presented for discussion, including investing in community development finance institutions, accelerating digitization, and mobilizing flexible innovation spaces.
- » *Advancing Equity and Inclusion: A Guide for Municipalities (City for All Women Initiative, 2015)* is an action-oriented toolkit for municipalities of all sizes to reflect on their relationship to equity and inclusion, and chart a path towards change.
- » *Ensuring Labour Market Success for Ethnic Minority and Immigrant Youth [Learning Manual] (OECD, 2011)* focuses on improving education and reducing barriers to employment for minorities and immigrant youth through local government policy, partnerships and collaboration with community groups and businesses.

Another opportunity to monitor is the United Way Inclusive Local Economic Opportunity (ILEO) Initiative for the Greater Toronto Area. It aims to reduce gaps in economic prosperity at the neighbourhood level (initially targeting those in Scarborough’s Greater Golden Mile) through public, private and community partnerships.

27 Growth that works for everyone (Webpage), 2017

## Main Street Recovery

Main Streets are defined by a strong cluster of businesses with supporting residential and institutional uses that contribute to a strong cluster of activity at the heart of a community<sup>1</sup>. For Main Street retail businesses to be successful, they generally need predictable and stable revenues and costs, sufficient cash reserves and access to financing, and transparent and efficient regulatory frameworks<sup>2</sup>. Coupled with this are location specific elements, including a cost-competitive business location along Main Street, supportive and efficient public infrastructure and services, and sufficient market support in the local area<sup>3</sup>. Abrupt changes in costs and operating procedures due to the pandemic, significant debt levels for small businesses<sup>4</sup>, and long standing structural barriers, has forced many businesses to temporarily or permanently close.

The Canadian Urban Institute (CUI) launched the Bring Back Main Street Initiative early on in the pandemic with the intention of supporting Main Streets across Canada through these challenging times. One of the topics they explored through their Solutions Briefs was how to establish small-business- friendly policy<sup>5</sup>. While primarily geared toward informing policy makers on near-term measures to mitigate the effects of COVID restrictions on Main Street businesses, the Brief also highlights opportunities to build back better. Solutions include<sup>6</sup>:

- » Simplifying regulations and communications to aid business owners in navigating, and ultimately complying with, municipal, provincial and federal regulations.
- » Supporting small businesses in accessing legal and real estate advice and negotiations support through the provision of information and funding, and establishment of mutually beneficial partnerships.
- » Exploring options for mitigating COVID-related assessment changes and tax shifts across commercial properties that threaten the sustainability of Main Streets.
- » Supporting new, innovative, community-based financial models as stable funding sources for

Main Street businesses, including minority-owned and newcomer-owned businesses and start ups.

- » Supporting the animation of vacant storefronts along Main Streets through partnerships with community groups, entrepreneurs, and real estate professionals.

To support Main Street revitalization in southern Ontario, the CUI and Economic Developers Council of Ontario (with funding from the Federal Economic Development Agency for Southern Ontario) established the My Main Street Local Business Accelerator program. This economic development program provides a range of supports including funding for hiring Main Street Ambassadors to support new and existing businesses<sup>7</sup>.

With the support of My Main Street, the easing of COVID restrictions, and the return of office workers, retailers have the potential to once again serve as key draws to main streets. Collaboration between landlords, retailers, community groups, and local governments will be essential in re-establishing main streets and downtowns as lively, attractive and accessible spaces<sup>8</sup>. Opportunities exist to shift the retail mix and introduce new offerings to attract different groups, such as students, as communities seek to increase the critical mass of people in main street and downtown areas<sup>9</sup>.

Notable resources for local governments include:

- » *Nova Scotia Main Streets Initiative: Assessment Method* (FBM & NSFM, 2021) is an interactive toolkit for identifying what's working well and what could be working better on a main street, and prioritizing investment. The guide is meant to be used by anyone with an interest in improving their main street, and includes additional resources for exploring topics such as supporting local businesses and improving walkability.
- » *Bring Back Main Street Initiative* (CUI, 2020-2022) reported on main streets throughout the pandemic. Their website includes main street memos from across Canada which explored the unique composition, strengths and weaknesses main streets face as well as opportunities to build back better. They also feature a Rapid Placemaking toolkit and Main Street Design Challenge Playbook.

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1 Nova Scotia Main Streets Initiative Assessment Method Conversation Guide and Ideas Book, FBM & NSFM, 2021

2 Supporting Main Street Recovery through Small-Business-Friendly Policy, J. Archer & J. Morgan, CUI, 2020

3 Ibid

4 Top Trends..., Retail Insider, 2022

5 Supporting Main Street..., CUI, 2020

6 Ibid

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7 My Main Street Local Business Accelerator Program, 2022

8 Canada Retail Outlook, JLL, Nov 2021

9 Ibid

### 3.3 Streetscape Improvement Programs Program scope

This section is intended to support the Town in its consideration of a Façade Improvement Program for Mount Albert which had a 2021 population of 5,695. It provides a review of four comparably sized communities and their respective improvement programs, as well as a takeaways from the Township of Uxbridge’s current Community Improvement Plan (CIP) review.

Community, Façade and Storefront Improvement Programs provide funding in the form of grants or loans to building owners for property improvements which benefit the community. Projects typically centre around physical infrastructure improvements (such as façade’s and signage) intended to revitalize and reactivate a key community streetscape, such as a downtown or main street.

The study communities of Prescott, Neepawa, and St. Mary’s each have a commercial main street area, while Wellington North has two in the communities of Mount Forest and Arthur, respectively. Streetscape improvements are generally concentrated in these main street areas where most businesses are located, however the program area can be tailored based on the community (**Table 3-1**).

The Community Improvement Plans and Programs reviewed are often acted as a an umbrella for targeted improvement programs such as façade and signage improvement, accessibility, vacant or underutilized storefronts, patio and sidewalk improvements, and digital readiness investments. While occupied commercial properties are often the main target of the programs, other uses, including mixed use, industrial, affordable housing, and brown field sites are also enabled in placed like Prescott and Wellington North. To be eligible for funding, buildings and their respective owners are often expected to be in compliance with municipal plans and policies, and to adhere to design guidelines when present.

#### Funding

Grant funding average ~\$5,000 per property and 50% matching agreements are standard for all communities reviewed. To support businesses in making more extensive renovations, some communities like Prescott and St. Mary’s do provide additional funds as grants and loans. The total program amount allocated by the municipality to run streetscape improvement programs appear to be the range of \$10,000 - 15,000 per year.

Table 3-1. Storefront Improvement Programs Overview

Municipality	Program name	Pop. (2021 census)	Maximum funding per property	Program area(s)
Town of Prescott, ON	Community Improvement Program	4,078	\$5,000*	Riverwalk and Downtown Core, Industrial Employment, Heritage Conservation, and Brownfield Areas
Town of Neepawa, MB	Storefront Improvement Incentive Program	5,600	\$5,000	Within Town boundaries
Town of St. Mary’s, ON	Community Improvement Plan	7,386	\$10,000**	Within Town boundaries (downtown, industrial areas, and residential areas)
Town of Amherst, NS	Gritty to Pretty	9,404	\$3,000	Within Town boundaries
Township of Wellington North, ON	Community Improvement Plan	12,431	\$2,500***	Urban centre (for the communities for Mount Forest and Arthur), Rural, and Hamlet CIP areas
Township of Uxbridge	Community Improvement Plan	21,566	\$5,000	Downtown Uxbridge Community Improvement Area (with preference for Downtown Core and Brook St W projects)

\*Excluding \$20,000 Interest Free Loan Program

\*\*Up to \$20,000 if combined value includes Service Connection Fee Grant

\*\*\* For Façade Improvement Loan and Grant Program, and for Building Improvement Grant, respectively

Some municipalities partner with business improvement districts to run the program.

Few programs were found to assist municipalities in funding these types of improvement programs. Federal and provincial programs, such as the Green Municipal Fund and Infrastructure Canada's Inventing in Canada Plan, may be of interest for plans, studies and infrastructure improvements. To support business owner's, Digital Main Street's Ontario Grants Program a digital transformation grant program and digital service squad grant program to help transition brick-and-mortar small businesses into the digital environment.

### Successes and Challenges

Program uptake in the communities of Prescott, Amherst and Wellington North has been particularly strong. In Amherst, the community contributed \$3 for every \$1 the Town funded in 2018 for a total of \$83,000 in improvements and a further \$25,000 in investment. At the time of writing, the Town of Prescott has approved more than \$470,000 in grants since 2018 with the vast majority of projects occurring in the Riverwalk and Downtown Core area. In comparison, Wellington North has accepted 40 applications since the programs inception in 2012, with a total dollar value exceeding \$375,000 in main street improvements. Approximately 22% of the total (\$84,584) was contributed by the Town through CIP grants. Keys to success appear to be business buy-in and awareness of the program, clear program guidelines and application processes, and securing yearly funding.

Challenges for municipalities in running successful programs include allocating and prioritizing funds to the CIP in the municipal budget each year, marketing the program to the target business audience, and reducing redundancy in the programs offered. The Town of St. Mary's for example, has recently consolidated their grant and loans programs into one CIP which better suits the Town's needs<sup>1</sup>. Regular review of streetscape improvement plans is crucial to ensuring program objectives are met.

The Town of Prescott is surrounded by the larger Augusta Township, which limits the growth of the town. Much like Mount Albert, this presents an opportunity for Prescott to focus on stabilizing and solidifying its business activities in its small Downtown.

1 St. Marys gives new Community Improvement Plan a green light, C. Montanini, July 28 2021

### Uxbridge Spotlight

Changes to the existing Community Improvement Plan was identified as a quick win in Uxbridge's recent Downtown Revitalization Strategic Plan (2022). Specific, the Plan recommended a full review of the policy, updates to the application process to make it more streamlined and user friendly, and a targeted marketing campaign aimed at eligible building/property owners.

In spring 2022, the Township kicked off the CIP review and in August 2022, the proposed amendments to the existing plan included:

- » "Application evaluation criteria which place a priority on projects in the 2022 Strategic Plan
- » Specifying use of grants rather than loans to reflect current practice
- » Clarification of specific financial incentive programs under the Building, Façade and Signage Improvement Program including grants for: the cost of preparing plans and drawings, upgrading open area or increasing tree cover, development of outdoor patios and related works, and new technology implementation
- » Extension of applicable programs to business owners and tenants with written authorization from property owner
- » Add to list of applications under which securities can be reduced or waived severances, pre-servicing, site plan, subdivision or other agreements"<sup>2</sup>

The proposed amendments were aimed at supporting the Strategic Plan while clarifying the process for applicants and increasing the range of available supports. As of Sept 12 2022, Uxbridge Town Council adopted the Amendment.

Notably, the area south of Cemetery Rd and Button Cres in Uxbridge is identified in the Oak Ridges Moraine Conservation Plan as a Settlement Area similar to Mount Albert. While the Uxbridge's CIP Area covers the Downtown (south to Mill St) and is therefore not directly impacted by the Conservation Plan, it is worth noting that the complete community and supportive transit objectives of the plan align with the board intent of CIP's to support placemaking and vibrant walkable communities.

2 Town of Uxbridge CIP Amendment No. 1 Public Presentation Slidedeck, Aug 8 2022

## 4.0 Trade Area

### 4.1 Introduction

In order to create a framework for evaluating retail demand and subsequent gaps in the provision of shops and services, it is necessary to define and identify the Trade Areas from which Mount Albert and Holland Landing's retail sales are most frequently and likely to be sourced. Generated Trade Areas recognize drive times, demographics, spending attributes and competition, which collectively portray the market to prospective tenants, developers and investors.

Identifying the Trade Area is important for understanding the total market potential available to current and future retailers. The local and regional residential base has particular demographic and spending habits that provide insight as to the type of compatible retail tenants, the amount of retail floorspace supportable in the market, and the current inflow or outflow of retail sales, and for which categories such inflow or outflow exists.

As a first step, a Retail Trade Area is delineated to identify the geographic region from which regular patronage could be expected, based on a series of boundary determinants. Major considerations in defining Retail Trade Areas were applied to determine the most realistic Trade Areas, as well as to help sensitize potential market share inputs of corresponding Trade Area retail spending.

Retail Trade Area determinants include:

1. Transportation networks, including streets and highways, which affect access, drive times, commuting and employment distribution patterns;
2. Major infrastructure projects both planned or under development which could affect future travel patterns;
3. Overall community development vision, including an understanding of key nodes' characteristics;
4. Local and regional competitive environment, present and future;
5. Proposed generative uses (retail, cultural, civic, etc.) and their relationship within the wider market;
6. Significant natural and man-made barriers (e.g. water features, highways, industrial areas);
7. De facto barriers resulting from notable socioeconomic differentiation; and
8. Patterns of existing and future residential and commercial development.

For this particular study, Retail Trade Areas (**Figure 4-1**) are delineated utilizing a combination of drive times and competitive forces including similar sized communities to the north and northeast, as well as the Town of Newmarket and the Greater Toronto Metropolitan Area as major commercial centres to the south. Recognizing the regional draw of these larger centres, Mount Albert's Trade Area is oriented towards the northeast and captures residents within a 5 minute drive south and south east of the community. The trade area also includes rural residents within a 35 minute drive northeast including the small community of Udora. In contrast, Holland Landing's Trade Area is centered around the village core of the community and includes residential to the north.

### 4.2 Population Demographics and Projections

Using data sources that include the most recent Statistics Canada Census release as well as Manifold Data Mining Inc (2021) population estimates and growth forecasts were tabulated for the identified Trade Areas. These forecasts represent a snapshot based on demographic models, and does not account for future planning realities that seek to turn around population decline.

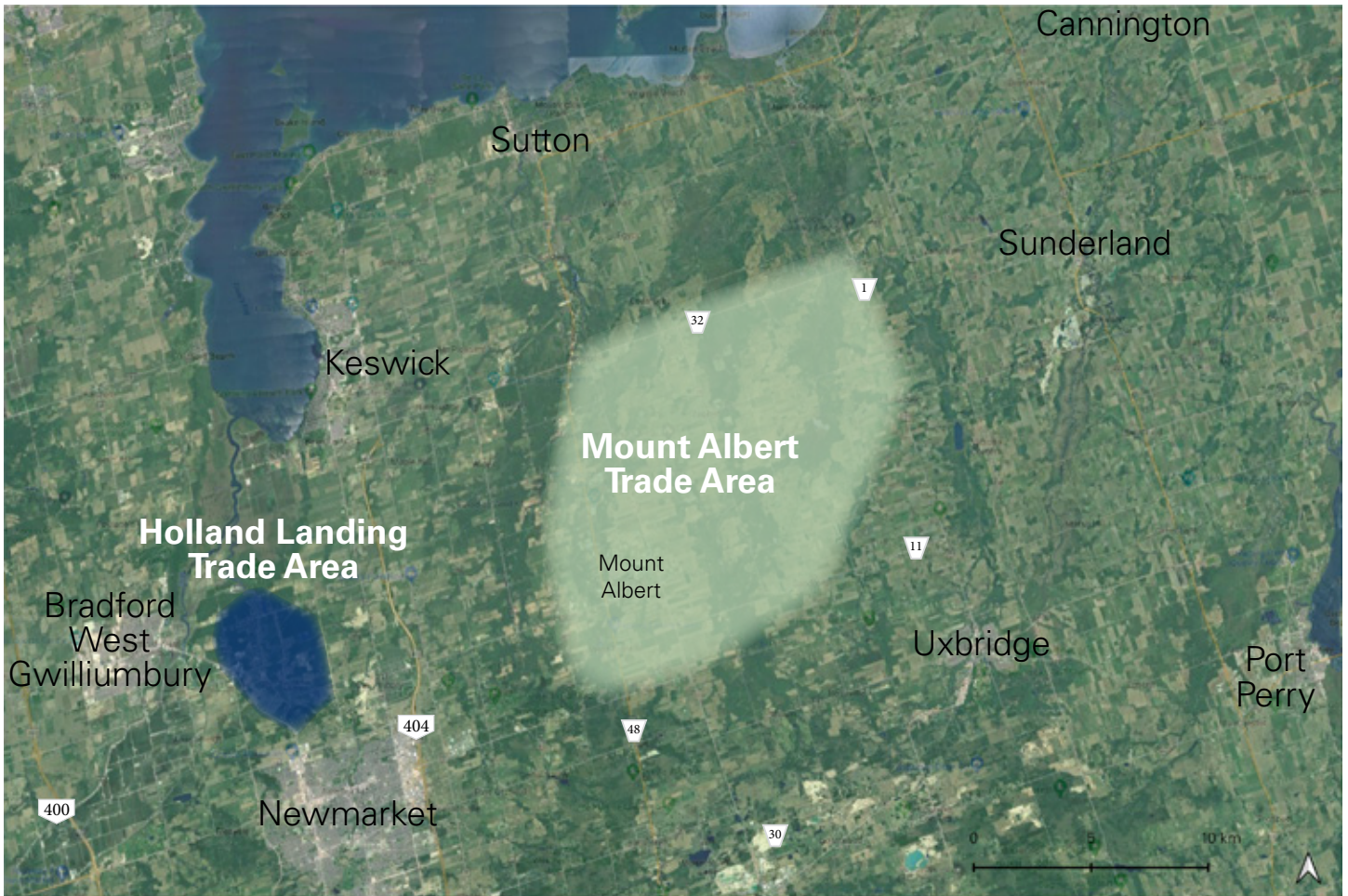
#### Mount Albert

Estimated for the end of year 2021, Mount Albert's Trade Area population is 9,904 with 75% considered Ethnic Cruisers (**Figure 4-2**). Using the province as a benchmark, the population in this Trade Area also tends to be similar to Ontario's with a slightly higher portion of children and youth, and a higher household income (\$151,052 vrs \$132,186 Ontario average). Unlike many smaller Ontario communities which struggle with declining populations, the population in the Mount Albert Trade Area is anticipated to increase by 1.18% per year over the next three years.

#### Holland Landing

Estimated for the end of year 2021, Holland Landing's Trade Area population is 12,172 with 28% considered Nest Builders (**Figure 4-2**). Using the province as a benchmark, the population in this Trade Areas also tends to be slightly older with an increasing population of 0.67% per year over the next three years. Household income (\$147,522) is also higher than the Ontario average (\$132,186).

Figure 4-1. Mount Albert and Holland Landing Trade Areas



**Overview**

Table 4-1 to 4-7, Figure 4-4 and Figure 4-5 provide a more detailed depiction of each Trade Area’s retail environment rather than being solely dependent upon each communities localized population base. This breakdown of the Trade Area Population is much more appealing to the business community.

Household incomes are among the most direct determinants of spending patterns and the potential for spending on retail, food and beverage, entertainment, and services.

Overall, household incomes and housing costs are higher than the provincial average in both Mount Albert and Holland Landing. This speaks to the increased demand for housing and increasing households seen in East Gwillimbury in recent years.

Notably, visible minorities represent 9.1% and 6.1% of Mount Albert and Holland Landing’s trade area populations, respectively. This reflects the ongoing regional trend toward increased immigration and diversification that was highlighted in the Town’s **Healthy and Active Living Master Plan** (2018).



Index Legend: Compared to Benchmark (%)		Colour
>=180	Extremely High	
>=110 and <180	High	
>=90 and <110	Similar	
>=60 and <90	Lower	
<50	Extremely Low	

Table 4-1. Trade Area Demographic Summary

(Source: Manifold Data Mining Inc & FBM)

Attribute	Benchmark - Ontario		Mount Albert Trade Area			Holland Landing Trade Area		
	value	percent	value	percent	index	value	percent	index
<b>SUMMARY</b>								
Total number of labour force age 15 and over	8,064,478		5,550			7,520		
Total population in families	12,185,364		8,916			10,688		
Average number of persons per census family	2.98		2.81		94	2.93		98
Total population in private households	14,410,904		9,852			11,835		
Total number of census families in private households	4,076,137		3,178			3,645		
Average number of persons in private households	2.53		2.80		111	2.80		111
Total number of private households	5,700,179		3,524			4,220		
Total population	14,693,829		9,904			12,172		
Total population age 15 and over	12,416,879		8,146			10,518		
<b>POPULATION AGE</b>								
Population age 0-14	2,276,950	15.50%	1,758	17.75%	115	1,654	13.59%	88
Population age 15-24	1,854,732	12.62%	1,304	13.16%	104	1,531	12.58%	100
Population age 25-34	2,061,351	14.03%	1,181	11.92%	85	1,667	13.70%	98
Population age 35-44	1,923,523	13.09%	1,249	12.61%	96	1,319	10.84%	83
Population age 45-54	1,860,941	12.66%	1,377	13.90%	110	1,579	12.97%	102
Population age 55-64	2,019,965	13.75%	1,474	14.88%	108	2,259	18.56%	135
Population age 65+	2,696,366	18.35%	1,563	15.78%	86	2,163	17.77%	97
<b>DWELLING</b>								
Average dwelling value \$	\$814,224		\$894,578		110	\$1,211,142		149
Home owners	3,973,295	69.70%	3,216	91.25%	131	3,689	87.41%	125
Home tenants	1,717,205	30.12%	308	8.75%	29	531	12.59%	42
Band housing	10,486	0.18%	0	0.00%	0	0	0.00%	0
<b>HOUSEHOLDS</b>								
One-family households	3,837,758	67.33%	2,660	75.47%	112	3,109	73.67%	109
Multiple-family households	162,446	2.85%	69	1.96%	69	149	3.53%	124
Non-family households	1,699,975	29.82%	598	16.96%	57	706	16.74%	56
<b>EDUCATION</b>								
Total population aged 15 years and over by highest certificate, diploma, or degree	12,416,879		8,146			10,518		
No certificate, diploma, or degree	2,175,333	17.52%	1,183	14.52%	83	1,838	17.48%	100
High school diploma or equivalent	3,384,448	27.26%	2,285	28.05%	103	3,182	30.25%	111
Post-secondary certificate, diploma, or degree	6,857,098	55.22%	4,678	57.43%	104	5,498	52.27%	95
Apprenticeship or trades certificate or diploma	747,204	6.02%	665	8.17%	136	876	8.32%	138
College, CEGEP or other non-university certificate or diploma	2,572,424	20.72%	2,085	25.60%	124	2,592	24.64%	119
University certificate or diploma below bachelor level	289,194	2.33%	198	2.44%	105	182	1.73%	74
University certificate, diploma, or degree at bachelor level or above	3,248,275	26.16%	1,729	21.23%	81	1,848	17.57%	67
Bachelor's degree	2,130,762	17.16%	1,289	15.82%	92	1,411	13.42%	78

Table 4-2. CanaCode Lifestyle Cluster Segmentation for Mount Albert & Holland Landing Trade Areas (as indexed to Province of Ontario averages)

(Source: Manifold Data Mining Inc & FBM)

Attribute	Benchmark PR: Ontario, ON		Mount Albert Trade Area			Holland Landing Trade Area		
	value	percent	value	percent	index	value	percent	index
A: AFFLUENTS	295,166	5.18%	0	0.00%	0	0	0.00%	0
B: ELITE PROFESSIONALS	512,284	8.99%	0	0.00%	0	565	13.39%	149
C: ETHNIC CRUISERS	391,642	6.87%	2,665	75.63%	1,101	872	20.66%	301
D: NEST BUILDERS	460,928	8.09%	0	0.00%	0	1,218	28.86%	357
E: BUY ME A NEW HOME	755,730	13.26%	147	4.18%	32	818	19.39%	146
F: EMPTY NESTERS	303,317	5.32%	0	0.00%	0	196	4.65%	87
G: UP THE LADDER	778,947	13.67%	711	20.19%	148	494	11.70%	86
H: HIGH TRADES	345,360	6.06%	0	0.00%	0	47	1.11%	18
I: URBAN LIFE IN SMALL TOWN	245,617	4.31%	0	0.00%	0	0	0.00%	0
J: JOYFUL COUNTRY	150,660	2.64%	0	0.00%	0	0	0.00%	0
K: RURAL HANDYMEN	99,079	1.74%	0	0.00%	0	0	0.00%	0
L: COMFORTABLE APARTMENT DWELLERS	749,755	13.15%	0	0.00%	0	0	0.00%	0
M: SINGLES	123,546	2.17%	0	0.00%	0	0	0.00%	0
N: NEW CANADIANS	179,477	3.15%	0	0.00%	0	10	0.24%	8
O: RENTERS	94,911	1.67%	0	0.00%	0	0	0.00%	0
P: ONE PARENT FAMILIES	46,076	0.81%	0	0.00%	0	0	0.00%	0
Q: THRIFTY	167,685	2.94%	0	0.00%	0	0	0.00%	0

Powered by PolarisIntelligence.com, Data modelled by Manifold Data Mining Inc., Data Vintage: 2021/2022

*CanaCode Lifestyles is a customer segmentation solution offering a data fusion of demographic, household spending, consumer lifestyle, attitude and behavioural databases. The purpose is to provide users and readers of the demographic data in this report with a 360-degree view of the respective target market's choices, preferences and shopping patterns.*

*The following page provides a visual summary of the dominant segments in the Mount Albert and Holland Landing Trade Areas.*



Figure 4-3. Dominant CanaCode Lifestyle Cluster in Mount Albert's Trade Area (as indexed to Province of Ontario averages)

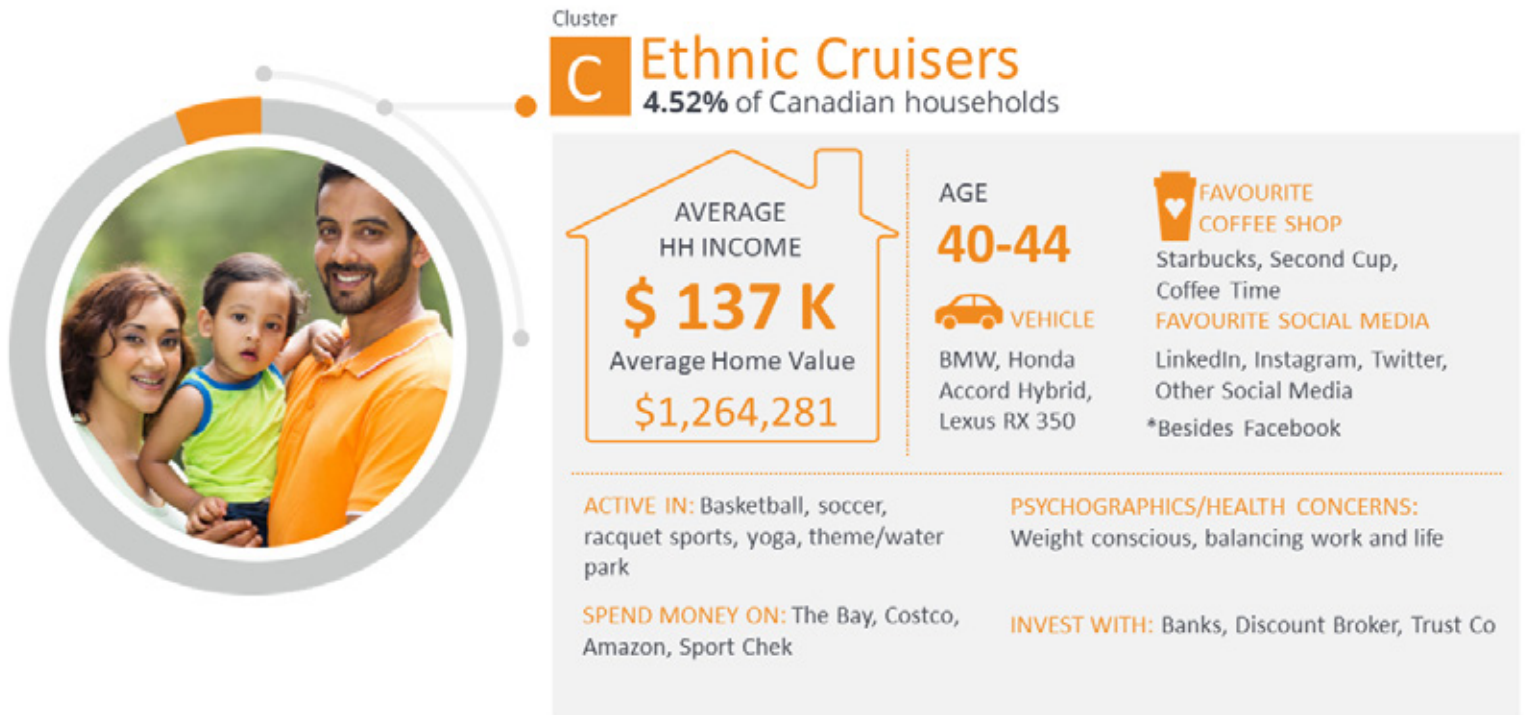


Figure 4-2. Dominant CanaCode Lifestyle Cluster in Holland Landing's Trade Area (as indexed to Province of Ontario averages)

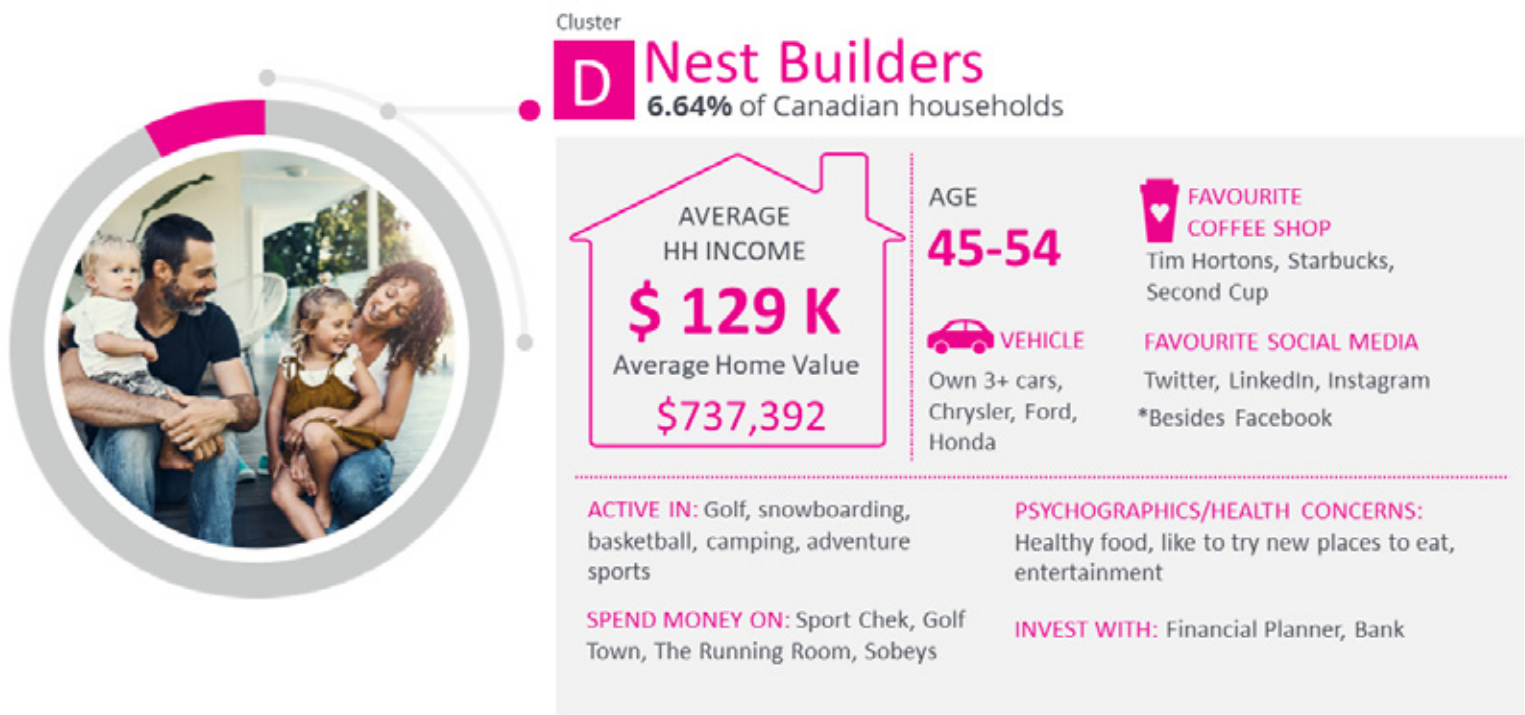




Table 4-3. Trade Area Populations Projections Summary 2021 to 2031

(Source: Manifold Data Mining Inc & FBM)

Attribute	Benchmark - Ontario		Mount Albert Trade Area			Holland Landing Trade Area		
	value	percent	value	percent	index	value	percent	index
<b>PROJECTIONS</b>								
Annual population growth in the period: Next 3 years		1.00%		1.18%	118		0.67%	67
Annual household growth in the period: Next 3 years		1.00%		1.34%	134		0.95%	95
Annual family growth in the period: Next 3 years		1.00%		1.42%	142		0.81%	81
Annual population growth in the period: Next 5 years		1.15%		1.82%	158		1.08%	94
Annual household growth in the period: Next 5 years		1.35%		2.09%	155		1.51%	112
Annual family growth in the period: Next 5 years		1.16%		2.18%	188		1.28%	110
Annual population growth in the period: 5 to 10 years from current year		1.08%		1.95%	181		1.13%	105
Annual household growth in the period: 5 to 10 years from current year		1.27%		2.22%	175		1.56%	123
Annual family growth in the period: 5 to 10 years from current year		1.08%		2.30%	213		1.35%	125
<b>POPULATION GROWTH</b>								
Current year total population	14,693,829		9,904			12,172		
3-Year Projections - Total population	15,211,613		10,502			12,588		
5-Year Projections - Total population	15,556,803		10,843			12,845		
10-Year Projections - Total population	16,413,919		11,947			13,590		
<b>HOUSEHOLD GROWTH</b>								
Current year total number of households	5,700,179		3,524			4,220		
3-Year Projections - Total number of households	5,937,405		3,767			4,424		
5-Year Projections - Total number of households	6,095,555		3,909			4,548		
10-Year Projections - Total number of households	6,492,049		4,364			4,915		
<b>FAMILY GROWTH</b>								
Current year total number of census families	4,092,674		3,178			3,645		
3-Year Projections - Total number of census families	4,238,366		3,411			3,795		
5-Year Projections - Total number of census families	4,335,163		3,541			3,885		
10-Year Projections - Total number of census families	4,575,107		3,968			4,156		
<b>HOUSEHOLD INCOME GROWTH</b>								
Current year average household income	\$109,708		\$138,179		126	\$128,753		117
3-Year Projections - Average household income	\$115,000		\$142,703		124	\$134,226		117
5-Year Projections - Average household income	\$122,372		\$148,856		122	\$141,865		116
10-Year Projections - Average household income	\$141,088		\$162,337		115	\$159,952		113



Table 4-4. Trade Area Detailed Population Breakdown

(Source: Manifold Data Mining Inc & FBM)

Attribute	Benchmark - Ontario		Mount Albert Trade Area			Holland Landing Trade Area		
	value	percent	value	percent	index	value	percent	index
<b>POPULATION AGE GROUP</b>								
Total population by age groups	14,693,800		9,904			12,172		
0-14	2,276,950	15.50%	1,758	17.75%	115	1,654	13.59%	88
0-4	734,336	5.00%	586	5.92%	118	521	4.28%	86
5-9	754,020	5.13%	602	6.08%	119	536	4.40%	86
10-14	788,594	5.37%	569	5.75%	107	596	4.90%	91
15-64	9,720,510	66.15%	6,583	66.47%	100	8,355	68.64%	104
15-19	854,434	5.82%	628	6.34%	109	666	5.47%	94
20-24	1,000,300	6.81%	676	6.82%	100	865	7.11%	104
25-29	1,035,480	7.05%	571	5.77%	82	926	7.61%	108
30-34	1,025,870	6.98%	610	6.15%	88	741	6.09%	87
35-39	997,205	6.79%	649	6.55%	96	655	5.38%	79
40-44	926,318	6.30%	600	6.06%	96	664	5.45%	87
45-49	913,795	6.22%	670	6.76%	109	738	6.06%	97
50-54	947,146	6.45%	707	7.14%	111	841	6.91%	107
55-59	1,044,800	7.11%	792	8.00%	113	1,132	9.30%	131
60-64	975,162	6.64%	681	6.88%	104	1,127	9.26%	139
65 and over	2,696,370	18.35%	1,563	15.78%	86	2,163	17.77%	97
65-69	820,064	5.58%	541	5.46%	98	786	6.46%	116
70-74	691,318	4.71%	411	4.15%	88	591	4.86%	103
75-79	479,309	3.26%	269	2.72%	83	374	3.07%	94
80-84	328,259	2.23%	191	1.93%	87	206	1.70%	76
85 and over	377,417	2.57%	151	1.53%	60	206	1.69%	66
85-89	235,644	1.60%	100	1.00%	63	147	1.21%	76
90-94	109,852	0.75%	34	0.35%	47	50	0.41%	55
95-99	27,679	0.19%	17	0.17%	89	9	0.07%	37
100 and over	4,241	0.03%	1	0.01%	33	0	0.00%	0
Average age of total population	41.60		40.20		97	42.80		103
Median age of total population	40.90		40.60		99	45.00		110

Figure 4-4. Population Breakdown

(Source: Manifold Data Mining Inc & FBM)

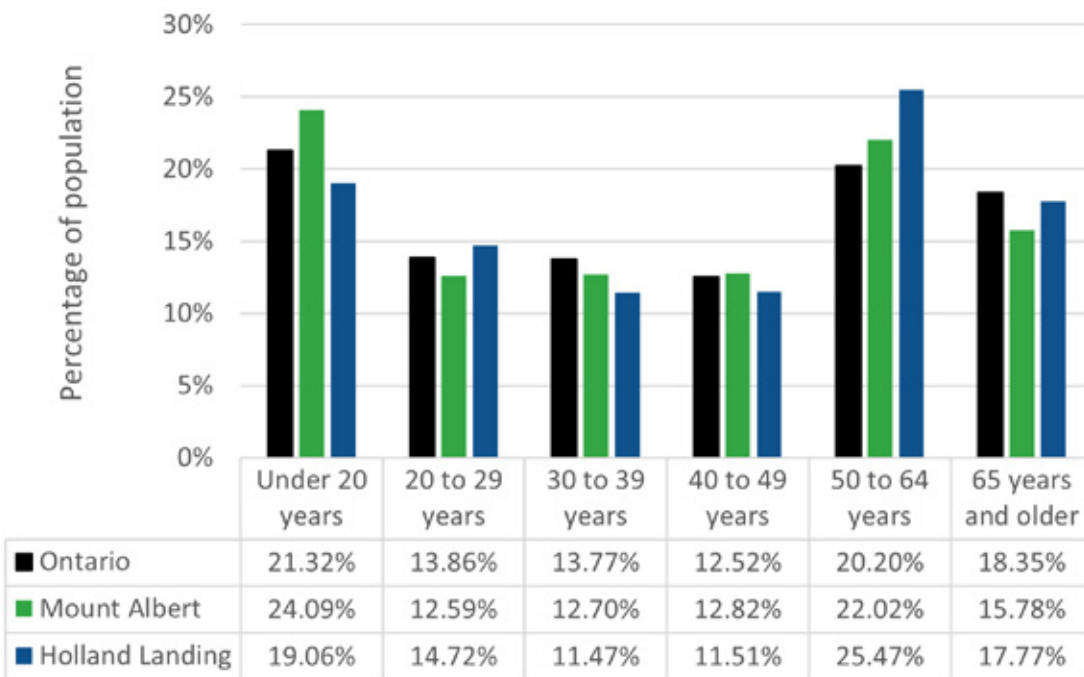




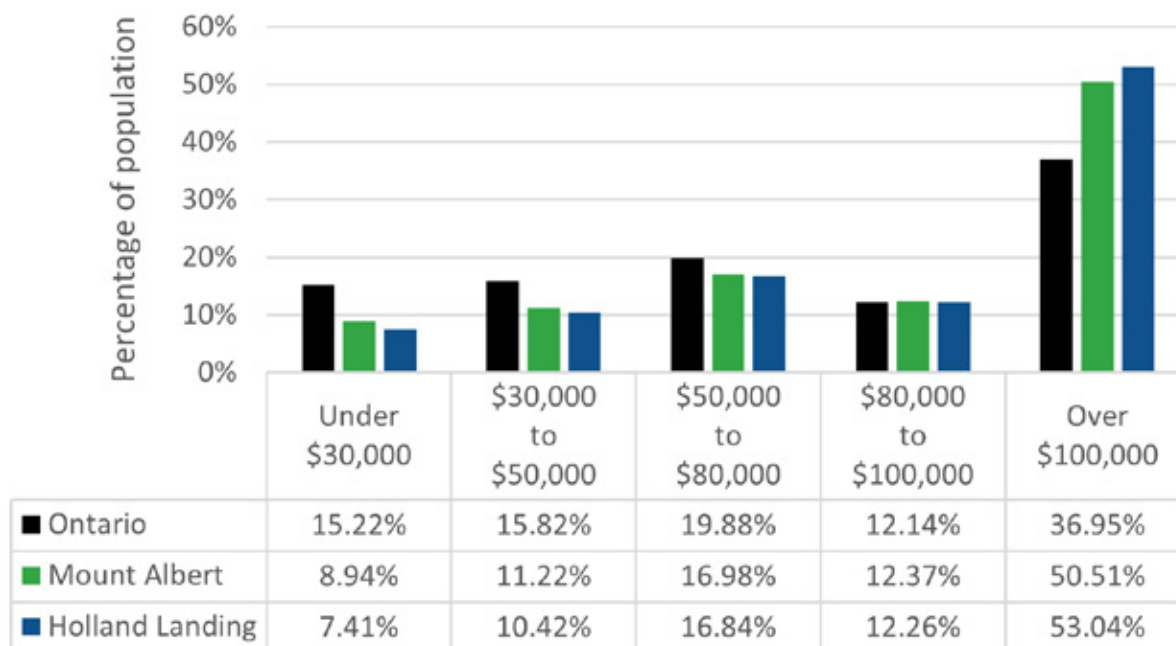
Table 4-5. Trade Area Household Income Breakdown

(Source: Manifold Data Mining Inc & FBM)

Attribute	Benchmark - Ontario		Mount Albert Trade Area			Holland Landing Trade Area		
	value	percent	value	percent	index	value	percent	index
<b>HOUSEHOLD INCOME</b>								
Total number of households	5,700,990		3,524			4,220		
Average household income \$	\$109,708		\$138,179		126	\$128,753		117
Median household income \$	\$83,780		\$114,349		136	\$115,456		138
Household with income under \$5,000	72,619	1.27%	18	0.52%	41	14	0.32%	25
Household with income \$5,000 to \$9,999	79,143	1.39%	28	0.79%	57	18	0.43%	31
Household with income \$10,000 to \$14,999	126,272	2.22%	53	1.50%	68	28	0.65%	29
Household with income \$15,000 to \$19,999	178,443	3.13%	61	1.72%	55	60	1.42%	45
Household with income \$20,000 to \$24,999	203,141	3.56%	74	2.09%	59	91	2.15%	60
Household with income \$25,000 to \$29,999	207,866	3.65%	82	2.32%	64	103	2.44%	67
Household with income \$30,000 to \$34,999	217,630	3.82%	112	3.17%	83	91	2.16%	57
Household with income \$35,000 to \$39,999	225,307	3.95%	83	2.36%	60	105	2.48%	63
Household with income \$40,000 to \$44,999	228,807	4.01%	103	2.91%	73	123	2.92%	73
Household with income \$45,000 to \$49,999	230,344	4.04%	98	2.78%	69	121	2.86%	71
Household with income \$50,000 to \$59,999	365,998	6.42%	192	5.44%	85	225	5.34%	83
Household with income \$60,000 to \$69,999	389,116	6.83%	200	5.69%	83	241	5.70%	83
Household with income \$70,000 to \$79,999	377,680	6.63%	206	5.85%	88	245	5.80%	87
Household with income \$80,000 to \$89,999	356,636	6.26%	218	6.19%	99	262	6.21%	99
Household with income \$90,000 to \$99,999	335,299	5.88%	218	6.18%	105	255	6.05%	103
Household with income \$100,000 and over	2,106,690	36.95%	1,780	50.51%	137	2,238	53.04%	144
Household with income \$100,000 to \$124,999	530,864	9.31%	422	11.97%	129	442	10.47%	112
Household with income \$125,000 to \$149,999	468,682	8.22%	386	10.95%	133	462	10.95%	133
Household with income \$150,000 to \$199,999	496,435	8.71%	473	13.41%	154	582	13.80%	158
Household with income \$200,000 and over	610,705	10.71%	500	14.18%	132	752	17.82%	166

Figure 4-5. Population Income Breakdown

(Source: Manifold Data Mining Inc & FBM)



### 4.3 Summary of Employment & Labour

**Table 4-55** and **Figure 4-6** provide a summary of the estimated 2021 Labour Force profile for Mount Albert and Holland Landing's Trade Areas.

Approximately 20.1% of Mount Albert's employed work at home, which is higher than both Holland Landing (17.4%) and the provincial average (17.9%). Of those who commute to work, 36.6% of Mount Albert's workforce commutes more than 30 minutes and 61.3% use a vehicle as their primary mode of transportation. Similarly, 27.9% of Holland Landing's workforce commutes more than 30 minutes and 65.4% use a vehicle a vehicle as their primary mode of transportation.

This suggests Mount Albert and Holland Landing are bedroom communities for those working in the surrounding area. These workers are likely employed in the nearby Town of Newmarket, and further south in the Greater Toronto Area. This results in a consumer outflow as people tend to shop near their work place.

Referring to **Table 4-6**, in terms of employment sector (by total employment), Professional, Scientific and Technical Services (761) and Construction (672) represent the top two employment categories in Mount Albert. Employment in the Construction sector is very high compared to the Ontario average (6.28%) in both Mount Albert (12.1%) and Holland Landing (12.2%). In Holland Landing, Construction (918) and Manufacturing (783) represent the top two employment categories.

**Table 4-6. Labour Force Information**

(Source: Manifold Data Mining Inc & FBM)



Index Legend: Compared to Benchmark (%)		Colour
>=180	Extremely High	
>=110 and <180	High	
>=90 and <110	Similar	
>=50 and <90	Lower	
<50	Extremely Low	

Attribute	Benchmark - Ontario		Mount Albert Trade Area			Holland Landing Trade Area		
	value	percent	value	percent	index	value	percent	index
<b>LABOUR FORCE ACTIVITY - TOTAL</b>								
Total population 15+ years	12,416,900		8,146			10,518		
In the labour force	8,064,480	64.95%	5,550	68.13%	105	7,520	71.49%	110
Unemployed	736,167	5.93%	618	7.58%	128	695	6.60%	111
Employed	7,328,310	59.02%	4,932	60.55%	103	6,825	64.89%	110
Not in the labour force	4,352,400	35.05%	2,597	31.87%	91	2,998	28.51%	81
Participation rate (%)		64.95%		68.13%	105		71.49%	110
Employment rate (%)		59.02%		60.55%	103		64.89%	110
Unemployment rate (%)		9.13%		11.13%	122		9.24%	101
<b>PLACE OF WORK</b>								
Total employed labour force 15 years and over by place of work status	7,328,310		4,932			6,825		
At home	1,439,460	17.85%	1,118	20.14%	113	1,311	17.44%	98
Outside Canada	45,328	0.56%	12	0.21%	38	0	0.01%	2
No fixed workplace address	711,518	8.82%	691	12.46%	141	972	12.92%	146
Usual place of work	5,132,010	63.64%	3,112	56.07%	88	4,542	60.40%	95
<b>COMMUTING DURATION</b>								
Total employed population aged 15 years and over who commute to work	5,659,350		3,652			5,314		
Less than 15 minutes	1,970,080	24.43%	732	13.18%	54	1,480	19.68%	81
15 to 29 minutes	1,613,930	20.01%	948	17.08%	85	1,602	21.31%	106
30 to 44 minutes	988,783	12.26%	781	14.07%	115	891	11.85%	97
45 to 59 minutes	614,867	7.62%	666	12.01%	158	745	9.91%	130
60 minutes and over	471,699	5.85%	526	9.48%	162	596	7.93%	136
<b>MODE OF TRANSPORTATION</b>								
Total employed labour force 15 years and over who commute to work by mode of transportation	5,659,350		3,652			5,314		
Car, truck, van, as driver	4,060,840	50.36%	3,188	57.43%	114	4,637	61.66%	122
Car, truck, van, as passenger	351,545	4.36%	217	3.90%	89	284	3.78%	87
Public transit	802,499	9.95%	131	2.36%	24	242	3.22%	32
Walked	301,081	3.73%	77	1.39%	37	49	0.66%	18
Bicycle	75,372	0.94%	12	0.22%	23	12	0.16%	17
Other method	68,010	0.84%	28	0.51%	61	90	1.20%	143

Figure 4-6. Mode of Transportation to Work

(Source: Manifold Data Mining Inc & FBM)

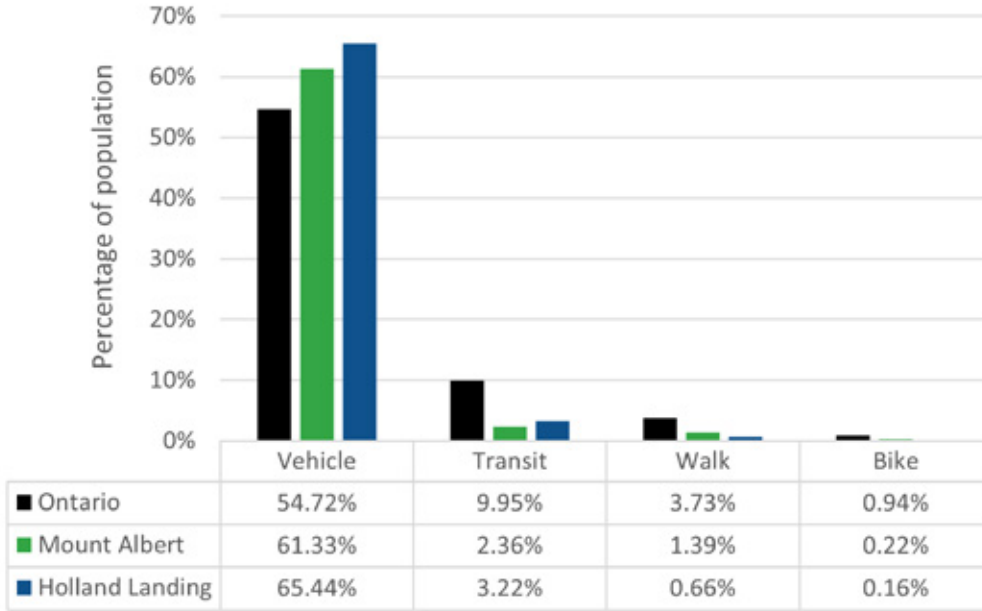


Table 4-7. Labour Force Industry and Occupation

(Source: Manifold Data Mining Inc & FBM)

Attribute	Benchmark - Ontario		Mount Albert Trade Area			Holland Landing Trade Area		
	value	percent	value	percent	index	value	percent	index
<b>LABOUR FORCE INDUSTRY</b>								
Total labour force population aged 15+ years - North American Industry Classification System (NAICS) 2017	8,064,480		5,550			7,520		
Industry - not applicable	343,153	4.26%	325	5.85%	137	330	4.39%	103
All industries	7,721,320	95.75%	5,225	94.15%	98	7,190	95.61%	100
11 Agriculture, forestry, fishing, and hunting	118,861	1.47%	368	6.63%	451	94	1.25%	85
21 Mining, quarrying, and oil and gas extraction	40,419	0.50%	9	0.16%	32	21	0.28%	56
22 Utilities	69,595	0.86%	25	0.45%	52	88	1.17%	136
23 Construction	506,432	6.28%	672	12.11%	193	918	12.21%	194
31-33 Manufacturing	750,077	9.30%	374	6.74%	72	783	10.41%	112
41 Wholesale trade	315,938	3.92%	210	3.79%	97	258	3.43%	88
44-45 Retail trade	863,803	10.71%	445	8.02%	75	733	9.75%	91
48-49 Transportation and warehousing	353,144	4.38%	178	3.20%	73	242	3.22%	74
51 Information and cultural industries	187,048	2.32%	142	2.56%	110	178	2.37%	102
52 Finance and insurance	461,838	5.73%	60	1.09%	19	350	4.65%	81
53 Real estate and rental and leasing	186,741	2.32%	179	3.23%	139	135	1.79%	77
54 Professional, scientific, and technical services	663,596	8.23%	761	13.71%	167	513	6.82%	83
55 Management of companies and enterprises	17,706	0.22%	20	0.37%	168	1	0.02%	9
56 Administrative and support, waste management and remediation services	357,540	4.43%	354	6.38%	144	416	5.53%	125
61 Educational services	613,506	7.61%	330	5.95%	78	590	7.85%	103
62 Health care and social assistance	835,061	10.36%	422	7.61%	73	598	7.95%	77
71 Arts, entertainment, and recreation	158,129	1.96%	157	2.83%	144	156	2.08%	106
72 Accommodation and food services	430,367	5.34%	215	3.88%	73	385	5.11%	96
81 Other services (except public administration)	317,074	3.93%	38	0.68%	17	225	3.00%	76
91 Public administration	474,450	5.88%	264	4.75%	81	506	6.73%	114
<b>OCCUPATION</b>								
Total labour force 15 years and over by occupation	8,064,480		5,550			7,520		
0 Management occupations	914,818	11.34%	792	14.27%	126	993	13.21%	116
1 Business, finance, and administration occupations	1,302,860	16.16%	816	14.71%	91	1,344	17.87%	111
2 Natural and applied sciences and related occupations	625,194	7.75%	330	5.94%	77	398	5.30%	68
3 Health occupations	519,714	6.44%	244	4.40%	68	353	4.70%	73
4 Occupations in education, law and social, community and government services	994,518	12.33%	518	9.34%	76	820	10.91%	88
5 Occupations in art, culture, recreation, and sport	232,438	2.88%	289	5.22%	181	200	2.66%	92
6 Sales and service occupations	1,643,380	20.38%	1,039	18.72%	92	1,427	18.97%	93
7 Trades, transport and equipment operators and related occupations	983,586	12.20%	829	14.94%	122	1,217	16.19%	133
8 Natural resources, agriculture, and related production occupations	128,639	1.60%	205	3.70%	231	190	2.53%	158
9 Occupations in manufacturing and utilities	376,174	4.67%	162	2.92%	63	247	3.28%	70
Occupation - not applicable	343,153	4.26%	325	5.85%	137	330	4.39%	103

## 4.4 Retail Spending Profile

Detailed information of retail spending within each Trade Area was collected from Manifold Data Mining Inc., a leading supplier of demographic and consumer expenditure information, using 2021 year end data. The data was further consolidated into 22 specific spending categories in order to build a spending profile for the Trade Areas, which has been indexed against the Ontario average for the same.

These spending categories include (**Table 4-7**):

- » Grocery, Convenience & Specialty Foods
- » Pharmacy
- » Alcohol, Tobacco & Cannabis
- » Personal & Home Services
- » *Health Care & Medical Services*
- » Fashion & Footwear
- » Jewelry & Accessories
- » Beauty & Personal Care
- » Furniture & Décor
- » Appliances & Electronics
- » Home Improvement & Gardening
- » Books, Media & Computers
- » Sporting Goods
- » Toys & Hobbies
- » Specialty Retail
- » Quick Service Food & Beverage
- » Restaurants & Pubs
- » Arts & Entertainment
- » Fitness & Leisure
- » Auto Parts & Accessories
- » Auto/RV/Motorsports Dealerships
- » *Auto Fuel*

Having established the respective Trade Area boundaries, population and demographic profile, the size of each respective retail market and its anticipated growth was projected using retail spending data from Manifold Data Mining. The task involved developing an understanding of how the Trade Area residents spend their shopping and leisure dollars on a household basis for each of the 22 categories.

While categories such as *Health Care & Medical Services* as well as *Auto Fuel* have an associated household expenditure, they are only included in the spending profile and not quantified in the overall demand. Health Care & Medical Services do not have a typical productivity associated with them for forecasting space since a large component of the

business model is not a traditional fee-for-service or fee-for-product model and involves direct insurance payment. Auto Fuel, on the other hand is also highly volatile in terms of pricing, which is often a component of quantifying demand and productivity along with an understanding of the number of pumps, vehicles and litres sold as well as the fact that taxes vary from region to region.

### Mount Albert

Mount Albert's Trade Area spending is estimated at \$143 million (2021 year-end estimate), as shown in **Table 4-7**. If excluding Health Care and Auto Categories (including Auto Fuel), the total available retail spending in Mount Albert's Trade Area is \$111 million.

Each of the major categories of spending (Grocery & Convenience, Comparison Merchandise, Restaurants & Entertainment, and Auto/RV/Motorsports Parts & Sales) then aggregated as shown in **Figure 4-7**. This visually shows the importance that Grocery & Convenience spending should play for Mount Albert's resident base, but also shows a significant amount of Comparison Merchandise Spending. In both cases, as will be seen, a large share of trade area spending is clearly not being captured in Mount Albert based on the current inventory and merchandise offering.

By 2031 (**Table 4-10**), based on conservative forecasts for population growth, Mount Albert's Trade Area spending potential could increase by just over \$41 million to \$152 million, excluding Health Care and Auto categories.

### Holland Landing

Holland Landing's Trade Area spending is estimated at \$170 million (2021 year-end estimate), as shown in **Table 4-7**. If excluding Health Care and Auto Categories (including Auto Fuel), the total available retail spending in Holland Landing's Trade Area is \$132 million.

Grocery & Convenience spending by local Holland Landing residents is approximately \$51 million, which is almost all leaving the community for Newmarket which is expected to continue given the very close drive time proximity of major grocery stores and general merchandisers like Walmart and Costco.

By 2031 (**Table 4-9**), based on conservative forecasts for population growth, the Holland Landing Trade Area spending potential could increase by almost \$38 million to \$170 million, excluding Health Care and Auto categories.

Table 4-8. Trade Area Retail Spending Potential 2021 - Mount Albert and Holland Landing Trade Areas

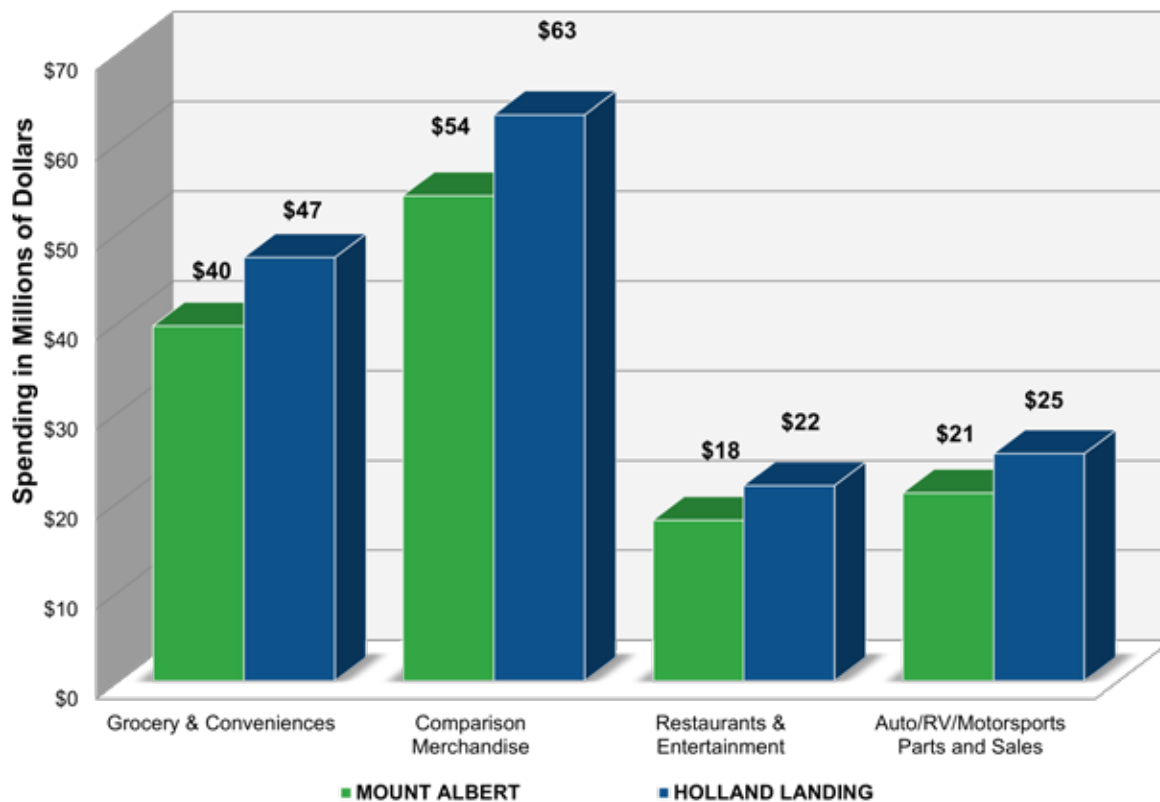
(Source: Manifold Data Mining Inc & FBM)

Retail Spending by Merchandise Category	2021		2021		
	MOUNT ALBERT TRADE AREA Per Household Retail Spending	MOUNT ALBERT TRADE AREA Aggregate Retail Spending	HOLLAND LANDING TRADE AREA Per Household Retail Spending	HOLLAND LANDING TRADE AREA Aggregate Retail Spending	
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	\$7,670	\$27,027,952	\$7,743	\$32,674,283
	Pharmacy	\$769	\$2,711,538	\$732	\$3,089,015
	Alcohol, Tobacco & Cannabis	\$1,333	\$4,699,144	\$1,318	\$5,561,584
	Personal & Home Services	\$1,454	\$5,123,454	\$1,398	\$5,897,767
	Health Care & Medical Services	\$1,003	\$3,534,673	\$1,017	\$4,293,615
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$2,298	\$8,098,371	\$2,165	\$9,137,107
	Jewelry & Accessories	\$350	\$1,234,259	\$331	\$1,396,912
	Beauty & Personal Care	\$844	\$2,973,745	\$875	\$3,691,247
	Furniture & Décor	\$1,160	\$4,087,889	\$1,151	\$4,857,292
	Appliances & Electronics	\$1,767	\$6,225,692	\$1,730	\$7,302,557
	Home Improvement & Gardening	\$4,309	\$15,183,815	\$4,182	\$17,648,355
	Books, Media & Computers	\$2,973	\$10,477,672	\$2,994	\$12,634,952
	Sporting Goods	\$410	\$1,445,510	\$353	\$1,488,157
	Toys & Hobbies	\$279	\$983,737	\$277	\$1,169,184
	Specialty Retail	\$957	\$3,374,159	\$898	\$3,788,705
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$2,718	\$9,579,300	\$2,751	\$11,607,570
	Restaurants & Pubs	\$1,835	\$6,465,892	\$1,907	\$8,049,169
	Arts & Entertainment	\$169	\$594,427	\$166	\$699,890
	Fitness & Leisure	\$363	\$1,279,423	\$341	\$1,439,919
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$2,003	\$7,056,999	\$1,980	\$8,356,102
	Auto/RV/Motorsports Dealership	\$3,947	\$13,909,605	\$4,021	\$16,970,207
	Auto Fuel	\$2,174	\$7,661,282	\$2,113	\$8,918,886
<b>TOTAL CATEGORIES</b>		<b>\$40,786</b>	<b>\$143,728,539</b>	<b>\$40,444</b>	<b>\$170,672,473</b>
<b>TOTAL (excluding Health Care &amp; Auto)</b>		<b>\$31,659</b>	<b>\$111,565,980</b>	<b>\$31,311</b>	<b>\$132,133,664</b>



Figure 4-7. Trade Area Retail Spending Potential 2021 - Mount Albert and Holland Landing Trade Areas

(Source: Manifold Data Mining Inc & FBM)





## Miscellaneous Inflow Spending

Another factor worth considering for Mount Albert because of its somewhat isolated location relative to immediately surrounding communities is the role that miscellaneous inflow has on the market. Mount Albert is not considered a major tourist destination, but from conversations with local businesses as well as the nature of historic community events, it is acknowledged that retail customers do visit the community for events, restaurants and personal services, as well as for grocery items when traveling through the community en route to cottage country along Highway 48.

Consequently, estimates of the inflow were applied to the various spending categories and determined that conservatively (at 5%), miscellaneous inflow could generate an additional \$5 million in retail spending to the community.

Spending categories that are typically attractive to these outlying, less frequent miscellaneous segments would be Quick Service F&B, Personal Services, Grocery or Pharmacy, though other categories may also benefit from “impulse” purchases.

**Table 4-9. Mount Albert Miscellaneous Inflow Spending**

(Source: Manifold Data Mining Inc & FBM)

			2021
Misc Inflow Factor	Retail Spending by Merchandise Category	MOUNT ALBERT Misc Inflow Spending	
Convenience & Day-to-Day Goods/Services	10.0% Grocery, Convenience & Specialty Foods	\$3,151,010	
	5.0% Pharmacy	\$158,060	
	5.0% Alcohol, Tobacco & Cannabis	\$273,921	
	2.5% Personal & Home Services	\$149,327	
	0.0% Health Care & Medical Services	\$0	
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	0.0% Fashion & Footwear	\$0	
	0.0% Jewelry & Accessories	\$0	
	0.0% Beauty & Personal Care	\$0	
	2.5% Furniture & Décor	\$102,197	
	0.0% Appliances & Electronics	\$0	
	5.0% Home Improvement & Gardening	\$759,191	
	0.0% Books, Media & Computers	\$0	
	0.0% Sporting Goods	\$0	
	0.0% Toys & Hobbies	\$0	
	5.0% Specialty Retail	\$168,708	
Leisure, Recreation & Entertainment Goods/Services	5.0% Quick Service F&B	\$478,965	
	5.0% Restaurants & Pubs	\$323,295	
	1.0% Arts & Entertainment	\$5,944	
	0.0% Fitness & Leisure	\$0	
Automotive Goods (excluding repair)	2.5% Auto Parts & Accessories	\$176,425	
	0.0% Auto/RV/Motorsports Dealership	\$0	
	0.0% Auto Fuel	\$0	
<b>4.0%</b>	<b>TOTAL RETAIL CATEGORIES ONLY</b>	<b>\$5,747,043</b>	
<b>5.0%</b>	<b>TOTAL (excluding Auto)</b>	<b>\$5,570,618</b>	

**Table 4-10. Trade Area Retail Spending Potential 2026**

(Source: Manifold Data Mining Inc & FBM)

Retail Spending by Merchandise Category		2026		2026	
		MOUNT ALBERT TRADE AREA Per Household Retail Spending	MOUNT ALBERT TRADE AREA Aggregate Retail Spending	HOLLAND LANDING TRADE AREA Per Household Retail Spending	HOLLAND LANDING TRADE AREA Aggregate Retail Spending
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	\$8,061	\$31,510,100	\$8,138	\$37,010,158
	Pharmacy	\$809	\$3,161,203	\$769	\$3,498,927
	Alcohol, Tobacco & Cannabis	\$1,401	\$5,478,421	\$1,385	\$6,299,606
	Personal & Home Services	\$1,528	\$5,973,096	\$1,469	\$6,680,400
	Health Care & Medical Services	\$1,054	\$4,120,841	\$1,069	\$4,863,378
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$2,415	\$9,441,355	\$2,276	\$10,349,600
	Jewelry & Accessories	\$368	\$1,438,941	\$348	\$1,582,283
	Beauty & Personal Care	\$887	\$3,466,892	\$919	\$4,181,075
	Furniture & Décor	\$1,219	\$4,765,799	\$1,210	\$5,501,854
	Appliances & Electronics	\$1,857	\$7,258,122	\$1,819	\$8,271,606
	Home Improvement & Gardening	\$4,528	\$17,701,805	\$4,395	\$19,990,290
	Books, Media & Computers	\$3,125	\$12,215,225	\$3,147	\$14,311,609
	Sporting Goods	\$431	\$1,685,224	\$371	\$1,685,636
	Toys & Hobbies	\$293	\$1,146,874	\$291	\$1,324,335
Specialty Retail	\$1,006	\$3,933,708	\$944	\$4,291,465	
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$2,857	\$11,167,871	\$2,891	\$13,147,894
	Restaurants & Pubs	\$1,928	\$7,538,155	\$2,005	\$9,117,293
	Arts & Entertainment	\$177	\$693,003	\$174	\$792,765
	Fitness & Leisure	\$382	\$1,491,595	\$359	\$1,630,996
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$2,105	\$8,227,287	\$2,081	\$9,464,956
	Auto/RV/Motorsports Dealership	\$4,148	\$16,216,288	\$4,227	\$19,222,152
	Auto Fuel	\$2,285	\$8,931,781	\$2,221	\$10,102,421
<b>TOTAL CATEGORIES</b>		<b>\$42,866</b>	<b>\$167,563,587</b>	<b>\$42,507</b>	<b>\$193,320,698</b>
<b>TOTAL (excluding Auto)</b>		<b>\$33,274</b>	<b>\$130,067,390</b>	<b>\$32,908</b>	<b>\$149,667,792</b>

Table 4-11. Trade Area Retail Spending Potential 2031

(Source: Manifold Data Mining Inc & FBM)

Retail Spending by Merchandise Category		2031		2031	
		MOUNT ALBERT TRADE AREA Per Household Retail Spending	MOUNT ALBERT TRADE AREA Aggregate Retail Spending	HOLLAND LANDING TRADE AREA Per Household Retail Spending	HOLLAND LANDING TRADE AREA Aggregate Retail Spending
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	\$8,472	\$36,972,237	\$8,553	\$42,036,918
	Pharmacy	\$850	\$3,709,184	\$809	\$3,974,155
	Alcohol, Tobacco & Cannabis	\$1,473	\$6,428,081	\$1,456	\$7,155,225
	Personal & Home Services	\$1,606	\$7,008,505	\$1,544	\$7,587,740
	Health Care & Medical Services	\$1,108	\$4,835,171	\$1,124	\$5,523,927
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$2,538	\$11,077,972	\$2,392	\$11,755,294
	Jewelry & Accessories	\$387	\$1,688,375	\$366	\$1,797,190
	Beauty & Personal Care	\$932	\$4,067,863	\$966	\$4,748,953
	Furniture & Décor	\$1,281	\$5,591,929	\$1,271	\$6,249,122
	Appliances & Electronics	\$1,951	\$8,516,286	\$1,912	\$9,395,064
	Home Improvement & Gardening	\$4,759	\$20,770,334	\$4,620	\$22,705,394
	Books, Media & Computers	\$3,284	\$14,332,680	\$3,307	\$16,255,428
	Sporting Goods	\$453	\$1,977,350	\$390	\$1,914,581
	Toys & Hobbies	\$308	\$1,345,680	\$306	\$1,504,208
Specialty Retail	\$1,058	\$4,615,599	\$992	\$4,874,337	
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$3,003	\$13,103,772	\$3,038	\$14,933,655
	Restaurants & Pubs	\$2,027	\$8,844,861	\$2,107	\$10,355,614
	Arts & Entertainment	\$186	\$813,132	\$183	\$900,440
	Fitness & Leisure	\$401	\$1,750,156	\$377	\$1,852,520
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$2,212	\$9,653,451	\$2,187	\$10,750,497
	Auto/RV/Motorsports Dealership	\$4,360	\$19,027,309	\$4,442	\$21,832,926
	Auto Fuel	\$2,401	\$10,480,066	\$2,335	\$11,474,543
<b>TOTAL CATEGORIES</b>		<b>\$45,053</b>	<b>\$196,609,994</b>	<b>\$44,675</b>	<b>\$219,577,730</b>
<b>TOTAL (excluding Auto)</b>		<b>\$34,971</b>	<b>\$152,613,996</b>	<b>\$34,587</b>	<b>\$169,995,837</b>

# 5.0 Commercial Supply

## 5.1 Introduction

The dynamics of the overall commercial market comprising retail and food & beverage shops and services, and street level office services provide critical indicators as to the performance of Mount Albert's and Holland Landing's retail commercial sectors and moreover the magnitude of demand and resulting opportunity for which certain market segments or gaps could be filled.

This section will provide a detailed inventory of the business mix (predominantly ground floor) that comprise the current commercial market for Mount Albert and Holland Landing, which serves as the core centrality for shops and services in the identified Trade Areas.

The purpose of the inventory and evaluation is to identify a foundation for demand and current retail performance (also known as retail sales productivity) followed by identifying the potential types of tenants and/or merchandise categories for whom Mount Albert and Holland Landing could be considered a compatible market for expansion or attraction.

To document the retail inventory, FBM conducted on-the-ground fieldwork in which streetfront retail premises were documented in terms of the retail store, merchandise category, estimated unit size, vacancy as well as North American Industry Classification System (NAICS) code.

The inventory was categorized into the same merchandise categories that were profiled in the retail spending so that a direct comparison could be taken. In some cases where retail data was not available, and store sizes were estimated using leasing plans, brokerage websites and satellite mapping measurements.

## 5.2 Mount Albert Summary

Mount Albert as its own retail area has been documented and profiled and has a total ground level business inventory (**Figure 5-1 to 5-4**, and **Table 5-1**) of approximately 112,888 sf. If excluding Medical & Wellness, Professional Services & Vacant space from this inventory, the net occupied retail inventory in Mount Albert is 74,124 sf or 66% of the total ground level business floorspace inventory. See **Appendix B** for detailed inventory tables.

Not surprisingly, as a smaller local serving area, the top inventory categories in Mount Albert are:

1. Grocery & Conveniences (28,644 sf)
2. Professional & Financial Services (14,933 sf)
3. Home Improvement & Gardening (12,986 sf)
4. Quick Service Food & Beverage (12,197 sf)

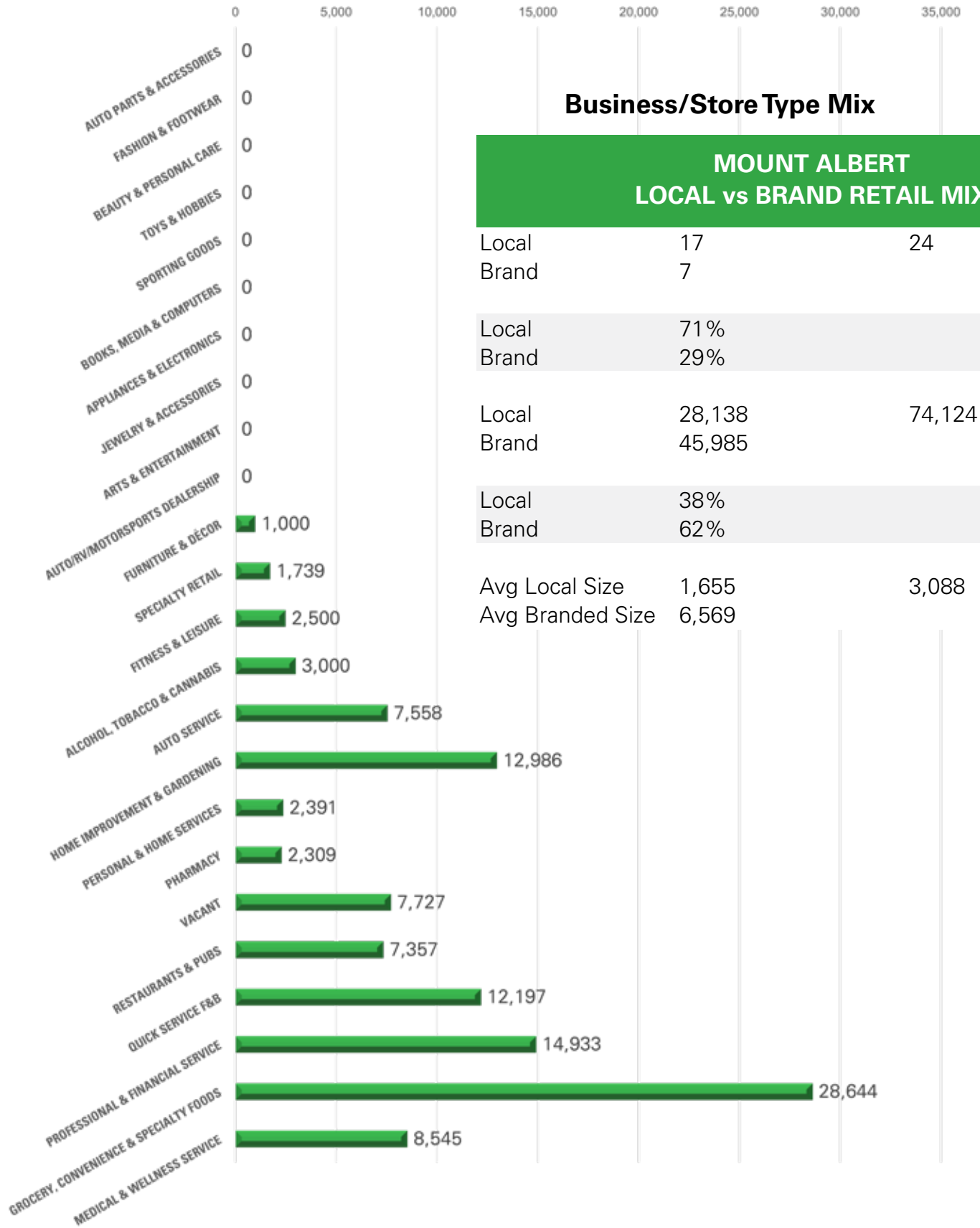
In total, Mount Albert's "retail only" storefronts comprise a business mix by store count of 71% local to 29% branded. When examining this same business mix by floorspace, the ratio works out to 38% local to 62% branded. It is worth noting that both the Foodland and Home Hardware, while branded are actually franchise-operated/locally owned businesses and therefore represent a strong local connection to the community. Presently Mount Albert has a strong local business culture. With development limitations presented by the Oak Ridges Moraine, large scale retail development is not expected, which bodes well for further small, local entrepreneurial businesses. This is a very unique opportunity for a community that has a growing, yet under-served populace where retail sales dollars are leaving the community.

It is true that Mount Albert has a limited retail offering within the Comparison or Department Store Type Merchandise Categories (DSTM), but Mount Albert has a very unique opportunity to grow and cultivate a concentration of locally owned and operated businesses, some of which may choose to provide some of those missing categories as part of their merchandise offering. Survey data also confirms that a lack of offering is among the reasons shoppers currently shop in Newmarket or Uxbridge when Mount Albert would be just as, if not more convenient. While there may be some smaller opportunities to strategically add some inventory, it is important that they be located at sites that are compatible and beneficial to the community as a whole and the Downtown/Village Core specifically, and where lands are available. At present, finding appropriate lands is the biggest challenge facing the community.

Initial estimates of inventory based on the mix, quality and offering suggests that retail sales productivity in Mount Albert is estimated to be in the range of \$320 per sf. Comparable communities with a similar context could be expected to perform at a lower range of \$225 to \$275 per sf range. This suggests that the small provision of local shops and services performs well and indicates healthy demand.

Figure 5-1. Mount Albert Commercial Retail Inventory by Category and Business/Store Type Mix

(Source: FBM)



**Table 5-1. Mount Albert Commercial Retail Inventory**

(Source: FBM)

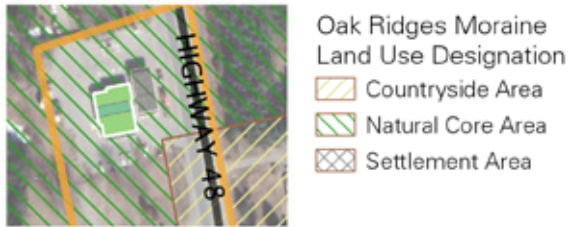
MERCHANTISE CATEGORY	MOUNT ALBERT FLOORSPACE (sq. ft.)	MOUNT ALBERT MIX (%)
AUTO PARTS & ACCESSORIES	0	0.0%
FASHION & FOOTWEAR	0	0.0%
BEAUTY & PERSONAL CARE	0	0.0%
TOYS & HOBBIES	0	0.0%
SPORTING GOODS	0	0.0%
BOOKS, MEDIA & COMPUTERS	0	0.0%
APPLIANCES & ELECTRONICS	0	0.0%
JEWELRY & ACCESSORIES	0	0.0%
ARTS & ENTERTAINMENT	0	0.0%
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%
FURNITURE & DÉCOR	1,000	0.9%
SPECIALTY RETAIL	1,739	1.5%
PHARMACY	2,309	2.0%
PERSONAL & HOME SERVICES	2,391	2.1%
FITNESS & LEISURE	2,500	2.2%
ALCOHOL, TOBACCO & CANNABIS	3,000	2.7%
RESTAURANTS & PUBS	7,357	6.5%
AUTO SERVICE	7,558	6.7%
VACANT	7,727	6.8%
MEDICAL & WELLNESS SERVICE	8,545	7.6%
QUICK SERVICE F&B	12,197	10.8%
HOME IMPROVEMENT & GARDENING	12,986	11.5%
PROFESSIONAL & FINANCIAL SERVICE	14,933	13.2%
GROCERY, CONVENIENCE & SPECIALTY FOODS	28,644	25.4%
<b>TOTAL</b>		
		<b>112,888</b>
<b>Retail Floorspace (excluding Auto Service, Medical &amp; Wellness, Professional Services, Public Service &amp; Education, &amp; Vacant)</b>		
		<b>74,124 66%</b>
<b>Total Estimated Retail Sales (excluding Professional, Finance, Public Service &amp; Vacant)</b>		
		<b>\$23,752,162</b>
<b>Estimated Retail Sales Productivity (\$/sf)</b>		
		<b>\$320</b>

Figure 5-2. Mount Albert Village Core and Highway Commercial Retail Inventory

(Source: FBM with imagery from Google and data from the Town of East Gwillimbury)

### Retail Category

- Grocery & Convenience Retail
- Comparison & Specialty Retail
- Personal Services
- Professional & Financial Services
- Full Service Restaurants & Pubs
- Quick Service Restaurants & Cafés
- Arts, Leisure & Entertainment
- Automotive
- Medical & Wellness
- Public Service/Institutional
- Vacant Retail Frontage
- Residential



### Context Map

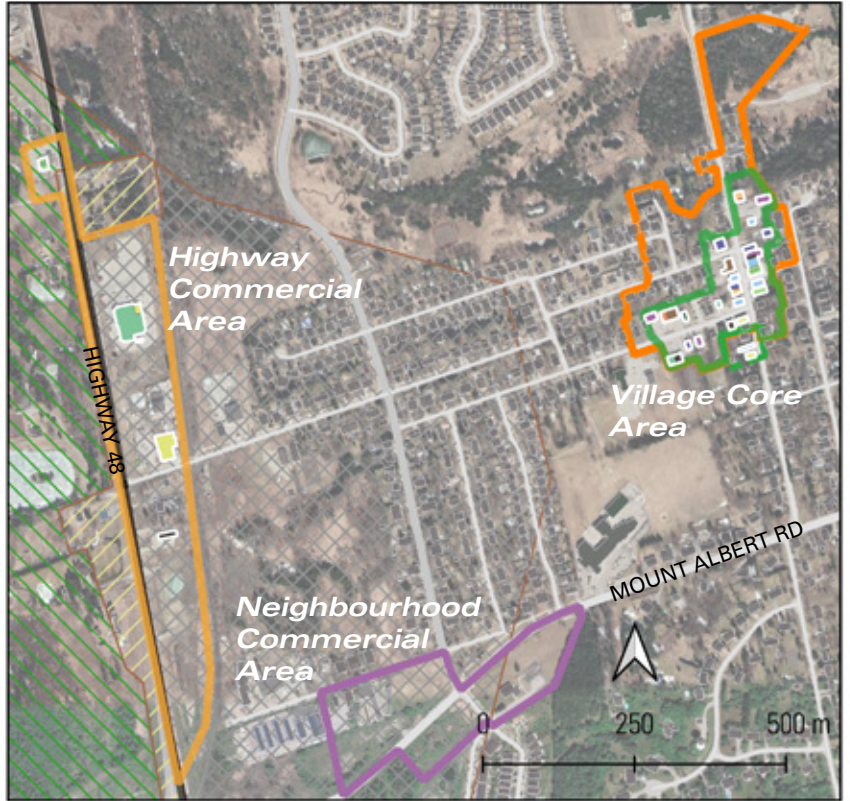
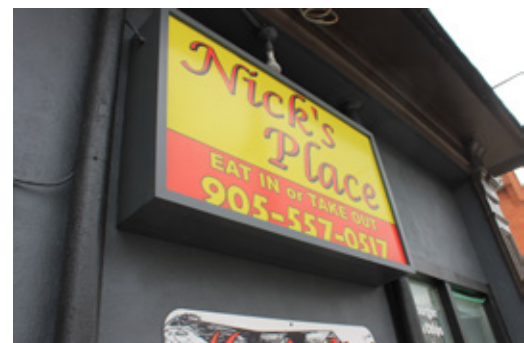


Figure 5-3. Mount Albert Representative Commercial Retail Imagery

(Source: FBM Fieldwork)





**Figure 5-4. Notable Vacancies in Mount Albert**

(Source: FBM Fieldwork)



As will be documented in Section 6, the current amount of local retail spending is not being captured well in Mount Albert and there will be pressures to provide more retail floorspace capable of attracting some new-to-market retailers who may not be looking at the Village Core, but rather along the highway and near the Foodland or Home Hardware. The reality however, is that these options are limited because of servicing limitations and the Oak Ridges Moraine Conservation area.

The following breaks out the Mount Albert Village Core, Highway Commercial area and Neighbourhood Commercial area, given the uniqueness of each area and since the Village Core is an essential part of the concurrent an on-going Downtown Revitalization Strategy.

### 5.2.1 Mount Albert Village Core Node

Mount Albert's Village Core node includes the Downtown or main street area at the intersection of Centre Street and Main Street where the majority of businesses in Mount Albert are located (**Figure 5-2**).

#### Inventory

The overall inventory for the Village Core area, as detailed in **Table 5-1** reveals a total ground level business inventory comprising 64,221 sf. If excluding Medical & Wellness, Professional Services, Auto Service & Vacant space from this inventory, the net occupied retail inventory in the Village Core is 29,513 sf or 46% of the total ground level business floorspace inventory.

#### Vacancy

The Village Core retail vacancy sits at 6.9% (4,483 sf), allocated across a number of smaller downtown vacant spaces as visually shown in **Figure 5.4**.

Notable vacancies in the node include:

- » 61 Main Street (beside Main Milk Convenience)
- » 73 & 75 Main Street
- » 19157 Centre Street

The current vacancy level is not indicative of demand in the local market, but rather the lack of newer quality spaces or those with enhanced or improvement storefront or streetfront presence. The latter is something that may well be an outcome of the concurrent Downtown Revitalization Strategy. Additionally, the Milk Convenience vacancy is in the process of being refitted for a potential tenant prospect. Therefore, in reality, the vacancy in the Village Core is negligible.

The recent approval and now-under-construction of the Village Green will add an additional approximately 10,000 sf of commercial space to the Village Core area. This figure is not captured in the vacancy nor inventory, but is reflective of the evident demand in the local market for additional local services, particularly medical and wellness.

In looking to manage vacancies, and as the community prepares for growth, any new development should be very targeted for uses that have the ability to create benefit for the greater community good rather than impacting existing businesses. One such example would be to work with existing Village Core businesses who may already be looking for larger spaces and for whom new development might be more compatible.

The Village Core area should continue to be a marketing priority for attracting local businesses as well as finding opportunities for small infill development along Main Street and Centre Street.

Overall, vacancy is not a significant concern, but equally speaking succession planning for existing family business should be encouraged as an opportunity where it is often the case in smaller markets that businesses and buildings tend to be for sale rather than particular spaces for lease.

### **5.2.2 Mount Albert Highway Commercial Node**

Mount Albert's Highway Commercial node includes the businesses along the western boundary of the community with frontage along Highway 48 (**Figure 5-2**).

#### ***Inventory***

The overall inventory for the Highway Commercial Node, as detailed in **Table 5-1** reveals a total ground level business inventory comprising 48,559 sf. With the exception of the Mount Albert Veterinary Hospital, all of this floorspace is retail in nature and benefits substantially from the highway traffic which has local commuter flow as well as weekend visitor volumes.

#### ***Vacancy***

The Highway Commercial retail vacancy sits at 6.6% (3,408 sf), which represents the building formerly occupied as a showroom for the Village Green Development at 19103 Highway 48. The area at and around this location and along the south side of Highway 48 represents the only potential area for commercial development, pending the provision of full services to the lands.

Opportunities for other infill development along Highway 48 are most prominent on the Foodland Parking lot where consideration for a freestanding LCBO would be logical as it would allow the Foodland to re-merchandise approximately 3,000 sf of internal floorspace for more grocery offering, while increasing the overall opportunity for LCBO.

The current challenge along Highway 48 is the lack of full infrastructure services and the Oak Ridges Moraine, which limits any large scale commercial development. This will result in continued sales outflow, as well as the commensurate environmental impact from vehicles leaving the community as opposed to an increased commercial offering for the local population base. On the flip side however, growth of local entrepreneurial activity should be a benefactor where recognized brands are less likely to be attracted to the community because of the above limitations.

### **5.2.3 Mount Albert Neighbourhood Commercial Node**

Mount Albert's Neighbourhood Commercial Node straddles Mount Albert Road and has the potential to serve as a gateway to the community. This node is largely undeveloped with the exception of Kytech Machine Works Ltd (non-retail use) and light industrial uses to the northwest. Hillside Church is the only institutional use within this node. Given the lack of retail uses in this node, an inventory was not compiled, but it does not discount the opportunity for small scale local mixed-use development formats from being developed in locations with proximity to residential neighbourhoods.

## **5.3 Retail Space Per Capita**

Utilizing data from FBM's extensive retail inventory tabulation in conjunction with Demographic Data provided by Statistics Canada and Manifold Data Mining Inc., the approximate retail space per capita ratio has been estimated for Mount Albert's retail market. As a starting point, **Figure 5-5** depicts the Target Retail Space Per Capita, which provides a baseline for determining how much retail per capita is best suited to a community, according to its population size.

How much retail a community is able to support is crucial for determining future land use plans: a local government wants to have as much evidence as possible to demonstrate to potential retailers the opportunity and untapped potential in their community. Per Capita ratios can also be used as a methodology to gauge future demand, if and as population growth occurs.

Mount Albert is unique in that it is situated in the middle of an area surrounded by largely agrarian and undeveloped lands for an approximate 15-minute drive or more. Additionally, the local community has continued to develop with high value residential, yet the local commercial offering has not kept up with that pattern or pace of residential development. This has created an imbalance of commercial offering for the community. This imbalance has benefited communities like Newmarket or Uxbridge, but not Mount Albert or East Gwillimbury.

By prioritizing the Downtown Revitalization, as well as benefiting from the limitations for not being able to accommodate larger retail developments, Mount Albert can be the beneficiary of establishing itself as a hotbed for local business activity.

Seldom do rural or isolated communities exhibit the strong population growth, high incomes and large households like Mount Albert, combined with natural development limitations.

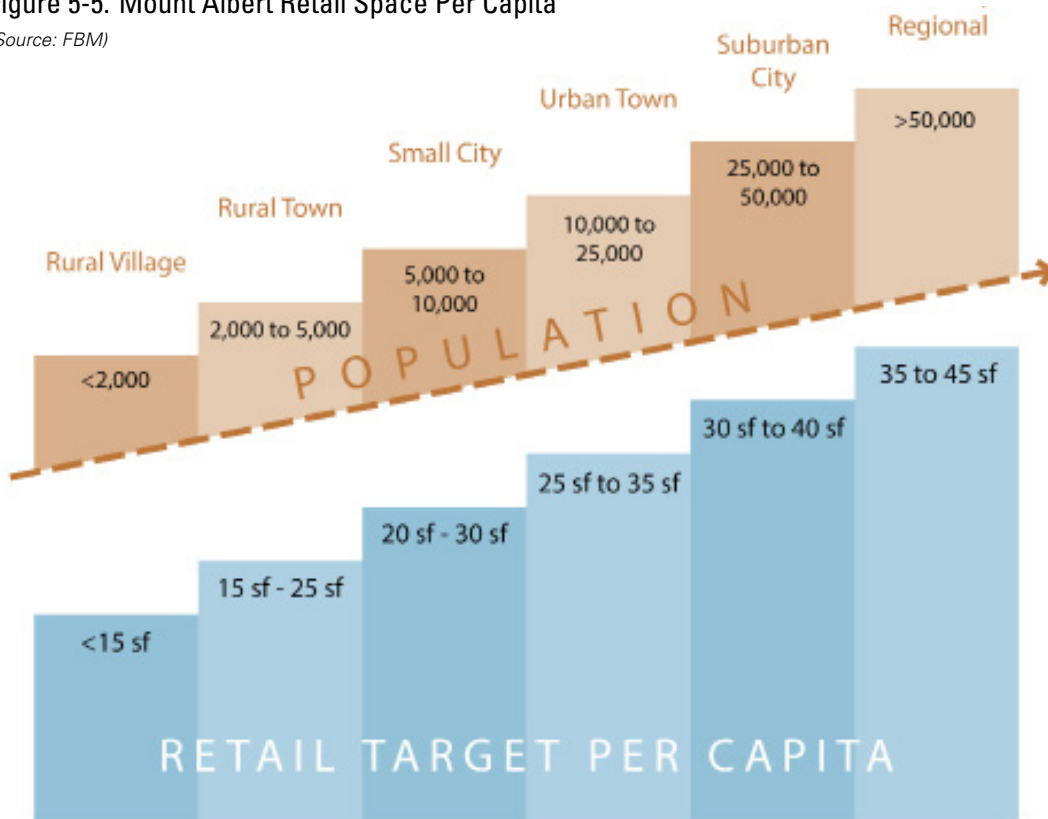
These attributes should be harnessed and promoted as part of Mount Albert's unique selling proposition to grow its small local business culture.

The current retail space per capita, as calculated by FBM takes into account a trade area beyond simply Mount Albert's geopolitical boundary, by using a drive time analysis and other criteria to form the retail trade (as noted previously).

Figure 5-5 is meant to illustrate a general indication of retail opportunity and representation for communities, with an understanding that some variations do exist. Many location specific factors contribute to an areas overall retail market, and cannot be addressed in a general chart or graph. Such locational factors can include specialized demands of a community, or unique characteristics that warrant certain retail traits.

Figure 5-5. Mount Albert Retail Space Per Capita

(Source: FBM)



Mount Albert's per capita retail ratio 7.48 sf. This figure is calculated by dividing the retail inventory (74,124 sf) by the trade area population (9,904). Therefore  $74,124 / 9,904 = 7.48$  sf per capita. This means the current retail inventory relative to the trade area it serves is largely negatively impacting Mount Albert whereby it presently functions as a "rural village" which is disconnected from how the community in reality functions. There are though signs for growth to bring more balance to the local marketplace.

Retail space per capita is an industry measure of the ratio of retail space against a city/town's population. An examination of retail space per capita provides a general indication of whether a market is under-retailed or over-retailed.

In most urban markets in Canada and the United States, a typical benchmark for ALL retail space per capita is in the range of 30 sf to 40 sf<sup>1</sup>.

This figure can be misleading however as this accounts for organized shopping center space only in centers larger than 10,000 sf. Therefore, when factoring in all retail including street front retail, urban markets can be higher than this figure.

It also means that rural markets, since they don't have the same type of retail infrastructure need to factor all space into their equation, since they are predominantly main street and multiple property owner/business owner driven.

Using **Figure 5-5** as a benchmark for retail space in communities and for a comparable market like Mount Albert which is somewhat rural yet has a strong recent history of new residential development, this figure should fall in the 15 to 20 sf per capita range.

Accordingly, the estimated retail space per capita ratio for Mount Albert and its 9,904 person retail trade area is in the range of only 7.5 sf/capita if not including non-retail street front space like Medical & Wellness and Professional & Financial Services.

The per capita figure illustrates that the inventory for Mount Albert is very low and should have more retail space than it does to day. Mount Albert should target a retail space per capita ratio of 15 to 20 sf/capita, as this would ensure a stable growth into the future, without necessarily creating an over-retailed environment or excessive sales impact on the Village Core. Often times by creating a retail environment that keeps more dollars locally can benefit even small local nodes like the Village Core as it keeps more people and "eyes" in the area.

The retail inventory in terms of floor space and vacancies suggest that demand may not be robust, but that Mount Albert should be very targeted in its approach to obtaining the most compatible retail businesses to fit within vacant spaces while accommodating infill and small scale redevelopment opportunities.

Mount Albert's Village Core is not of a large enough size that it would be highly susceptible to targeted future retail growth in the periphery. Rather, as the Revitalization Strategy unfolds, the timing is ideal for the Village Core to redefine its future now before future retail enters the market elsewhere.

This is yet another reason why East Gwillimbury should review its current allocation and locations for future commercial land to ensure that development is directed in the most appropriate areas in terms of scale and possible impact.

Since much of the future demand and tenant prospects are likely to be local entrepreneurs or small franchises, they will be looking for quality tenant ready spaces or new development. Both Holland Landing and Mount Albert should recognize this reality and ensure that landlords or developers take advantage of opportunities to upgrade, renovate or redevelop properties to create an attractive environment for retention and attraction.

## 5.4 Holland Landing Summary

The full retail and business mix inventory for Holland Landing is summarized in **Table 5-2** and **Figure 5-6** to **Figure 5-9**. See **Appendix B** for detailed inventory tables.

Holland Landing has a total ground level business inventory (**Figure 5-6**) of approximately 60,398 sf (**Table 5-2**). If excluding Medical & Wellness, Professional Services & Vacant space from this inventory, the net occupied retail inventory in Holland Landing is 32,197 sf or 53% of the total ground level business floorspace inventory.

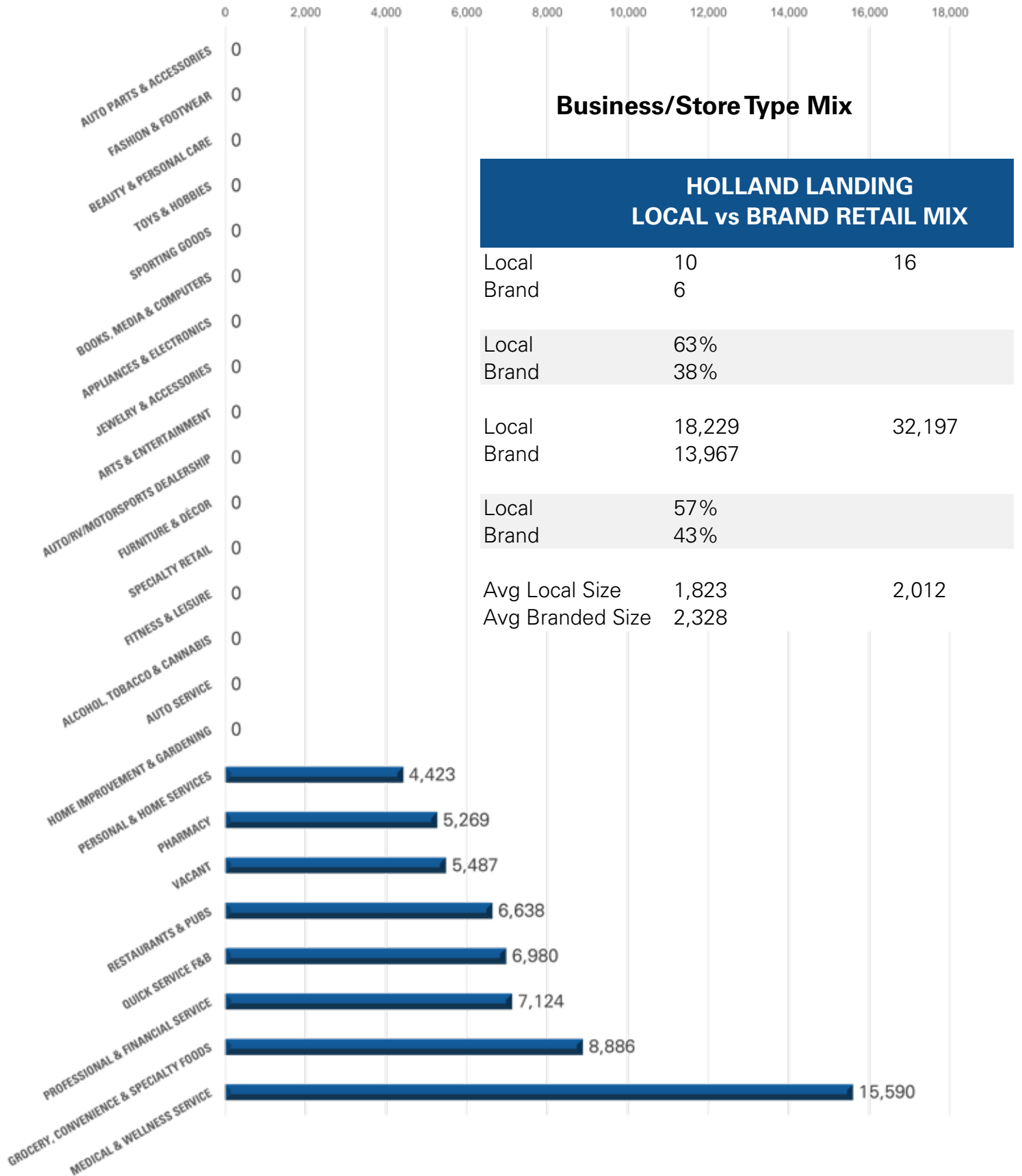
Holland Landing's location as a community places it on the fringe of Newmarket's extensive commercial and retail offering and as such it is not expected that Holland Landing will function more than as a strong neighbourhood node.

This observation is evident in the fact that the largest floorspace contributor is Medical and Wellness services at over one quarter of the total business floorspace (15,590 sf). This service base is further supported by a Pharmacy inventory of almost 5,300 sf. Consequently, the focus of retail development in Holland Landing is expected to continue to be in local-serving neighbourhood nodes.

<sup>1</sup> International Council of Shopping Centres

Figure 5-6. Holland Landing Commercial Retail Inventory by Category and Business/Store Type Mix

(Source: FBM)



**Table 5-2. Holland Landing Commercial Retail Inventory**

(Source: FBM)

MERCHANDISE CATEGORY	HOLLAND LANDING FLOORSPACE (sq. ft.)	HOLLAND LANDING MIX (%)
AUTO PARTS & ACCESSORIES	0	0.0%
FASHION & FOOTWEAR	0	0.0%
BEAUTY & PERSONAL CARE	0	0.0%
TOYS & HOBBIES	0	0.0%
SPORTING GOODS	0	0.0%
BOOKS, MEDIA & COMPUTERS	0	0.0%
APPLIANCES & ELECTRONICS	0	0.0%
JEWELRY & ACCESSORIES	0	0.0%
ARTS & ENTERTAINMENT	0	0.0%
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%
FURNITURE & DÉCOR	0	0.0%
SPECIALTY RETAIL	0	0.0%
FITNESS & LEISURE	0	0.0%
ALCOHOL, TOBACCO & CANNABIS	0	0.0%
AUTO SERVICE	0	0.0%
HOME IMPROVEMENT & GARDENING	0	0.0%
PERSONAL & HOME SERVICES	4,423	7.3%
PHARMACY	5,269	8.7%
VACANT	5,487	9.1%
RESTAURANTS & PUBS	6,638	11.0%
QUICK SERVICE F&B	6,980	11.6%
PROFESSIONAL & FINANCIAL SERVICE	7,124	11.8%
GROCERY, CONVENIENCE & SPECIALTY FOODS	8,886	14.7%
MEDICAL & WELLNESS SERVICE	15,590	25.8%

Holland Landing’s retail vacancy is 9% (5,487 sf) and this is predominantly in a freestanding building at the neighbourhood area at 19439 Yonge Street. Since much of the regional-scale commercial activity is less than 5 minutes drive time away from Holland Landing, it is expected that backfilling of existing retail spaces would be by quick service food & beverage or more medical and wellness services.

Unlike Mount Albert, and because of how spending is directed more towards Newmarket, the estimated retail sales productivity in Holland Landing is lower at an estimated \$279 per sf.

<b>TOTAL</b>	<b>60,398</b>	
<b>Retail Floorspace (excluding Auto Service, Medical &amp; Wellness, Professional Services, Public Service &amp; Education, &amp; Vacant)</b>	<b>32,197</b>	<b>53%</b>
<b>Total Estimated Retail Sales (excluding Professional, Finance, Public Service &amp; Vacant)</b>	<b>\$8,993,656</b>	
<b>Estimated Retail Sales Productivity (\$/sf)</b>	<b>\$279</b>	

Figure 5-7. Holland Landing Village Core Commercial Retail Inventory

(Source: FBM with imagery from Google)

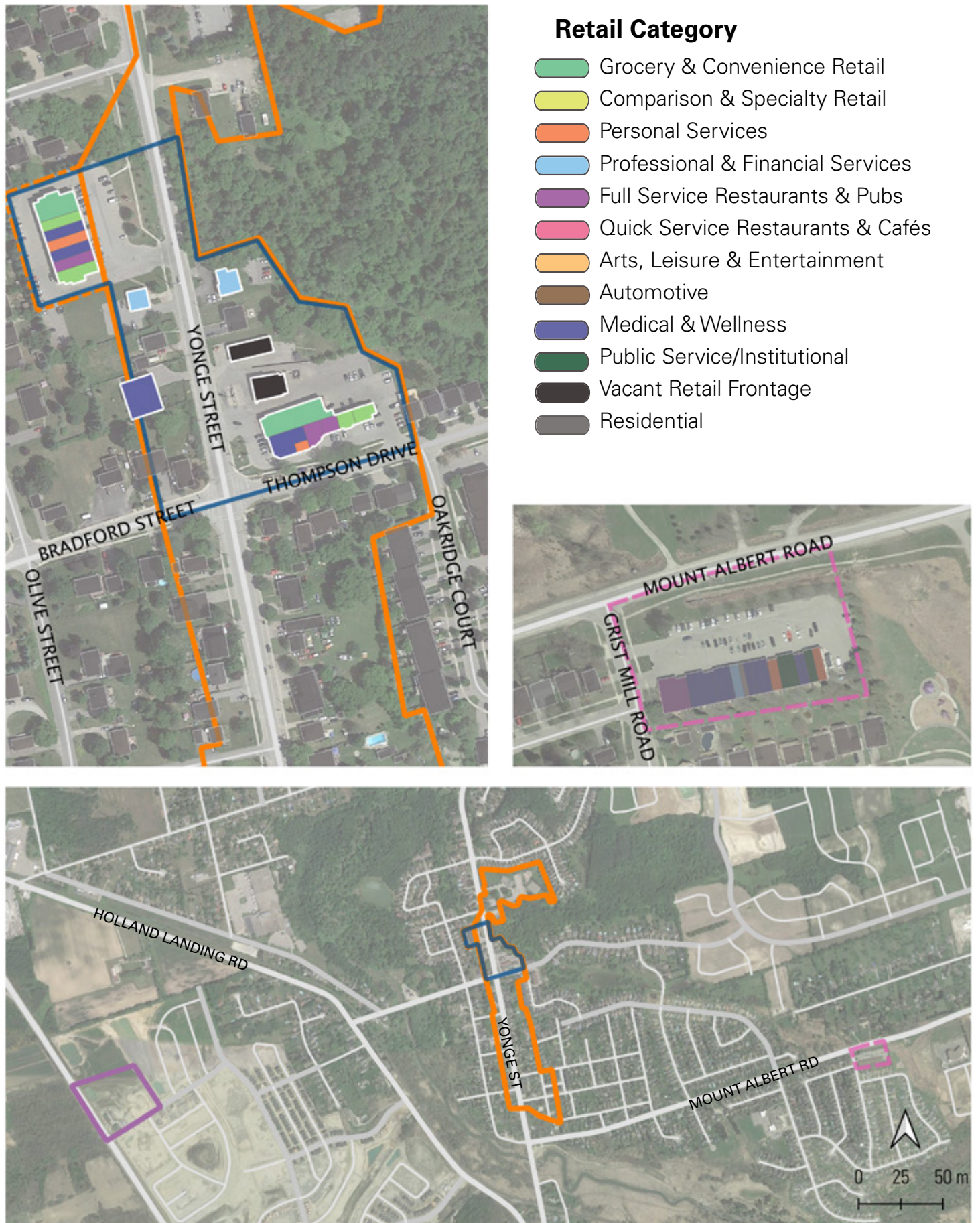


Figure 5-8. Holland Landing Representative Commercial Retail Imagery

(Source: FBM Fieldwork)



Figure 5-9. Notable Vacancies in Holland Landing

(Source: FBM Fieldwork)





# 6.0 Resident and Consumer Survey

## 6.1 Introduction

As a supplemental part of this Commercial Gap Analysis, a survey was conducted by CIMA+ with supplemental analysis provided by Deloitte for the purposes of this Retail Gap Analysis, with an understanding that the revitalization strategy is only focused on streetscaping and infrastructure realignment.

The purpose of this survey was to obtain feedback from community members from within Mount Albert, as part of the concurrent Downtown Revitalization Strategy, as well as from the surrounding areas, if applicable. The aim of the study was to determine the use of local retailers and any gaps that exist in local shops or services, while at the same time gather input on the needs, wants, likes and dislikes for the downtown revitalization program.

The survey was conducted via an online open-URL survey shared widely with community members in through a number of websites and organizations. These included:

- Town of East Gwillimbury website
- East Gwillimbury Chamber of Commerce website and Facebook page;
- Mount Albert Community Concerns (Facebook)

The survey was conducted over the period of May 27th to August 2nd, 2022 and gained 189 completed responses. Respondents were split into residents of Mount Albert and those residing outside of Mount Albert and asked a specific set of questions about uses and attitudes towards retailers the area, as well as general revitalization questions. From the total responses, 180 respondents were residents of Mount Albert while 9 were from outside of Mount Albert. Among the resident responses, 4% were also business owners in Mount Albert. The majority of residents responded with their age between 35-44.

The summary provided here focuses solely on those responses pertaining to this Retail Gap Analysis Study. The full responses to the questions is provided in **Appendix C**.

## 6.2 Key Findings

The following provides a summary of the key findings from the survey.

- » Residents reported the main reason to visit downtown Mount Albert to be due to personal services such as banking and postal office.

- » Residents visited downtown Mount Albert frequently, with over half reporting two or more times per week.
- » When asked about their top 3 favorite things about downtown Mount Albert, Residents stated to enjoy **Restaurants**, the atmosphere of a **'small town' community**, and close **proximity to their personal residence**.
- » A number of priorities were identified in 2014 as part of the Mount Albert Revitalization strategy. Residents were asked to rank these priorities in accordance to their importance. The top 3 still highly-rated priorities were:
  1. Improvements to building exteriors and storefront appearance
  2. streetscaping ((landscaping plantings, street furniture, public art)
  3. enhancing marketing of downtown businesses.
- » Top 3 most often mentioned improvements sought in downtown were:
  1. community involvement
  2. attracting new businesses
  3. creating a more attractive look to buildings.
- » Respondents were asked which new businesses, shops or services they would like to see, majority of the individuals responded with bakeries.
- » Residents were noted to shop weekly near their primary residents and were see to travel to Newmarket for daily conveniences.
- » Individuals were prepared to travel 10-30 km away for daily conveniences and preferred to shop in Newmarket (66%) for larger purchases, while shopping weekly in Mount Albert.
- » Residents also used shops and services in other parts of East Gwillimbury on a weekly basis. Their primary reason for shopping outside of Mount Albert was the availability of goods and services.
- » Top 3 primary reasons that residents noted they shopped at East Gwillimbury was for:
  1. availability of goods and services (27%)
  2. availability of specific retailer (24%)
  3. cost of goods or services (20%).

# 7.0 Market Demand Analysis

## 7.1 Introduction

The following section will assess the amount of supportable retail floorspace in Mount Albert justified by the present Trade Area and premised on estimates of the current market share of total available retail spending by the existing trade area. This process will forecast demand in terms of both floorspace (square footage) and land (acres) to provide a basis for future land use planning in East Gwillimbury and specifically for Mount Albert.

## 7.2 Retail Floorspace Demand

In most typical urban or suburban market scenarios, forecasting retail demand would largely be predicated and have a close correlation with population growth and the inherent opportunities that would naturally come from a growing trade area. Mount Albert is a community that upon first glance might be seen as a rural community with limited growth, but in fact the community has experienced significant residential development against which retail growth has not kept pace. With trade area population growth rate forecasts at just under 2.0% per annum over the next decade, Mount Albert is exhibiting strong signs for unmet, near term retail opportunities, particularly in the Village Core area.

With this understanding of the retail market dynamic and population growth and the results of the consumer survey, the key to forecasting new floorspace demand must look at the notion of achieving a greater market share of the existing spending for categories that represent strength today. In particular, as will be shown, this greater market share will need to apply to the local and surrounding trade area, given what seems to be a below average retention of household retail spending.

From FBM's extensive analysis of the current retail inventory, retail sales productivity estimates were applied to each of the respective categories to provide an indication of the current estimated retail sales that Mount Albert's retail businesses are generating.

By dividing the total Trade Area retail spending potential into the category-specific retail sales productivity estimates (measured in \$/sf), the estimated market share figures could be calculated from which a measure of supportable floorspace can be determined.

### ***Demand Based on Existing Market Shares***

The results of this approach is shown in **Table 7-1** which quantifies the total estimated market share of retail spending in the Mount Albert Trade Area. **Table 7-1** reveals that Mount Albert's residents currently garner only of the available Trade Area spending (20.5%). This means that almost 80% of the resident Trade Area spending is spent outside of the community. This is considered a very low an unhealthy level of sales retention; unhealthy for businesses as well as unhealthy for sustainability as this means residents are driving 15+ minutes for most of their day to day goods and services.

The estimated market shares reveal that a category such as Grocery & Specialty Foods is only capturing 39% of the Trade Area spending, where in reality this figure should be more in the range of 60% to 70%.

The current demographic composition of the community with respect to population growth, household income and age distribution further suggest a definite disconnect between the amount of retail in Mount Albert and the available market which it should serve.

Not unexpectedly, Fashion-type categories exhibit almost non-existent retail spending in Mount Albert. Books & Media, Sporting Goods and Toys & Hobbies also have near zero sales retention. It is evident that most of this spending is drawn to the larger markets of Newmarket, Richmond Hill or Markham, or smaller suburban communities like Uxbridge or Keswick. Added to this, the role of online retail sales is also significant in these above categories, as it is for Home Furniture & Decor, which is also a low spending retention category.

Typically, the way for a community like Mount Albert to capture more of this spending would likely be through the introduction of a mid-size General Merchandise retailer like a Giant Tiger or Canadian Tire, which tends to carry all of these product offerings. However, it is not likely these brands will locate any time soon, therefore any smaller local retailer would be well-advised to ensure as broad an offering as possible at a value price point to ensure concept marketability.

To illustrate the impact on future demand for Mount Albert, **Tables 7-2 and 7-3** illustrate the amount of future demand that would be possible solely based on the status quo of maintaining the current market shares.



Table 7-1. Estimated Market Share Retention of Retail Spending in Mount Albert 2021

(Source: FBM & Manifold Data Mining Inc)

Retail Spending by Merchandise Category		2021			
		MOUNT ALBERT Sales Productivity (\$psf)	MOUNT ALBERT Estimated Market Share	Market Share Sales \$	Current Retail Floorspace (sf)
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	\$411	39%	\$11,781,718	28,644
	Pharmacy	\$390	31%	\$900,414	2,309
	Alcohol, Tobacco & Cannabis	\$439	26%	\$1,316,250	3,000
	Personal & Home Services	\$114	5%	\$272,156	2,391
	Health Care & Medical Services				
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$0	0%	\$0	-
	Jewelry & Accessories	\$0	0%	\$0	-
	Beauty & Personal Care	\$0	0%	\$0	-
	Furniture & Décor	\$222	5%	\$222,438	1,000
	Appliances & Electronics	\$0	0%	\$0	-
	Home Improvement & Gardening	\$219	18%	\$2,848,829	12,986
	Books, Media & Computers	\$0	0%	\$0	-
	Sporting Goods	\$0	0%	\$0	-
Leisure, Recreation & Entertainment Goods/Services	Toys & Hobbies	\$0	0%	\$0	-
	Specialty Retail	\$162	8%	\$282,565	1,739
	Quick Service F&B	\$500	37%	\$3,679,249	12,197
	Restaurants & Pubs	\$323	35%	\$2,374,024	7,357
Automotive Goods (excluding repair)	Arts & Entertainment	\$0	0%	\$0	-
	Fitness & Leisure	\$142	28%	\$355,469	2,500
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$142	0%	\$0	-
	Auto/RV/Motorsports Dealership	\$0	0%	\$0	-
	Auto Fuel				
<b>TOTAL RETAIL CATEGORIES ONLY</b>		<b>\$324</b>	<b>16.1%</b>	<b>\$24,033,112</b>	<b>74,123</b>
<b>TOTAL (excluding Auto)</b>		<b>\$324</b>	<b>20.5%</b>	<b>\$24,033,112</b>	<b>74,123</b>

The result of this forecast reveals that by 2031, Mount Albert could support an additional new 18,912 sf of retail space (excluding Auto categories). The combined categories that would be most notable in this would be Grocery & Conveniences at 13,947 sf and Home Improvement & Gardening at 5,700 sf.

These two categories are interesting in that both the Foodland and Home Hardware are in positions where they would like to expand. In the case of Foodland, they could add another 3,000 sf of grocery if the LCBO were relocated on-site.

Similarly, if the Home Hardware did not have constraints placed by servicing, they too may consider an expansion of their building. Conversely, the Restaurant sector, which has been hit hard by the COVID-19 pandemic is not illustrative of as much demand based on current market shares, which are

relatively low at 37% for Quick Service F&B and 35% for Restaurants & Pubs.

Forecasts to 2031 that are premised on conservative, maintained rates of market share reveal limited demand for new floorspace. Given the nature of residential development in the area, it is highly unlikely that there won't be demand for more food and beverage offering and therefore the opportunity for greater retention of spending does exist.

Referring to **Table 7-4**, the land needs implications of the status quo over time are relatively minimal (1.2 acres total) and further confirms that demand is most likely to be accommodated in the Village Core as Mixed-Use MU-1 zoning or as Neighbourhood Commercial C4. It is clearly evident based on overall residential development as well as the development of Village Green that the status quo is not realistic.



**Table 7-2. Estimated Retail Demand by 2031 Based on Maintaining Current Market Share**

(Source: FBM & Manifold Data Mining Inc)

Retail Spending by Merchandise Category	2031				2021 to 2031		
	MOUNT ALBERT Sales Productivity (\$psf)	MOUNT ALBERT Estimated Market Share	Market Share Sales \$	Current Retail Floorspace (sf)	Current Retail Inventory (sf)	Total Cumulative NEW Floorspace Demand (sf)	
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	\$411	39%	\$17,518,257	13,947	28,644	13,947
	Pharmacy	\$390	31%	\$1,284,399	985	2,309	985
	Alcohol, Tobacco & Cannabis	\$439	26%	\$1,881,116	1,287	3,000	1,287
	Personal & Home Services	\$114	5%	\$380,581	953	2,391	953
	Health Care & Medical Services						
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$0	0%	\$0	-	0	0
	Jewelry & Accessories	\$0	0%	\$0	-	0	0
	Beauty & Personal Care	\$0	0%	\$0	-	0	0
	Furniture & Décor	\$222	5%	\$312,572	405	1,000	405
	Appliances & Electronics	\$0	0%	\$0	-	0	0
	Home Improvement & Gardening	\$219	18%	\$4,099,846	5,703	12,986	5,703
	Books, Media & Computers	\$0	0%	\$0	-	0	0
	Sporting Goods	\$0	0%	\$0	-	0	0
Leisure, Recreation & Entertainment Goods/Services	Toys & Hobbies	\$0	0%	\$0	-	0	0
	Specialty Retail	\$162	8%	\$405,966	759	1,739	759
	Quick Service F&B	\$500	37%	\$5,306,072	-1,587	12,197	-1,587
	Restaurants & Pubs	\$323	35%	\$3,428,545	3,268	7,357	3,268
Automotive Goods (excluding repair)	Arts & Entertainment	\$0	0%	\$0	0	0	0
	Fitness & Leisure	\$142	28%	\$486,255	920	2,500	920
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$142	0%	\$0	0	0	0
	Auto/RV/Motorsports Dealership	\$0	0%	\$0	0	0	0
	Auto Fuel						
<b>TOTAL RETAIL CATEGORIES ONLY</b>	<b>\$348</b>	<b>16.6%</b>	<b>\$35,103,610</b>	<b>26,639</b>	<b>74,123</b>	<b>26,639</b>	
<b>TOTAL (excluding Auto)</b>	<b>\$348</b>	<b>21.0%</b>	<b>\$35,103,610</b>	<b>26,639</b>	<b>7,727</b>	<b>18,912</b>	

### Demand Based on Increased Market Shares

Since the status quo is not realistic nor desirable for Mount Albert, an alternative direction for defining retail opportunity lies in noticeably increasing the overall market share of sales, realizing that Newmarket and to a lesser degree Uxbridge will still continue to be notable factors in attracting spending in the Department Store Type Merchandise (DSTM) categories.

Tables 7-5 and 7-6 provide a forecast of future demand in terms of floorspace and land based on applying an increase from 20% overall market share across all categories to almost 37% by 2031. While the reality may dictate that some categories may not increase their market share significantly, while others could well seek to increase more noticeably, the overall impact of the increase is that which is considered important in this analysis.

Table 7-3. Estimated Retail Demand Summary 2021 to 2031 Based on Maintaining Current Market Share

(Source: FBM)

Retail Merchandise Category	2021	2026	2031	2021 to 2031	
	Current Floorspace Supply (sf)	Cumulative NEW Floorspace Demand (sf)	Cumulative NEW Floorspace Demand (sf)	Current Retail Inventory (sf)	Total Future NEW Demand (sf)
Convenience & Day-to-Day Goods/Services	36,344	9,391	17,171	36,344	17,171
Comparison or Department Store Type Merchandise (DSTM)	15,725	3,560	6,867	15,725	6,867
Leisure, Recreation & Entertainment Goods/Services	22,054	-1,011	2,601	22,054	2,601
Automotive Goods (excluding repair)	0	0	0	0	0
<b>Total (sf)</b>	<b>74,123</b>	<b>11,940</b>	<b>26,639</b>	<b>74,123</b>	<b>26,639</b>

Table 7-4. Estimated Land Needs Summary 2021 to 2031 Based on Maintaining Current Market Share

(Source: FBM)

Retail Node	Total 10-yr New Demand by 2031 with CURRENT Market Share (sf / acres)		MOUNT ALBERT			
	% Share of Demand	Share of Demand (sf)	Land Utilization Factor	Net Land Area (acres)		
<b>Total</b>	<b>26,639</b>	<b>1.2</b>	<b>100%</b>	<b>26,639</b>	<b>0.49</b>	<b>1.2</b>
Mixed Use MU-1	40%	10,656	0.7	0.3		
Community Commercial C3	20%	5,328	0.3	0.4		
Neighbourhood Commercial C4	40%	10,656	0.5	0.5		

If the retained market shares presented previously in **Table 7-1** were to increase to more realistic levels for a community of Mount Albert's size with the amount of new residential development, income levels and household sizes, the total demand by the year 2031, combining population growth with spending growth and increased retail sales market share capture could result in incremental new space of approximately 134,553 sf, or more than 100,000 sf than if current market shares are maintained.

Although future demand shows a noticeable bump from the current market share scenario, it is important to note that this demand does not necessarily have to be accommodated. Rather, the other way to view an increasing market share is that existing businesses and some new additions could perform at higher levels of productivity which would lead to more successful businesses in the community.

The future merchandise offering in Mount Albert over the next decade should therefore be ideally premised around bolstering the day-to-day convenience offering as well as complementary basic comparison or DSTM type merchandise including personal and home fashion. Similarly, there is an opportunity to boost the amount of Quick Service Food & Beverage establishments both in the Village Core and possibly along Highway 48, pending some infrastructure servicing capacity improvements. Based on current market voids and survey responses, immediate "low hanging fruit" target branded retailers along Highway 48 could include Tim Hortons or Starbucks drive thru concepts. In the Village Core, opportunities exist for more local businesses that could support the critical mass and awareness of an existing business like Lighthouse Cafe.

As summarized in **Table 7-7**, the amount of demand would suggest a need for approximately 5.7 acres of potential land. Of this 5.7 acres, the Mixed-Use MU-1 lands could require approximately 2.2 acres as part of the Downtown Revitalization Strategy where parking would be provided on-street. Similarly, the Neighbourhood C4 lands could need 2.5 acres of small development not necessarily premised on surface parking, but rather a higher site building utilization and local pedestrian connectivity. Overall land needs are not as big a factor as identifying the business types that fill the voids in an effort to stem the current retail sales outflow and support an active and vibrant community retail scene.

The goal should also be to ensure that existing businesses can increase their market share and resulting sales and profitability while accommodating new businesses in the local market for greater overall market penetration.

Retail growth need not always be about adding new retail, but creating an environment for stronger retention and performance of existing businesses. This latter statement is important for the Village Core area, but also does not discount the opportunity to increase the critical mass and critical mix of businesses.

The retail demand forecasts suggest that there healthy demand for future retail and there are tenants capable of improving the sales retention and attraction in Mount Albert, if the appropriate land and servicing is made available.

Mount Albert has a unique opportunity where local entrepreneurial activity can be promoted in an environment in which competition from brands is limited and not likely over the foreseeable future. Add to this the fact that local demographics are represented by healthy population growth, high incomes, large household sizes and a limited offering. When applied in concert with the ongoing Downtown Revitalization, there is no reason why more local businesses as well as existing businesses cannot thrive as part of a retail collective and destination.

The single biggest challenge for retail in Mount Albert, and specifically in the Village Core is a lack of awareness of new residents about current businesses. Therefore, a major component for increasing market share is to increase the awareness of new residents whose current mobility patterns (by vehicle) often take them away from the Village Core leading to an "out-of-sight, out-of-mind" mentality.

Local businesses should be much more proactive using modern and more traditional means of marketing. This marketing should go hand-in-hand with the current revitalization efforts to reinforce that change is happening and that businesses are open.

The municipality should also look at improving local directional signage and work towards creating a consistent brand for the Village Core, which currently suffers from an identity conflict; is it a Village, Downtown, Main Street or Town Centre? From the perspective of the study, it is recommended that Mount Albert focus on a Village identity.

In the absence of any noticeable commercial changes and the perception that the Village Core has not evolved in tandem with the changing development patterns and local demographics, the result has been an easily overlooked node.

Mount Albert would be well served by promoting compact and clustered commercial growth. Future land needs at approximately 5 acres is a 10-year planning window, but East Gwillimbury should look to ensure future land allocation is appropriately identified, sized and serviced to accommodate growth that may very well exceed the conservative forecasts presented in this study, but not in a way that requires encroachment into the Oak Ridges Moraine Conservation lands.

Mount Albert may not have the ability to significantly curb its sales outflow, but it can and should strive for a better retention of local spending than currently exists.

In summary, critical findings of future demand suggest:

- » Increased market share of spending is critical
- » Improve servicing on Highway 48 for possible small scale infill development adjacent to Home Hardware and Foodland.
- » Improve local signage and marketing awareness of Village Core businesses
- » Establish a familiar brand for the Village Core
- » Promote Mount Albert as a complete community
- » Work with retailers to find spaces that maximize their floorspace utilization



Table 7-5. Estimated Retail Demand by 2031 Based on Increasing Current Market Shares

(Source: FBM)

Retail Spending by Merchandise Category	2031				2021 to 2031		
	MOUNT ALBERT Sales Productivity (\$psf)	MOUNT ALBERT Estimated Market Share	Market Share Sales \$	Current Retail Floorspace (sf)	Current Retail Inventory (sf)	Total Cumulative NEW Floorspace Demand (sf)	
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	\$410	60%	\$26,923,891	37,024	28,644	37,024
	Pharmacy	\$390	50%	\$2,046,675	2,939	2,309	2,939
	Alcohol, Tobacco & Cannabis	\$440	60%	\$4,264,348	6,692	3,000	6,692
	Personal & Home Services	\$130	20%	\$1,474,682	8,953	2,391	8,953
	Health Care & Medical Services						
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$200	10%	\$1,107,797	5,539	0	5,539
	Jewelry & Accessories	\$300	10%	\$168,837	563	0	563
	Beauty & Personal Care	\$250	10%	\$406,786	1,627	0	1,627
	Furniture & Décor	\$225	20%	\$1,177,591	4,234	1,000	4,234
	Appliances & Electronics	\$230	5%	\$425,814	1,851	0	1,851
	Home Improvement & Gardening	\$200	30%	\$6,883,236	21,430	12,986	21,430
	Books, Media & Computers	\$130	5%	\$752,466	5,788	0	5,788
	Sporting Goods	\$165	15%	\$296,603	1,798	0	1,798
	Toys & Hobbies	\$165	15%	\$201,852	1,223	0	1,223
Specialty Retail	\$165	25%	\$1,272,524	5,973	1,739	5,973	
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$400	60%	\$8,703,386	9,561	12,197	9,561
	Restaurants & Pubs	\$350	40%	\$3,921,954	3,849	7,357	3,849
	Arts & Entertainment	\$125	20%	\$166,054	1,328	0	1,328
	Fitness & Leisure	\$145	25%	\$437,539	518	2,500	518
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$245	10%	\$1,016,355	4,148	0	4,148
	Auto/RV/Motorsports Dealership	\$300	15%	\$2,854,096	9,514	0	9,514
	Auto Fuel						
<b>TOTAL RETAIL CATEGORIES ONLY</b>		<b>\$309</b>	<b>30.5%</b>	<b>\$64,502,488</b>	<b>134,553</b>	<b>74,123</b>	<b>134,553</b>
<b>TOTAL (excluding Auto)</b>		<b>\$311</b>	<b>36.2%</b>	<b>\$60,632,036</b>	<b>120,890</b>	<b>7,727</b>	<b>126,826</b>

Table 7-6. Estimated Retail Demand by 2021 to 2031 Based on Increasing Current Market Shares

Retail Merchandise Category	2021	2026	2031	Current Retail Inventory (sf)	Total Future NEW Demand (sf)
	Current Floorspace Supply (sf)	Cumulative NEW Floorspace Demand (sf)	Cumulative NEW Floorspace Demand (sf)		
Convenience & Day-to-Day Goods/Services	36,344	24,377	55,608	36,344	55,608
Comparison or Department Store Type Merchandise (DSTM)	15,725	20,471	50,027	15,725	50,027
Leisure, Recreation & Entertainment Goods/Services	22,054	4,935	15,256	22,054	15,256
Automotive Goods (excluding repair)	0	4,472	13,662	0	13,662
<b>Total (sf)</b>	<b>74,123</b>	<b>54,255</b>	<b>134,553</b>	<b>74,123</b>	<b>134,553</b>

Table 7-7. Estimated Retail Land Needs by 2031 Based on Increasing Current Market Shares

Retail Node	Total 10-yr New Demand by 2031 with INCREASED Market Share (sf / acres)		MOUNT ALBERT				
	% Share of Demand	Share of Demand (sf)	Land Utilization Factor	Net Land Area (acres)			
<b>Total</b>		<b>134,553</b>	<b>5.7</b>	<b>100%</b>	<b>134,553</b>	<b>0.54</b>	<b>5.7</b>
Mixed Use MU-1	50%	67,276	0.7				2.2
Community Commercial C3	10%	13,455	0.3				1.0
Neighbourhood Commercial C4	40%	53,821	0.5				2.5



## 8.0 Retail Gap Strategy & Action Plan

### 8.1 Introduction

This section highlights the key findings of the Retail Gap Analysis as well as documenting some general retail trends that are noteworthy and relevant to Mount Albert's and Holland Landing's locational, demographic and economic contexts.

### 8.2 Retail Market Analysis Key Findings

In conjunction with ongoing residential development, strong household demographics and an increase in overall market share of trade area spending, Mount Albert could add to its retail inventory by as much as 135,000 sf in specifically targeted categories/business types by 2031. In reality this magnitude of demand cannot be accommodated because of limitations from the Oak Ridges Moraine. That said, the focus of future retail growth should be a combination of some portion of demand, but increasing market share from local and new businesses, and a resulting environment of thriving, well performing local businesses. If the local businesses perform at high productivities, then the property owners and landlords will have equal success in their achievable lease rates. This is the ultimate win-win for the community.

An important aspect of the overall messaging for Mount Albert's Village Core is that retail demand is not simply predicated on adding new space, but specifically targeting new businesses that have the capacity to succeed and working with existing businesses so that they can better market themselves to the local population that are either not aware of the Village Core or of the businesses in general.

In retail however, sometimes competition is necessary to ensure that spending is retained in the community and in many cases a new competitor can actually increase the overall spending. In the case of Mount Albert, the current market share rate of 20% is low and does suggest an opportunity to increase to almost 36%. Doing so benefits existing retailers, as well as creating a base for much-needed new retailers to enter the market.

### 8.3 Action Plan & Tenant Opportunities

Since forecasts in this study are yielding estimates for floorspace (135,000 sf) and land (5 acres) in Mount Albert, any growth planning exercise should consider a longer-term need for future commercial land with a potential for locating the majority of this land along Highway 48, as long as servicing connections are

established and if there were changes to the Oak Ridges Moraine, which is not likely nor desirable at the time of this Study. East Gwillimbury should be looking to accommodate commercial land opportunities to ensure capacity and responsiveness for potential commercial investment, while promoting smart growth and complete community premised on the Village Core.

New demand will require concerted effort at allocating appropriately sized and serviced land in areas most beneficial, such as Highway 48 for highway commercial infill and the Village Core for smaller spaces into which local independent businesses can locate and grow.

There are also current businesses in the Village Core that are outgrowing their current space and it will be equally important that the Downtown Revitalization Strategy create a framework for creating buildings and spaces that can accommodate expansions, rather than risk losing well-established local businesses.

Although vacancies are not high in Mount Albert or Holland Landing, the Municipality and business-serving organizations should work with landlords in the respective Village Core areas to actively promote and utilize vacant spaces. This could include adaptive interim uses such as Community Market weekend pop-ups. The goal should be to create daily activation of available spaces by looking at ways to create rotating "main street pop-ups". One such example is in the image below taken from the Town of Mahone Bay in Nova Scotia.



In a secondary market like Mount Albert and to a lesser degree Holland Landing, the key to attracting businesses lies not only in presenting a good market

and business case, but will likely fall under two (2) approaches; securing franchise partners and succession planning.

For many businesses with recognized brands, the likelihood of attracting a corporate run store is limited, but the franchise or licensee model is a distinct possibility. The optimal approach for this target is to look at a market like Newmarket, Richmond Hill or even Uxbridge to see if existing franchise holders would be interested in additional locations as part of an overall locational network strategy in Mount Albert. This approach is preferred by franchisers as there is a built in relationship with the franchisees who understand the business model.

The second approach for succession planning is often overlooked in smaller or secondary markets, where a successful local business may be family run and is of value to the community, but its future is up-in-the-air because no one is able to take over.

An organization such as [Succession Matching](#) provides a road map for businesses to ensure they can continue in their respective communities. Succession planning looks to understand the Consumer Segment, Value Proposition, Revenue Streams, Distribution Channels and Key Partnerships.

Smaller communities and those with essential village cores, downtowns or main streets, must continue to cultivate an environment in which local independent stores can succeed. In Mount Albert as well as Holland Landing, the following independent store types could be considered as compatible with the demographic profiles and anticipated development. Additionally, there are opportunities to cultivate local independent store types that would be equipped to fit within the downtown as either pop-up incubators or full-time tenants.

Mount Albert is currently undergoing a major Downtown Revitalization Strategy that will dramatically fix and upgrade the street activity and ambiance. This Commercial Gap Analysis Study is advocating for the growth of local retail entrepreneurial activity that will support the investment in the Downtown (Village Core) streetscape.

The fact that the Oak Ridges Moraine Conservation area in essence prevents larger branded retailers from coming to Mount Albert is a positive that can and should benefit local businesses. While this has not yet proven to be the case, the Revitalization Strategy and increased marketing to new residents who are not fully aware that the Village core even exists must be a priority.

Mount Albert has a unique opportunity that many comparable communities do not have; limited threat of larger competition and a growing, affluent, high spending local population.

### Independent Store Types (Village Core)

- » Personal and Medical Services
- » Recycled/Upcycled Fashions
- » Cidery/Cider House/Craft Brewery
- » Delicatessen/Butcher
- » Bakery/Patisserie
- » Specialty Beef Jerky/Hot Sauces
- » Community Food Coop-Deli
- » Community Kitchen
- » Co-working office/café
- » Bicycle Accessories & Repairs
- » 50s Diner (Burgers & Shakes)
- » Florist
- » Creperie
- » Candy Shop
- » Mobile Phone Repairs
- » Comic Shop/Novelties/Used Books
- » Old Style Barber Shop
- » Ethnic fare (Filipino, Indian, Vietnamese, Korean etc)
- » Pet Supplies and Pet Foods
- » Indigenous Arts & Crafts
- » Billiards or Pool Hall

Mount Albert's Village Core should work towards becoming a "main street" so that it could potentially be supported by the Ontario My Main Street Community Activator (placemaking) and Local Business Accelerator programs (<https://mymainstreet.ca/>).



This would require a concerted effort at creating a consistent identity as to what Mount Albert's Village Core actually is. Is it a Downtown, Village or Main Street? The manner in which the community perceives the area varies between those that have lived in the community a long time versus those who have moved to the area from larger cities and for whom a smaller town feel is more desired, or even visitors viewing current signage which simply says "Business Centre"

It is critical that the municipality, its businesses and residents through the Downtown Revitalization Strategy and other community-wide planning efforts resolve this disparity and consider how the Village Core is area is defined. This is ultimately how signage, wayfinding and marketing will need to be portrayed to locals and newcomers. Collaborating with a business-serving organization to participate in the My Main Streets program can further this transition while supporting the Downtown Revitalization. Most members of the MyMain Street program have Ambassadors that serve a collective of 100 to 200 businesses, so it may be an opportunity for East Gwillimbury to consider sharing an Ambassador with other communities in East Gwillimbury.

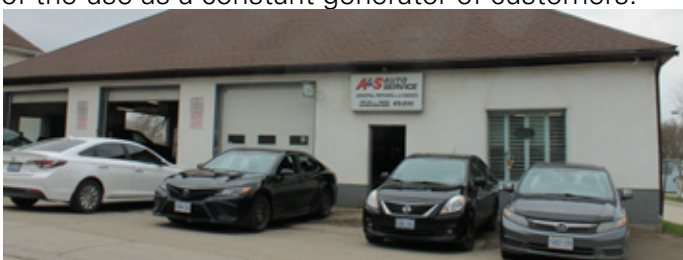
Other intangible aspects of the Mount Albert Village core area, as it relates to the concurrent revitalization efforts pertains to businesses like automotive. While not a traditional retail use, a building housing this use was recently purchased and it is not reasonable to foresee this use changing any time soon. However, this does not mean that the building nor use can benefit the revitalization or local businesses. The mere presence of the auto repair can create a captive audience for potential customers who may need shops and services during smaller, quicker repairs. From a streetscape perspective, the corner location of the building at a critical crosswalk location could present a unique opportunity to create a pocket park with seating out front of the building area. Additionally, if an option were available for an alternate location off-site for parking vehicles, perhaps the front bays of the building could be more visible for some creative art on the bay doors while closed. These are all interventions that could enhance the building and streetscape while harnessing the value of the use as a constant generator of customers.

The ability to work with a business for external building improvements would be contingent on establishing a municipal facade improvement program and/or becoming a participant in the My Main Street initiative with the Community Activator Program. There are also other federal funding programs that could also be pursued such as the Canada Healthy Communities Initiative.

Other non-traditional streetscape planning considerations that could have a positive impact on customer behaviour such as dwell times could include an electrical vehicle charging station, bike repair station as part of a pocket park concept, or mobile/moveable parklet.



Lastly, from the perspective of the Village Core area, it is important that local businesses stress the economic, social, cultural and environmental reciprocal benefit that shopping local has on a community.



## Summary Action Items

	Community	Now <1yr	Next 1-5yr	Ongoing
<b>Enable Supportive Policy and Concentrate Development in Established Commercial Nodes</b>				
» Undertake an infrastructure servicing review and identify the necessary requirements to enable development along Highway 48	Mount Albert		X	
» Identify and confirm properties that could be prioritized for infill commercial development along Highway 48.	Mount Albert	X		
» Consider allocating approximately 5 ac for future longer-term, C-3 zoning commercial	Mount Albert	X		
» Consider implementing commercial facade improvements through a Community Improvement Plan as enabled in the Official Plan	Mount Albert		X	
» Determine My Main Street Activator Program application requirements and identify inter-community collaborators. Explore additional Federal programs for placemaking and business support funding	Both	X	X	
<b>Increase Market Share and Businesses Supports</b>				
» Strategically target developments that have the ability to benefit the greater community rather than impacting existing businesses.	Mount Albert		X	
» Prioritize Mount Albert's Village Core/Downtown area for business attraction and small infill development	Both			X
» Cultivate local independent store types in Village Cores by creating indoor incubator pop up comprising local home-based vendors	Both	X		
» Host an entrepreneurial marketing workshop to assist local businesses in exposing the village core to new residents	Mount Albert	X		
» Support new retail opportunities in the range of 500- 1,000 sf concentrated in and around Mount Albert's Village Core	Mount Albert		X	
» Encourage redevelopment of underused properties and/or work with property owners to create select spaces capable of meeting expansion needs of local businesses	Mount Albert		X	
» Collaborate with the business-serving organizations and landlords to actively promote and utilize vacant spaces with the goal of activating the spaces.	Both			
» Engage with local and regional commercial real estate agencies to proactively share the market opportunities	Both			X
» Introduce a parklet or patio grant program for local businesses in the Village Core to animate the non-building frontage.	Mount Albert		X	
<b>Attract Visitors and Residents</b>				
» Develop a consistent identity for Mount Albert's Village Core/Downtown/Main Street	Mount Albert	X		
» As part of the revitalization strategy create appealing wayfinding and pop-up placemaking features to increase dwell times	Mount Albert	X	X	
» Continued event programming including periodic, yet regular street closures	Mount Albert		X	X

**Commercial Gap Analysis**  
Town of East Gwillimbury



***Appendices***





# APPENDIX A - Select Large Font Trade Area and Market Demand Tables

Table 4-1. Trade Area Demographic Summary on page 19

Attribute	Benchmark - Ontario		Mount Albert Trade Area			Holland Landing Trade Area		
	value	percent	value	percent	index	value	percent	index
<b>SUMMARY</b>								
Total number of labour force age 15 and over	8,064,478		5,550			7,520		
Total population in families	12,185,364		8,916			10,688		
Average number of persons per census family	2.98		2.81		94	2.93		98
Total population in private households	14,410,904		9,852			11,835		
Total number of census families in private households	4,076,137		3,178			3,645		
Average number of persons in private households	2.53		2.80		111	2.80		111
Total number of private households	5,700,179		3,524			4,220		
Total population	14,693,829		9,904			12,172		
Total population age 15 and over	12,416,879		8,146			10,518		
<b>POPULATION AGE</b>								
Population age 0-14	2,276,950	15.50%	1,758	17.75%	115	1,654	13.59%	88
Population age 15-24	1,854,732	12.62%	1,304	13.16%	104	1,531	12.58%	100
Population age 25-34	2,061,351	14.03%	1,181	11.92%	85	1,667	13.70%	98
Population age 35-44	1,923,523	13.09%	1,249	12.61%	96	1,319	10.84%	83
Population age 45-54	1,860,941	12.66%	1,377	13.90%	110	1,579	12.97%	102
Population age 55-64	2,019,965	13.75%	1,474	14.88%	108	2,259	18.56%	135
Population age 65+	2,696,366	18.35%	1,563	15.78%	86	2,163	17.77%	97
<b>DWELLING</b>								
Average dwelling value \$	\$814,224		\$894,578		110	\$1,211,142		149
Home owners	3,973,295	69.70%	3,216	91.25%	131	3,689	87.41%	125
Home tenants	1,717,205	30.12%	308	8.75%	29	531	12.59%	42
Band housing	10,486	0.18%	0	0.00%	0	0	0.00%	0
<b>HOUSEHOLDS</b>								
One-family households	3,837,758	67.33%	2,660	75.47%	112	3,109	73.67%	109
Multiple-family households	162,446	2.85%	69	1.96%	69	149	3.53%	124
Non-family households	1,699,975	29.82%	598	16.96%	57	706	16.74%	56
<b>EDUCATION</b>								
Total population aged 15 years and over by highest certificate, diploma, or degree	12,416,879		8,146			10,518		
No certificate, diploma, or degree	2,175,333	17.52%	1,183	14.52%	83	1,838	17.48%	100
High school diploma or equivalent	3,384,448	27.26%	2,285	28.05%	103	3,182	30.25%	111
Post-secondary certificate, diploma, or degree	6,857,098	55.22%	4,678	57.43%	104	5,498	52.27%	95
Apprenticeship or trades certificate or diploma	747,204	6.02%	665	8.17%	136	876	8.32%	138
College, CEGEP or other non-university certificate or diploma	2,572,424	20.72%	2,085	25.60%	124	2,592	24.64%	119
University certificate or diploma below bachelor level	289,194	2.33%	198	2.44%	105	182	1.73%	74
University certificate, diploma, or degree at bachelor level or above	3,248,275	26.16%	1,729	21.23%	81	1,848	17.57%	67
Bachelor's degree	2,130,762	17.16%	1,289	15.82%	92	1,411	13.42%	78



Table 4-3. Trade Area Populations Projections Summary 2021 to 2031 on page 22

Attribute	Benchmark - Ontario		Mount Albert Trade Area			Holland Landing Trade Area		
	value	percent	value	percent	index	value	percent	index
<b>PROJECTIONS</b>								
Annual population growth in the period: Next 3 years		1.00%		1.18%	118		0.67%	67
Annual household growth in the period: Next 3 years		1.00%		1.34%	134		0.95%	95
Annual family growth in the period: Next 3 years		1.00%		1.42%	142		0.81%	81
Annual population growth in the period: Next 5 years		1.15%		1.82%	158		1.08%	94
Annual household growth in the period: Next 5 years		1.35%		2.09%	155		1.51%	112
Annual family growth in the period: Next 5 years		1.16%		2.18%	188		1.28%	110
Annual population growth in the period: 5 to 10 years from current year		1.08%		1.95%	181		1.13%	105
Annual household growth in the period: 5 to 10 years from current year		1.27%		2.22%	175		1.56%	123
Annual family growth in the period: 5 to 10 years from current year		1.08%		2.30%	213		1.35%	125
<b>POPULATION GROWTH</b>								
Current year total population	14,693,829		9,904			12,172		
3-Year Projections - Total population	15,211,613		10,502			12,588		
5-Year Projections - Total population	15,556,803		10,843			12,845		
10-Year Projections - Total population	16,413,919		11,947			13,590		
<b>HOUSEHOLD GROWTH</b>								
Current year total number of households	5,700,179		3,524			4,220		
3-Year Projections - Total number of households	5,937,405		3,767			4,424		
5-Year Projections - Total number of households	6,095,555		3,909			4,548		
10-Year Projections - Total number of households	6,492,049		4,364			4,915		
<b>FAMILY GROWTH</b>								
Current year total number of census families	4,092,674		3,178			3,645		
3-Year Projections - Total number of census families	4,238,366		3,411			3,795		
5-Year Projections - Total number of census families	4,335,163		3,541			3,885		
10-Year Projections - Total number of census families	4,575,107		3,968			4,156		
<b>HOUSEHOLD INCOME GROWTH</b>								
Current year average household income	\$109,708		\$138,179		126	\$128,753		117
3-Year Projections - Average household income	\$115,000		\$142,703		124	\$134,226		117
5-Year Projections - Average household income	\$122,372		\$148,856		122	\$141,865		116
10-Year Projections - Average household income	\$141,088		\$162,337		115	\$159,952		113



Table 4-4. Trade Area Detailed Population Breakdown on page 23

Attribute	Benchmark - Ontario		Mount Albert Trade Area			Holland Landing Trade Area		
	value	percent	value	percent	index	value	percent	index
<b>POPULATION AGE GROUP</b>								
Total population by age groups	14,693,800		9,904			12,172		
0-14	2,276,950	15.50%	1,758	17.75%	115	1,654	13.59%	88
0-4	734,336	5.00%	586	5.92%	118	521	4.28%	86
5-9	754,020	5.13%	602	6.08%	119	536	4.40%	86
10-14	788,594	5.37%	569	5.75%	107	596	4.90%	91
15-64	9,720,510	66.15%	6,583	66.47%	100	8,355	68.64%	104
15-19	854,434	5.82%	628	6.34%	109	666	5.47%	94
20-24	1,000,300	6.81%	676	6.82%	100	865	7.11%	104
25-29	1,035,480	7.05%	571	5.77%	82	926	7.61%	108
30-34	1,025,870	6.98%	610	6.15%	88	741	6.09%	87
35-39	997,205	6.79%	649	6.55%	96	655	5.38%	79
40-44	926,318	6.30%	600	6.06%	96	664	5.45%	87
45-49	913,795	6.22%	670	6.76%	109	738	6.06%	97
50-54	947,146	6.45%	707	7.14%	111	841	6.91%	107
55-59	1,044,800	7.11%	792	8.00%	113	1,132	9.30%	131
60-64	975,162	6.64%	681	6.88%	104	1,127	9.26%	139
65 and over	2,696,370	18.35%	1,563	15.78%	86	2,163	17.77%	97
65-69	820,064	5.58%	541	5.46%	98	786	6.46%	116
70-74	691,318	4.71%	411	4.15%	88	591	4.86%	103
75-79	479,309	3.26%	269	2.72%	83	374	3.07%	94
80-84	328,259	2.23%	191	1.93%	87	206	1.70%	76
85 and over	377,417	2.57%	151	1.53%	60	206	1.69%	66
85-89	235,644	1.60%	100	1.00%	63	147	1.21%	76
90-94	109,852	0.75%	34	0.35%	47	50	0.41%	55
95-99	27,679	0.19%	17	0.17%	89	9	0.07%	37
100 and over	4,241	0.03%	1	0.01%	33	0	0.00%	0
Average age of total population	41.60		40.20		97	42.80		103
Median age of total population	40.90		40.60		99	45.00		110





Table 4-5. Trade Area Household Income Breakdown on page 24

Attribute	Benchmark - Ontario		Mount Albert Trade Area			Holland Landing Trade Area		
	value	percent	value	percent	index	value	percent	index
<b>HOUSEHOLD INCOME</b>								
Total number of households	5,700,990		3,524			4,220		
Average household income \$	\$109,708		\$138,179		126	\$128,753		117
Median household income \$	\$83,780		\$114,349		136	\$115,456		138
Household with income under \$5,000	72,619	1.27%	18	0.52%	41	14	0.32%	25
Household with income \$5,000 to \$9,999	79,143	1.39%	28	0.79%	57	18	0.43%	31
Household with income \$10,000 to \$14,999	126,272	2.22%	53	1.50%	68	28	0.65%	29
Household with income \$15,000 to \$19,999	178,443	3.13%	61	1.72%	55	60	1.42%	45
Household with income \$20,000 to \$24,999	203,141	3.56%	74	2.09%	59	91	2.15%	60
Household with income \$25,000 to \$29,999	207,866	3.65%	82	2.32%	64	103	2.44%	67
Household with income \$30,000 to \$34,999	217,630	3.82%	112	3.17%	83	91	2.16%	57
Household with income \$35,000 to \$39,999	225,307	3.95%	83	2.36%	60	105	2.48%	63
Household with income \$40,000 to \$44,999	228,807	4.01%	103	2.91%	73	123	2.92%	73
Household with income \$45,000 to \$49,999	230,344	4.04%	98	2.78%	69	121	2.86%	71
Household with income \$50,000 to \$59,999	365,998	6.42%	192	5.44%	85	225	5.34%	83
Household with income \$60,000 to \$69,999	389,116	6.83%	200	5.69%	83	241	5.70%	83
Household with income \$70,000 to \$79,999	377,680	6.63%	206	5.85%	88	245	5.80%	87
Household with income \$80,000 to \$89,999	356,636	6.26%	218	6.19%	99	262	6.21%	99
Household with income \$90,000 to \$99,999	335,299	5.88%	218	6.18%	105	255	6.05%	103
Household with income \$100,000 and over	2,106,690	36.95%	1,780	50.51%	137	2,238	53.04%	144
Household with income \$100,000 to \$124,999	530,864	9.31%	422	11.97%	129	442	10.47%	112
Household with income \$125,000 to \$149,999	468,682	8.22%	386	10.95%	133	462	10.95%	133
Household with income \$150,000 to \$199,999	496,435	8.71%	473	13.41%	154	582	13.80%	158
Household with income \$200,000 and over	610,705	10.71%	500	14.18%	132	752	17.82%	166



Table 4-6. Labour Force Information on page 25

Attribute	Benchmark - Ontario		Mount Albert Trade Area			Holland Landing Trade Area		
	value	percent	value	percent	index	value	percent	index
<b>LABOUR FORCE ACTIVITY - TOTAL</b>								
Total population 15+ years	12,416,900		8,146			10,518		
In the labour force	8,064,480	64.95%	5,550	68.13%	105	7,520	71.49%	110
Unemployed	736,167	5.93%	618	7.58%	128	695	6.60%	111
Employed	7,328,310	59.02%	4,932	60.55%	103	6,825	64.89%	110
Not in the labour force	4,352,400	35.05%	2,597	31.87%	91	2,998	28.51%	81
Participation rate (%)		64.95%		68.13%	105		71.49%	110
Employment rate (%)		59.02%		60.55%	103		64.89%	110
Unemployment rate (%)		9.13%		11.13%	122		9.24%	101
<b>PLACE OF WORK</b>								
Total employed labour force 15 years and over by place of work status	7,328,310		4,932			6,825		
At home	1,439,460	17.85%	1,118	20.14%	113	1,311	17.44%	98
Outside Canada	45,328	0.56%	12	0.21%	38	0	0.01%	2
No fixed workplace address	711,518	8.82%	691	12.46%	141	972	12.92%	146
Usual place of work	5,132,010	63.64%	3,112	56.07%	88	4,542	60.40%	95
<b>COMMUTING DURATION</b>								
Total employed population aged 15 years and over who commute to work	5,659,350		3,652			5,314		
Less than 15 minutes	1,970,080	24.43%	732	13.18%	54	1,480	19.68%	81
15 to 29 minutes	1,613,930	20.01%	948	17.08%	85	1,602	21.31%	106
30 to 44 minutes	988,783	12.26%	781	14.07%	115	891	11.85%	97
45 to 59 minutes	614,867	7.62%	666	12.01%	158	745	9.91%	130
60 minutes and over	471,699	5.85%	526	9.48%	162	596	7.93%	136
<b>MODE OF TRANSPORTATION</b>								
Total employed labour force 15 years and over who commute to work by mode of transportation	5,659,350		3,652			5,314		
Car, truck, van, as driver	4,060,840	50.36%	3,188	57.43%	114	4,637	61.66%	122
Car, truck, van, as passenger	351,545	4.36%	217	3.90%	89	284	3.78%	87
Public transit	802,499	9.95%	131	2.36%	24	242	3.22%	32
Walked	301,081	3.73%	77	1.39%	37	49	0.66%	18
Bicycle	75,372	0.94%	12	0.22%	23	12	0.16%	17
Other method	68,010	0.84%	28	0.51%	61	90	1.20%	143



Table 4-7. Labour Force Industry and Occupation on page 26

Attribute	Benchmark - Ontario		Mount Albert Trade Area			Holland Landing Trade Area		
	value	percent	value	percent	index	value	percent	index
<b>LABOUR FORCE INDUSTRY</b>								
Total labour force population aged 15+ years - North American Industry Classification System (NAICS) 2017	8,064,480		5,550			7,520		
Industry - not applicable	343,153	4.26%	325	5.85%	137	330	4.39%	103
All industries	7,721,320	95.75%	5,225	94.15%	98	7,190	95.61%	100
11 Agriculture, forestry, fishing, and hunting	118,861	1.47%	368	6.63%	451	94	1.25%	85
21 Mining, quarrying, and oil and gas extraction	40,419	0.50%	9	0.16%	32	21	0.28%	56
22 Utilities	69,595	0.86%	25	0.45%	52	88	1.17%	136
23 Construction	506,432	6.28%	672	12.11%	193	918	12.21%	194
31-33 Manufacturing	750,077	9.30%	374	6.74%	72	783	10.41%	112
41 Wholesale trade	315,938	3.92%	210	3.79%	97	258	3.43%	88
44-45 Retail trade	863,803	10.71%	445	8.02%	75	733	9.75%	91
48-49 Transportation and warehousing	353,144	4.38%	178	3.20%	73	242	3.22%	74
51 Information and cultural industries	187,048	2.32%	142	2.56%	110	178	2.37%	102
52 Finance and insurance	461,838	5.73%	60	1.09%	19	350	4.65%	81
53 Real estate and rental and leasing	186,741	2.32%	179	3.23%	139	135	1.79%	77
54 Professional, scientific, and technical services	663,596	8.23%	761	13.71%	167	513	6.82%	83
55 Management of companies and enterprises	17,706	0.22%	20	0.37%	168	1	0.02%	9
56 Administrative and support, waste management and remediation services	357,540	4.43%	354	6.38%	144	416	5.53%	125
61 Educational services	613,506	7.61%	330	5.95%	78	590	7.85%	103
62 Health care and social assistance	835,061	10.36%	422	7.61%	73	598	7.95%	77
71 Arts, entertainment, and recreation	158,129	1.96%	157	2.83%	144	156	2.08%	106
72 Accommodation and food services	430,367	5.34%	215	3.88%	73	385	5.11%	96
81 Other services (except public administration)	317,074	3.93%	38	0.68%	17	225	3.00%	76
91 Public administration	474,450	5.88%	264	4.75%	81	506	6.73%	114
<b>OCCUPATION</b>								
Total labour force 15 years and over by occupation	8,064,480		5,550			7,520		
0 Management occupations	914,818	11.34%	792	14.27%	126	993	13.21%	116
1 Business, finance, and administration occupations	1,302,860	16.16%	816	14.71%	91	1,344	17.87%	111
2 Natural and applied sciences and related occupations	625,194	7.75%	330	5.94%	77	398	5.30%	68
3 Health occupations	519,714	6.44%	244	4.40%	68	353	4.70%	73
4 Occupations in education, law and social, community and government services	994,518	12.33%	518	9.34%	76	820	10.91%	88
5 Occupations in art, culture, recreation, and sport	232,438	2.88%	289	5.22%	181	200	2.66%	92
6 Sales and service occupations	1,643,380	20.38%	1,039	18.72%	92	1,427	18.97%	93
7 Trades, transport and equipment operators and related occupations	983,586	12.20%	829	14.94%	122	1,217	16.19%	133
8 Natural resources, agriculture, and related production occupations	128,639	1.60%	205	3.70%	231	190	2.53%	158
9 Occupations in manufacturing and utilities	376,174	4.67%	162	2.92%	63	247	3.28%	70
Occupation - not applicable	343,153	4.26%	325	5.85%	137	330	4.39%	103



Table 4-7. Trade Area Retail Spending Potential 2021 - Mount Albert and Holland Landing Trade Areas on page 28

Retail Spending by Merchandise Category		2021		2021	
		MOUNT ALBERT TRADE AREA Per Household Retail Spending	MOUNT ALBERT TRADE AREA Aggregate Retail Spending	HOLLAND LANDING TRADE AREA Per Household Retail Spending	HOLLAND LANDING TRADE AREA Aggregate Retail Spending
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	\$7,670	\$27,027,952	\$7,743	\$32,674,283
	Pharmacy	\$769	\$2,711,538	\$732	\$3,089,015
	Alcohol, Tobacco & Cannabis	\$1,333	\$4,699,144	\$1,318	\$5,561,584
	Personal & Home Services	\$1,454	\$5,123,454	\$1,398	\$5,897,767
	Health Care & Medical Services	\$1,003	\$3,534,673	\$1,017	\$4,293,615
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$2,298	\$8,098,371	\$2,165	\$9,137,107
	Jewelry & Accessories	\$350	\$1,234,259	\$331	\$1,396,912
	Beauty & Personal Care	\$844	\$2,973,745	\$875	\$3,691,247
	Furniture & Décor	\$1,160	\$4,087,889	\$1,151	\$4,857,292
	Appliances & Electronics	\$1,767	\$6,225,692	\$1,730	\$7,302,557
	Home Improvement & Gardening	\$4,309	\$15,183,815	\$4,182	\$17,648,355
	Books, Media & Computers	\$2,973	\$10,477,672	\$2,994	\$12,634,952
	Sporting Goods	\$410	\$1,445,510	\$353	\$1,488,157
	Toys & Hobbies	\$279	\$983,737	\$277	\$1,169,184
Specialty Retail	\$957	\$3,374,159	\$898	\$3,788,705	
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$2,718	\$9,579,300	\$2,751	\$11,607,570
	Restaurants & Pubs	\$1,835	\$6,465,892	\$1,907	\$8,049,169
	Arts & Entertainment	\$169	\$594,427	\$166	\$699,890
	Fitness & Leisure	\$363	\$1,279,423	\$341	\$1,439,919
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$2,003	\$7,056,999	\$1,980	\$8,356,102
	Auto/RV/Motorsports Dealership	\$3,947	\$13,909,605	\$4,021	\$16,970,207
	Auto Fuel	\$2,174	\$7,661,282	\$2,113	\$8,918,886
<b>TOTAL CATEGORIES</b>		<b>\$40,786</b>	<b>\$143,728,539</b>	<b>\$40,444</b>	<b>\$170,672,473</b>
<b>TOTAL (excluding Health Care &amp; Auto)</b>		<b>\$31,659</b>	<b>\$111,565,980</b>	<b>\$31,311</b>	<b>\$132,133,664</b>

Table 7-1. Estimated Market Share Retention of Retail Spending in Mount Albert 2021 on page 47



Retail Spending by Merchandise Category		2021			
		MOUNT ALBERT Sales Productivity (\$psf)	MOUNT ALBERT Estimated Market Share	Market Share Sales \$	Current Retail Floorspace (sf)
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	\$411	39%	\$11,781,718	28,644
	Pharmacy	\$390	31%	\$900,414	2,309
	Alcohol, Tobacco & Cannabis	\$439	26%	\$1,316,250	3,000
	Personal & Home Services	\$114	5%	\$272,156	2,391
	Health Care & Medical Services				
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$0	0%	\$0	-
	Jewelry & Accessories	\$0	0%	\$0	-
	Beauty & Personal Care	\$0	0%	\$0	-
	Furniture & Décor	\$222	5%	\$222,438	1,000
	Appliances & Electronics	\$0	0%	\$0	-
	Home Improvement & Gardening	\$219	18%	\$2,848,829	12,986
	Books, Media & Computers	\$0	0%	\$0	-
	Sporting Goods	\$0	0%	\$0	-
	Toys & Hobbies	\$0	0%	\$0	-
Specialty Retail	\$162	8%	\$282,565	1,739	
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$500	37%	\$3,679,249	12,197
	Restaurants & Pubs	\$323	35%	\$2,374,024	7,357
	Arts & Entertainment	\$0	0%	\$0	-
	Fitness & Leisure	\$142	28%	\$355,469	2,500
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$142	0%	\$0	-
	Auto/RV/Motorsports Dealership	\$0	0%	\$0	-
	Auto Fuel				
<b>TOTAL RETAIL CATEGORIES ONLY</b>		<b>\$324</b>	<b>16.1%</b>	<b>\$24,033,112</b>	<b>74,123</b>
<b>TOTAL (excluding Auto)</b>		<b>\$324</b>	<b>20.5%</b>	<b>\$24,033,112</b>	<b>74,123</b>



Table 7-2. Estimated Retail Demand by 2031 Based on Maintaining Current Market Share on page 48

Retail Spending by Merchandise Category		2031				2021 to 2031	
		MOUNT ALBERT Sales Productivity (\$psf)	MOUNT ALBERT Estimated Market Share	Market Share Sales \$	Current Retail Floorspace (sf)	Current Retail Inventory (sf)	Total Cumulative NEW Floorspace Demand (sf)
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	\$411	39%	\$17,518,257	13,947	28,644	13,947
	Pharmacy	\$390	31%	\$1,284,399	985	2,309	985
	Alcohol, Tobacco & Cannabis	\$439	26%	\$1,881,116	1,287	3,000	1,287
	Personal & Home Services	\$114	5%	\$380,581	953	2,391	953
	Health Care & Medical Services						
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$0	0%	\$0	-	0	0
	Jewelry & Accessories	\$0	0%	\$0	-	0	0
	Beauty & Personal Care	\$0	0%	\$0	-	0	0
	Furniture & Décor	\$222	5%	\$312,572	405	1,000	405
	Appliances & Electronics	\$0	0%	\$0	-	0	0
	Home Improvement & Gardening	\$219	18%	\$4,099,846	5,703	12,986	5,703
	Books, Media & Computers	\$0	0%	\$0	-	0	0
	Sporting Goods	\$0	0%	\$0	-	0	0
	Toys & Hobbies	\$0	0%	\$0	-	0	0
Specialty Retail	\$162	8%	\$405,966	759	1,739	759	
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$500	37%	\$5,306,072	-1,587	12,197	-1,587
	Restaurants & Pubs	\$323	35%	\$3,428,545	3,268	7,357	3,268
	Arts & Entertainment	\$0	0%	\$0	0	0	0
	Fitness & Leisure	\$142	28%	\$486,255	920	2,500	920
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$142	0%	\$0	0	0	0
	Auto/RV/Motorsports Dealership	\$0	0%	\$0	0	0	0
	Auto Fuel						
<b>TOTAL RETAIL CATEGORIES ONLY</b>		<b>\$348</b>	<b>16.6%</b>	<b>\$35,103,610</b>	<b>26,639</b>	<b>74,123</b>	<b>26,639</b>
<b>TOTAL (excluding Auto)</b>		<b>\$348</b>	<b>21.0%</b>	<b>\$35,103,610</b>	<b>26,639</b>	<b>7,727</b>	<b>18,912</b>



Table 7-5. Estimated Retail Demand by 2031 Based on Increasing Current Market Shares on page 51

Retail Spending by Merchandise Category		2031				2021 to 2031	
		MOUNT ALBERT Sales Productivity (\$psf)	MOUNT ALBERT Estimated Market Share	Market Share Sales \$	Current Retail Floorspace (sf)	Current Retail Inventory (sf)	Total Cumulative NEW Floorspace Demand (sf)
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	\$410	60%	\$26,923,891	37,024	28,644	37,024
	Pharmacy	\$390	50%	\$2,046,675	2,939	2,309	2,939
	Alcohol, Tobacco & Cannabis	\$440	60%	\$4,264,348	6,692	3,000	6,692
	Personal & Home Services	\$130	20%	\$1,474,682	8,953	2,391	8,953
	Health Care & Medical Services						
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	\$200	10%	\$1,107,797	5,539	0	5,539
	Jewelry & Accessories	\$300	10%	\$168,837	563	0	563
	Beauty & Personal Care	\$250	10%	\$406,786	1,627	0	1,627
	Furniture & Décor	\$225	20%	\$1,177,591	4,234	1,000	4,234
	Appliances & Electronics	\$230	5%	\$425,814	1,851	0	1,851
	Home Improvement & Gardening	\$200	30%	\$6,883,236	21,430	12,986	21,430
	Books, Media & Computers	\$130	5%	\$752,466	5,788	0	5,788
	Sporting Goods	\$165	15%	\$296,603	1,798	0	1,798
	Toys & Hobbies	\$165	15%	\$201,852	1,223	0	1,223
Specialty Retail	\$165	25%	\$1,272,524	5,973	1,739	5,973	
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$400	60%	\$8,703,386	9,561	12,197	9,561
	Restaurants & Pubs	\$350	40%	\$3,921,954	3,849	7,357	3,849
	Arts & Entertainment	\$125	20%	\$166,054	1,328	0	1,328
	Fitness & Leisure	\$145	25%	\$437,539	518	2,500	518
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$245	10%	\$1,016,355	4,148	0	4,148
	Auto/RV/Motorsports Dealership	\$300	15%	\$2,854,096	9,514	0	9,514
	Auto Fuel						
<b>TOTAL RETAIL CATEGORIES ONLY</b>		<b>\$309</b>	<b>30.5%</b>	<b>\$64,502,488</b>	<b>134,553</b>	<b>74,123</b>	<b>134,553</b>
<b>TOTAL (excluding Auto)</b>		<b>\$311</b>	<b>36.2%</b>	<b>\$60,632,036</b>	<b>120,890</b>	<b>7,727</b>	<b>126,826</b>

# APPENDIX B - Mount Albert Detailed Commercial Retail Inventory

NAICS 2-DIGIT	NAICS 6-DIGIT	NAICS DETAILED CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	TENANT NAME	Community	Node	SIZE (SF)
44-45	445310	Beer, wine and liquor stores	Alcohol, Tobacco & Cannabis	LCBO Convenience Outlet/The Beer Store (Foodland)	Mount Albert	Community Commercial MA	3,000
81	811111	General automotive repair	Auto Service	A & S Auto Service	Mount Albert	Village Core	3,918
81	811192	Car washes	Auto Service	The Cleaning Centre Carwash	Mount Albert	Village Core	3,640
71	711120	Dance companies	Fitness & Leisure	Kicks Dance Studio	Mount Albert	Village Core	1,800
71	711120	Dance companies	Fitness & Leisure	Kicks Dance Studio - Studio 2	Mount Albert	Village Core	700
72	722511	Full-service restaurants	Restaurants & Pubs	The Lloyd House Restaurant & Pub	Mount Albert	Village Core	1,962
72	722511	Full-service restaurants	Restaurants & Pubs	Twisted Fork Restaurant & Bar	Mount Albert	Village Core	2,835
72	722511	Full-service restaurants	Restaurants & Pubs	Wing House	Mount Albert	Village Core	2,560
44-45	445110	Supermarkets and other grocery (except convenience) stores	Grocery, Convenience & Specialty Foods	Foodland - Mount Albert	Mount Albert	Community Commercial MA	23,270
44-45	445131	Convenience retailers	Grocery, Convenience & Specialty Foods	Mt. Albert Main Milk Convenience	Mount Albert	Village Core	1,867
44-45	445131	Convenience retailers	Grocery, Convenience & Specialty Foods	Mt. Albert Variety & Gift	Mount Albert	Village Core	1,188
44-45	445230	Fruit and vegetable markets	Grocery, Convenience & Specialty Foods	Niemi Family Farm and Farmer's Market	Mount Albert	Outliers	1,607
44-45	447110	Gasoline stations with convenience stores	Grocery, Convenience & Specialty Foods	Shell Shop	Mount Albert	Community Commercial MA	712
44-45	444120	Paint and wallpaper retailers	Furniture & Décor	The Corner Decor &...More/Benjamin Moore	Mount Albert	Village Core	1,000
44-45	444130	Hardware stores	Home Improvement & Gardening	Mount Albert Home Hardware Building Centre	Mount Albert	Community Commercial MA	12,986
72	722511	Full-service restaurants	Quick Service F&B	Pizza 77	Mount Albert	Village Core	3,131
72	722512	Limited-service eating places	Quick Service F&B	Chen's Restaurant	Mount Albert	Village Core	2,659
72	722512	Limited-service eating places	Quick Service F&B	Frano Pizza & Panini	Mount Albert	Community Commercial MA	1,370
72	722512	Limited-service eating places	Quick Service F&B	Lighthouse Cafe	Mount Albert	Village Core	1,531
72	722512	Limited-service eating places	Quick Service F&B	Moose Caboose Canadian Grill	Mount Albert	Community Commercial MA	517
72	722512	Limited-service eating places	Quick Service F&B	Nick's Place	Mount Albert	Village Core	1,840
72	722512	Limited-service eating places	Quick Service F&B	Subway	Mount Albert	Community Commercial MA	1,149
62	621210	Offices of dentists	Medical & Wellness Service	Dentistry in Mount Albert	Mount Albert	Village Core	1,450
62	621310	Offices of chiropractors	Medical & Wellness Service	Mount Albert Chiropractic & Wellness Centre	Mount Albert	Village Core	1,785
62	621210	Offices of dentists	Medical & Wellness Service	Mount Albert Dental Centre	Mount Albert	Village Core	2,040
62	621110	Offices of physicians	Medical & Wellness Service	The Dr. Charles Bill Medical Centre/Mount Albert Physiotherapy	Mount Albert	Village Core	3,270
81	812114	Barber shops	Personal & Home Services	Centre Barbershop	Mount Albert	Village Core	600
81	812310	Coin-operated laundries and dry cleaners	Personal & Home Services	The Cleaning Centre Laundrymat	Mount Albert	Village Core	1,791
44-45	456110	Pharmacies and drug stores	Pharmacy	IDA Ben's Pharmacy	Mount Albert	Village Core	2,309
52	524210	Insurance agencies and brokerages	Professional & Financial Service	Al Dorman Insurance Brokers	Mount Albert	Village Core	1,821
49	491110	Postal service	Professional & Financial Service	Canada Post	Mount Albert	Village Core	1,482
52	522130	Credit unions	Professional & Financial Service	DUCA Credit Union	Mount Albert	Village Core	1,996
53	531212	Offices of real estate brokers	Professional & Financial Service	Flemming Properties / RE/MAX Prime Properties	Mount Albert	Village Core Adjacent	1,944
52	524210	Insurance agencies and brokerages	Professional & Financial Service	James Campbell Insurance Brokers	Mount Albert	Village Core	2,423
54	541940	Veterinary services	Professional & Financial Service	Mount Albert Veterinary Hospital	Mount Albert	Community Commercial MA	2,311
81	812210	Funeral homes	Professional & Financial Service	Skwarchuk Funeral Homes	Mount Albert	Village Core	2,957
91				Mount Albert Community Centre	Mount Albert		5,499
61				Mount Albert Public School	Mount Albert		45,962
61				Robert Munsch Public School	Mount Albert		36,049
91				Ross Family Complex & Library	Mount Albert		18,142
91				Rowland Masonic Lodge	Mount Albert	Village Core	1,499
44-45	458119	All other sporting goods retailers	Specialty Retail	Red Scarf Equestrian Inc	Mount Albert	Village Core Adjacent	1,739
VACANT	0		Vacant	Vacant	Mount Albert	Community Commercial MA	3,245
VACANT	0		Vacant	Vacant	Mount Albert	Village Core	886
VACANT	0		Vacant	Vacant	Mount Albert	Village Core	971
VACANT	0		Vacant	Vacant	Mount Albert	Village Core	829
VACANT	0		Vacant	Vacant	Mount Albert	Village Core	841
VACANT	0		Vacant	Vacant	Mount Albert	Village Core	956



# APPENDIX B - Holland Landing Detailed Commercial Retail Inventory

NAICS 2-DIGIT	NAICS 6-DIGIT	NAICS DETAILED CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	TENANT NAME	Community	Node	SIZE (SF)
72	722511	Full-service restaurants	Restaurants & Pubs	CW Coop's Holland Landing	Holland Landing	Village Core Area	1,412
72	722511	Full-service restaurants	Restaurants & Pubs	Sun Star Grill	Holland Landing	Village Core Area Adjacent	1,663
72	722511	Full-service restaurants	Restaurants & Pubs	The Landing Bar & Grill	Holland Landing	Outliers	3,564
44-45	445131	Convenience retailers	Grocery, Convenience & Specialty Foods	Circle K	Holland Landing	Village Core Area Adjacent	3,536
44-45	445110	Supermarkets and other grocery (except convenience) stores	Grocery, Convenience & Specialty Foods	The Neighbourhood Market	Holland Landing	Village Core Area	5,350
72	722511	Full-service restaurants	Quick Service F&B	Santa Fe Pizza	Holland Landing	Village Core Area	958
72	722512	Limited-service eating places	Quick Service F&B	Dragon King Chinese Food	Holland Landing	Village Core Area	1,010
72	722512	Limited-service eating places	Quick Service F&B	Pizza Pizza	Holland Landing	Village Core Area Adjacent	2,128
72	722512	Limited-service eating places	Quick Service F&B	Shiawase Sushi	Holland Landing	Village Core Area	1,240
72	722512	Limited-service eating places	Quick Service F&B	Subway	Holland Landing	Village Core Area Adjacent	1,644
62	621210	Offices of dentists	Medical & Wellness Service	DentalWorks	Holland Landing	Outliers	1,965
62	621390	Offices of all other health practitioners	Medical & Wellness Service	Essential Healing Touch	Holland Landing	Village Core Area	4,771
62	621210	Offices of dentists	Medical & Wellness Service	Holland Landing Dental	Holland Landing	Village Core Area Adjacent	1,696
62	621310	Offices of chiropractors	Medical & Wellness Service	Holland Landing Health Centre	Holland Landing	Village Core Area	2,837
62	621110	Offices of physicians	Medical & Wellness Service	Holland Landing Medical Clinic	Holland Landing	Outliers	1,161
62	621320	Offices of optometrists	Medical & Wellness Service	Sight Care Optometry Office and Optical	Holland Landing	Outliers	1,046
62	621390	Offices of all other health practitioners	Medical & Wellness Service	Ultimate Health Clinic	Holland Landing	Outliers	2,115
81	812910	Pet care (except veterinary) services	Personal & Home Services	CRZY4K9S & Cats 2	Holland Landing	Outliers	1,109
81	812310	Coin-operated laundries and dry cleaners	Personal & Home Services	Dry Clean Alteration Landromat	Holland Landing	Village Core Area Adjacent	1,639
81	812116	Unisex hair salons	Personal & Home Services	Hair Dynamics	Holland Landing	Village Core Area	501
81	812116	Unisex hair salons	Personal & Home Services	Tangles Hair Salon & Spa	Holland Landing	Outliers	1,174
44-45	456110	Pharmacies and drug stores	Pharmacy	Holland Landing Drug Mart	Holland Landing	Outliers	3,585
44-45	456110	Pharmacies and drug stores	Pharmacy	IDA Hollands Family Pharmacy	Holland Landing	Village Core Area Adjacent	1,684
23	236110	Residential building construction	Professional & Financial Service	Andrin - Design Haus and Sales Office	Holland Landing	Neighbourhood Commercial	2,533
49	491110	Postal service	Professional & Financial Service	Canada Post	Holland Landing	Village Core Area	1,488
54	541940	Veterinary services	Professional & Financial Service	Holland Landing Animal Hospital	Holland Landing	Village Core Area	1,959
54	541213	Tax preparation services	Professional & Financial Service	Holland Landing Tax Company	Holland Landing	Outliers	1,143
91				Caroline Mulroney, Member of Provincial Parliament York-Simcoe	Holland Landing	Outliers	2,253
91				East Gwillimbury Fire Station 2-4	Holland Landing	Village Core Area	8,148
91				Holland Landing Community Centre & Library	Holland Landing	Village Core Area	15,472
91				Scot Davidson, Member of Parliament, York-Simcoe	Holland Landing	Outliers	1,071
VACANT	0		Vacant	Vacant	Holland Landing	Village Core Area	2,847
VACANT	0		Vacant	Vacant	Holland Landing	Village Core Area	2,640

**Deloitte.**

**Mount Albert Downtown Revitalization August 2022**



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## Background/Research Methodology

- The Town of East Gwillimbury hired FBM and Deloitte to conduct a survey of community members from within the community and the surrounding areas. The aim of the study was to determine the use of local retailers in the Mount Albert area and any gaps that exist in local shops or services.
- The survey was prepared by CIMA+ with input from FBM and Deloitte as part of a concurrent Mount Albert Downtown Revitalization Strategy.
- The survey was made available via an online open-URL survey shared widely with community members through social media and websites.
- The survey was conducted during the period May 27th to August 2nd 2022, and gained 180 completed responses.
- Respondents were split into residents of East Gwillimbury and non-residents and asked a specific set of questions about uses and attitudes towards retailers the area.

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## Key Findings

- Newmarket was the most popular place for residents to shop for daily conveniences as well as larger purchases. The main reason was the relatively lower availability of goods and services in East Gwillimbury.
- While most residents preferred shopping in Newmarket, many residents reporting using the shops and services in other parts of East Gwillimbury.
- When asked about which types of event would encourage them to visit downtown Mount Albert, most individuals mentioned seasonal/holiday family friendly activities. Most residents' perception of 'downtown revitalization' envisioned a cleaner, more attractive appearance of the city, containing more family friendly activities and seasonal events.
- When asked their favorite things about downtown Mount Albert, the local restaurants were the feature that was mentioned most often by residents. Conversely, when residents were asked about the reasons they visit downtown, restaurants were not frequently mentioned.
- Residents were asked to rank various revitalization priorities for Mount Albert. The top 3 included improvements to building exteriors and storefront appearance, streetscaping, and enhanced marketing of downtown businesses. Residents were also asked what they would like to see within the downtown revitalization design project in Mount Albert. The majority expressed an interest in seeing more streetscaping and decorative plants around the town which indicated their desire for a more physically appealing town.
- Bakeries and Restaurants were the two leading businesses and shops respondents noted they wished to see with the revitalization.

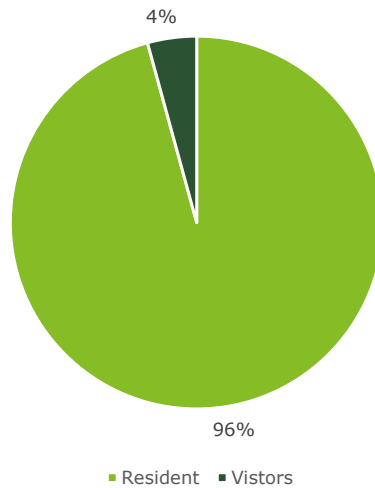
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# Survey Results

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Mount Albert Downtown Revitalization Survey 2022 4

**What is your resident Status?**



Respondents were asked their resident status. Both residents and non-residents were asked the same questions. 180 respondents were residents while 9 were visitors.

\*Due to low responses among non-residents, these results are not summarized in this report.

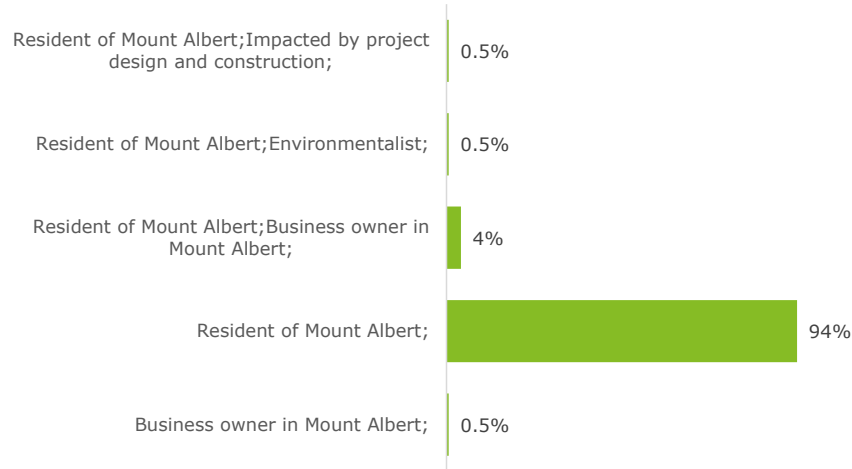
n=180

# Residents

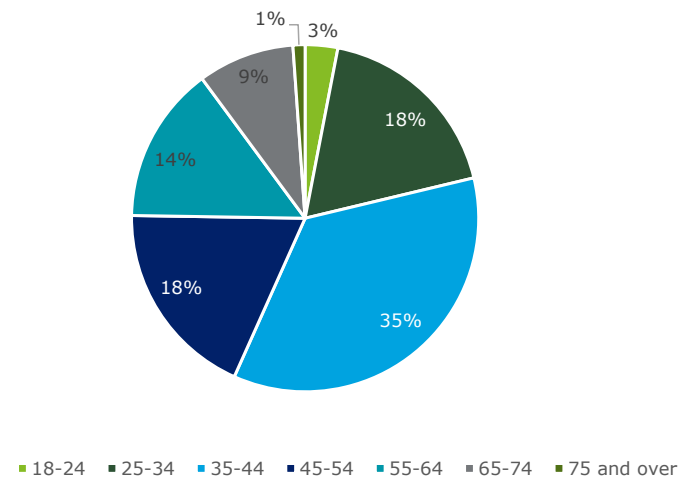
This section includes the responses of 180 residents who responded to the survey.

**Among the residents, 4% were also business owners in Mount Albert. Respondents represented various age groups in the area.**

**What is your interest in the Project?**



**What is your age?**



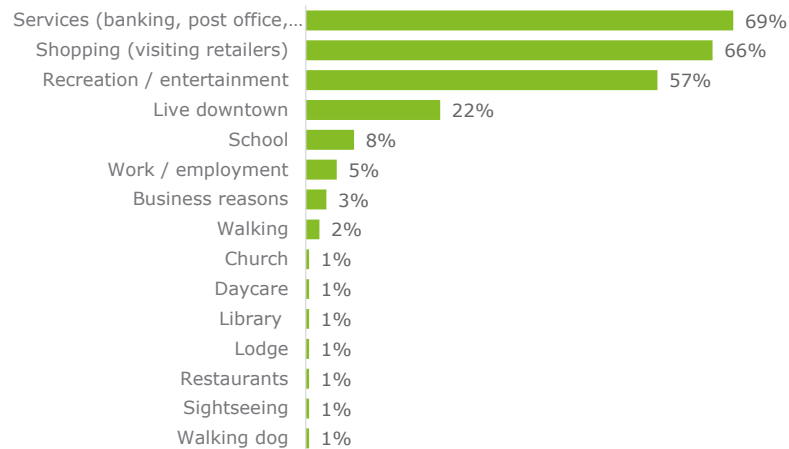
n=180

Mount Albert Downtown Revitalization Survey 2022 7



The main reasons mentioned by residents for visiting downtown Mount Albert were for personal services such as banking/postal office, and shopping.

## Why do you visit downtown Mount Albert?



**Top 3:**

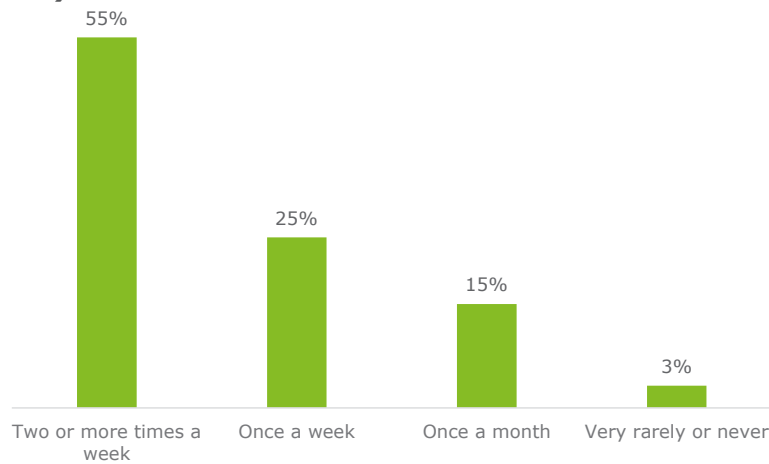
- Services
- Shopping
- Recreation/Entertainment

n=70

Mount Albert Downtown Revitalization Survey 2022 8

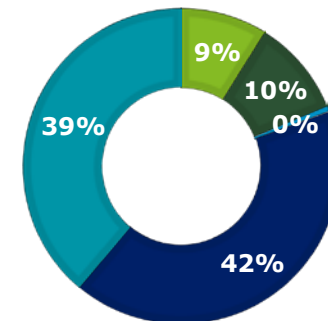
**Residents visited downtown Mount Albert frequently, with over half reporting two or more times per week. The most common mode of transportation was using private cars.**

**How often do you visit downtown Mount Albert?  
(n=180)**



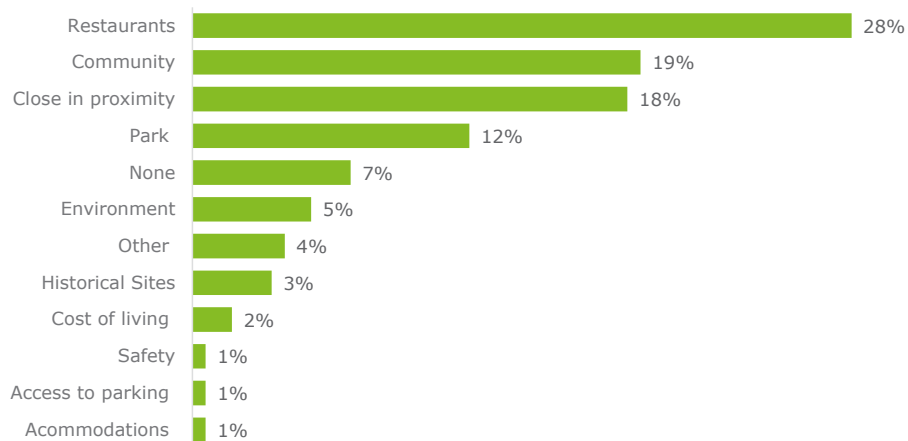
**How do you travel to downtown Mount Albert?  
(n=179)**

■ Bike ■ electric bike ■ I live here ■ Private car ■ Walk



When asked about their top 3 favorite things about downtown Mount Albert, Residents stated they enjoy the restaurants, the atmosphere of a 'small town' community, and how close it was to their personal residence.

**What are your top three (3) favorite things about downtown Mount Albert?**



**TOP 3**

- Restaurants
- Sense of "small town" Community
- Close in Proximity to residence

n=178

Several priorities were identified in 2014 as part of the Mount Albert Revitalization strategy. Residents were asked to rank these priorities in accordance to their importance. The top 3 most highly-rated priorities were: Improvements to building exteriors and storefront appearance, Streetscaping, and enhancing marketing of downtown businesses.

Ranking of Priorities identified in the 2014 Mount Albert Downtown Revitalization Strategy

### **Top 3 Priorities**

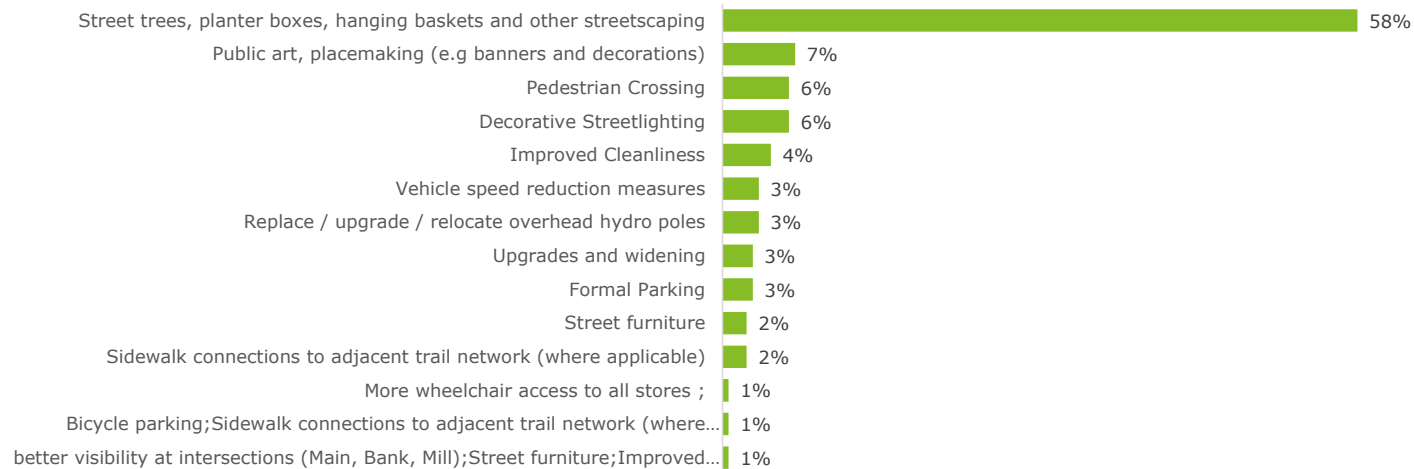
- 1. Improvements to building exteriors and storefront appearance**
- 2. Streetscaping (landscaping plantings, street furniture, public art)**
- 3. Enhance Marketing of Downtown businesses**

n=180

Mount Albert Downtown Revitalization Survey 2022 11

**Residents were asked what they would like to see within the downtown revitalization design project in Mount Albert. The majority expressed seeing more streetscaping and decorative plans around the town.**

**What would you like to see within the downtown revitalization design project in Mount Albert?**

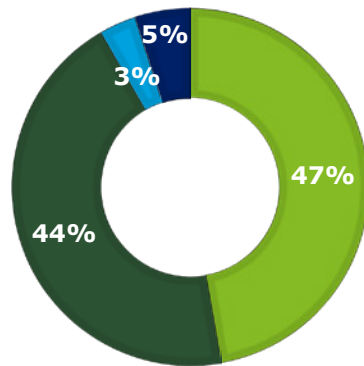


n=180

Mount Albert Downtown Revitalization Survey 2022 12

Respondents were asked if they agreed with creating more one-way streets to accommodate wider sidewalks and on-street parking. 47% of the individuals disagreed while 44% agreed.

■ No ■ Yes ■ Unsure ■ Other



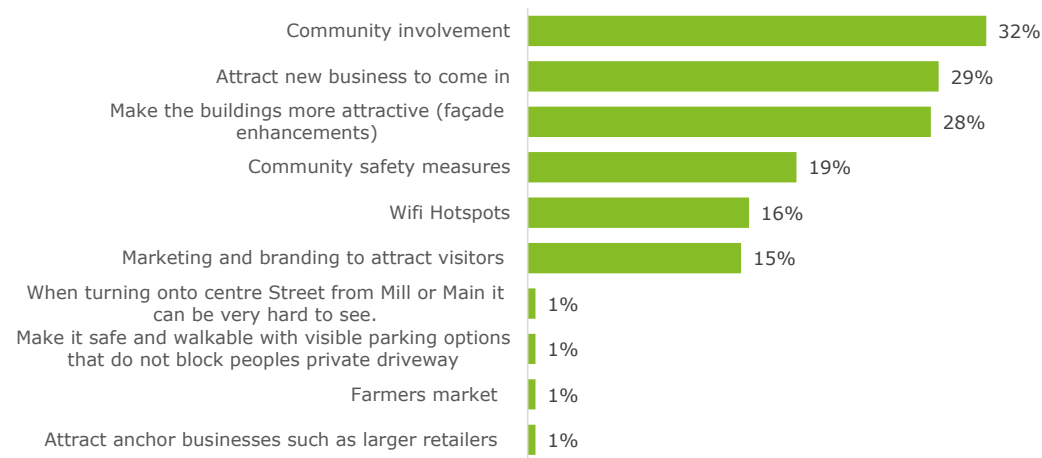
Do you agree with converting some of the side streets to one-way streets to accommodate wider sidewalks and on-street parking?

n=180

Mount Albert Downtown Revitalization Survey 2022 13

**When asked about the potential improvements the residents would like to see in downtown Mount Albert, the most often mentioned improvements were: community involvement, attracting new businesses, and creating a more attractive look to buildings.**

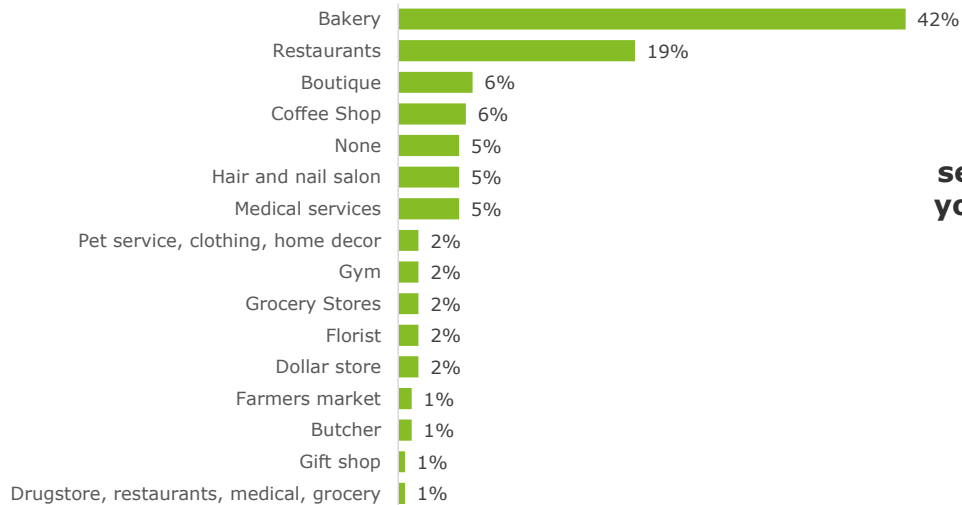
### What other improvements would you like to see in downtown Mount Albert?



n=79

Mount Albert Downtown Revitalization Survey 2022 14

Respondents were asked which new businesses, shops or services they would like to see, and the most-mentioned responses were bakeries and restaurants.



**What new businesses, shops, services, events or facilities would you like to see in downtown Mount Albert?**

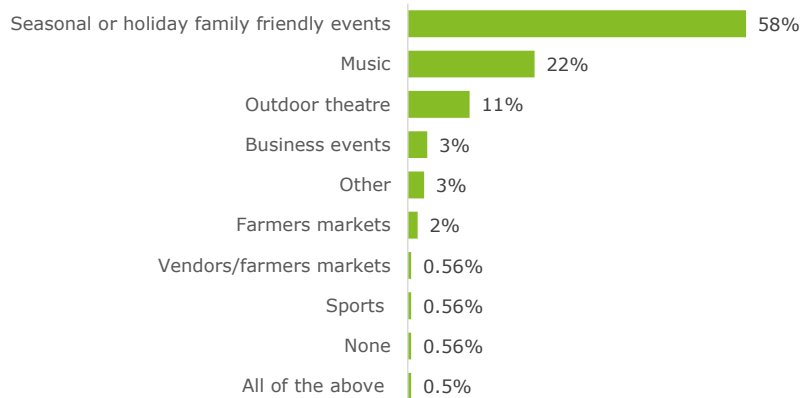
n=177

Mount Albert Downtown Revitalization Survey 2022 15

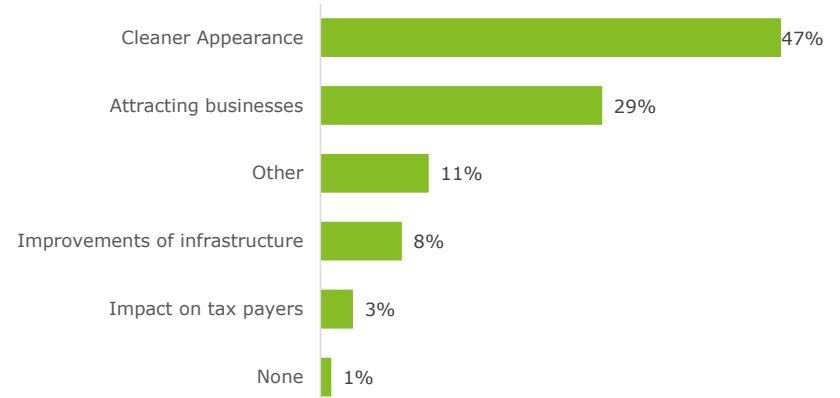


**When asked about which types of events would encourage them to visit downtown Mount Albert, individuals responded with more seasonal events carrying family friendly activities. In addition, they were also asked about their perception of 'downtown revitalization' in which many respondents envisioned a cleaner, more attractive appearance of the city.**

**What types of events would attract or encourage you to visit downtown Mount Albert more frequently?**



**When you think about 'downtown revitalization', what does that mean to you?**

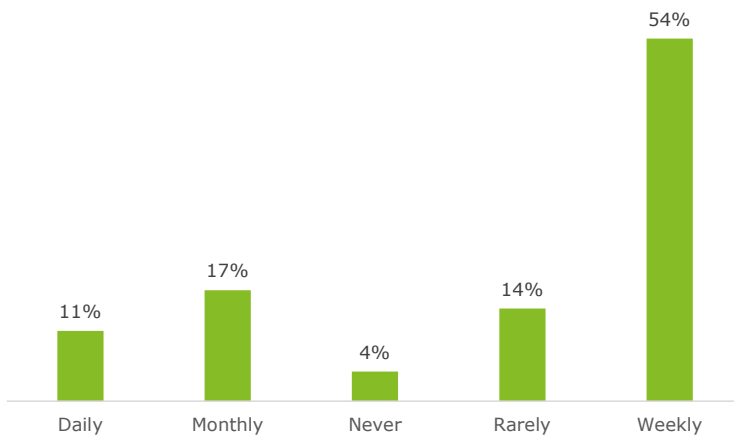


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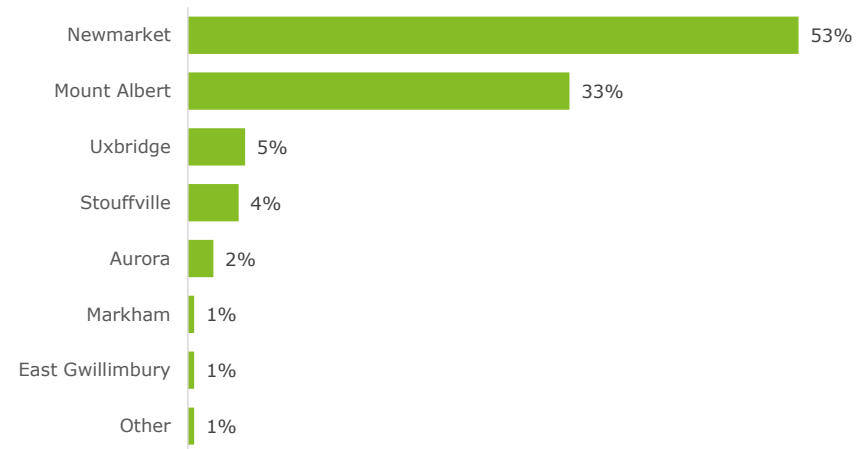
Mount Albert Downtown Revitalization Survey 2022 16

**Most residents shopped at least weekly near their primary residence. Newmarket was the most preferred area to shop for daily conveniences followed by Mount Albert.**

**How often do you shop near your primary resident?**



**Where do you prefer to shop for your day-to-day conveniences (grocery, pharmacy, alcohol)?**

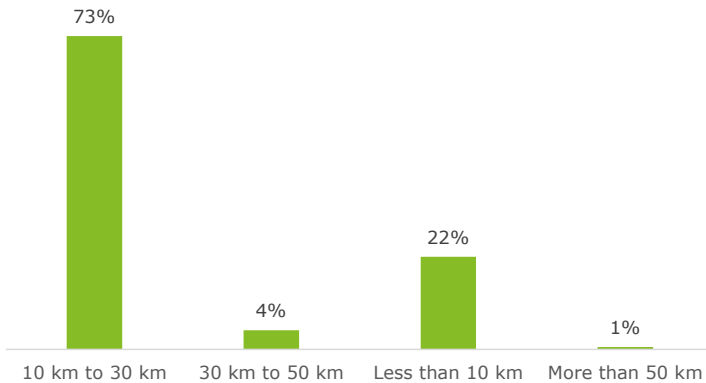


n=180

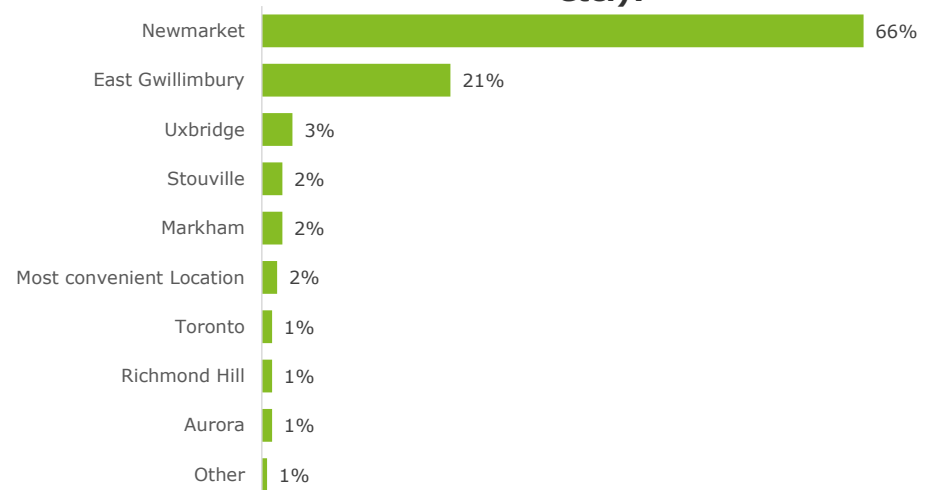
Mount Albert Downtown Revitalization Survey 2022 17

**Most individuals were prepared to travel 10-30km away for daily conveniences and preferred to shop in Newmarket for larger purchases.**

**How far are you prepared to travel for your day-to-day conveniences (grocery, pharmacy, alcohol etc.)?**



**Where do you prefer to shop for your larger purchases (home/auto/apparel/electronics etc.)?**

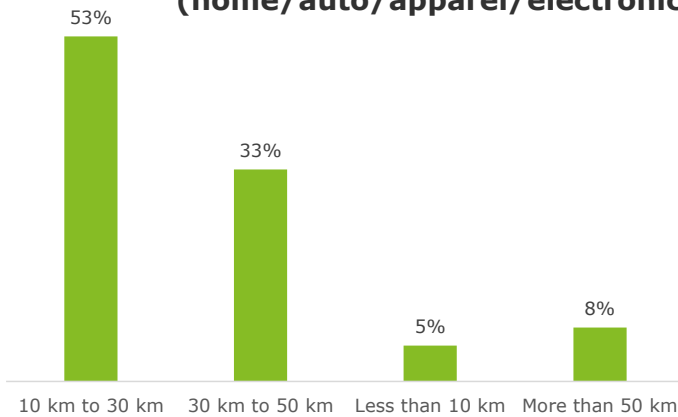


n=180

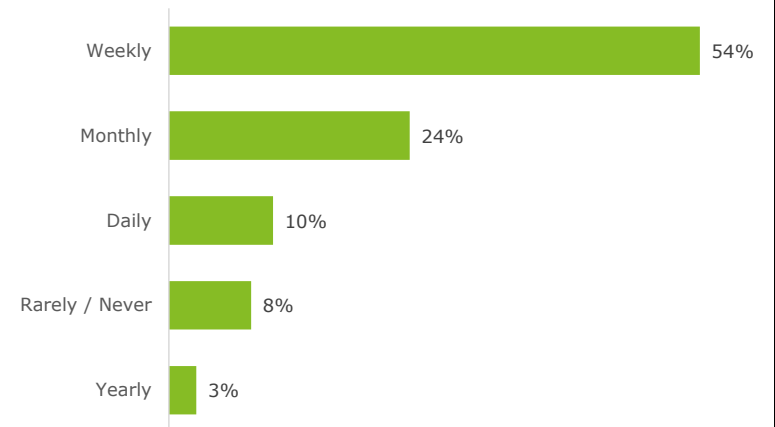
Mount Albert Downtown Revitalization Survey 2022 18

**Most respondents were prepared to travel at least 10-30 km away for larger purchases.  
The majority of residents shopped in Mount Albert weekly or more.**

**How far are you prepared to travel for your larger purchases (home/auto/apparel/electronics etc.)?**



**How often do you use shops or services in Mount Albert?**

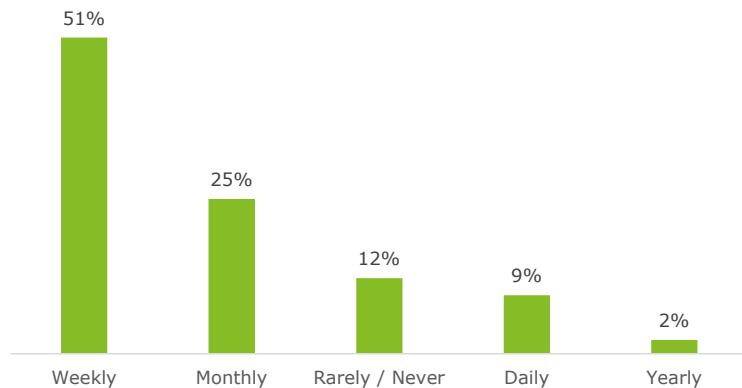


n=180

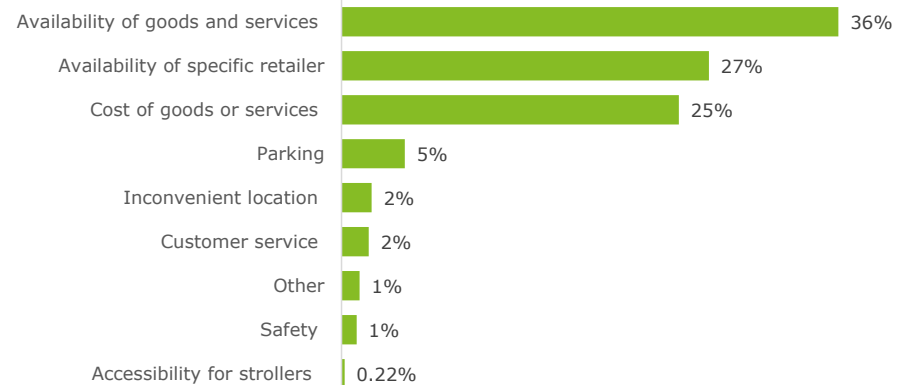
Mount Albert Downtown Revitalization Survey 2022 19

**Residents also used shops and services in other parts of East Gwillimbury on a weekly basis. Their primary reason for shopping outside of Mount Albert was the availability of goods and services.**

**How often do you use shops or services in other parts of East Gwillimbury? (n=180)**



**Please tell us your primary reasons for shopping outside of Mount Albert? (n=48)**



**Some of the primary reasons that residents noted they shopped outside East Gwillimbury was for the availability of goods and services and the availability of specific retailers.**



**Please tell us your primary reasons for shopping outside of East Gwillimbury.**

n=117

Mount Albert Downtown Revitalization Survey 2022 21

## Thank You!

### Contact Details

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