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# WHITE CHURCH URBAN BOUNDARY EXPANSION AREA

## Commercial Needs Analysis

Hamilton, Ontario

Prepared for Whitechurch Landowners Group Inc.

February 3, 2025



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February 3, 2025

Whitechurch Landowners Group Inc.  
7501 Keel Street, Suite 200  
Vaughan, Ontario L4K 1Y2

Dear Whitechurch Landowners:

**RE: White Church Urban Boundary Expansion Area – Commercial Needs Analysis (Hamilton, Ontario)**

urbanMetrics inc. is pleased to submit this Commercial Needs Analysis in support of the proposed expansion of the City of Hamilton Urban Boundary which will include a 364 hectare parcel of land (the “subject lands”). These lands are bounded by Upper James Street, Miles Road, Airport Road East and White Church Road East. These lands are being planned as a new secondary plan area, the White Church Secondary Plan, with low density and medium density residential built forms, along with parks, schools, green space, and commercial space.

As part of the submission requirements, the City of Hamilton requires a commercial needs assessment to evaluate the need for commercial space as the area’s population grows.

Our study has concluded that there is ample capacity for commercial space to meet the needs of the area’s residents out to 2051 and beyond.

Yours very truly,

A handwritten signature in black ink, appearing to read "D. R. Annand".

Mr. Douglas R. Annand, PLE  
Partner,  
urbanMetrics Inc.

A handwritten signature in black ink, appearing to read "Daniel Bailey".

Mr. Daniel Bailey  
Project Manager,  
urbanMetrics Inc.

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# 1.0 Introduction

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# 1.1 Purpose

urbanMetrics inc. (“urbanMetrics”) has been retained by the Whitechurch Landowners Group Inc. (the “Landowners Group”) to prepare a Commercial Needs Assessment for the White Church Urban Boundary Expansion Area (“White Church Secondary Plan”, “White Church SP”, the “Secondary Plan”, the “subject lands”) area in the City of Hamilton, Ontario (the “City”). This analysis is intended to identify the amount and types of commercial space needed to support the daily and weekly needs of the forecast population within subject lands and surrounding area, as well as the estimated employment generated by the required commercial space.

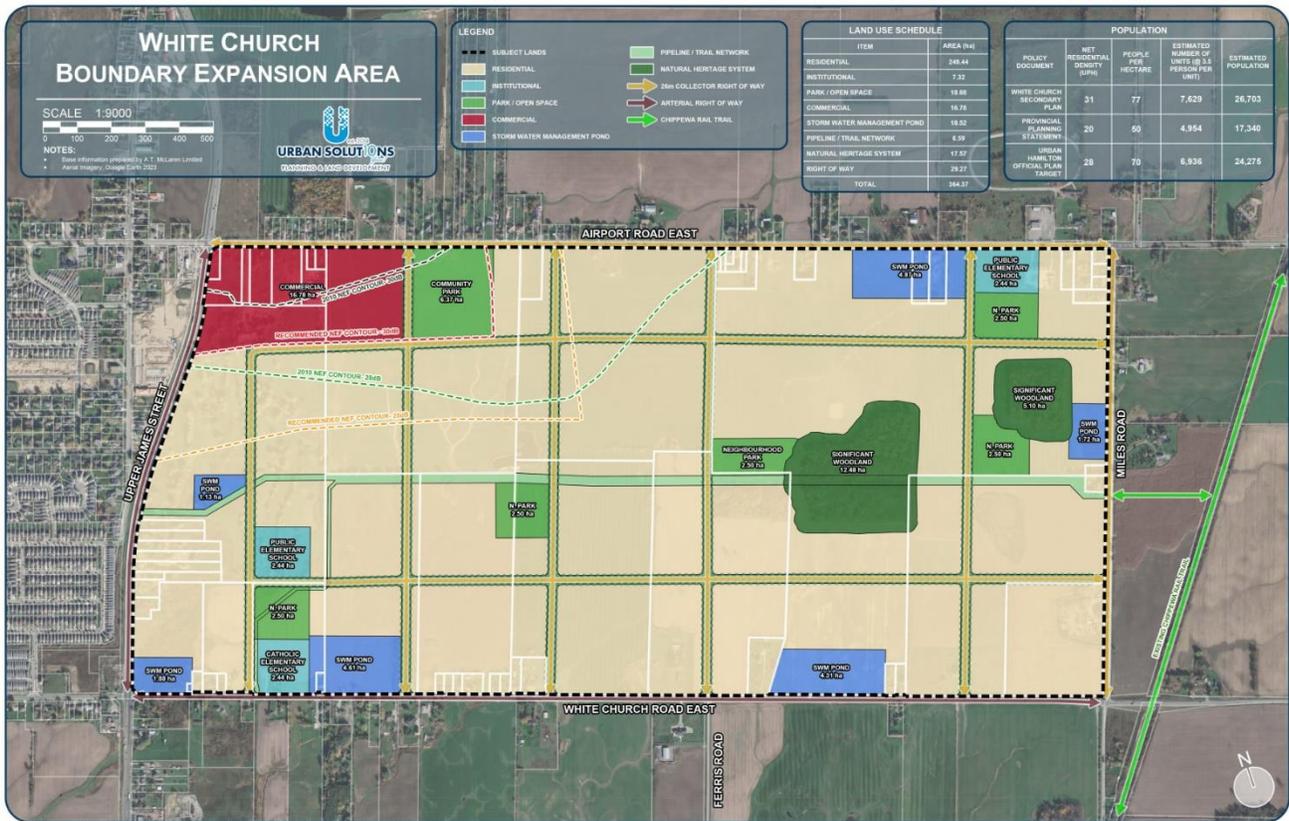
# 1.2 Concept Plan

Based on a preliminary draft land use plan provided by Urban Solutions Planning & Land Development Consultants Inc. (“Urban Solutions”) in January 2025 (see Figure 1-1), the White Church SP will be comprised of 364.37 hectares of land. This plan includes 249.44 hectares of primarily low density (detached and semi-detached) and medium density (townhouse) residential development and designates 16.78 hectares of land for commercial uses. Specific commercial uses or tenants have not been identified at this time.

The estimated population of the White Church Secondary Plan Area, based on a net density of 31 units per hectare and a blended persons per unit (PPU) factor of 3.5, will be approximately 26,700 persons. This yields a density of approximately 77 people per hectare across the plan area excluding natural areas.



Figure 1-1: White Church Urban Boundary Expansion Area Concept Plan



SOURCE: UrbanSolutions, dated January 8, 2025.

# 2.0 Site Context

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## 2.1 Site Location and Context

The White Church Urban Boundary Expansion Area (“White Church Secondary Plan area”, “White Church SP” subject site”) lands are located just east of the built-up Mount Hope neighbourhood, which is part of the former Town of Glanbrook (see Figure 2-1). Currently, the subject lands are occupied by rural residential homes along the arterial roads and most of the Southern Pines Golf and Country Club.

Upper James Street, the western boundary of the Secondary Plan area, is a four-lane major arterial that largely functions as a thoroughfare connecting the Mount Hope area with the rest of urban Hamilton. South of Airport Road East, there are limited access points to Upper James Street from the existing residential neighbourhoods. Most of the existing commercial space in Mount Hope is concentrated around the intersection of Homestead Drive and Airport Road East.

The other boundaries of the subject lands, White Church Road East, Miles Road, and Airport Road East are two-lane roads that primarily support rural traffic. Approximately five kilometres east of the White Church SP area is Binbrook, a village with approximately 11,000 residents.

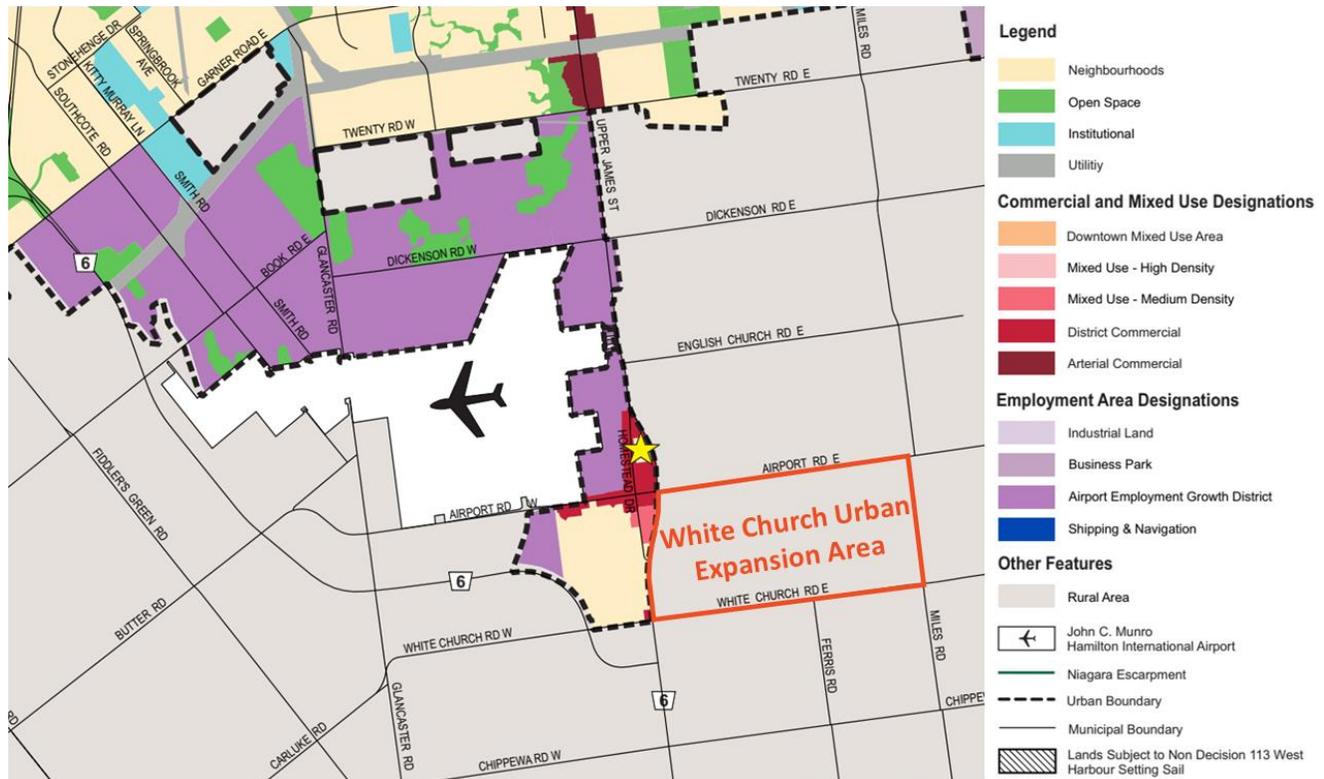
Figure 2-1: White Church Urban Boundary Expansion Area Context



SOURCE: urbanMetrics Inc., with Google Earth imagery. White Church Urban Boundary Expansion Area Boundaries for illustration purposes only.

As shown in Figure 2-2, the proposed lands designated Commercial on the subject site will be located at the southeast corner of White Church Road East and Airport Road East, just west of the lands along Airport Road East that are designated as *District Commercial* in the Urban Hamilton Official Plan (UHOP). The lands on either side of Upper James Street north of Airport Road East are also designated as *District Commercial* in the UHOP. The commercial uses that will be located on the subject site at this location will be visible from both arterials and will face the existing gas station and convenience store located on the southwest corner of the intersection.

Figure 2-2: White Church Urban Boundary Expansion Area Nearby UHOP Land Use Designations



SOURCE: urbanMetrics Inc., with land use mapping and legend from *Urban Hamilton Official Plan Schedule E-1*. Site identification and map and legend cropping by urbanMetrics Inc.

## 2.2 Site Access

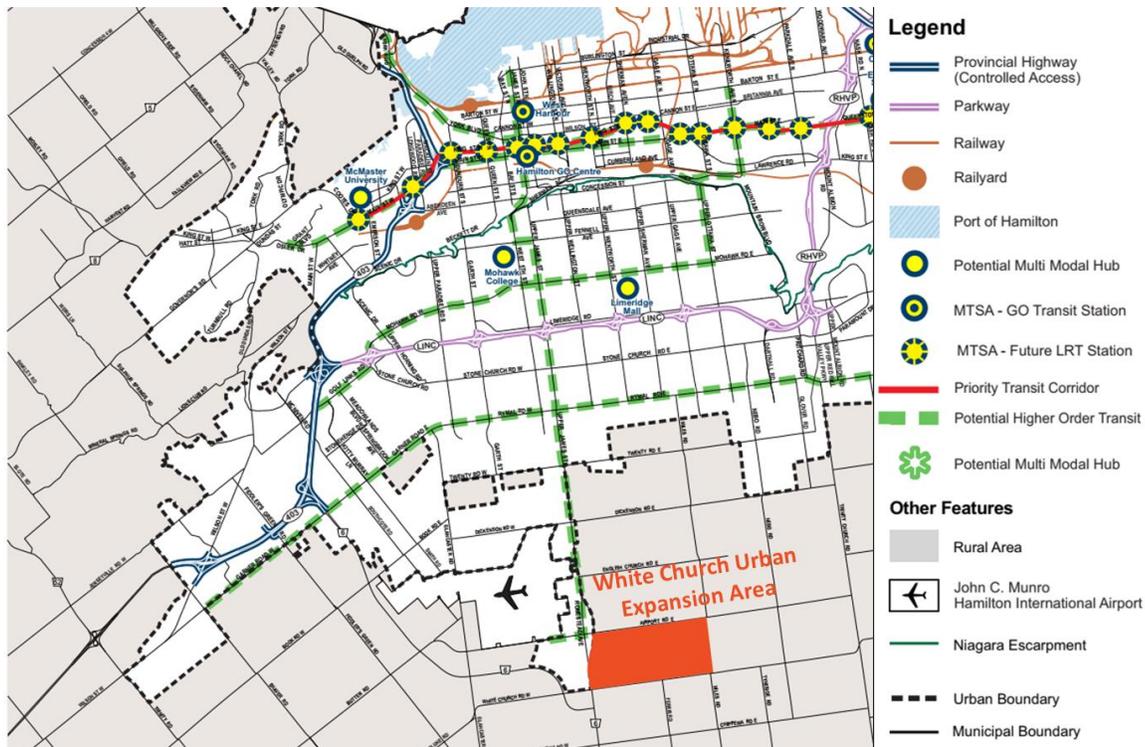
There is one public transit route operated by the Hamilton Street Railway (“HSR”) that services the community. The northbound route makes three stops near the Hamilton International Airport, and one stop in the centre of the community at Airport Road East and Homestead Drive. This transit route connects the Mount Hope community with the balance of the urban Hamilton area. This bus route is identified as a *Potential Higher Order Transit* corridor in Appendix B of the Urban Hamilton Official Plan (see Figure 2-3). The closest 20 A-Line Express stop to the proposed commercial lands is just under 250 metres to the west, and as a result no public transit currently operates adjacent to the portion of the subject lands that will include the majority of the community’s commercial space.

Figure 2-3: HSR Network Fall 2024 Network Map – Northbound



SOURCE: urbanMetrics Inc., with HSR Fall 2024 GTFS data from Open Data Hamilton.

Figure 2-4: Hamilton Urban Official Plan Major Transportation Facilities and Routes



SOURCE: urbanMetrics Inc., with land use mapping and legend from *Urban Hamilton Official Plan - Appendix B* Site identification and map and legend cropping by urbanMetrics Inc.

While the expansion of transit into and around the White Church Urban Expansion Area will require buy-in from the City of Hamilton, the recommended transit network as identified by NexTrans in their Transportation Master Plan Study is shown in Figure 2-5. This would add three bus stops adjacent to the commercial area of the White Church Urban Boundary Expansion Area, served by two bus routes. As daily and weekly retail and service commercial needs are not typically met through stand-alone trips on transit, the expansion of transit in the area is not expected to have a significant impact on capture rates or net inflow rates for local commercial space. However, it may affect the mode used to access retail by residents stopping off to do shopping on their way to or from work.



Figure 2-6: Study Area



SOURCE: urbanMetrics Inc.

## 2.4 Study Area Population

The population within the Study Area is expected to grow significantly as a result of both the completion of development within the Mount Hope population centre, and the White Church Urban Boundary Expansion Area. As shown in Figure 2-7 the buildout population is expected to be approximately 32,800 residents, with the majority of the population anticipated to reside within the White Church Urban Boundary Expansion Area. As detailed phasing plans for the subject site are not yet available, we have assumed a general estimate of development timing with site preparation work beginning in 2026 and a phase of 1,000 units being completed every two years until buildout of the Expansion Area in 2042. The buildout of the remaining residential portion of Mount hope is expected by 2031.

The population of the White Church Urban Boundary Expansion Area is based on the concept plans provided by Urban Solutions. The population of the rest of the

study area is based on 2021 census data, with additional population growth estimated based on unit counts and Persons Per Unit (PPU) figures from the City of Hamilton *Development Charges Background Study*. Unit counts were based on development application data, building permit data, address point data, in-person observations, and aerial imagery. Of note, this population estimate does not include the future redevelopment of dwellings to include any Additional Dwelling Units, as these are anticipated to primarily locate in older dwellings.

Figure 2-7: Study Area Population Estimate

<b>Year</b>	<b>Study Area</b>	<b>White Church Boundary Expansion Area</b>	<b>Rest of Study Area</b>
2021	3,400	200	3,200
2023	5,100	200	4,900
2031	11,300	5,300	6,100
2041	24,400	18,400	6,100
2051	32,800	26,700	6,100

SOURCE: urbanMetrics Inc., based in site plans provided by Urban Solutions, Statistics Canada 2021 census data, new build Persons Per Unit from the Hamilton Development Charges Background Study, development application data, and aerial imagery. All numbers rounded to the nearest hundred. Study Area total may not equal sub-areas due to rounding.



# 3.0 Commercial Market Overview

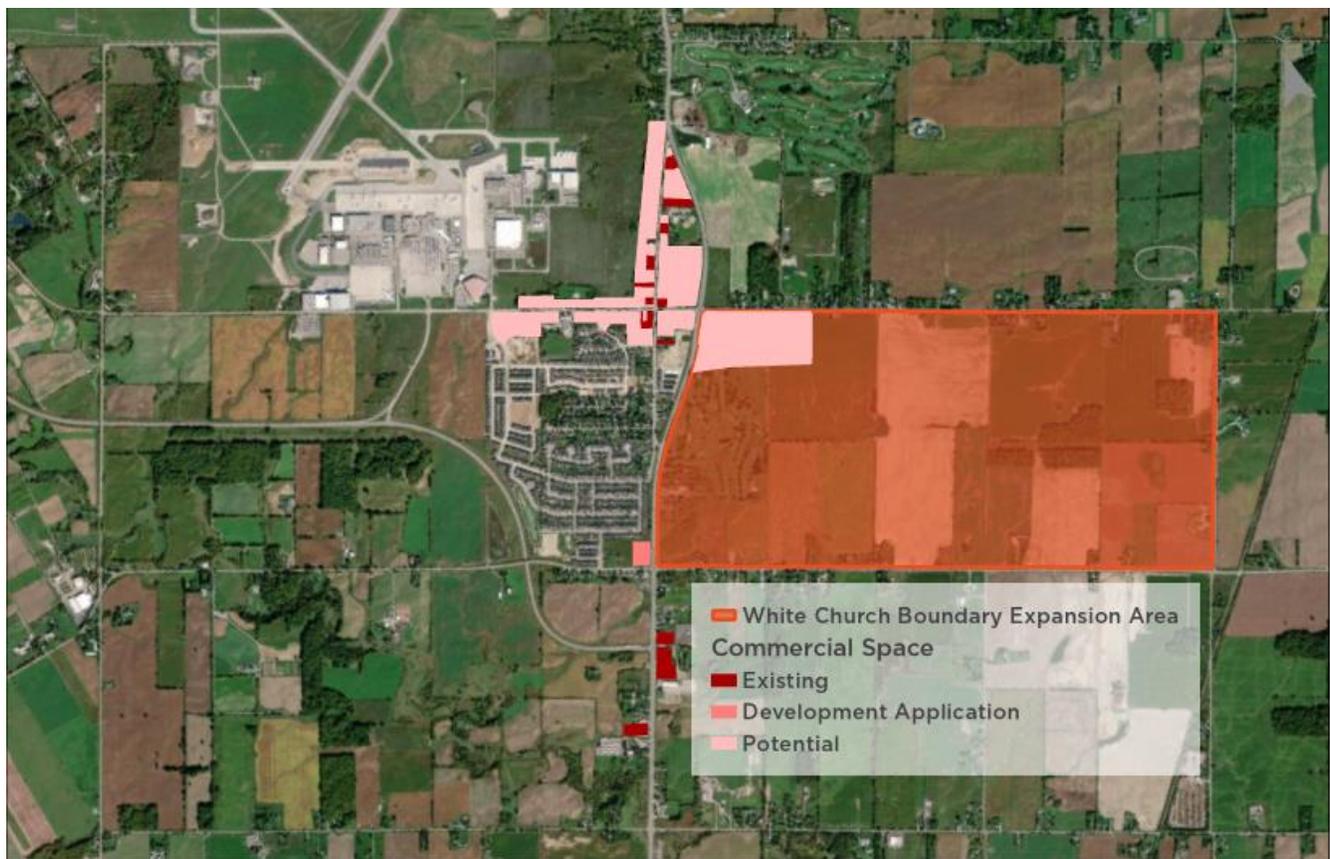
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### 3.1 Commercial Lands

As previously identified, the lands on either side of both Airport Road East and Homestead Drive are designated as *District Commercial*. These lands as well as the designated commercial portion of the subject site are shown in Figure 3-1. As stated in section 4.7.1 of the Urban Hamilton Official Plan (UHOP) within the *District Commercial* designation “the range of retail uses are intended to serve the daily and weekly shopping needs of residents in the surrounding neighbourhoods. The District Commercial areas shall also serve as a focus for the adjacent neighbourhood(s) by creating a sense of place.” As a result, the *Airport Employment Growth District* lands around the airport are not intended to provide a significant supply of neighbourhood-serving retail/service uses, and this is reflected in our following analysis.

Figure 3-1: Commercial Lands Within Study Area



SOURCE: urbanMetrics Inc.

As demonstrated in the following sections, the Study Area could potentially have an estimated 1.39 million square feet of commercial space at build-out, composed primarily of future commercial space that may develop through the existing and proposed planning permissions. Given that the amount and location of the Study Area commercial uses are expected to primarily serve area residents, the resulting commercial space will only develop to the degree that there is a sufficient local population to provide adequate expenditure support.

Figure 3-2: Study Area Estimated Commercial Space on Build-Out

<b>Component</b>	<b>Commercial GFA (sq. ft.)</b>
Existing Commercial Space	52,300
Development Application	31,500
Potential Future Commercial Space	1,302,000
<b>Total</b>	<b>1,385,800</b>

SOURCE: urbanMetrics Inc.

## 3.2 Existing Commercial Space

urbanMetrics has conducted an in-person inventory of all existing retail/service commercial space in the Study Area in December 2024.

Commercial inventories typically include the following categories, as per the North American Industry Classification System (“NAICS”):

- Food Store Retail (“FSR”);
- Non-Food Store Retail (“NFSR”);
- Beer, Wine and Liquor (“BWL”);
- Services; and
- Vacant space.

While automobile dealers are not typically included in commercial inventories due to their primary space requirements being located outside the showroom, the office of a used automobile dealer has been included in the inventory as it is located within a commercial building along with other uses.

The Study Area currently has minimal retail/service offerings, even within the local-serving categories. In total, there is just over 50,000 square feet of retail/service commercial space in the Mount Hope community and Study Area.

There are no supermarkets, apparel stores, or general merchandise stores to support existing residents living in the community. There is one local food store at the intersection of Airport Road East and Homestead Drive that functions as a convenience store with simple grocery staples. Automotive repair shops have the greatest number of stores while Building and Outdoor Home Supply stores have the largest floor area. A large tiling store is located just south of White Church Road East, which comprises most of the space in the Building and Outdoor Home Supply category.

Current residents of the Mount Hope community are likely required to drive 10 minutes (6 km) to stores located in the built-up urban Hamilton area to conduct most of their weekly shopping. They likely shop at the nearest Arterial Commercial node at South Hamilton Square or at other commercial plazas located along Rymal Road and Upper James Street which have a full range of retail/service stores.

Considering the ongoing growth in Mount Hope and the substantial population increase that will result from the build-out of the White Church SP area, there will be significant opportunity for new commercial space to support the daily and weekly shopping needs of the local population.

Figure 3-3: Trade Area Inventory

Category	Trade Area	% of Total Inventory
<b>Food Store Retail (FSR)</b>	<b>3,500</b>	<b>6.7%</b>
Convenience & Specialty Food	3,500	6.7%
<b>Non-Food Store Retail (NFSR)</b>	<b>17,800</b>	<b>34.0%</b>
Building and Outdoor Home Supply	16,700	31.9%
Miscellaneous Retailers	500	1.0%
Pharmacies & Personal Care	600	1.1%
<b>Services</b>	<b>25,800</b>	<b>49.3%</b>
Food Services & Drinking Places	10,100	19.3%
Health Care	3,500	6.7%
Personal & Household Goods Repair & Maintenance	8,400	16.1%
Social Services	3,800	7.3%
<b>Vacant</b>	<b>4,000</b>	<b>7.6%</b>
<b>Automobile Dealers</b>	<b>1,200</b>	<b>2.3%</b>
<b>Grand Total</b>	<b>52,300</b>	<b>100.0%</b>
<b>Vacancy Rate (%)</b>	<b>7.6%</b>	

SOURCE: urbanMetrics, based on in-person inventory in December 2024

### 3.3 Commercial Development Application

In addition to the existing retail/service uses there is a single development application with a total proposed floor area of 31,495 square feet (2,926 square metres) of commercial space. The specific tenants and retail uses have not been specifically identified for the majority of this proposed space. This application is located at 3530 Upper James Street, on the northeast corner of Upper James Street and White Church Road East. This application proposes a one-storey drive-thru restaurant with a floor area of 4,521 square feet (420 square metres), as well as a two-storey commercial plaza with 22,271 square feet (2,069 square metres) of at grade retail space and 4,704 square feet (437 square metres) of second-storey office space. This application would add a total of 31,495 square feet (2,926 square metres) of commercial space. Based on the local context the second storey office would likely be occupied by service commercial uses.



We also understand that a previous application at 3311 Homestead Drive included a small number of office uses but this proposal has since received permission to be exclusively residential.

## 3.4 Potential Future Commercial Space

As shown previously in Figure 3-1, the lands on either side of Airport Road East between Providence Way and Upper James Street, and the lands on either side of Homestead Drive north of Airport Road East are zoned as District Commercial (C6). This zone allows for a full range of commercial uses (excluding major office uses), with a maximum floor area per commercial use of 107,639 square feet (10,000 square metres), and a maximum height of 14 metres. The majority of these lands are currently occupied by very low density detached dwellings and agricultural uses.

The northeast corner of the White Church Urban Boundary Expansion Area is also proposed to be developed with commercial uses, and is expected to have a similar zoning framework as the surrounding area.

As specific built forms or floor areas have not been proposed for either area of these commercial lands, their exact capacity to accommodate commercial uses depends on a number of assumptions. The assumptions used by urbanMetrics are as follows:

- The lands can be developed to a gross Floor Space Index (FSI) of 0.25. In the City of Hamilton existing shopping centres typically have a FSI between 0.20 to 0.30, which represents a built form with ample surface parking surrounding single-storey commercial buildings. Given current trends and zoning requirements, it is likely that new commercial development in this area will be more pedestrian focused and can likely develop at higher density than existing shopping centres.
- New commercial development will generally front onto existing roads or the proposed roads within the White Church Urban Boundary Expansion Area, with minimal need for additional roads, stormwater management ponds, or other site restrictions.

Under these assumptions the Study Area could accommodate over 1.3 million square feet of additional retail/service space at full build out (see Figure 3-4).

Figure 3-4: Study Area Potential Future Commercial Space

<b>Component</b>	<b>Land Area (ha)</b>	<b>Floor Space Index (FSI)</b>	<b>Commercial GFA (sq. ft.)</b>
White Church Expansion Area	16.8	0.25	452,000
District Commercial	31.6	0.25	851,000
<b>Total</b>	<b>48.4</b>	<b>0.25</b>	<b>1,302,000</b>

SOURCE: urbanMetrics Inc. Commercial GFA rounded to nearest thousand.

# 4.0 Commercial Needs Analysis

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In order to evaluate the demand for retail and service commercial space urbanMetrics has used an expenditure approach to evaluate the demand for retail facilities and a per capita approach to evaluate the demand for service commercial space. Both of these approaches are standard methodologies for estimating retail and/or service space demand. The retail expenditure approach incorporates current data on the expected incomes and likely retail spending of study area residents, however due to limitations with Statistics Canada data this method does not include service commercial uses. The per-capita service space approach uses standard per capita space requirements for the service commercial categories but does not directly use local incomes or spending trends as inputs. By using these two approaches a more comprehensive picture of retail and service space demand can be generated.

## 4.1 Retail and Service Commercial Categories

Below we have highlighted the various store categories which include Food Store Retail (FSR), Beer, Wine, and Liquor (BWL), Non-Food Store Retail (NFSR), and Services. FSR, BWL, and NFSR requirements have been estimated using the expenditure approach, while services are estimated using the per-capita approach. The specific categories are summarized below:

- Food Store Retail (FSR)
  - Supermarket & Grocery; and
  - Other Specialty Food.
- Beer, Wine and Liquor Stores
- Selected Non-Food Store Retail (NFSR)
  - Building & Outdoor Home Supply;
  - General Merchandise;
  - Apparel & Accessories;
  - Furniture, Home Furnishings & Electronics;
  - Other Miscellaneous Retail; and
  - Pharmacies & Personal Care.
- Services
  - Food Services & Drinking Places;

- Finance, Insurance and Real Estate;
- Health Care;
- Personal Care;
- Local Office Services (Professional, Scientific and Technical Services, Select Civic and Social Organizations, Select Office Administrative Services); and
- Other (Cultural, Entertainment and Recreation, Personal & Household Goods Repair and Maintenance, Select Educational Services, Social Services).

## 4.2 Retail Expenditure Approach

The amount of warranted space in the Study Area is calculated based on various factors. The following summarizes our methodology utilized to calculate the warranted space for each of the categories analyzed:

1. Retail expenditure shares by retail category are estimated based on Ontario per capita retail expenditures which have been adjusted to account for online spending. This analysis is based on a weighted average of the specific trends in e-commerce spending from 2014 to 2019 in the various retail categories and the changes to these spending patterns which occurred during the COVID-19 pandemic.
2. Study Area total retail expenditures are estimated by adjusting the Ontario per capita retail expenditures based on the Study Area per capita incomes. Per capita incomes are estimated based on census income data by dwelling type and the expected unit mix in the Study Area. This approach recognizes that the Study Area will not have the average unit mix that is characteristic of Hamilton due to its intended purpose to fulfill the need for ground-related housing while at the same time avoiding competition with expected new apartment housing in the city’s intensification nodes.
3. Future Study Area market shares have been forecast over the study period (until 2051), based on the potential for changing spending patterns. These shares have been increased over the forecast period to reflect the impact of the addition of clusters of viable retail, which will be able to capture a greater share of the market than an individual stand-alone store.
4. The Study Area’s market share is applied to the available expenditure potential, and inflow rates are added to account for expenditures by non-residents. The total market expenditure is then calculated. This total market expenditure is

forecast to increase to reflect population growth over the study period. Inflow into the Study Area is not expected to represent a significant portion of retail expenditures, as residents will continue to support regional serving retail located further north in the built-up portion of Hamilton.

- 5. The warranted space in each category is then calculated based on expected sales performance levels applied to the total sales volume available. Sales performance is based on benchmark retail stores and the expected retail mix in the Study Area.

### **Ontario Per Capita Retail Expenditure Shares**

The following chart (see Figure 4-1) highlights per capita retail expenditures for Ontario residents using a 2023 base year and based on the specific retail categories considered. It is important to note that this exercise relies on per-capita, not per-household data, and does not discriminate between household members. In addition, it represents an average of all residents of disparate income levels.

The estimated total expenditure of \$11,498 also reflects adjustments for online spending, which is unrelated to the specific in person spending within a specific Study Area.



Figure 4-1: Ontario Per Capita Retail Expenditures 2023

<b>2023 Dollars</b>	<b>2023</b>	<b>Share</b>
<b>Province of Ontario</b>		
<b>Food Store Retail (FSR)</b>	<b>\$ 2,759</b>	<b>24.0%</b>
Supermarket & Grocery	\$ 2,334	20.3%
Other Specialty Food	\$ 425	3.7%
<b>Selected Non-Food Store Retail (NFSR)</b>	<b>\$ 8,101</b>	<b>70.5%</b>
Building & Outdoor Home Supply	\$ 1,044	9.1%
General Merchandise	\$ 2,598	22.6%
Apparel & Accessories	\$ 977	8.5%
Furniture, Home Furnishings & Electronics	\$ 1,142	9.9%
Other Miscellaneous Retail	\$ 984	8.6%
Health & Personal Care	\$ 1,356	11.8%
<b>Beer, Wine and Liquor Stores</b>	<b>\$ 638</b>	<b>5.5%</b>
<b>Total Retail Expenditures</b>	<b>\$ 11,498</b>	<b>100.0%</b>

SOURCE: urbanMetrics inc., with inputs from Statistics Canada Table 20-10-0056-01 and Table 20-10-0065-01.

### Study Area Resident Income

Both the total amount of retail spending and the share of retail spending in each retail category is associated with resident income levels specific to the Study Area. As shown in Figure 4-2, the per capita income of Hamilton residents in detached dwellings is much higher than average, with other ground-related dwellings having higher incomes than apartments. The per capita income expected based on the expected population by dwelling type is also shown in Figure 4-2. The higher average incomes of residents living in detached dwellings is likely the result of ground-related houses having high headship rates among working-age age cohorts, detached dwellings having high rates of family occupants with multiple adults, and the higher cost of detached dwellings requiring higher incomes. All of these factors are inter-related, and as a result this does not necessarily imply that residents of the Study Area will be wealthier than residents of other detached dwellings across Hamilton.

It should be noted that the total income data excludes residents that do not live in private dwellings, such as hospitals, nursing homes, residential care facilities,



shelters, correctional institutes, rooming houses, religious establishments, or temporary accommodation services. While these uses are not specifically proposed to locate in the Study Area, a small number of these uses might be appropriate in a residential or commercial context. As a result, we have adjusted the average per capita income to account for the impact of including residents in collective dwellings (i.e. not in a private dwelling), which is an adjustment of approximately 1.6%. This reflects the very small number of these uses expected in the Study Area, consistent with the city-wide rate.

Overall, the average per capita income in the Study Area on build-out is expected to be approximately \$45,200. Of note if a different ratio of dwelling types (e.g. more townhouses or semi-detached) is used to achieve the required population density on the subject site, incomes would be slightly lower. This would reduce the total demand for retail space. It should also be noted that the study area income in the 2021 census was lower than our current estimate, however residents of new-build units are expected to have more typical incomes as calculated above.

Figure 4-2: Study Area Estimated Per-Capita Income

	Total - Structural type of dwelling	Single-detached house	Semi-detached house	Row house	Apartment or flat in a duplex	Apartment in a building that has fewer than five storeys	Apartment in a building that has five or more storeys	Other single-attached house	Movable dwelling
Hamilton Total Income <sup>1</sup>	\$24,240,000,000	\$17,120,000,000	\$678,000,000	\$2,645,000,000	\$592,000,000	\$1,084,000,000	\$2,056,000,000	\$36,800,000	\$11,200,000
Hamilton Population <sup>2</sup>	560,920	355,910	18,440	71,790	16,940	32,605	63,965	960	305
Hamilton Per Capita Income	\$43,215	\$48,102	\$36,768	\$36,844	\$34,947	\$33,246	\$32,143	\$38,333	\$36,721
Estimated Share of Study Area Build-Out Population	100.0%	81.0%	0.1%	18.6%	0.1%	0.2%	0.0%	0.0%	0.0%
<b>Average Study Area Per Capita Income</b>	<b>\$45,958</b>								
<b>Adjusted Average Study Area Per Capita Income (To Account for Residents in Collective Dwellings)</b>	<b>\$45,230</b>								

<sup>1</sup> Statistics Canada. Table 98-10-0060-01 Household income statistics by dwelling and household characteristics: Canada, provinces and territories, census divisions and census subdivisions.

<sup>2</sup> Statistics Canada. Table 98-10-0043-01 Structural type of dwelling, age and gender: Canada, provinces and territories, census divisions and census subdivisions.

SOURCE: urbanMetrics Inc., based on Statistics Canada income and population data, and one potential unit mix based on proposed density.

## Study Area Retail Expenditure Forecast

After adjusting the Ontario per capita retail expenditures based on the anticipated Study Area per capita incomes using our in-house model, per capita expenditures in the Study Area are projected to increase from an estimated \$11,636 in 2023 to \$12,021 in 2031, \$12,501 in 2041, and \$12,982 in 2051, based on constant 2023 dollars (see Figure 4-3). Total retail expenditures are estimated to increase by \$268 million, from \$59.4 million in 2023 to approximately \$327.5 million in 2051.

Figure 4-3: Study Area Total Retail Expenditure Potential Forecast

2023 Dollars	2023	2031	2041	2051
<b>Study Area</b>				
Per Capita Retail Expenditures <sup>1</sup>	\$ 11,636	\$ 12,021	\$ 12,501	\$ 12,982
Population <sup>2</sup>	5,113	13,063	30,564	32,766
<b>TOTAL RETAIL EXPENDITURE POTENTIAL (\$Millions)</b>	<b>\$ 59.5</b>	<b>\$ 157.0</b>	<b>\$ 382.1</b>	<b>\$ 425.4</b>
<b>Food Store Retail (%)</b>	<b>24.0%</b>	<b>24.0%</b>	<b>24.0%</b>	<b>24.0%</b>
Supermarket & Grocery (%)	20.3%	20.3%	20.3%	20.3%
Other Specialty Food (%)	3.7%	3.7%	3.7%	3.7%
<b>Non-Food Store Retail (%)</b>	<b>70.5%</b>	<b>70.5%</b>	<b>70.5%</b>	<b>70.5%</b>
Building & Outdoor Home Supply (%)	9.1%	9.1%	9.1%	9.1%
General Merchandise (%)	22.6%	22.6%	22.6%	22.6%
Apparel & Accessories (%)	8.5%	8.5%	8.5%	8.5%
Furniture, Home Furnishings & Electronics (%)	9.9%	9.9%	9.9%	9.9%
Other Miscellaneous Retail (%)	8.6%	8.6%	8.6%	8.6%
Health & Personal Care (%)	11.8%	11.8%	11.8%	11.8%
<b>Beer, Wine and Liquor Stores (%)</b>	<b>5.5%</b>	<b>5.5%</b>	<b>5.5%</b>	<b>5.5%</b>
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>Food Store Retail (\$Millions)</b>	<b>\$ 14.3</b>	<b>\$ 37.7</b>	<b>\$ 91.7</b>	<b>\$ 102.1</b>
Supermarket (\$Millions)	\$ 12.1	\$ 31.9	\$ 77.6	\$ 86.4
Other Food (\$Millions)	\$ 2.2	\$ 5.8	\$ 14.1	\$ 15.7
<b>Non-Food Store Retail (\$Millions)</b>	<b>\$ 41.9</b>	<b>\$ 110.6</b>	<b>\$ 269.2</b>	<b>\$ 299.7</b>
Building & Outdoor Home Supply (\$Millions)	\$ 5.4	\$ 14.3	\$ 34.7	\$ 38.6
General Merchandise (\$Millions)	\$ 13.4	\$ 35.5	\$ 86.3	\$ 96.1
Apparel & Accessories (\$Millions)	\$ 5.1	\$ 13.3	\$ 32.5	\$ 36.1
Furniture, Home Furnishings & Electronics (\$Millions)	\$ 5.9	\$ 15.6	\$ 38.0	\$ 42.3
Other Miscellaneous Retail (\$Millions)	\$ 5.1	\$ 13.4	\$ 32.7	\$ 36.4
Health & Personal Care (\$Millions)	\$ 7.0	\$ 18.5	\$ 45.1	\$ 50.2
<b>Beer, Wine and Liquor Stores (\$Millions)</b>	<b>\$ 3.3</b>	<b>\$ 8.7</b>	<b>\$ 21.2</b>	<b>\$ 23.6</b>
<b>TOTAL (\$Millions)</b>	<b>\$ 59.5</b>	<b>\$ 157.0</b>	<b>\$ 382.1</b>	<b>\$ 425.4</b>

SOURCE: urbanMetrics inc., based on inputs from Statistics Canada.

<sup>1</sup> Per Capita expenditures are calculated based on income differences from the provincial average.

<sup>2</sup> Population projections based on 2021 census data, development applications data, building permit data, White Church Urban Boundary Expansion Area concept plans, and Development Charge Background Study PPU.

## Study Area Food Store Retail (Expenditure Approach)

As shown in Figure 4-4, Study Area residents currently spend an estimated \$14.3 million in the food store retail category, of which an estimated \$2.1 million occurs within the Study Area.

Based on expenditure trends, the total available expenditures in this category are projected to increase by \$69.3million by 2051. After accounting for the minimal inflow expected, a total increase of \$81.5 million in food store retail spending by 2051 will generate demand for between 95,900 and 135,900 square feet of new food store retail space.

Historically, beer, wine, and liquor (BWL) stores have been analyzed separately from food store retailers. However, with anticipated Provincial legislation permitting the sale of alcohol in a much wider array of stores, including convenience stores, it is expected that over the long term, a larger share of liquor, beer, and wine sales will occur within stores traditionally classified as food stores. As BWL stores have almost double the sales per square foot compared to food store retail, we have analyzed this component separately. Any warranted BWL space could be added in either traditional alcohol retailers or within food stores.

Figure 4-4: Food Store Retail (FSR) Warranted Space Projections

<b>Food Store Retail (FSR) Analysis</b>				
<b>2023 Dollars</b>	<b>2023</b>	<b>2031</b>	<b>2041</b>	<b>2051</b>
<b>Study Area</b>				
Food Store Retail (FSR) Expenditures (\$Millions)	\$ 14.3	\$ 37.7	\$ 91.7	\$ 102.1
Estimated Study Area Share (%)	15.0%	50.0%	60.0%	70.0%
Estimated Study Area Share (\$Millions)	\$ 2.1	\$ 18.8	\$ 55.0	\$ 71.5
Residual Potential (\$Millions)		\$ 16.7	\$ 52.9	\$ 69.3
<b>Study Area WARRANTED ADDITIONAL FSR SPACE (including inflow)</b>				
Additional Residual Potential Available from Study Area Residents		\$ 16.7	\$ 52.9	\$ 69.3
Plus Inflow Sales		15.0%	15.0%	15.0%
Inflow Sales		\$ 2.9	\$ 9.3	\$ 12.2
<b>TOTAL ADDITIONAL SALES POTENTIAL AVAILABLE IN THE TRADE AREA (\$Millions)</b>		<b>\$ 19.6</b>	<b>\$ 62.2</b>	<b>\$ 81.5</b>
Square Feet Warranted (excluding sales transfers from Trade Area Stores)		Square Feet		
@\$600 per square foot		32,700	103,700	135,900
@\$750 per square foot		26,200	82,900	108,700
@\$850 per square foot		23,100	73,200	95,900

SOURCE: urbanMetrics inc., with inputs from the 2021 *CSCA Retail 100* report, Statistics Canada, and Study Area population estimates detailed in this report.



## Study Area Beer, Wine, and Liquor Retail (Expenditure Approach)

As shown in Figure 4-5, Study Area residents currently spend an estimated \$3.3 million in the beer, wine, and liquor store retail category, of which no spending occurs within the Study Area due to a lack of retail stores.

Based on expenditure trends, the total available expenditure in this category is projected to increase by \$11.8 million by 2051. After accounting for the minimal inflow expected, a total increase of \$13.9 million in beer, wine, and liquor store retail spending by 2051 will generate demand for between 8,700 and 13,900 square feet of new beer, wine, and liquor store retail space.

As discussed above, the warranted BWL retail space is expected to be split between food store retail stores and stand-alone beer, wine, and liquor stores such as the LCBO as a result of legislative changes. The exact ratio of this split is not yet known.

Figure 4-5: Beer, Wine, and Liquor (BWL) Warranted Space Projections

<b>Beer, Wine, and Liquor (BWL)</b>	<b>2023</b>	<b>2031</b>	<b>2041</b>	<b>2051</b>
<b>2023 Dollars</b>				
<b>Study Area</b>				
BWL Expenditures (\$Millions)	\$ 3.3	\$ 8.7	\$ 21.2	\$ 23.6
Estimated Study Area Share (%)	0.0%	30.0%	50.0%	50.0%
Estimated Study Area Share (\$Millions)	\$ -	\$ 2.6	\$ 10.6	\$ 11.8
Residual Potential (\$Millions)		\$ 2.6	\$ 10.6	\$ 11.8
<b>Study Area WARRANTED ADDITIONAL BWL SPACE (including inflow)</b>				
Additional Residual Potential Available from Study Area Residents		\$ 2.6	\$ 10.6	\$ 11.8
Plus Inflow Sales <sup>3</sup>		15.0%	15.0%	15.0%
Inflow Sales		\$ 0.5	\$ 1.9	\$ 2.1
<b>TOTAL ADDITIONAL SALES POTENTIAL AVAILABLE IN THE STUDY AREA (\$Millions)</b>		<b>\$ 3.1</b>	<b>\$ 12.5</b>	<b>\$ 13.9</b>
Square Feet Warranted (excluding sales transfers from Study Area Stores)		Square Feet		
@\$1000 per square foot		3,100	12,500	13,900
@\$1300 per square foot		2,400	9,600	10,700
@\$1600 per square foot		1,900	7,800	8,700

SOURCE: urbanMetrics inc., with inputs from the 2021 *CSCA Retail 100* report, Statistics Canada, and Study Area population estimates detailed in this report.



## Study Area Non-Food Store Retail (Expenditure Approach)

As shown in Figure 4-6, Study Area residents currently spend an estimated \$41.9 million in the non-food store retail category, of which an estimated \$1.0 million occurs within the Study Area. It should be noted that the vast majority of existing non-food store retail space is in two stores in the Building and Outdoor Home Supply category (a tile store and garden centre), and most customers likely come from outside the Study Area. There is only 1,100 square feet of other non-food store retail. Moving forward most customers are expected to come from within the Study Area as a large enough local population is created to increase demand, with local-serving stores becoming more viable.

Based on expenditure trends, the total available expenditure in this category is projected to increase by \$193.8 million by 2051. After accounting for the minimal inflow expected, a total increase of \$228.0 million in non-food store retail spending by 2051 will generate demand for between 304,000 and 414,500 square feet of new food store retail space.

Of note, pharmacies typically have much higher sales per square foot than other store types in this category, while also having high capture rates and lower inflow rates. As a result, the share of sales in pharmacies and personal care stores versus other subcategories can have large impacts on the average sales per square foot.

Figure 4-6: Non-Food Store Retail (NFSR) Warranted Space Projections

<b>Non-Food Store Retail (NFSR) Analysis</b>				
<b>2023 Dollars</b>	<b>2023</b>	<b>2031</b>	<b>2041</b>	<b>2051</b>
<b>Study Area</b>				
Non-Food Store Retail (NFSR) Expenditures (\$Millions)	\$ 41.9	\$ 110.6	\$ 269.2	\$ 299.7
Estimated Study Area Share (%)	2.5%	35.0%	50.0%	65.0%
Estimated Study Area Share (\$Millions)	\$ 1.0	\$ 38.7	\$ 134.6	\$ 194.8
Residual Potential (\$Millions)		\$ 37.7	\$ 133.6	\$ 193.8
<b>Study Area WARRANTED ADDITIONAL NFSR SPACE (including inflow)</b>				
Additional Residual Potential Available from Trade Area Residents		\$ 37.7	\$ 133.6	\$ 193.8
Plus Inflow Sales		15.0%	15.0%	15.0%
Inflow Sales		\$ 6.6	\$ 23.6	\$ 34.2
<b>TOTAL ADDITIONAL SALES POTENTIAL AVAILABLE IN THE STUDY AREA (\$Millions)</b>		<b>\$ 44.3</b>	<b>\$ 157.1</b>	<b>\$ 228.0</b>
Square Feet Warranted (excluding sales transfers from Trade Area Stores) <sup>3</sup>		Square Feet		
@\$550 per square foot		80,600	285,700	414,500
@\$650 per square foot		68,200	241,700	350,700
@\$750 per square foot		59,100	209,500	304,000

SOURCE: urbanMetrics inc., with inputs from the 2021 *CSCA Retail 100* report, Statistics Canada, and Study Area population estimates detailed in this report.



### 4.3 Per Capita Approach

We have used a different methodology to estimate the service commercial space warranted in the Study Area. The expenditure-based model’s applicability is limited for service space as each service category contains a high degree of variance in the performance level or sales per square foot of each service provider and reliable data is unavailable.

In place of an expenditure analysis, we have utilized a per capita analysis that applies a space ratio per new resident in the different service categories to project the total quantity of space warranted by population growth.

As shown in Figure 4-7 there will be a demand for 298,900 square feet of service commercial space by 2051, with a need for an additional 273,100 square feet of service commercial space. Food services and drinking places making up the largest category of warranted space, followed by finance, insurance, and real estate, and personal care services. In general, most services are expected to have high capture rates, and low inflow. This reflects their role as local-serving businesses with relatively small catchment areas.

Figure 4-7: Projected Study Area Warranted Service Space

Commercial Needs - Retail Category	Typical Space Per Capita (Sq Ft)	Total Space Required by Residents (Sq Ft)	Target Capture	Space Required (Sq Ft)	Inflow	Total Warranted Space (Sq Ft)	Less: Existing Space	Total Net New Space Required
Trade Area Population (2051)	[( 32,800 x A = B) x C = D] / (1-E) =					F	G	H
<b>Store Categories</b>								
<b>Services</b>	<b>13.0</b>							
Food Services & Drinking Places	3.0	98,400	70%	68,880	15%	81,000	10,100	70,900
Finance, Insurance and Real Estate	2.0	65,600	70%	45,920	15%	54,000	0	54,000
Health Care	1.5	49,200	70%	34,440	15%	40,500	3,500	37,000
Personal Care	2.0	65,600	70%	45,920	15%	54,000	0	54,000
Business Services <sup>1</sup>	1.5	49,200	60%	29,520	15%	34,700	0	34,700
Other <sup>2</sup>	3.0	98,400	30%	29,520	15%	34,700	12,200	22,500
<b>Total</b>	<b>13.0</b>					<b>298,900</b>	<b>25,800</b>	<b>273,100</b>

<sup>1</sup> Includes: Professional, Scientific and Technical Services, Select Civic and Social Organizations, Selected Office Administration and Selected Educational Services

<sup>2</sup> Includes: Cultural, Entertainment and Recreation, Personal & Household Goods Repair and Maintenance, & Social Services

SOURCE: urbanMetrics inc. Values are rounded.



## 4.4 Retail Needs Summary

The above retail analysis is summarized in Figure 4-8, and indicated that there is a need for an additional 783,500 square feet of retail and service commercial space, made up of 743,200 square feet of occupied space and 40,300 square feet of vacant space. This would achieve a healthy vacancy rate of 5.5%. The commercial lands in the White Church Urban Boundary Expansion Area could easily accommodate 451,500 square feet of additional commercial space, with the remaining 332,000 of new commercial space needed accommodated within the over 30 hectares of already zoned District Commercial lands. Overall, there is more than enough land to support the needs of the Study Area on buildout.

In general, local-serving commercial space generally requires an existing population before it is viable, and this commercial space is expected to be developed in line with the population growth of the Study Area. As such, most commercial space is likely to develop after 2031, when approximately half the buildout population will be present, and sufficient demand exists to support full-size retail stores.

Figure 4-8: Study Area Retail Needs Summary, 2051

<b>Retail Category</b>	<b>Existing Commercial Space (sq. ft.)</b>	<b>Warranted Additional Space (sq. ft.)</b>	<b>Total Space Needed (sq. ft.)</b>
Food Store Retail (FSR)	3,500	108,700	112,200
Beer, Wine, and Liquor (BWL)	0	10,700	10,700
Non-Food Store Retail (NFSR)	17,800	350,700	368,500
Services	25,800	273,100	298,900
<b>Total Occupied Commercial Space</b>	<b>47,100</b>	<b>743,200</b>	<b>790,300</b>
<b>Jobs (@400 sq. ft. per employee)</b>	<b>120</b>	<b>1,860</b>	<b>1,980</b>
Vacant Space & Other Uses	5,200	40,300	45,500

# 5.0 Conclusions

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Based on our above analysis, we have identified the following key conclusions:

- The Study Area will contain approximately 32,800 residents by 2051.
- Between existing commercial space, development applications with commercial space, the potential of the District Commercial zoned lands, and the Commercial block in the White Church Urban Boundary Expansion Area the study area could accommodate 1.39 million square feet of retail. It is very unlikely that the majority of this space will be required or be developed as commercial space over the 2051 time horizon.
- There will be a need for between 95,900 and 135,900 square feet of additional Food Store Retail (FSR) space by 2051. This represents one to three major grocery stores and assorted specialty and convenience stores.
- There will be a need for an additional 8,700 to 13,900 square feet of Beer, Wine, and Liquor (BWL) retail space by 2051. This space may develop as stand-alone stores (e.g. LCBO), or within grocery stores and convenience stores under the new permissions for alcohol sales.
- There will be a need for an additional 304,000 to 414,500 square feet of Non-Food Store Retail (NFSR) by 2051.
- There will be a need for a total of 783,500 square feet of retail and service commercial space, made up of 743,200 square feet of occupied space and 40,300 square feet of vacant space. This would achieve a healthy vacancy rate of 5.5%.
- Overall, there will be a need for an estimated total of 835,800 square feet of commercial space in the Study Area including existing and new commercial space, as well as vacant space by 2051. In our professional opinion there is more than sufficient designated commercial lands to accommodate this need.