



 Watson
& Associates
ECONOMISTS LTD.

Major Transit Station Area – Commercial Analysis

City of Brampton

Draft Report

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Watson & Associates Economists Ltd.
905-272-3600
info@watsonecon.ca



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List of Acronyms and Abbreviations

| | |
|----------|-----------------------------------|
| G.F.A. | gross floor area |
| G.L.A. | gross leasable area |
| G.T.H.A. | Greater Toronto and Hamilton Area |
| F.S.W. | floor space per worker |
| M.T.S.A. | Major Transit Station Area |
| P.R.E. | population-related employment |
| S.G.U. | small geographic unit |



Executive Summary

Watson & Associates Economists Ltd. (Watson) was retained by the City of Brampton in February 2024 to provide recommendations on the minimum requirements for commercial uses for the 12 Major Transit Station Areas (M.T.S.A.s) across the City that support planning for a good balance of mixed uses.^[1] To support the recommendations, the following has been undertaken:

- Analysis and a brief commentary on planning for the evolving retail market, including the types of commercial uses to be expected in mixed-use environments.
- Review of existing conditions within the City's M.T.S.A.s, including estimates on the existing retail and service commercial floorspace and commercial dynamics of each M.T.S.A. (i.e., the function and role of the existing commercial base).
- An estimate of the population and employment yields based on a review of the M.T.S.A. land use concept plans and background prepared for people and jobs density targets.
- Consideration of the minimum commercial space recommendations, building on the Best Practices review prepared by the City and based on a review of other large urban Canadian municipalities.
- Recommendations on the minimum commercial floorspace for each of the 12 M.T.S.A.s identified for study and guidance on the following:
 - the types of commercial uses to expect;
 - the minimum threshold of commercial floorspace to be considered in the M.T.S.A.;
 - an appropriate benchmark for commercial floorspace to be considered on ground floor sites (i.e., commercial gross floor area (G.F.A.) per housing unit) facing boulevards; and
 - key considerations when reviewing minimum commercial requirements.

As the City continues to grow and urbanize, the City will need to ensure that its retail base is evolving with the needs of residents. A key policy thrust in the new Council-adopted City of Brampton O.P. (Brampton Plan) is to support complete communities

^[1] M.T.S.A.s assessed in this report which includes the following: Centre Street; Kennedy; Rutherford; Laurelcrest; Dixie; Central Park; Bramalea; The Gore; Gateway Terminal; Ray Lawson; Steeles at Mississauga; and Mount Pleasant.



across the City with access to uses such as commercial to support the daily needs of residents. Moreover, while the City's M.T.S.A.s offer a significant opportunity to meet growing housing needs, a key challenge for the City moving forward is balancing the pressures to accommodate residential development with the need for commercial space that contributes towards complete community principles.

The City's M.T.S.A.s today are predominately auto-oriented retail, and a large portion of the retail base accommodates the regional retail trade area. Over the next 25 years, the City envisions these M.T.S.A.s as mixed-use environments that are transit supportive. Typically, mixed-use sites accommodate local serving retail uses, such as convenience stores and small food store uses; services (e.g., dry cleaners, hair and nail salons, tutoring centres, banks, insurance offices, and medical/dental offices); restaurants and other food and drinking establishments; drug stores and health care stores; and small-scale non-food store uses (e.g., dollar stores and apparel stores). A mixed-use area is unlikely to attract customers from beyond the local area unless the area provides high-order transit connectivity, a distinctive experience, or supports a large employment base. The Province has ambitious transit improvements planned for the City which bodes well for the M.T.S.A.s. Having said that, the City needs to ensure that the commercial floorspace requirements within the M.T.S.A.s are appropriate.

The City's M.T.S.A.s are a key component of the City's commercial base. The M.T.S.A.s studied in this report contain just over 472,000 sq.m of retail and commercial services floorspace (over 5.1 million sq.ft.). This is a significant amount of commercial floorspace that accommodates the needs of residents across the City and those living in neighbouring communities. The function of the commercial space in the M.T.S.A.s will change from primarily retail areas serving a regional population base to dynamic complete communities with retail and commercial services to support the needs of the local area. It is recognized that the transition will displace a large portion of the existing retail base that will no longer be compatible in mixed-use environment. As the transition occurs, expectations on the amount of retail and commercial space should consider the population thresholds required to support commercial growth, as well as prioritizing the sites at key locations for ground floor retail uses, such as intersections at boulevards.

The conceptual land use plans envision that total population at a full mature state of the M.T.S.A.s will collectively reach a population base of 261,800 people. This is considered a significant population base, as it is larger than the current population base of some of the mid-sized municipalities across the Greater Toronto and Hamilton Area



(for example, the population of the Town of Oakville has an estimated population base of 233,700 people as of 2024).^[1] To support this level of population, the City will need to ensure that it has appropriate level of commercial uses to support the local needs of residents and contribute towards complete communities.

The 12 M.T.S.A.s are envisioned in the conceptual land use plans to accommodate 1,846,460 sq.m (19,875,000 sq.ft.) of retail and commercial services floorspace, an increase of approximately 1,374,220 sq.m (14,792,000 sq.ft.) from the existing retail and commercial services space today. It is recognized that the full mature state identified in the land use concept plans may occur beyond a 2051 time horizon, while some of the M.T.S.A.s may take longer to transform.

The M.T.S.A.s studied in this report have good fundamentals in supporting mixed-use development, including opportunities to build upon a strong existing retail base, major redevelopment proposals underway, demonstrated demand for high-density developments, site opportunities along the City's main corridors, and major transit improvements planned. The commercial space envisioned in the conceptual land use plans should be considered as long-term plans at a full mature state.

The conceptual land use plans suggest that the M.T.S.A.s will have an average of approximately 7.1 sq.m (76 sq.ft.) of retail and commercial services space per resident at a fully mature state which is lower than the current average of 13 sq.m per (140 sq.ft.) resident. The retail and commercial services base that exists today includes retail uses that cater to occasional shopping by residents by vehicle across the City and beyond which means the trade area extends significantly beyond the M.T.S.A. Generally, regional serving retail uses contribute towards a higher amount of retail and commercial services floorspace per resident, as it reflects serving a population beyond the local area. Going forward, as the M.T.S.A.s evolve with an orientation towards local serving retail uses, retail uses will be visited by residents in the area on a more frequent basis (e.g., weekly, daily, or monthly depending on the retail use). As the M.T.S.A.s transition towards a local serving retail function, it can be expected that the retail and commercial services floorspace per resident will drop significantly. Furthermore, this downward ratio reflects the City's desire to accommodate more housing yet maintain a reasonable

[1] Town of Oakville population estimate derived from Town of Oakville website <https://www.oakville.ca/community-events/community-resources/about-oakville/>, retrieved July 30, 2024.



amount of retail and commercial service to retain the important commercial function of the M.T.S.A.s. in contributing towards complete communities.

Based on Watson's review of the conceptual plans, the allocation of retail and commercial services floorspace appears appropriate for long-term planning purposes, except for the M.T.S.A.s of Mount Pleasant, Central Park, Centre Street, and Rutherford. The ratio of commercial floorspace per resident identified in the conceptual land use plans seems appropriate for the remaining M.T.S.A.s. over the long term, but it represents the upper limit of what could reasonably be expected. As such, the amount of commercial space identified in the conceptual land use plans should not be used as a requirement for short-term planning. Recognizing that it will take some time to support retail uses in a mixed-use environment before the M.T.S.A.s establish a population threshold that will no longer be dependent on auto-oriented retail trade, the City should ensure flexibility in accommodating growth in the M.T.S.A.s. Moreover, the City should continue to monitor development in the M.T.S.A.s, including tracking growth.

The conceptual land use plans include a high amount of commercial space per resident for the M.T.S.A.s of Central Park, Centre Street, and Rutherford, at a level that would require significant transformation of the M.T.S.A.s. The commercial space per resident identified in the plans of these M.T.S.A.s is more than what would be required to support the local needs of the residents. It is recommended that the City plan for up to 8.4 sq.m (90 sq.ft.) per resident for these M.T.S.A.s. The City should prioritize sites for ground floor retail along Queen Street near intersections, recognizing the greatest potential to accommodate retail uses within the M.T.S.A.s.

Furthermore, the expectation of the Mount Pleasant M.T.S.A. to provide approximately 12,100 sq.m (130,000 sq.ft.) of retail and commercial services space may be difficult to achieve given the density anticipated and the sites available on major boulevards. It is recommended that the City prioritize sites fronting Bovaird Drive for ground floor retail uses. The development concept plan identified ground floor retail uses fronting Lagerfeld Drive. These lands, however, should be considered a lower priority for retail uses and the City should explore removing the retail on these sites from the conceptual land use plan given that the area is not anticipated to have a high residential density to support retail fronting along interior streets.



The M.T.S.A.s of Dixie, Bramalea, Kennedy, Laurelcrest, Ray Lawson, The Gore, Gateway, and Steeles at Mississauga generally have a reasonable ratio of commercial space per resident as identified in the conceptual land use plans prepared by the City.

Based on the report findings, it is recommended that the City consider the following:

- When reviewing sites, the City should consider commercial frontage requirements. Sites along a major boulevard should have a minimum frontage requirement of at least 70% along a major boulevard based on best practices. Furthermore, sites with retail frontage should be prioritized at intersection locations for ground floor retail uses and should include a higher amount of commercial frontage (i.e., greater than 70%).
- Recognizing the need for commercial uses, the City should consider the ratio of commercial space per resident for large mixed-use developments. A development application that seeks to significantly reduce the amount of retail space on the site identified in the City's conceptual plans and/or lower commercial frontage should be reviewed more closely. It is important that the City ensure flexibility in planning for mixed-use developments recognizing the market dynamics required to support commercial growth, while ensuring that an M.T.S.A. transforms as a complete community. Should there be a significant difference in the amount of commercial space, the appropriate level of commercial space could be explored through a Commercial Functional Study. Unlike a Commercial Market Study, a Commercial Function Study would examine the commercial function beyond the market dynamics. The City of Guelph, for example, requires a Commercial Function Study if the proposal seeks to provide less commercial space than the minimum commercial floorspace requirement. The Commercial Function Study requires the following to be demonstrated:
 - The availability of commercial floor space within the designation to meet daily and weekly needs of the surrounding community, especially for food store, food-related store, and/or drug store;
 - Opportunities for additional commercial floor space to be provided elsewhere and thereby sustain the local provision of commercial floor space within that designation or in the immediate area;



- Impacts on the ability of residents and employees in the area to use active transportation options to access commercial shopping areas and commercial services; and
- The role of the commercial space in creating a community focal point.^[1]
- Zoning requirements should consider loading requirements, especially in supporting a range of retail uses that depend on frequent deliveries (e.g., grocery stores). Typically, rear laneways with loading areas such as laybys (paved area beside a road where trucks can pull over and park for a short period of time) are a preferred requirement for large retailers in mixed-use environments.^[2] Other considerations include ensuring adequate amount of amenity space surrounding the site (e.g., parkland/walkway, bicycle/scooter parking and sidewalk space for sandwich boards (portable advertising signs) and patios).

^[1] City of Guelph, Official Plan, 2022 Consolidation, policy 9.4.2.2.

^[2] Retailer Insider article: *Tips For Designing Retail Spaces In Mixed-Use Developments*, September 17, 2017.



1. Introduction

1.1 Purpose

Watson & Associates Economists Ltd. (Watson) was retained by the City of Brampton in the February 2024 to provide recommendations on the minimum requirements for commercial uses for the 12 Major Transit Station Areas (M.T.S.A.s) across the City that support planning for a good balance of mix-uses. To support the recommendations, the following as been undertaken:

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 - key considerations when reviewing minimum commercial requirements.



1.2 Planning Considerations for an Evolving Retail Market

A large portion of the retail base in Brampton was developed during the national building wave of large-format retail uses in the 1980s through to the early 2000s. During this period, large-format retail growth included the development of “category-killers,” retailers specializing in a merchandising category (e.g., Staples, Home Depot, Best Buy, Chapters, Michaels, and Toys “R” Us) and large format discounters (e.g., Walmart, Costco, Zellers, and Canadian Tire). Given the availability of greenfield lands, a growing population, and accessibility to highways, Brampton became an attractive commercial market during this period.

Since the early 2000s, retail growth in Brampton, similar to the rest of the Greater Toronto and Hamilton Area (G.T.H.A.), has primarily focused on infilling existing retail sites through “baby-box” retail pads (smaller retailers with a similar building design to big-box retailers) in power centres, expansions of regional shopping centres, and retail growth oriented towards serving the local needs of a neighbourhood. This in part was largely driven by the rise of e-commerce and further accelerated due to the COVID-19 pandemic. The rise of e-commerce has influenced the demand for retail square footage, in particular the demand for retail goods. It is important to note that e-commerce levels in Canada have come down since the COVID-19 pandemic and have stabilized. Further, while e-commerce has been capturing market share from goods-based retailers, growth in service-based retailers continues as they provide social experiences and other services that cannot be purchased remotely. Further, mobile delivery platforms, such as Skip the Dishes and uberEats are extending the customer reach of food service establishments, including adding convenience for food service establishments that do not offer their own delivery service. Service-based retailers typically have smaller footprints than goods-based retailers and, therefore, have greater flexibility for intensification areas. These service-based retailers are driving the intensification of retail plazas, power centres and shopping centre sites across Canada by adding retail space to parking lots and occupying vacant retail space previously inhabited by goods-based retailers.

The anticipated population growth of Brampton will continue to drive demand for new local-serving retail, as consumers do not want to travel far to buy these products. As new residential developments are built, local serving retail will follow closely, but at a rate lower than experienced in the past. Accommodating local serving retail uses that



contribute towards building walkable communities should be a key objective in planning for intensification and greenfield areas. Other retail uses that are more regional serving (e.g., general merchandise, apparel, furniture, and electronics) are more likely to be drawn to auto-oriented areas due to the large trade area requirements to support store sales. It is important to recognize that regional serving commercial uses in Brampton not only serve customers from across the City, but also draw customers from the surrounding area, in particular Caledon, Halton Hills, Milton, Orangeville, and to a lesser extent, communities in Mississauga and Vaughan. As a result, a large portion of the City's existing retail and commercial service floorspace is positioned to accommodate trade beyond the City. As such, the retail base in the City is not only supported by local residents but also by residents in nearby communities that are attracted to the City due to the range of retail options it offers. While the City is a key regional market for retail trade in the Greater Toronto and Hamilton Area, it is important to note that the surrounding communities, such as Halton Hills (Georgetown), Caledon, and Milton have greenfield opportunities to accommodate commercial developments that have the potential to strengthen the commercial base in those communities and reduce the leakage of spending outside their communities.

As the City continues to grow and urbanize, the City will need to ensure that its retail base is evolving with the needs of residents. A key policy thrust in the new Council-adopted City of Brampton O.P. is to support complete communities across the City with access to uses such as commercial to support the daily needs of residents. Moreover, while the City's M.T.S.A.s offer a significant opportunity to meet growing housing needs, a key challenge for the City moving forward is balancing the pressures to accommodate residential development with the need for commercial space that contributes towards complete community principles.

The City's M.T.S.A.s today are predominately auto-oriented retail, and a large portion of the retail base accommodates the regional retail trade area. Over the next 25 years, the City envisions these M.T.S.A.s as mixed-use environments that are transit supportive. Typically, mixed-use sites accommodate local serving retail uses, such as convenience stores and small food store uses; services (e.g., dry cleaners, hair and nail salons, tutoring centres, banks, insurance offices, and medical/dental offices); restaurants and other food and drinking establishments; drug stores and health care stores; and small-scale non-food store uses (e.g., dollar stores and apparel stores). A mixed-use area is unlikely to attract customers from beyond the local area unless the



area provides high-order transit connectivity, a distinctive experience, or supports a large employment base. The Province has ambitious transit improvements planned for the City which bodes well for the M.T.S.A.s. Having said that, the City needs to ensure that the commercial floorspace requirements within the M.T.S.A.s are appropriate. Other cities that are more urbanized and have good fundamentals in supporting mixed uses, such as the City of Toronto, still face challenges in accommodating commercial floorspace in mixed-use developments. This report will explore the appropriate amount of commercial floorspace that should be considered within the City's M.T.S.A.s.

1.3 Study Areas

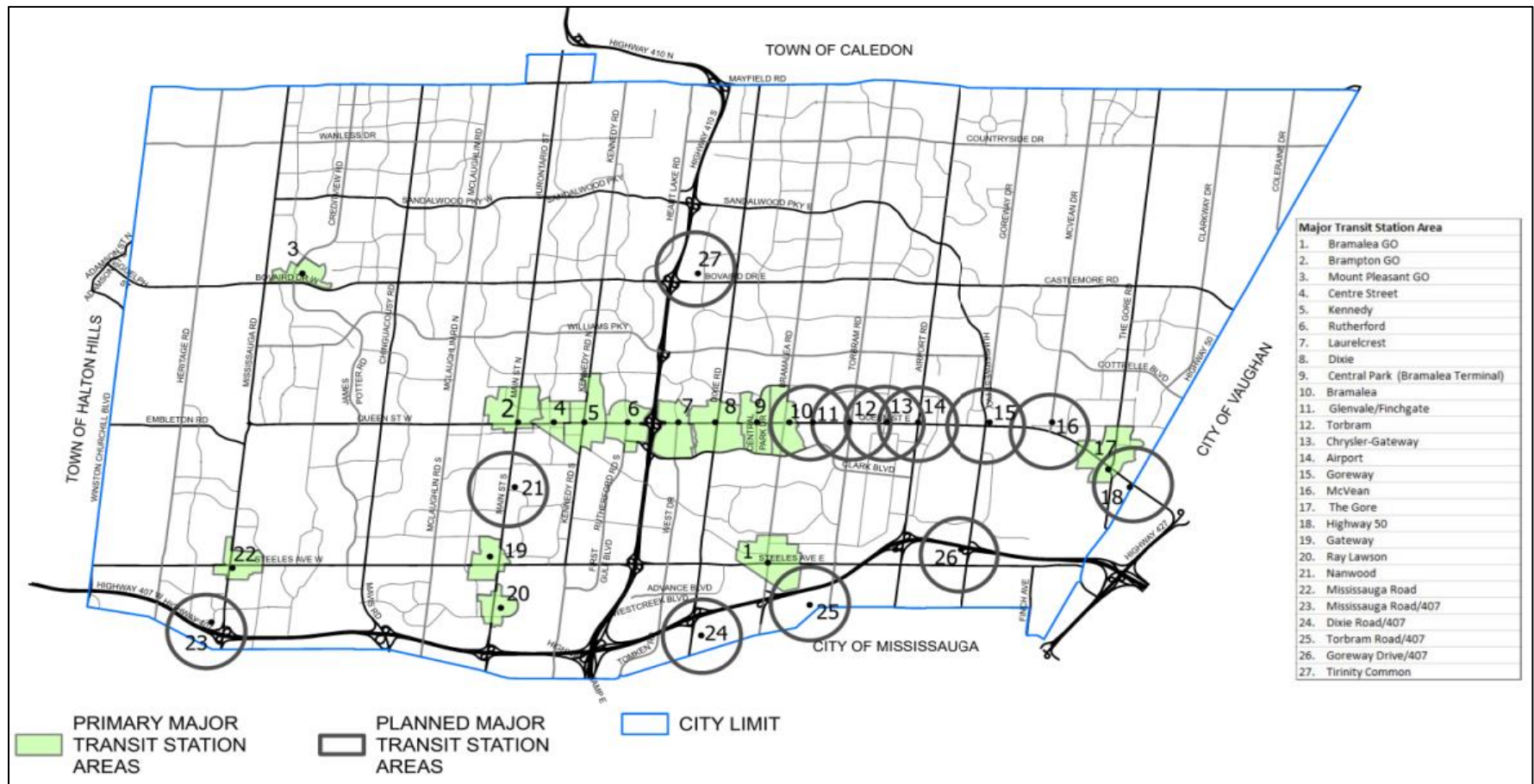
Figure 1 provides a map of the M.T.S.A.s across the City of Brampton. M.T.S.A.s assessed in this report which includes the following:

1. Centre Street
2. Kennedy
3. Rutherford
4. Laurelcrest
5. Dixie
6. Central Park
7. Bramalea
8. The Gore
9. Gateway Terminal
10. Ray Lawson
11. Steeles at Mississauga
12. Mount Pleasant

Most of these M.T.S.A.s are situated along the City's Queen Street corridor and the Hurontario Street corridor. The remaining M.T.S.A.s, including Mount Pleasant and Bramalea GO, benefit from access to GO Transit services, while Steeles at Mississauga is an M.T.S.A. situated on the edge of a large Employment Area in the City



Figure 1
City of Brampton
M.T.S.A.s



Source: City of Brampton, City of Brampton Official Plan, Schedule 1B – Major Transit Station Areas



1.4 Approach

There are a number of approaches to understand the appropriate mix of commercial uses in the M.T.S.A.s and mixed-use areas. Provided below is a summary of different approaches utilized in the report to assess the appropriate level of retail and commercial services in the City's M.T.S.A.s:

- An inventory of the City's current retail and commercial services space in the M.T.S.A.s was carried out by Watson. This background work provided insights on the current level of commercial space in the City's M.T.S.A.s and the amount of commercial space that would be required to transition from auto-oriented retail uses to mixed uses that are transit-supportive.
- A brief review of the floor space per worker (F.S.W.) utilized in the City's background work was carried out, including a review of the existing F.S.W. in the M.T.S.A.s.
- To understand the conceptual land use plans prepared by the City of Brampton for each of the M.T.S.A.s, Watson has reviewed these plans utilizing a number of approaches, including:
 - **P.R.E. Ratios:** the number of residents per 1 P.R.E. job.; this is calculated by dividing population by employment;
 - **Commercial Space Per Resident Ratios:** the amount of commercial floorspace per resident; this is calculated by dividing commercial floorspace by population; and
 - **Commercial Space to Total G.F.A. Ratio:** the amount of commercial floorspace as a share of the total G.F.A.; this is calculated by dividing the amount of commercial floorspace by the total G.F.A., which includes all residential and non-residential G.F.A.
- A jurisdictional review of comparable and large urban municipalities was also carried out to understand the approaches and minimum requirements in planning for commercial space in the M.T.S.A.s.

2. Existing Conditions

The following discussion builds on a desktop inventory of retail and commercial services floorspace that was conducted by Watson. The inventory is based on measurements by Watson of all retail purpose-built or mixed-use floorspace, including tenants in these



buildings that are not necessarily traditional retail businesses (e.g., dentist offices, medical clinics, government offices, etc.). It should be noted that the inventory excludes commercial floorspace in major office buildings (i.e., buildings larger than 20,000 sq.ft. or 1,800 sq.m). Retail and commercial services in multi-tenant industrial buildings are also excluded.

The 12 M.T.S.A.s assessed currently accommodate approximately 472,200 sq.m (or 5.1 million sq.ft.) of retail and commercial services floorspace. The retail and commercial services floorspace in the M.T.S.A.s is predominately characterized as auto-oriented retail buildings with extensive parking areas. It is anticipated that, over time, these sites will be redeveloped to accommodate mixed-use developments that are transit-supportive. The Mount Pleasant M.T.S.A. retail base, while small, has retail uses in a mixed-use setting.

Figure 2 summarizes the existing commercial services floorspace among the 12 M.T.S.A.s. Provided below are key highlights of the existing commercial base within the M.T.S.A.s. A notable observation is that the M.T.S.A.s collectively accommodate eight grocery stores along with various specialty food stores. As the M.T.S.A.s. evolve into mixed-use environments, a significant opportunity will be integrating these establishments into a mixed-use format, likely requiring them to fit within a smaller building footprint.

As summarized in Figure 2, the Dixie M.T.S.A. has the largest concentration of retail and commercial services among the M.T.S.A.s assessed, largely due to the Bramalea City Centre mall located within the M.T.S.A., which is considered a regional shopping draw. The Bramalea City Centre Mall draws customers from across the City and from neighbouring municipalities. The shopping centre also benefits from the office employment base in the area which contributes towards the customer base of the shopping centre. It is notable that this M.T.S.A. accommodates a large grocery store.

The Gateway M.T.S.A. has the second largest commercial base among the M.T.S.A. with a blend of local serving and regional serving commercial uses. The M.T.S.A. benefits as a City transit hub, as well as a key commercial node within the City's B.U.A. The Shoppers World Mall represents the largest component of commercial space within the Gateway M.T.S.A. The Shoppers World Mall currently contains approximately 64,500 sq.m (approximately 694,000 sq.ft.) with a range of local and regional serving retail uses, including a grocery store, a Canadian Tire store and junior department



stores (Giant Tiger and Winners). It should be noted that the Shoppers World Mall retail site includes plans for redevelopment as a mixed-use development. Other notable retail sites within the Gateway M.T.S.A. includes two additional large grocery stores (No Frills and Food Basics).

The Kennedy M.T.S.A. with just over 67,700 sq.m (6,300 sq.m) includes a blend of local and regional retail serving uses. The Centennial Mall (227 Vodden Street East), a small indoor mall, is key retail site in serving the local needs of the surrounding area. The Centennial Mall includes a grocery store (Food Basics), as well as medical/health care services and a range of retail and commercial services.

The Rutherford M.T.S.A. provides primarily local serving retail uses. The Bramrose Square, a large grocery anchored plaza of approximately 17,300 sq.m on a 9-hectare site is situated within the M.T.S.A. This plaza provides a range of local serving retail uses, including grocery, a fitness centre, restaurants, banks and a range of services. This plaza serves as an important part of the local area, given that the nearest large format grocery store (i.e., larger than 1,900 sq.m) is more than 2 km away. Surrounding Bramrose Square are smaller plazas providing a range of local servicing retail uses, as well as automotive related sales and services (new automotive dealerships and automotive repair and sales).

The Laurelcrest M.T.S.A. is situated near the Highway 410 and Queen Street interchange and given its proximity to the highway includes automotive service uses (e.g., auto repair/services), as well as a retail base accommodating regional trade (such as the 410 @ Highway 7 Shopping Centre), including Toys “R” Us, apparel stores and JYSK (home goods retailer). The Laurelcrest M.T.S.A. also includes a retail base that serves the local area, including a grocery store, banks and services.

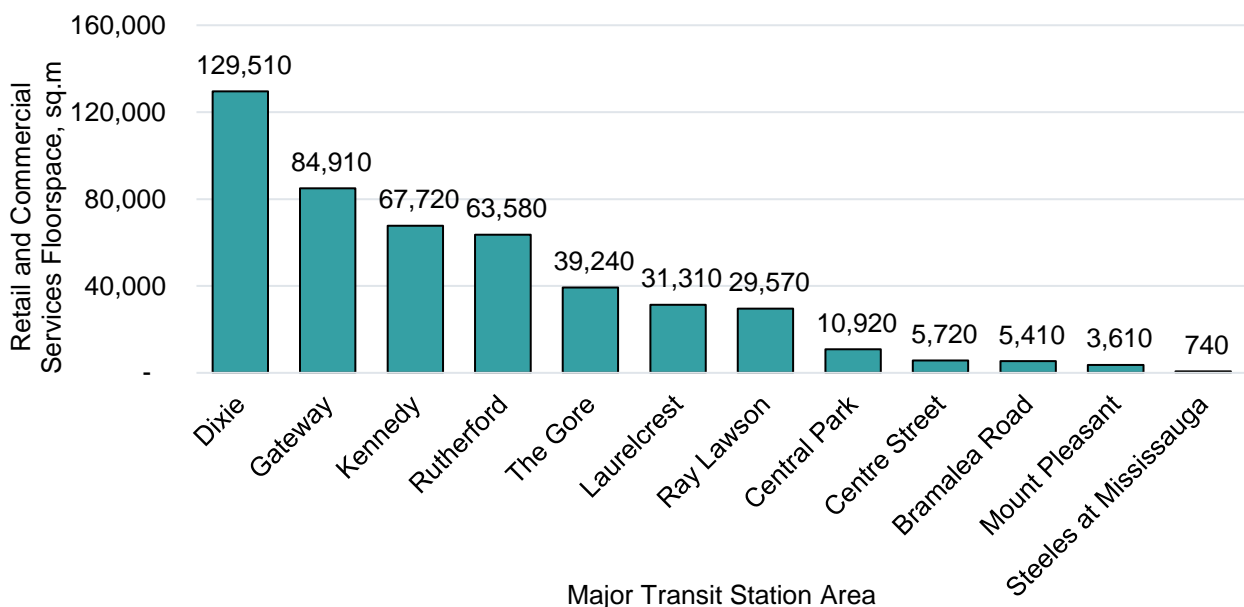
The remaining M.T.S.A.s. primarily contain local serving retail uses that draw customers from the surrounding neighbourhoods (i.e., within 3 to 5 km). Provided below is a summary of the commercial base of these M.T.S.A.s:

- The commercial base within the Ray Lawson M.T.S.A. is largely comprised of a grocery-anchored plaza with additional commercial uses surrounding the plaza. While the M.T.S.A. accommodates local trade, it currently benefits from the traffic along Hurontario Street, intercepting trade from commuters traveling between Brampton and Mississauga, as well as the nearby Sheridan College campus;



- The Central Park M.T.S.A. is situated adjacent to the Dixie M.T.S.A. and includes shadow retail uses to the Bramalea City Centre Mall, including a grocery store and various local serving retail uses. The M.T.S.A. benefits as a community hub, with the medical/health offices and social services;
- The Centre Street M.T.S.A. covers a small section of Queen Street, largely local serving uses on a mid-block section of Queen Street;
- The Gore M.T.S.A. is separated from the rest of the M.T.S.A.s along Queen Street. The M.T.S.A. functions as a small commercial node serving a local area on the eastern edge of the City, as well as communities within the City of Vaughan;
- The Steeles at Mississauga M.T.S.A. includes a very small retail base that includes two gas stations and convenience stores that also supports the surrounding Employment Area; and
- The Bramalea Road M.T.S.A. also includes a small retail base of largely commercial services in small retail buildings along Queen Street.

Figure 2
M.T.S.A. Study Areas
Retail and Commercial Services Floorspace, sq.m, 2024



Note: Based on gross leasable area which is the total rentable floor space, excluding common areas.

Source: Watson & Associates Economists Ltd., 2024.



A key consideration is the significant amount of employment these M.T.S.A.s generate in retail and commercial services establishments with approximately 10,500 jobs as of 2024 or approximately 26% of the City's P.R.E. base.^[1] Figure 3 provides a summary of the retail and commercial services floorspace, employment, and commercial F.S.W. by M.T.S.A. F.S.W. is a metric that estimates the average amount of gross leasable area (G.L.A.) occupied per employee. The G.L.A. includes the total rental area of a retail unit and excludes common areas. F.S.W.s can also be used in reverse to estimate the employment that may be generated from proposed development, which can provide the City of Brampton assistance in determining the potential yield of employment in development applications.

The F.S.W. in Figure 3 is measured based on the floorspace of a commercial unit divided by the number of employees in the unit. As the F.S.W. gets smaller, it indicates that there is less floorspace per employee and the commercial unit is therefore denser. As summarized in Figure 3, the average F.S.W. in the City's M.T.S.A.s ranges from 32 sq.m (343 sq.ft.) per employee in the Dixie M.T.S.A. to 67 sq.m (717 sq.ft.) per employee in the Laurelcrest M.T.S.A. The F.S.W. is low in the Dixie M.T.S.A., primarily due to the weighting of the retail tenants in the Bramalea City Centre which tend to have less on-site storage than stand-alone stores, while the F.S.W. is higher in Laurelcrest due to the presence of big-box stores and automotive service and repair facilities. Overall, the average F.S.W. in the City's M.T.S.A.s is estimated at 45 sq.m (484 sq.ft.). As the M.T.S.A.s become more urbanized, it is anticipated that the F.S.W. will become denser (i.e., lower), as the retail and commercial services opportunities will largely be accommodated in retail buildings with less storage for products and more oriented towards services that typically have a lower F.S.W.

Going forward, it is anticipated that the M.T.S.A.s will accommodate an average of 37 sq.m (400 sq.ft.) per employee for new retail and other mixed uses (i.e., excluding

^[1] Based on the Region of Peel Forecast, May 2024, and the City of Brampton Employment Survey. As of 2021, the Region of Peel forecast estimated a P.R.E. base of 42,600 jobs in the City of Brampton with approximately 10,900 jobs within the M.T.S.A., or approximately 26% of the City's P.R.E. is within the M.T.S.A.. The City of Brampton Employment Survey was used, with adjustments by Watson & Associates Economists Ltd., identifies the same percentage.



office) based on the conceptual land use plans.^[1] This F.S.W. assumption appears appropriate for a mixed-use environment within the context of Brampton. The City of Toronto, for example, has an average retail and commercial services F.S.W. of 33 sq.m (355 sq.ft.) and an average F.S.W. for small retail format uses of 26 sq.m (280 sq.ft.).^[2] It is assumed that F.S.W. levels in the City of Toronto are denser than Brampton.

Figure 3
M.T.S.A. Study Areas
Retail and Commercial Services Floorspace and Employment, 2024

| M.T.S.A. | Retail & Commercial Services G.L.A. Sq.m | Retail & Commercial Services G.L.A. Sq.ft. | Retail & Commercial Services Employees | F.S.W., Employees/Sq.m. | F.S.W., Sq.ft., Employees/Sq.ft. |
|------------------------|--|--|--|-------------------------|----------------------------------|
| Dixie | 129,510 | 1,394,000 | 4,060 | 32 | 343 |
| Gateway | 84,910 | 914,000 | 1,700 | 50 | 538 |
| Kennedy | 67,720 | 729,000 | 1,290 | 52 | 565 |
| Rutherford | 63,580 | 684,000 | 1,210 | 53 | 565 |
| The Gore | 39,240 | 422,000 | 620 | 63 | 681 |
| Laurelcrest | 31,310 | 337,000 | 470 | 67 | 717 |
| Ray Lawson | 29,570 | 318,000 | 520 | 57 | 612 |
| Central Park | 10,920 | 118,000 | 200 | 55 | 590 |
| Centre Street | 5,720 | 62,000 | 150 | 38 | 413 |
| Bramalea Road | 5,410 | 58,000 | 200 | 27 | 290 |
| Mount Pleasant | 3,610 | 39,000 | 60 | 60 | 650 |
| Steeles at Mississauga | 740 | 8,000 | 20 | 37 | 400 |
| Total | 472,240 | 5,083,000 | 10,500 | 45 | 484 |

Notes: M.T.S.A. = Major Transit Station Area; F.S.W. = Floor Space per Worker.
 Source: Employment derived from City of Brampton Employment Survey; retail commercial services floorspace estimates by Watson & Associates Economists Ltd., 2024.

^[1] Based on background F.S.W. assumptions prepared by Region of Peel for the M.T.S.A.s. These background F.S.W. assumptions have been utilized by the City of Brampton planning staff.

^[2] City of Toronto TO Profile, Floor Space per Worker Ratios Bulletin, prepared by the City of Toronto, January 2024.



2.1 Commercial Floorspace Considerations

Over the 2021 to 2051 period, the M.T.S.A.s are anticipated to not only add a robust employment base of 25,800 P.R.E. jobs but to transition to accommodate transit-supportive mixed-use developments.^[1] This means that the City will need to retain the existing number of P.R.E. jobs as well as accommodate new and existing businesses in an increasingly mixed-use format to support the transformation of the M.T.S.A.s. As a result, this would represent a significant increase in development activity for non-residential floorspace.

It is important to recognize that the transition of the M.T.S.A.s to mixed-use environment will involve a shift in the retail and commercial services base towards retail uses that support the local area. With plans to accommodate a significant increase in population density in the M.T.S.A.s., there will be a need to have more retail and commercial services that support the local population base, including grocery stores, drug stores, banks, personal services (e.g., hair salon, dry cleaners, etc.) and medical/dental offices. As the M.T.S.A.s transition, some of the existing retail and commercial services uses due to built-form or regional trade orientation in the M.T.S.A.s would likely seek new locations in the event that the M.T.S.A. is redeveloped (e.g., car dealerships, large format retailers, furniture stores, pool and spa dealers, and building supply stores). Furthermore, some of the existing retail uses in the M.T.S.A.s may adjust their building footprint to a smaller format for a mixed-used environment. For example, a 4,200 sq.m (45,000 sq.ft.) grocery store that exists today in the M.T.S.A. may decide to redevelop to a mixed-use prototype that may only be 1,400 sq.m (15,000 sq.ft.).

It is important to note that as an M.T.S.A. undergoes a transition, it is possible they will experience a temporary contraction in the amount of retail and commercial services floorspace as the M.T.S.A. establishes a critical mass of population in a new urban environment. During this period, it may be difficult to establish retail and commercial services uses. Even if the retail units are built, there may be challenges in leasing retail units. Large retail uses or commercial anchors (at least 1,400 sq.m or 15,000 sq.ft.), for example, will require a significant amount of population density be established in the M.T.S.A. prior to their entry in the M.T.S.A., to compensate for the lack of parking that would attract customers by automobiles. Furthermore, loading is a critical issue in a

^[1] Based on Region of Peel employment forecast derived from the Region of Peel Growth Forecast by S.G.U., May 2024.



mixed-use environment for larger tenants that have multiple deliveries throughout the week (e.g. grocery store). Typically, rear laneways with loading areas such as laybys (paved area beside a road where trucks can pull over and park for a short period of time) are a preferred requirement for large retailers in mixed-use environments.^[1]

Mixed-use sites that offer the opportunity to accommodate loading facilities from a rear laneway, as well as visibility from a major roadway should be prioritized for mixed-use developments that include retail uses.

3. Conceptual Major Transit Station Area Land Use Plans

The City of Brampton has prepared land use concept plans for 12 of the M.T.S.A.s assessed (excludes Bramalea GO M.T.S.A. due to the land use concept plan being prepared by the City at a later date). The land use plans generally envision the redevelopment of lands along the major corridors within the M.T.S.A.s.. As a result, the existing commercial services floorspace is planned to transform from its current state of auto-oriented retail uses to mixed-use buildings. Watson has added the estimated yield of population, jobs, and floorspace of current planning applications to the conceptual land use plans, based on a summary provided by the City of Brampton planning staff. It is important to note that the yields are subject to change as development occurs because they are based on a development concept. It is assumed that the existing retail and commercial services floorspace would be replaced within the M.T.S.A.s (i.e., the analysis assumes no double counting, nor does it add the existing retail and commercial services base to the conceptual land use plan totals) based on the conceptual land use plans prepared by the City. It is notable that some of the existing developments expected to remain through the transformation are large institutional uses (e.g., schools), select major office buildings, and some mature or recently established residential areas.

3.1 Estimated Retail and Commercial Services Floorspace

Figure 4 summarizes the existing retail and commercial services floorspace compared to the conceptual land use plans prepared by the City of Brampton (also includes

^[1] Retailer Insider article: *Tips For Designing Retail Spaces In Mixed-Use Developments*, September 17, 2017.



proposed applications), which includes a summary of the anticipated commercial floorspace envisioned in the M.T.S.A.s. It is important to recognize that the commercial floorspace envisioned in the conceptual land use plans is based on the mature state and would likely accommodate demand beyond 2051.

Key highlights include the following:

- The 12 M.T.S.A.s are envisioned to accommodate 1,846,460 sq.m (19,875,000 sq.ft.) of retail and commercial services floorspace, an increase of approximately 1,374,220 sq.m (14,792,000 sq.ft.) from the existing retail and commercial services space today.
- A net increase in retail and commercial services floorspace is envisioned for all M.T.S.A.s, as summarized in Figure 4.
- The Rutherford M.T.S.A. is envisioned to add 270,660 sq.m (2,913,000 sq.ft.) of retail and commercial services floorspace, the largest incremental increase among the M.T.S.A.s studied.
- The Gateway Terminal M.T.S.A. is envisioned to provide a slight increase to the retail and commercial services floorspace based on what currently exists today. It is important to recognize that the Gateway Terminal M.T.S.A. currently includes retail uses that attract customers from across the City and beyond. While the net increase is not significant for this area, there will still need to be considerable effort in replacing the existing retail and commercial services base in a new mixed-use setting.
- The Mount Pleasant M.T.S.A. is envisioned to accommodate 12,100 sq.m (130,000 sq.ft.) of retail and commercial services floorspace at a mature state, among the lowest of the 12 M.T.S.A.s. Compared to the other M.T.S.A.s, the Mount Pleasant has limited site opportunities to accommodate retail uses (e.g., opportunities for frontage along boulevards). Furthermore, lower population density levels are anticipated in this M.T.S.A. since the majority of the M.T.S.A. has been developed more recently in lower density housing forms.



Figure 4
M.T.S.A. Existing and Conceptual Land Use Plans
Retail and Commercial Services Floorspace, Sq.m

| M.T.S.A.s | Existing Situation: Commercial Floorspace, sq.m | Conceptual Land- Use Plan: Commercial Floorspace, sq.m | Change in Commercial Floorspace, sq.m. |
|----------------------------------|---|---|--|
| | A | B | C = B - A |
| Dixie | 129,510 | 375,970 | 246,460 |
| Gateway Terminal | 84,910 | 88,730 | 3,820 |
| Kennedy | 67,720 | 203,310 | 135,590 |
| Rutherford | 63,580 | 334,240 | 270,660 |
| The Gore | 39,240 | 79,350 | 40,110 |
| Laurelcrest | 31,310 | 200,530 | 169,220 |
| Ray Lawson | 29,570 | 73,250 | 43,680 |
| Central Park (Bramalea Terminal) | 10,920 | 178,180 | 167,260 |
| Centre St. | 5,720 | 144,200 | 138,480 |
| Bramalea | 5,410 | 119,850 | 114,440 |
| Mount Pleasant GO | 3,610 | 12,100 | 8,490 |
| Steeles at Mississauga | 740 | 36,750 | 36,010 |
| Total M.T.S.A.s | 472,240 | 1,846,460 | 1,374,220 |

Notes: M.T.S.A. = Major Transit Station Area. Figures have been rounded. Excludes the Bramalea GO M.T.S.A. Based on proposed applications and M.T.S.A. concepts. Sorted by existing situation.

Source: Existing situation commercial floorspace by Watson & Associates Economists Ltd.; conceptual land use plan commercial floorspace based on M.T.S.A. background figures prepared by the City of Brampton planning staff, May 2024.

3.2 Estimated Retail and Commercial Services Employment

As summarized in Figure 5, it is estimated the conceptual plans would generate approximately 49,700 retail and commercial services jobs, an increase of 39,200 jobs from what exists today.^[1] Figure 5 provides a summary of the estimated existing employment base today in the M.T.S.A. compared to the employment envisioned in the

^[1] As previously discussed, the M.T.S.A.s collectively are anticipated to accommodate 1,846,460 sq.m of retail and commercial services floorspace. Based on a gross floor area of 1,846,460 sq.m divided by employment of 49,700, results in a F.S.W. of 37 sq.m.



conceptual land use plans. As summarized, the Dixie M.T.S.A. is anticipated to accommodate the most retail and commercial services employment (10,120 jobs) at a mature state among the M.T.S.A.s., while the Mount Pleasant M.T.S.A. is anticipated to accommodate the lowest among the M.T.S.A.s (330 jobs). It is important to note that employment in Figure 5 only includes retail and commercial services employment, as such it excludes Major Office and institutional employment.

Figure 5
M.T.S.A. Existing and Conceptual Land Use Plans
Estimated Retail and Commercial Services Jobs

| M.T.S.A.s | Existing Situation: Retail and Commercial Services Employment | Conceptual Land- Use Plan: Estimated Retail and Commercial Services Employment | Increase in Retail and Commercial Services Employment |
|----------------------------------|--|--|---|
| | A | B | C = B - A |
| Dixie | 4,060 | 10,120 | 6,060 |
| Rutherford | 1,210 | 8,990 | 7,780 |
| Kennedy | 1,290 | 5,470 | 4,180 |
| Laurelcrest | 470 | 5,400 | 4,930 |
| Central Park (Bramalea Terminal) | 200 | 4,790 | 4,590 |
| Centre St. | 150 | 3,880 | 3,730 |
| Bramalea | 200 | 3,230 | 3,030 |
| Gateway Terminal | 1,700 | 2,390 | 690 |
| The Gore | 620 | 2,140 | 1,520 |
| Ray Lawson | 520 | 1,970 | 1,450 |
| Steeles at Mississauga | 20 | 990 | 970 |
| Mount Pleasant GO | 60 | 330 | 270 |
| Total M.T.S.A.s | 10,500 | 49,700 | 39,200 |

Notes: M.T.S.A. = Major Transit Station Area. Figures have been rounded. Excludes the Bramalea GO M.T.S.A. Based on proposed applications and M.T.S.A. land use plan concepts. Sorted by retail and services employment according to development concept.

Source: Existing situation commercial floorspace by Watson & Associates Economists Ltd.; conceptual land use plan commercial floorspace based on M.T.S.A. background figures prepared by the City of Brampton planning staff, May 2024.



3.3 Estimated Population Based on Conceptual Land Use Plans

As summarized in Figures 6 and 7, based on the conceptual land use plans, it is estimated the M.T.S.A.s would generate a population base of 226,900 people on lands identified for redevelopment and through new development as the M.T.S.A.s reach a full mature state. It is estimated that the current population base in the M.T.S.A.s is approximately 34,900 people. As a result, it is estimated that total population at a full mature state as identified in the conceptual land use plans is estimated to reach 261,800 people. This is considered a significant population base, as it larger than the current population base of some of the mid-sized municipalities across the G.T.H.A. (for example, the population of the Town of Oakville has an estimated population base of 233,700 people as of 2024).^[1] When comparing the population of the M.T.S.A. with the rest of the City of Brampton, it is important to consider the growth opportunities across the City, including the Heritage Heights Secondary Plan Area, as well as the Brampton Urban Growth Centre. The M.T.S.A.s represent one of the key areas for the City to direct and accommodate growth to 2051. Furthermore, it is recognized that the full mature state identified in the land use concept plans may occur beyond a 2051 time horizon, while some of the M.T.S.A.s may take longer to transform.

Other key highlights include the following:

- The Dixie M.T.S.A. is envisioned to accommodate a population of 42,000 people and includes plans for a population of 33,600 people to be accommodated through new development and redevelopment as it reaches a full mature state.
- The Gateway M.T.S.A. is planned to accommodate a population of 31,800 people. Plans are underway to redevelop the Shoppers World mall into a large mixed-use development. This development is anticipated to generate a new urban hub for the City and provide significant housing opportunities for Brampton. Currently the M.T.S.A. has only a small residential base with a population of 600.
- The Laurelcrest M.T.S.A. is primarily a retail area with big-box retail stores and other auto-oriented retail uses (e.g., gas stations, auto repair/services) along

[1] Town of Oakville population estimate derived from Town of Oakville website <https://www.oakville.ca/community-events/community-resources/about-oakville/>, retrieved July 30, 2024.



Queen Street. Over time, it is envisioned that this area will accommodate a population of 37,000 people.

- The conceptual land use plans suggest a significant increase in the population base across all M.T.S.A.s. as they reach a full mature state.

Figure 6
M.T.S.A. Existing and Conceptual Land Use Plans
Estimated Population

| M.T.S.A.s | Existing Population | Estimated Population through Redevelopment & New Development | Total Population |
|----------------------------------|---------------------|--|------------------|
| | A | B | C = A + B |
| Dixie | 8,400 | 33,600 | 42,000 |
| Gateway Terminal | 600 | 31,200 | 31,800 |
| Laurelcrest | 2,200 | 28,500 | 30,700 |
| Kennedy | 6,100 | 21,500 | 27,600 |
| Rutherford | 1,300 | 23,900 | 25,200 |
| Mount Pleasant GO | 1,400 | 19,900 | 21,300 |
| The Gore | 1,700 | 19,600 | 21,300 |
| Steeles at Mississauga | 0 | 15,900 | 15,900 |
| Bramalea | 5,800 | 7,800 | 13,600 |
| Ray Lawson | 200 | 12,800 | 13,000 |
| Central Park (Bramalea Terminal) | 5,800 | 4,800 | 10,600 |
| Centre St. | 1,400 | 7,400 | 8,800 |
| M.T.S.A. sub-Total | 34,900 | 226,900 | 261,800 |

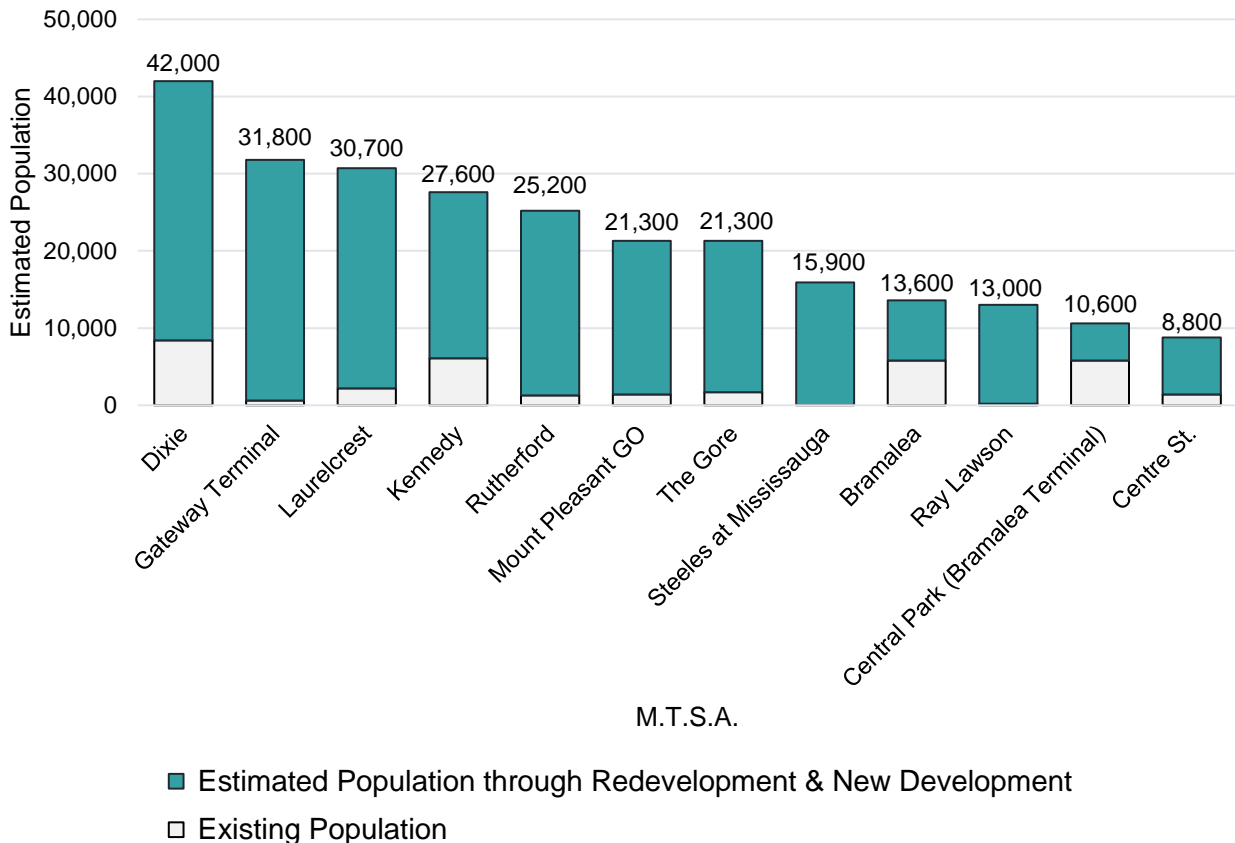
Notes: M.T.S.A. = Major Transit Station Area.

Sorted by total population of development concept.

Source: Existing population based on Region of Peel Official Plan growth forecasts by small geographic unit, Scenario 1 (May 2024). Conceptual land use plans and M.T.S.A. background figures prepared by the City of Brampton planning staff, May 2024.



Figure 7
M.T.S.A. Existing and Conceptual Land Use Plans
Estimated Population



Note: M.T.S.A. = Major Transit Station Area.

Source: Existing population based on Region of Peel Official Plan growth forecasts by small geographic unit, Scenario 1 (May 2024). Conceptual land use plan and M.T.S.A. background figures prepared by the City of Brampton planning staff, May 2024.

3.4 Estimated Retail and Commercial Services Floorspace Per Resident

As summarized in Figure 8, it is estimated that the conceptual plans would generate an average of approximately 7.1 sq.m (76 sq.ft.) of retail and commercial services floorspace per resident. As a comparison, the M.T.S.A.s are estimated to currently have an average of 13.6 sq.m (146 sq.ft.) of retail and commercial services floorspace per resident which is considered high and largely indicative of auto-oriented retail uses with a small population base. The retail and commercial services base that exists today



includes retail uses that cater to occasional shopping by residents by vehicle across the City and beyond which means the trade area extends significantly beyond the M.T.S.A. Generally, regional serving retail uses contribute towards a higher amount of retail and commercial services floorspace per resident, as it reflects serving a population beyond the local area. Going forward, as the M.T.S.A.s evolve with an orientation towards local serving retail uses, retail uses that are visited by residents in the area on a more frequent basis (e.g., weekly, daily or monthly depending on retail use). As the M.T.S.A. transition towards a local serving retail function, it can be expected that the retail and commercial services floorspace per resident will drop significantly.

Furthermore, in mixed-used settings, such as M.T.S.A.s, a policy target for commercial space per resident can range greatly, usually not exceeding 20 sq.m (215 sq.ft.), which means for every 1,000 residents, up to approximately 20,000 sq.m (215,000 sq.ft.) would be required. It is important to recognize reaching that level would largely indicate the mixed-use area has a wide range of retail uses, including regional serving uses, such as apparel stores, junior department stores (e.g., Winners/Marshalls) and other uses that are typically found in high-traffic mixed-use areas. In most cases, the commercial space per resident from a market perspective in a mixed-use setting is likely to be less than 4 sq.m (43 sq.ft.) per resident or 4,000 sq.m (43,000 sq.ft. per resident) for every 1,000 residents, unless there are compelling reasons for a higher amount of commercial space per resident. As the mixed-use area reaches a critical mass, the commercial space per resident would increase.

The higher end of the range of commercial space per resident would suggest that the mixed-use environment has a combination of the following features: a large population threshold within walking distance to support a range of retail uses; high-order transit connectivity; a range of prime site opportunities for retail (i.e., good frontage opportunities on major boulevards with a high amount of foot traffic); and large anchors or traffic generators to the area (e.g., post-secondary institution, office employment and amenity space). As such, within the context of the City of Brampton, the M.T.S.A.s along the central portion of the Queen Street (i.e., the precincts identified by the City which excludes The Gore M.T.S.A.) and Hurontario Street have the greatest opportunities to reach a high ratio of commercial space per resident. Having said that, it is important to recognize that the M.T.S.A.s will not operate independently, as the majority of the M.T.S.A.s along Queen Street are adjacent to another M.T.S.A.s. It can be expected that some of the M.T.S.A.s along Queen Street may have a greater role in



servicing the retail needs due to site factors such as frontage opportunities (e.g., corner frontage) and traffic generators (e.g., post-secondary institution and major office uses).

The retail and commercial services space per resident ratios in the conceptual land use plans generally represent the higher end of the range that can be reasonably expected at full mature state of the M.T.S.A. as envisioned in the conceptual land use plans. From a market perspective the commercial space per resident ratios identified in the conceptual land use plans would be considered high in the early stages of the transformation of the M.T.S.A.s as a large population threshold and critical mass would need to be established to realize the space per resident ratios for a number of the M.T.S.A.s. It is important to note that the City's conceptual plans include a significant amount of major office G.F.A. which is not included in the ratios.

Other key highlights include:

- The conceptual plan for the Mount Pleasant M.T.S.A. would accommodate 0.6 sq.m (6.4 sq.ft.) of retail and commercial services floorspace per resident which is among the lowest of the M.T.S.A.s reviewed. This would represent a need to provide approximately 12,100 sq.m (130,000 sq.ft.) of retail and commercial services space. The Mount Pleasant M.T.S.A., unlike most of the other M.T.S.A.s, has limited mixed use opportunities that front onto boulevards and corridors. It is recommended that the City prioritize sites fronting Bovaird Avenue Drive for ground floor retail uses. The development concept plan identified ground floor retail uses fronting Lagerfeld Drive. These lands, however, should be considered a lower priority for retail uses and the City should explore removing the retail on these sites from the conceptual land use plan given that the area is not anticipated to have a high residential density to support retail along interior roads.
- At the higher end, the Central Park M.T.S.A. is planned to accommodate 16.8 sq.m (181 sq.ft.) of retail and commercial floorspace per resident. This area includes a greater focus on non-residential uses. Furthermore, the proposed Toronto Metropolitan University School of Medicine Campus (site currently occupied by the Bramalea Civic Centre) is anticipated to be a key anchor for this M.T.S.A. which bodes well in supporting retail and commercial services floorspace opportunities. Having said that, achieving a commercial space per resident of 16.8 sq.m (181 sq.ft.) is considered high. Ground floor retail space along Queen Street near intersection should be prioritized. Given that this



M.T.S.A. is anticipated to accommodate only 10,600 residents at a full mature state, the City should plan for a low ratio of commercial space per resident, reflecting that the retail and commercial service floorspace in this area will be primarily driven by non-residential uses, such as the Toronto Metropolitan School of Medicine. It is recommended that the City explore decreasing the commercial floorspace by 50% (i.e., 89,100 sq.m or 959,000 sq.ft.) for this M.T.S.A. The reduction would result in a ratio of 8.4 sq.m per resident (90 sq.ft. per resident). Long term as the M.T.S.A. reaches full maturity, opportunities may exist to increase the amount of commercial space.

- Similarly, it is recommended that the City plan for retail and commercial services floorspace for the Centre Street and Rutherford M.T.S.A.s, to a similar ratio (8.4 sq.m per resident) as suggested for the Central Park M.T.S.A.s. In these M.T.S.A.s, the City should prioritize ground floor retail along Queen Street, especially near major intersections.
- The other M.T.S.A.s (i.e., excluding the M.T.S.A.s of Mount Pleasant, Central Park, Centre Street, Rutherford) appear appropriate for long-term planning purposes, however, the City should expect a lower ratio of commercial space per resident in the short term.



Figure 8
M.T.S.A. Existing and Conceptual Land Use Plans
Estimated Retail and Commercial Services Floorspace Per Resident

| M.T.S.A.s | Total Population | Retail & Commercial Services Floorspace, sq.m | Retail & Commercial Services Floorspace per Resident, sq.m |
|----------------------------------|------------------|---|--|
| | A | B | C = B / C |
| Central Park (Bramalea Terminal) | 10,600 | 178,180 | 16.8 |
| Centre St. | 8,800 | 144,200 | 16.4 |
| Rutherford | 25,200 | 334,240 | 13.3 |
| Dixie | 42,000 | 375,970 | 9.0 |
| Bramalea | 13,600 | 119,850 | 8.8 |
| Kennedy | 27,600 | 203,310 | 7.4 |
| Laurelcrest | 30,700 | 200,530 | 6.5 |
| Ray Lawson | 13,000 | 73,250 | 5.6 |
| The Gore | 21,300 | 79,350 | 3.7 |
| Gateway Terminal | 31,800 | 88,730 | 2.8 |
| Steeles at Mississauga | 15,900 | 36,750 | 2.3 |
| Mount Pleasant GO | 21,300 | 12,100 | 0.6 |
| M.T.S.A. sub-Total | 261,800 | 1,846,460 | 7.1 |

Higher indicates more retail & commercial services floorspace per resident

Note: M.T.S.A. = Major Transit Station Area.

Source: Conceptual land use plan and M.T.S.A. background figures prepared by the City of Brampton planning staff, May 2024.

3.5 Estimated Retail and Commercial Services Floorspace as Share of Gross Floor Area

As summarized in Figure 9, it is estimated that the conceptual plans envision an average of approximately 13% of the total G.F.A. as retail and commercial services uses. The total G.F.A. includes all residential and non-residential floorspace. Reviewing the retail and commercial services space based on a percentage of total gross floor area, provides an indication of the presence of commercial space. It also considers the share of other uses, such as office and residential uses.

Key highlights include the following:



- The Central Park M.T.S.A. is planned to accommodate 45% of its G.F.A. as retail and commercial services floorspace at its full mature state, the highest ratio among the M.T.S.A.s. This appears high and the City may want to explore planning for a lower share.
- Following the Central Park M.T.S.A., the M.T.S.A.s along the Queen Street Corridor (Bramalea, Rutherford, Dixie, Centre Street, Kennedy, and Laurelcrest) are planned to accommodate a large portion of retail and commercial services floorspace, ranging from 14% to 30% of the G.F.A. planned in the M.T.S.A. While the ratio is high for the Queen Street Corridor, it is envisioned that this corridor will retain its importance as a major commercial corridor supporting the City's population-related employment needs.
- The Ray Lawson M.T.S.A. and the Gore M.T.S.A. are estimated to accommodate 14% and 9%, respectively, of the G.F.A. planned as retail commercial services, including a greater focus on major offices and residential. The Ray Lawson M.T.S.A. is planned to build on its major office employment base. The Hazel McCallion Light Rail Transit line is anticipated to be a key asset in developing the major office employment base in the Ray Lawson M.T.S.A.
- The Steeles at Mississauga M.T.S.A. is estimated to accommodate 5% of the G.F.A. as retail and commercial services, largely due to a focus on major office uses and opportunities for high-density residential uses.
- The Gateway M.T.S.A. is envisioned to accommodate 2% of its G.F.A. for retail and commercial services which would suggest that this predominately retail area today would, over time, be more oriented towards other uses.
- As previously discussed, the Mount Pleasant M.T.S.A. has some limitations on the amount of retail and commercial services floorspace that can be expected due to the surrounding population density and limited site opportunities along a boulevard and corridor. As a result, it is planned that 2% of the G.F.A. accommodated in the M.T.S.A. is envisioned for retail and commercial services.



Figure 9
M.T.S.A. Existing and Conceptual Land Use Plans
Estimated Share of Retail and Commercial Services Floorspace

| M.T.S.A.s | Retail & Commercial Services Floorspace, sq.m | Total Gross Floor Area (Residential and Non-Residential), sq.m | Retail & Commercial Services Floorspace as Share of Total Gross Floor Area |
|----------------------------------|---|--|--|
| | A | B | C = A / B |
| Central Park (Bramalea Terminal) | 178,180 | 398,020 | 45% |
| Bramalea | 119,850 | 399,500 | 30% |
| Rutherford | 334,240 | 1,170,320 | 29% |
| Dixie | 375,970 | 1,585,770 | 24% |
| Centre St. | 144,200 | 768,060 | 19% |
| Kennedy | 203,310 | 1,214,570 | 17% |
| Laurelcrest | 200,530 | 1,461,220 | 14% |
| Ray Lawson | 73,250 | 596,730 | 12% |
| The Gore | 79,350 | 847,440 | 9% |
| Steeles at Mississauga | 36,750 | 718,610 | 5% |
| Gateway Terminal | 88,730 | 4,111,850 | 2% |
| Mount Pleasant GO | 12,100 | 605,230 | 2% |
| M.T.S.A. sub-Total | 1,846,460 | 13,877,320 | 13% |

Notes: M.T.S.A. = Major Transit Station Area. Figure only includes new and redevelopment plans, i.e., excludes existing residential and non-residential uses.

Source: Conceptual land use plan and M.T.S.A. background figures prepared by the City of Brampton planning staff, May 2024.

4. Jurisdiction Review of Planning for Commercial Uses in Mixed-Use Settings

Watson, with the assistance of the City of Brampton planning staff, conducted a brief review of the approach and policies used by comparable and large jurisdictions across Canada in planning for retail and commercial services uses in M.T.S.A.s and other transit-oriented mixed-use areas.



The following are key highlights:

Estimated Average Commercial Floorspace Per Resident

- In mixed-used settings such as M.T.S.A.s, a policy target for commercial space per resident can range from 4 sq.m to 20 sq.m, which means for every 1,000 residents, approximately 4,000 sq.m to 20,000 sq.m would be required. This is a wide range reflecting the various factors that contribute towards supporting commercial uses. It is important to recognize reaching the higher end of the range would largely indicate the mixed-use area has a wide range of retail uses, including regional serving uses, such as apparel stores, junior department stores (e.g., Winners/Marshalls) and other uses that are typically found in high-traffic mixed-use areas. In most cases, the commercial space per resident from a market perspective in a mixed-use setting is likely to be less 4 sq.m (43 sq.ft.) per resident or 4,000 sq.m (43,000 sq.ft. per resident) for every 1,000 residents, unless there are compelling reasons for a higher amount of commercial space per resident. As the mixed-use area reaches a critical mass, the commercial space per resident would increase.
- The City of Brampton conceptual land use plans for the M.T.S.A. generally represents the higher end of the commercial space that can be expected a full mature state. As the M.T.S.A.s develop, expectations on the amount of commercial space required should be lower. This Report identified the amount of commercial space per resident that can be expected for the M.T.S.A.s of Mount Pleasant, Central Park, Centre Street, and Rutherford would be significantly lower.

Retaining Existing Commercial Floorspace

- The City of Toronto in 2010 explored setting minimum commercial floorspace requirements as part of an Official Plan Amendment. The Official Plan Amendment was in response to a trend where the City was experiencing redevelopment proposals involving the reduction or elimination of existing commercial spaces in designated mixed-use areas. Given that the existing commercial base of some of the mixed-use areas are primarily auto-oriented retail uses, it was noted that there was no defensible basis to require applicants to retain or replace the existing amount of commercial space in a mixed-use development. The function and type of the existing commercial uses in a



designated mixed-use area may not be transferrable to a mixed-use format. This is an important consideration for the City of Brampton, as most of the commercial uses in the M.T.S.A.s, while representing a large commercial base, are not suitable for a mixed-use environment or may require a significant reduction in floorspace to integrate into a mixed-use environment.^[2]

Setting a Minimum Floorspace Index for Commercial Uses

- The City of Guelph Official Plan and zoning by-law includes a benchmark minimum floor space index of 0.15 for commercial space within strategic mixed-use areas. That means, for example, that 15,000 sq.m of commercial space would be needed on a 10-hectare site. In addition, a minimum floorspace of 6,500 sq.m (70,000 sq.ft.) is required which is measured across the entire mixed-use area. This policy reflects the City's desire to disperse commercial opportunities beyond its dominant retail areas. The City's Official Plan provides flexibility with this policy by requiring a Commercial Functional Study to be carried out if the applicant proposes a development concept that falls below the threshold. The Commercial Functional Study requires the applicant demonstrate that the proposal would contribute towards the local needs of residents and would not undermine the planned commercial function of the mixed-use area.^[3]
- In mixed-use areas, the City of Ottawa's Secondary Plans typically require a minimum floor space index of 0.50 for non-residential purposes.^[4] That means, for example, 50,000 sq.m of commercial space would be needed on a 10-hectare site.

Setting a Minimum Commercial Floorspace Ratio

- The City of Richmond Hill has site-specific Official Plan policies and secondary plans that require a minimum of 15% of the total G.F.A. of mixed-use

^[2] City of Toronto, Report to Council: Commercial Floorspace in Mixed Use Areas, prepared May 4, 2010, by Chief Planner and Executive Director, City Planning Division for Planning and Growth Committee, Report p. 1027.

^[3] City of Guelph Official Plan, February 2022 Consolidation, policy 9.4.2.

^[4] City of Ottawa Official Plan, November 2022, Volume 2A: Urban Secondary Plans, Volume 2A.



development to include non-residential uses.^[5] It is important to note that this minimum requirement includes office and institutional uses as well.

- In the recently adopted Weston 7 Secondary Plan, the City of Vaughan does not permit stand-alone residential buildings in the Mixed-Use I designation. Furthermore, all development applications within the Mixed-Use I designation shall include a minimum of 20% of its G.F.A. as non-residential land uses. The Weston 7 Secondary Plan is currently a large power centre with plans to redevelop as a mixed-use site.
- The Town of Oakville's Midtown Secondary Plan requires development within the Trafalgar Road Precinct (the central area of the Midtown area) to include a minimum of 30% of the total proposed G.F.A. as non-residential uses such as office, retail, commercial, or institutional uses. The policy provides some flexibility with the opportunity to provide less than a minimum non-residential requirement on a case-by-case basis provided that a Non-Residential Needs Analysis demonstrates an alternative amount of non-residential use within the Trafalgar Precinct can support the long-term employment objectives of the Secondary Plan.^[6]

Setting a Minimum Commercial Frontage Requirement

- The City of Vaughan has identified in the Vaughan Metropolitan Area Secondary Plan that retail, service commercial, or public uses are required along a frontage of a key boulevard. It is noted that in these areas a minimum of 70% of the frontage along the ground floor of each building shall be devoted to retail, service commercial, or public uses, unless it can be demonstrated there are functional or operational constraints that warrant relief from this requirement as determined through the development approval process.
- The Concord GO Secondary Plan in Vaughan requires similar frontage requirements. According to the secondary plan, at-grade uses shall predominantly consist of retail uses, which include retail, eating establishments, service commercial uses, business and professional offices, community facilities,

^[5] City of Richmond Hill Centre: South of High Tech Secondary Plan; Yonge Street and Carrville/16th Avenue Key Development Area (KDA); and Yonge and Bernard KDA Secondary Plan.

^[6] Town of Oakville Draft Proposed Midtown Official Plan Amendment, released April 2, 2024.



and day care facilities. A minimum of 60% of the building frontage facing an arterial or collector street shall consist of at-grade retail uses, except where a specific provision of this plan limits the amount of retail or commercial floor area within a defined area.

- The City of Mississauga Dundas Connects Masterplan requires that areas identified as Retail Priority Active Frontage have at least 70% of the total ground floor occupied by personal service establishments, restaurants, and retail stores.
- The Town of Newmarket's zoning by-law requires any building in the areas identified within the priority commercial areas within the Town's Urban Centres are required to have commercial uses that comprise 75% of ground-floor frontages.^[7]

Setting Minimum Commercial Floorspace Requirements

- The City of Burlington has set minimum commercial floorspace requirements in its M.T.S.A.s. This includes setting a minimum of 1,550 sq.m to 1,700 sq.m to be accommodated in mixed-use buildings in key precincts.
- The City of Edmonton has a series of commercial floorspace Transit Oriented Development guidelines in planning for commercial space. These guidelines require ground-floor uses to comprise 200 to 46,000 sq.m of commercial space based on the distance from higher-order transit platforms.
- The Town of Milton's Agerton Secondary Plan (draft) envisions an M.T.S.A. (greenfield site) of a minimum 6,800 population and 8,000 jobs which includes a split of 45% residents and 65% jobs. In order to achieve a mixed-use environment that will serve as a key node for commercial uses, the plan requires a minimum of 15,000 sq.m of G.F.A. for local commercial uses and a minimum of 28,000 sq.m of G.F.A. for district retail uses. In total, approximately 43,000 sq.m of commercial floorspace is required for the M.T.S.A., which is approximately 6 sq.m per resident within the M.T.S.A.^[8]

^[7] Town of Newmarket Urban Centres Zoning By-law 2018-48.

^[8] Town of Milton Agerton Secondary Plan, concept endorsed by Council, March 2019.



5. Conclusions and Recommendations

The City's M.T.S.A.s are a key component of the City's commercial base. The M.T.S.A.s studied in this report contain just over 472,000 sq.m of retail and commercial services floorspace (over 5.1 million sq.ft.). This is a significant amount of commercial floorspace that accommodates the needs of residents across the City and those living in neighbouring communities.

Over the long term, the function of the commercial space in the M.T.S.A.s is anticipated to change from primarily retail areas serving a regional population base to dynamic complete communities with retail and commercial services to support the needs of the local area. It is recognized that the transition will displace a large portion of the existing retail base that will no longer be compatible in a mixed-use environment. As the transition occurs, expectations on the amount of retail and commercial space should consider the population thresholds required to support commercial growth and prioritize the sites at key locations for ground floor retail uses such as intersections at boulevards.

The conceptual land use plans envision that the total population at a fully mature state of the M.T.S.A.s will collectively reach 261,800. This is considered a significant population base, as it is larger than the current population base of some of the mid-sized municipalities across the G.T.H.A.; for example, the population of the Town of Oakville has an estimated population base of 233,700 people as of 2024.^[9] To support this level of population, the City will need to ensure that it has an appropriate level of commercial uses to support the local needs of residents and contribute towards complete communities.

The 12 M.T.S.A.s are envisioned in the conceptual land use plans to accommodate 1,846,460 sq.m (19,875,000 sq.ft.) of retail and commercial services floorspace, an increase of approximately 1,374,220 sq.m (14,792,000 sq.ft.) from the existing retail and commercial services space today. It is recognized that the full mature state identified in the land use concept plans may occur beyond a 2051 time horizon, while some of the M.T.S.A.s may take longer to transform.

^[9] Town of Oakville population estimate derived from Town of Oakville website <https://www.oakville.ca/community-events/community-resources/about-oakville/>, retrieved July 30, 2024.



The M.T.S.A.s studied in this report have good fundamentals in supporting mixed-use development, including opportunities to build upon a strong existing retail base, major redevelopment proposals underway, demonstrated demand for high-density developments, site opportunities along the City's main corridors, and planned major transit improvements. The commercial space envisioned in the conceptual land use plans should be considered long-term plans at a fully mature state.

The conceptual land use plans suggest that the M.T.S.A.s will have an average of approximately 7.1 sq.m (76 sq.ft.) of retail and commercial services space per resident at a fully mature state which is lower than the current average of 13 sq.m per (140 sq.ft.) resident. The retail and commercial services base that exists today includes retail uses that cater to occasional shopping by residents by vehicle across the City and beyond which means the trade area extends significantly beyond the M.T.S.A. Generally, regional serving retail uses contribute towards a higher amount of retail and commercial services floorspace per resident, as it reflects serving a population beyond the local area. Going forward, as the M.T.S.A.s evolve with an orientation towards local serving retail uses, retail uses will be visited by residents in the area on a more frequent basis (e.g., weekly, daily, or monthly depending on the retail use). As the M.T.S.A.s transition towards a local serving retail function, it can be expected that the retail and commercial services floorspace per resident will drop significantly. Furthermore, this downward ratio reflects the City's desire to accommodate more housing yet maintain a reasonable amount of retail and commercial service to retain the important commercial function of the M.T.S.A.s. in contributing towards complete communities.

Based on Watson's review of the conceptual plans, the allocation of retail and commercial services floorspace appears appropriate for long-term planning purposes, except for the M.T.S.A.s of Mount Pleasant, Central Park, Centre Street., and Rutherford. The ratio of commercial floorspace per resident identified in the conceptual land use plans seems appropriate for the remaining M.T.S.A.s. over the long term, but it represents the upper limit of what could reasonably be expected. As such, the amount of commercial space identified in the conceptual land use plans should not be used as a requirement for short-term planning. Recognizing that it will take some time to support retail uses in a mixed-use environment before the M.T.S.A.s establish a population threshold that will no longer be dependent on auto-oriented retail trade, the City should ensure flexibility in accommodating growth in the M.T.S.A.s. Moreover, the City should continue to monitor development in the M.T.S.A.s, including tracking growth.



The conceptual land use plans include a high amount of commercial space per resident for the M.T.S.A.s of Central Park, Centre Street, and Rutherford, at a level that would require significant transformation of the M.T.S.A.s' commercial base. The commercial space per resident identified in the plans of these M.T.S.A.s is more than what would be required to support the local needs of the residents. It is recommended that the City plan for up to 8.4 sq.m (90 sq.ft.) per resident for these M.T.S.A.s. The City should prioritize sites for ground floor retail along Queen Street near intersections, recognizing the greatest potential to accommodate retail uses within the M.T.S.A.s.

Furthermore, the expectation of the Mount Pleasant M.T.S.A. to provide approximately 12,100 sq.m (130,000 sq.ft.) of retail and commercial services space may be difficult to achieve given the density anticipated and the sites available on major boulevards. It is recommended that the City prioritize sites fronting Bovaird Drive for ground floor retail uses. The development concept plan identified ground floor retail uses fronting Lagerfeld Drive. These lands, however, should be considered a lower priority for retail uses and the City should explore removing the retail on these sites from the conceptual land use plan given that the area is not anticipated to have a high residential density to support retail fronting along interior streets.

The M.T.S.A.s of Dixie, Bramalea, Kennedy, Laurelcrest, Ray Lawson, The Gore, Gateway, and Steeles at Mississauga generally have a reasonable ratio of commercial space per resident as identified in the conceptual land use plans prepared by the City.

Based on the report findings, it is recommended that the City consider the following:

- When reviewing sites, the City should consider commercial frontage requirements. Sites along a major boulevard should have a minimum frontage requirement of at least 70% along a major boulevard based on best practices. Furthermore, sites with retail frontage should be prioritized at intersection locations, for ground floor retail uses and should include a higher amount of commercial frontage (i.e., greater than 70%).
- Recognizing the need for commercial uses, the City should consider the ratio of commercial space per resident for large mixed-use developments. A development application that seeks to significantly reduce the amount of retail space on the site identified in the City's conceptual plans and/or lower commercial frontage should be reviewed more closely. It is important that the City ensure flexibility in planning for mixed-use developments recognizing the



market dynamics required to support commercial growth, while ensuring that the M.T.S.A. transforms as a complete community. Should there be a significant difference in the amount of commercial space, the appropriate level of commercial space could be explored through a Commercial Functional Study. Unlike a Commercial Market Study, a Commercial Function Study would examine the commercial function beyond the market dynamics. The City of Guelph, for example, requires a Commercial Function Study if the proposal seeks to provide less commercial space than the minimum commercial floorspace requirement. The Commercial Function Study requires the following to be demonstrated:

- The availability of commercial floor space within the designation to meet daily and weekly needs of the surrounding community, especially for food store, food-related store, and/or drug store;
- Opportunities for additional commercial floor space to be provided elsewhere and thereby sustain the local provision of commercial floor space within that designation or in the immediate area;
- Impacts on the ability of residents and employees in the area to use active transportation options to access commercial shopping areas and commercial services; and
- The role of the commercial space in creating a community focal point.^[10]
- Zoning requirements should consider loading requirements, especially in supporting a range of retail uses that depend on frequent deliveries (e.g., grocery stores). Typically, rear laneways with loading areas such as laybys (paved area beside a road where trucks can pull over and park for a short period of time) are a preferred requirement for large retailers in mixed-use environments.^[11] Other considerations include ensuring an adequate amount of amenity space surrounding the site (e.g., parkland/walkway, bicycle/scooter parking, and sidewalk space for sandwich boards (portable advertising signs) and patios).

^[10] City of Guelph, Official Plan, 2022 Consolidation, policy 9.4.2.2.

^[11] Retailer Insider article: *Tips For Designing Retail Spaces In Mixed-Use Developments*, September 17, 2017.