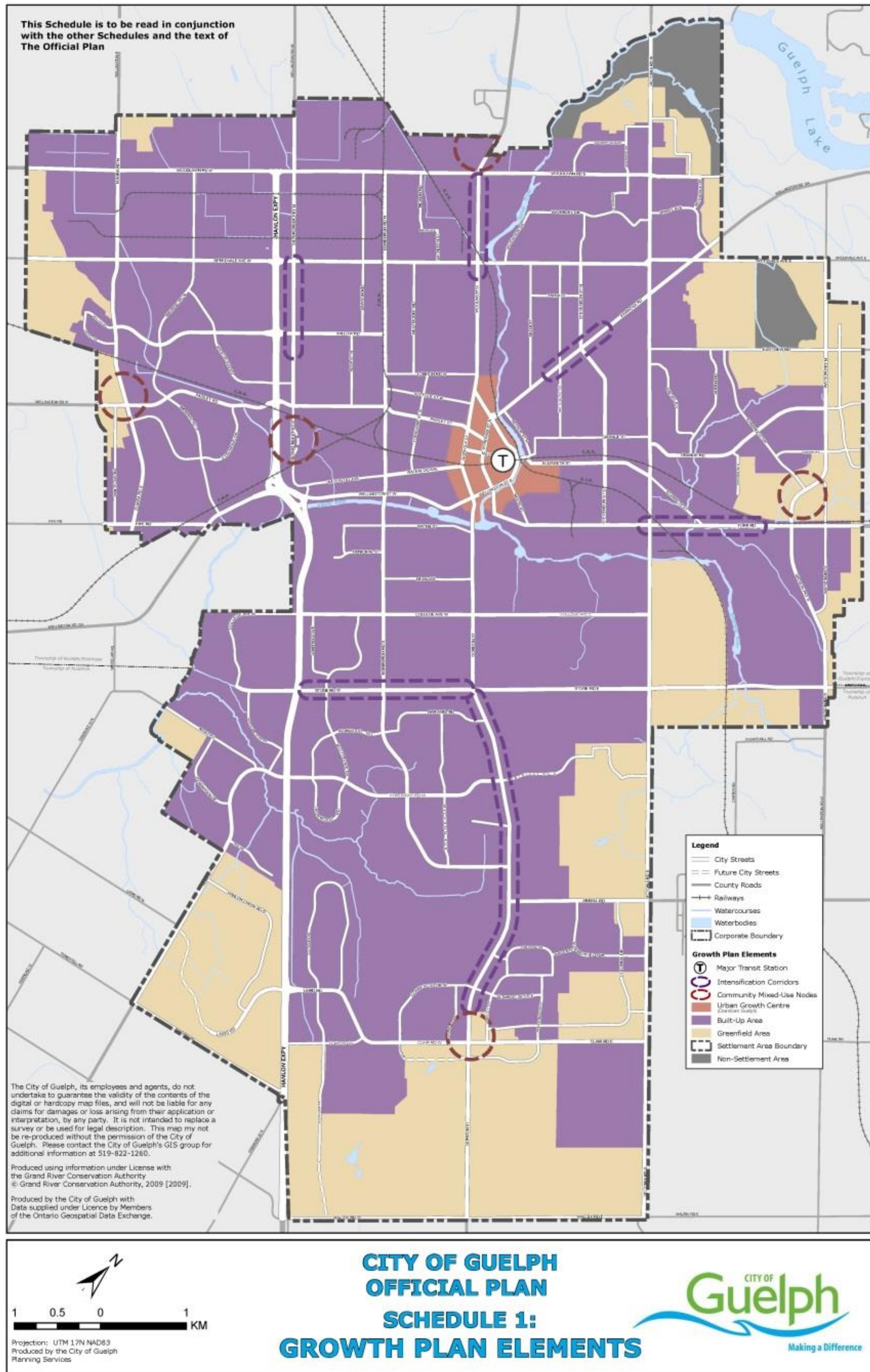


City of Guelph Official Plan

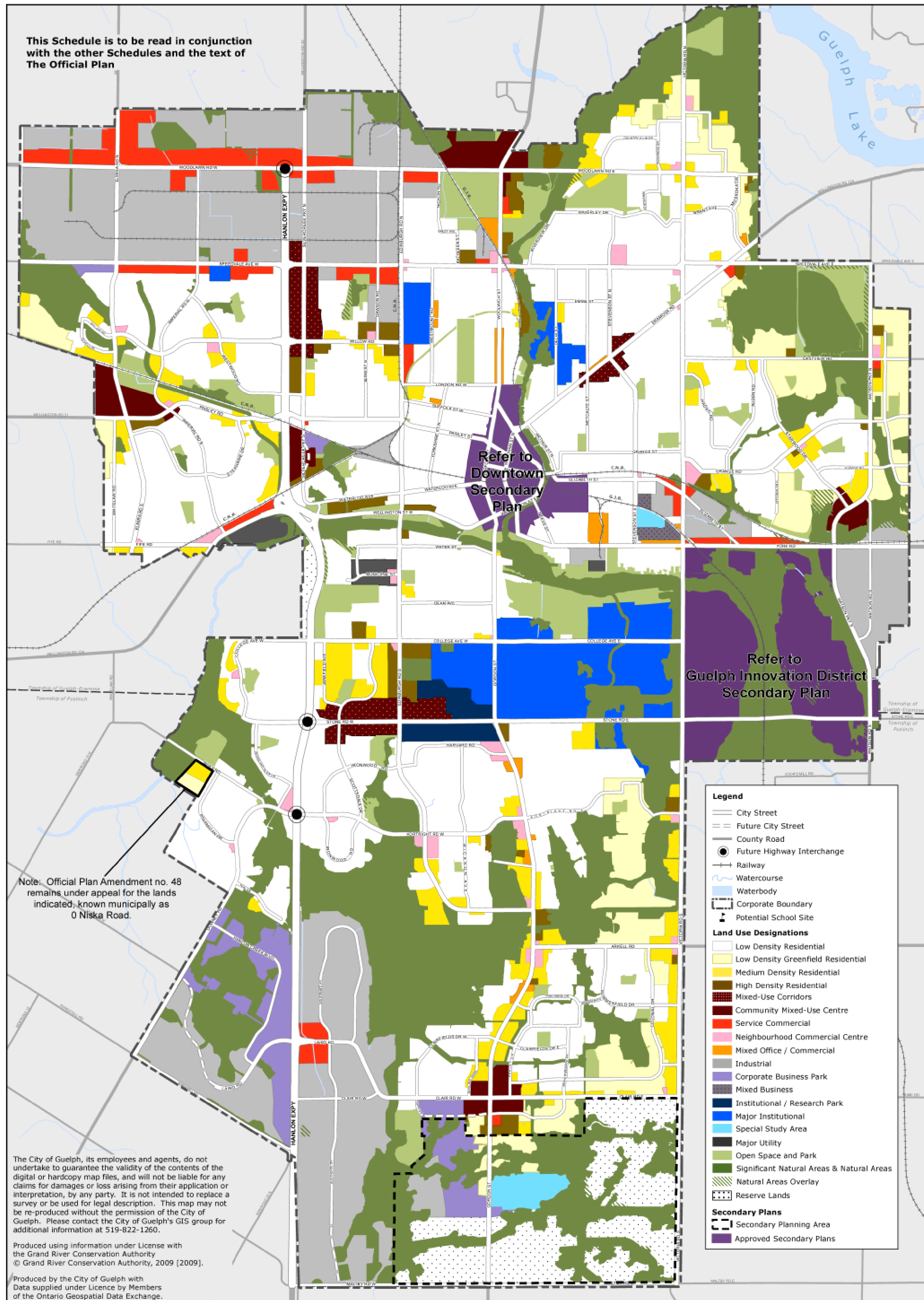
Schedule 1



GUELPH COMMERCIAL POLICY REVIEW

City of Guelph Official Plan

Schedule 2



1 0.5 0 1 KM

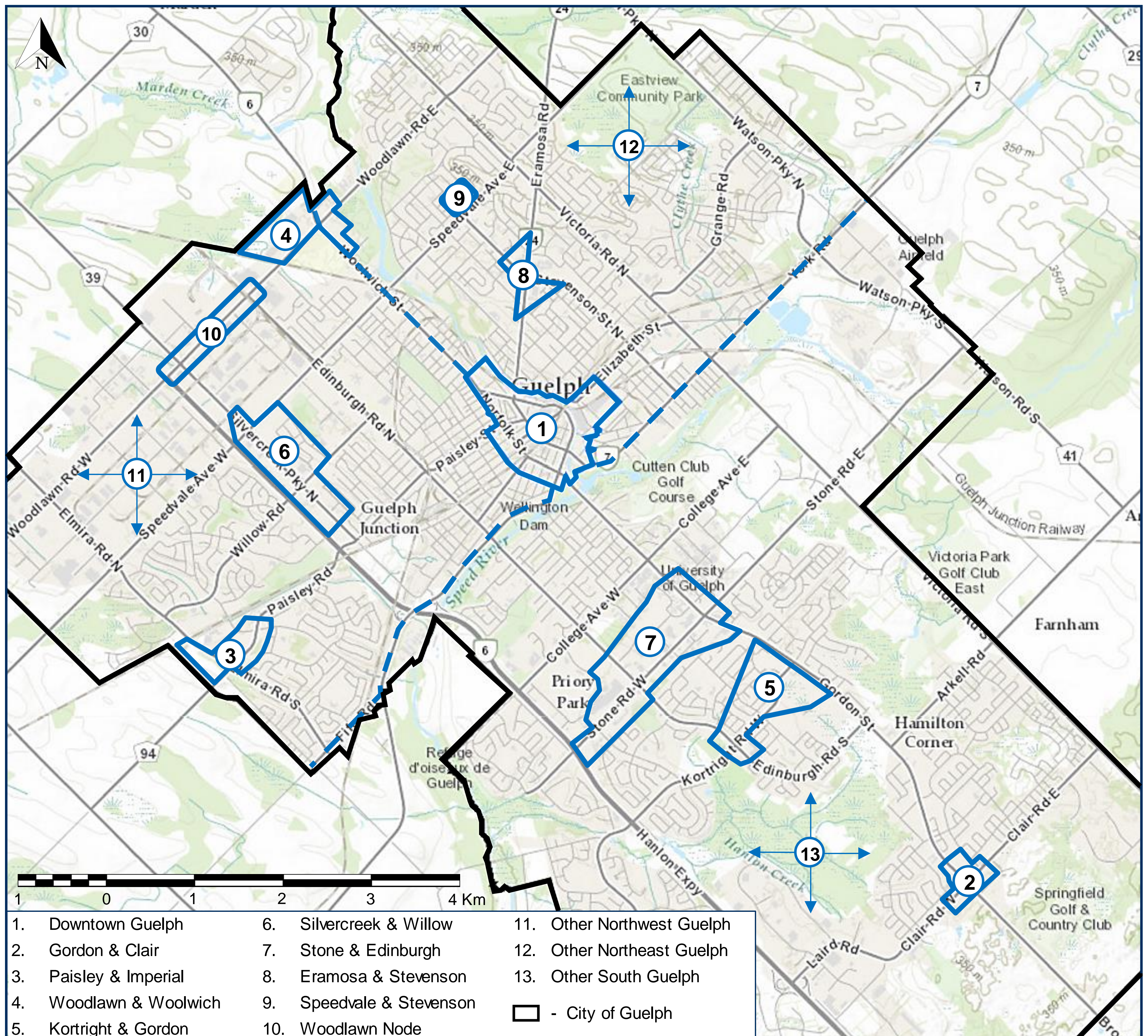
Projection: UTM 17N NAD83
Produced by the City of Guelph
Planning Services
September 2017 Consolidation

**CITY OF GUELPH
OFFICIAL PLAN
SCHEDULE 2:
LAND USE PLAN**

GUELPH COMMERCIAL POLICY REVIEW

Commercial Structure and Supply

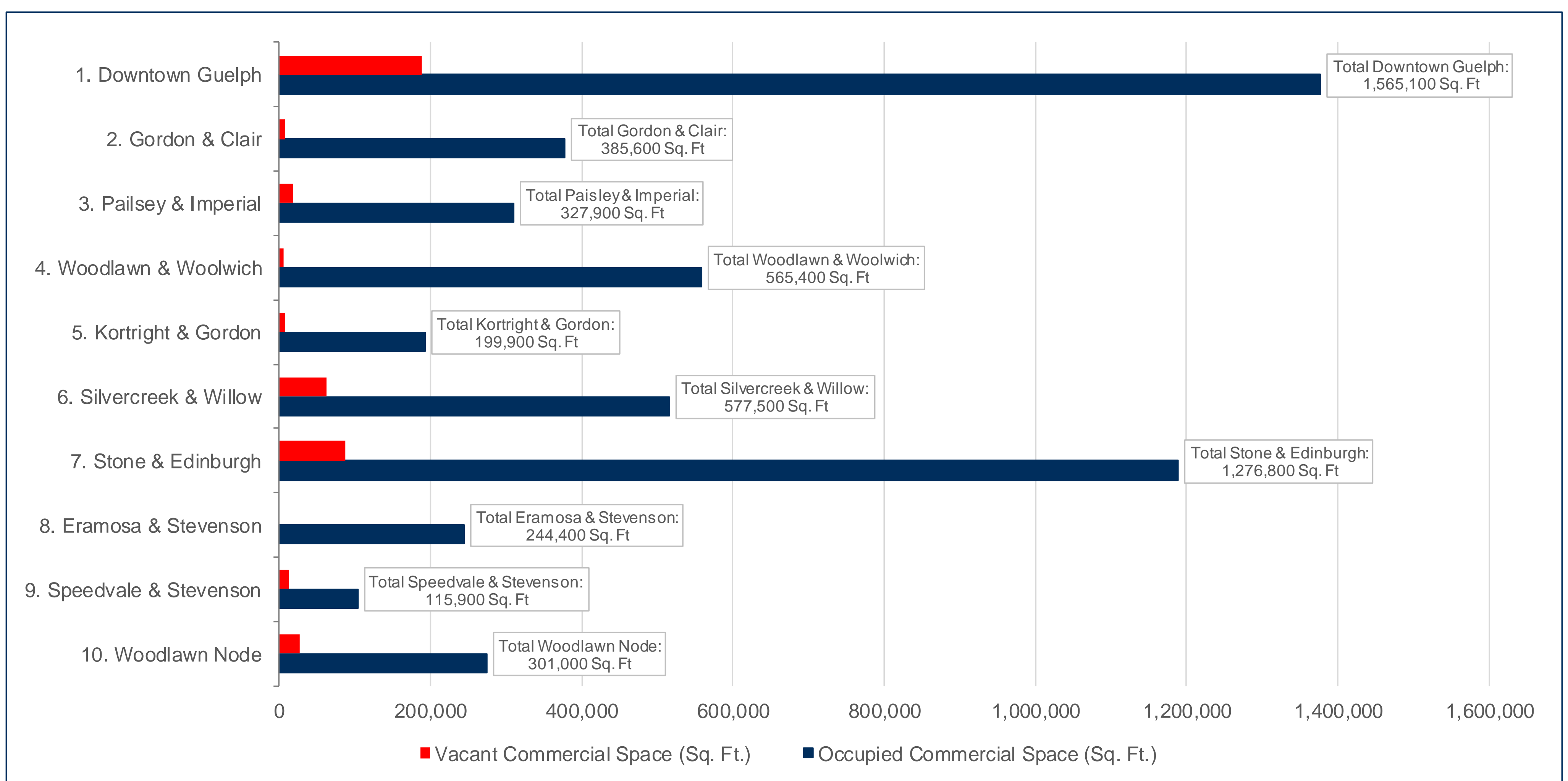
City of Guelph Inventory Nodes



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

Commercial Structure and Supply

Summary of Commercial Space within the City of Guelph

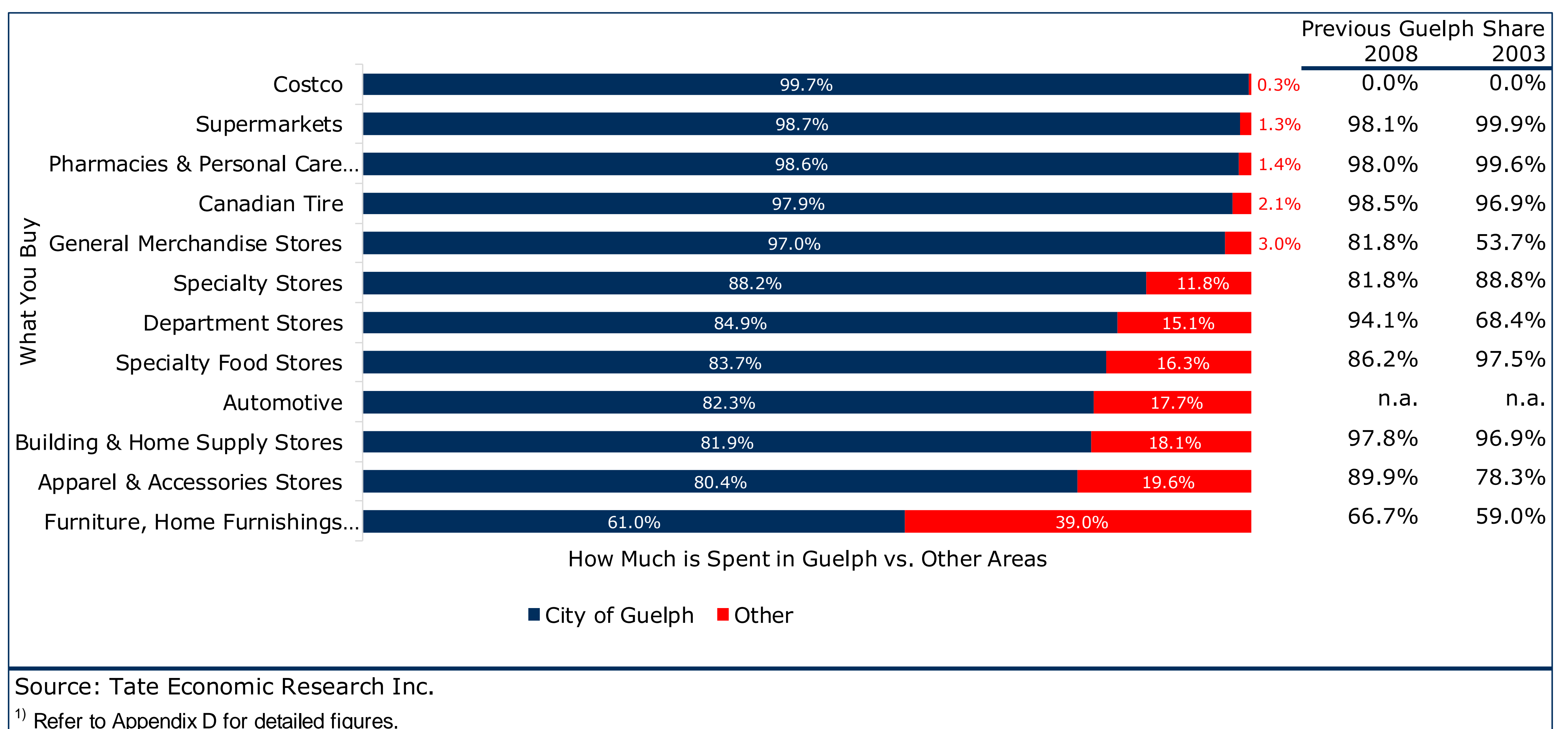


Source: Tate Economic Research Inc.

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

Commercial Structure and Supply

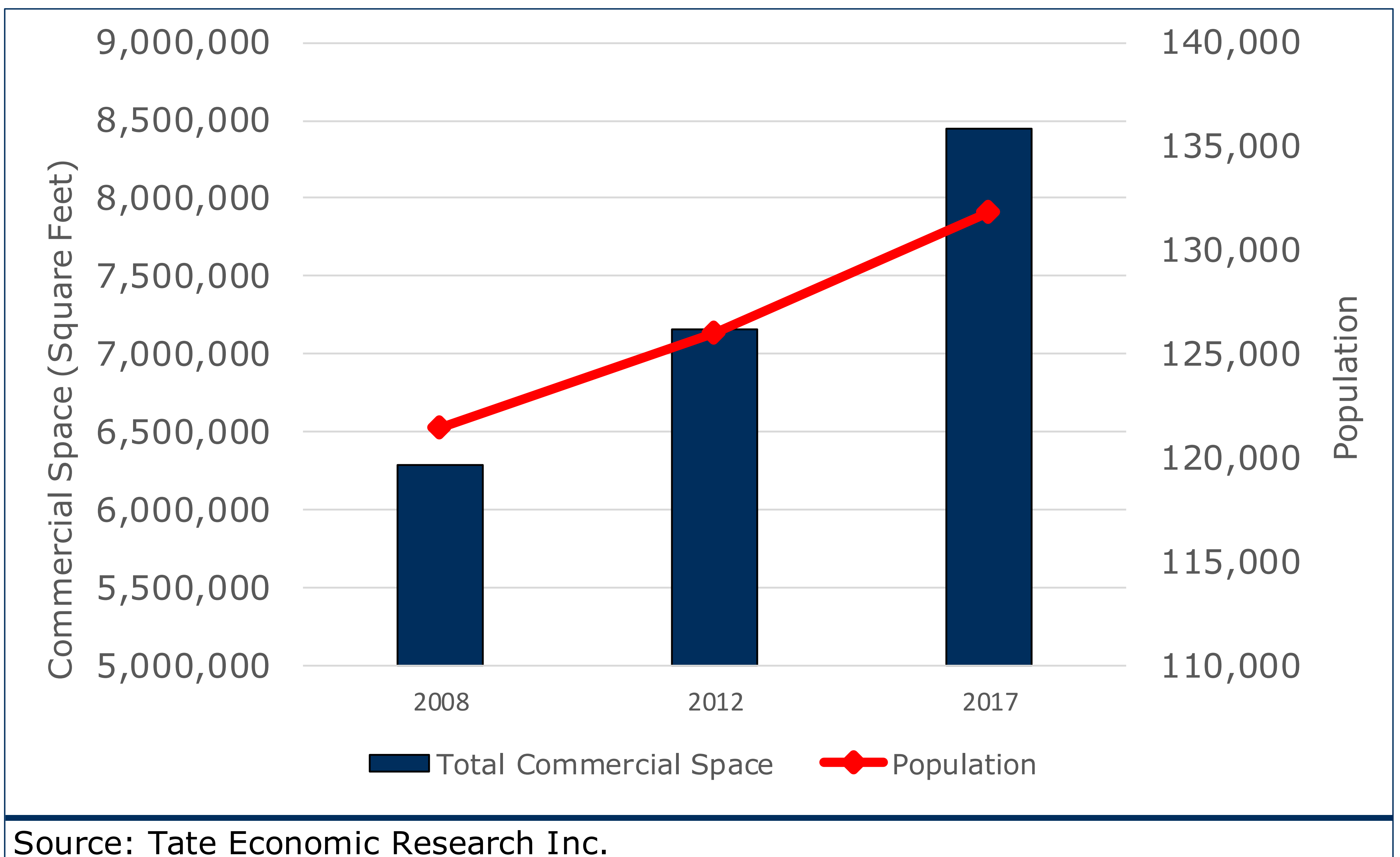
2017 City of Guelph Residents Retail Expenditures Distribution



Commercial Structure and Supply

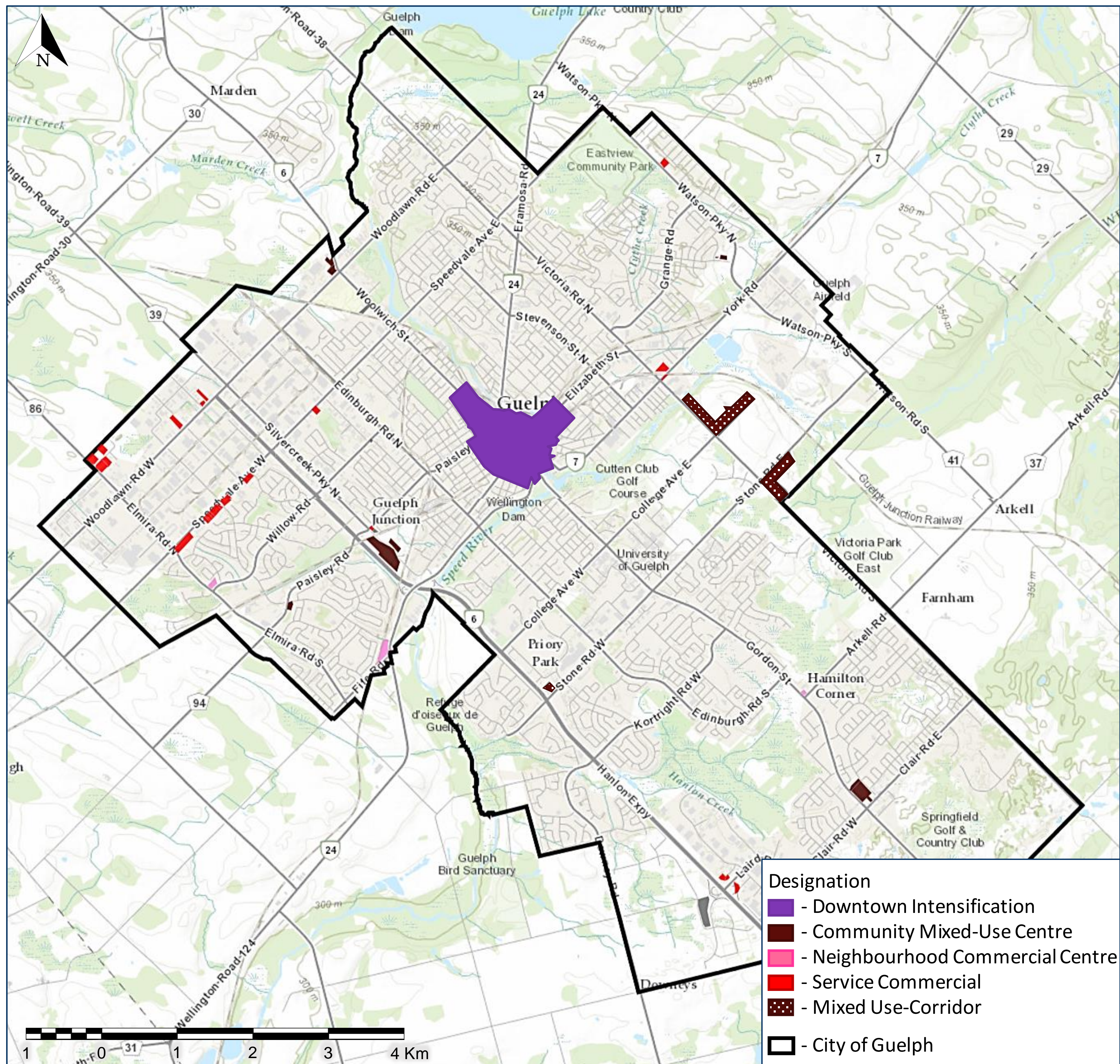
Population Growth Relative to Commercial Space (2008 – 2017)

...



Commercial Structure and Supply

Potential Future Development Intensification / Planned Undeveloped Commercial Land

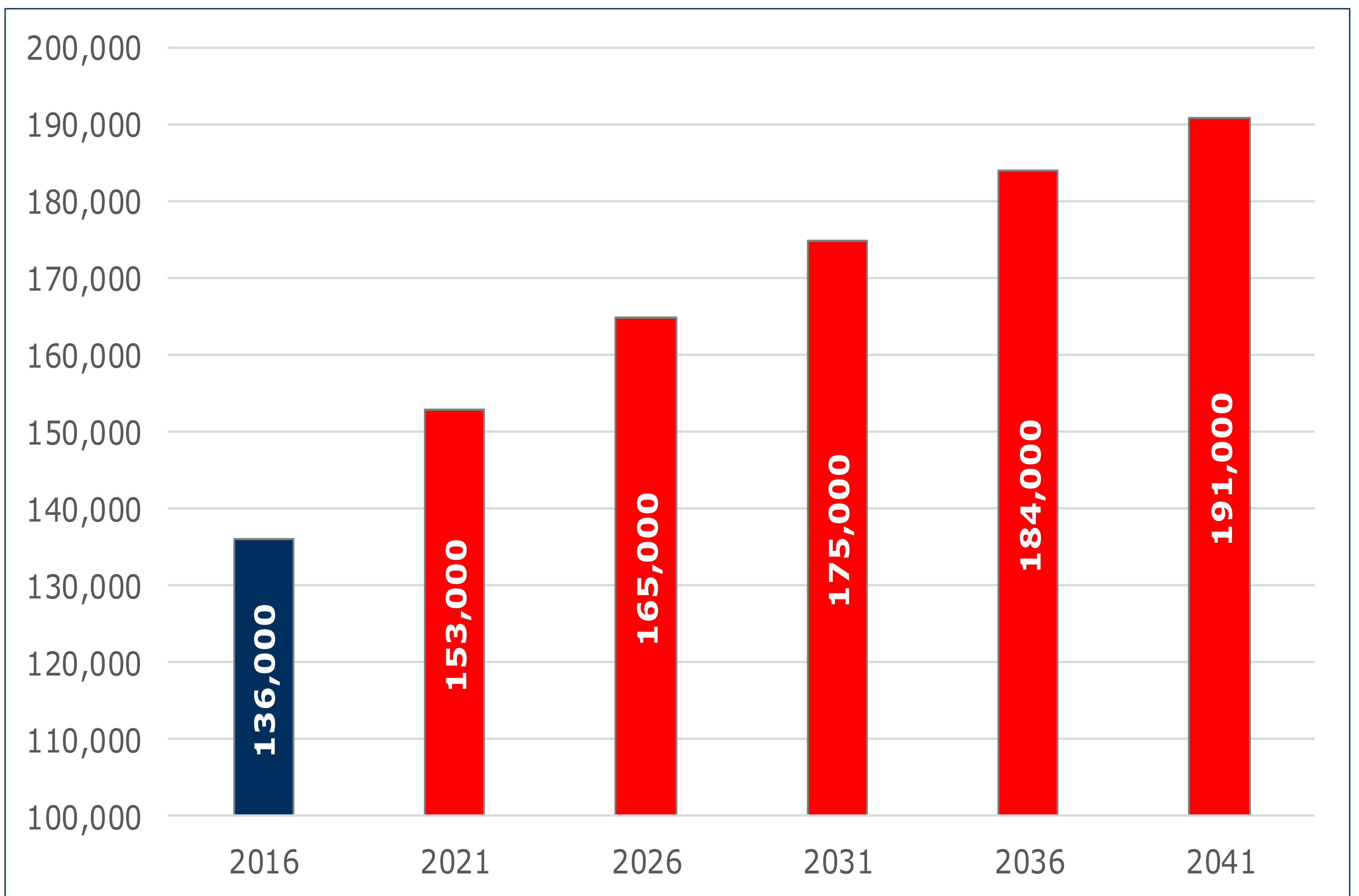


Designation	Potential Future Development: Intensification / Planned Amount (sq. ft.)	Undeveloped Commercial Land Parcel Size				
		< 2 Acres	2 - 4 Acres	5-10 Acres	>10 Acres	
Community Mixed-Use Centre	269,800	26.6	1	2	1	
Neighbourhood Commercial Centre	0	9.1	1	1	1	
Service Commercial	0	50.1	12	11	1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

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

Commercial Demand Analysis

City of Guelph Population Forecast 2016-2041



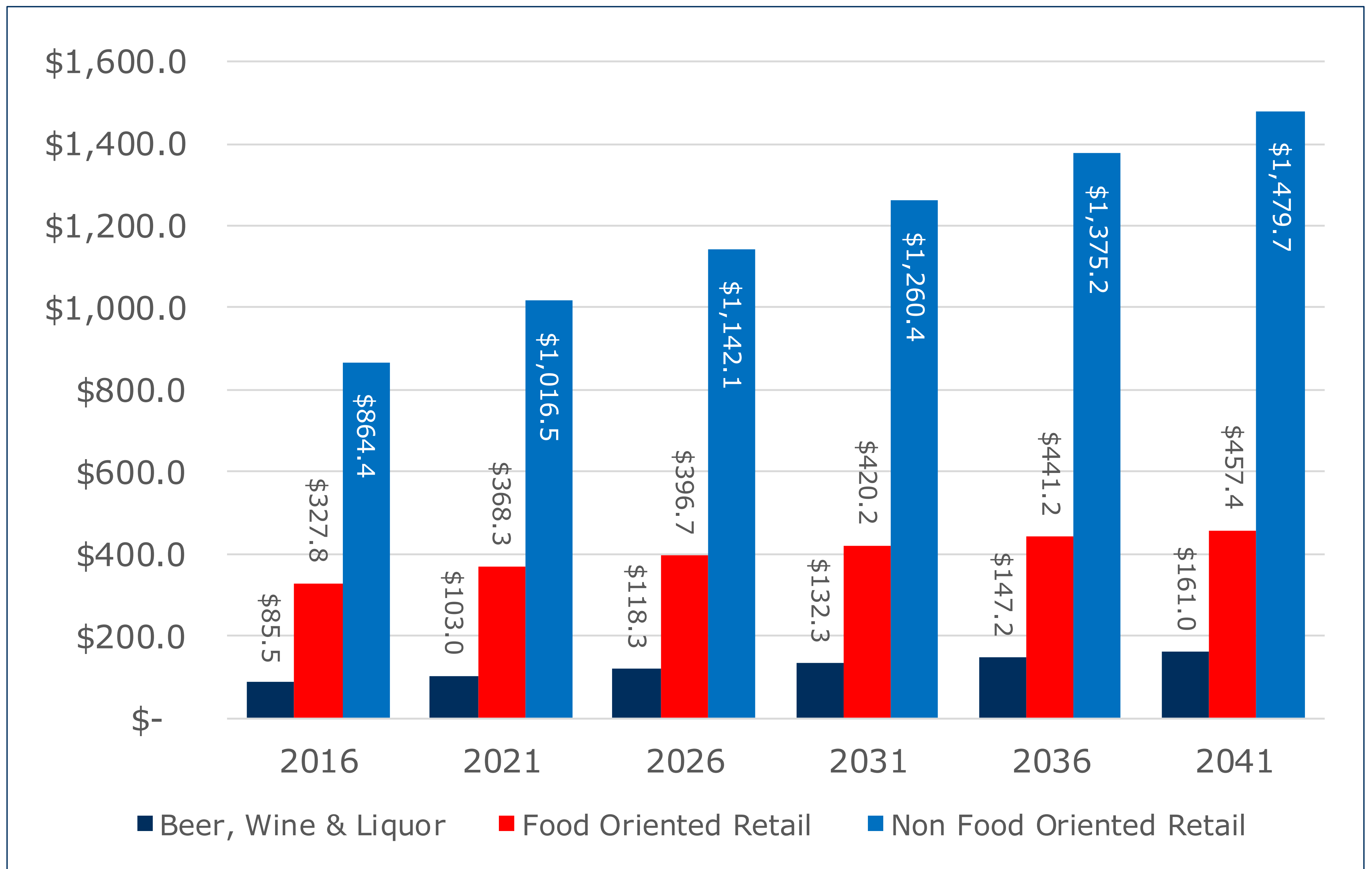
	2016	2021	2026	2031	2036	2041	2016-2041
City of Guelph	136,000	153,000	165,000	175,000	184,000	191,000	
Period Change		17,000	12,000	10,000	9,000	7,000	55,000
Average Annual Growth Rate		2.5%	1.6%	1.2%	1.0%	0.8%	1.6%

Source: Tate Economic Research Inc.

GUELPH COMMERCIAL POLICY REVIEW

Commercial Demand Analysis

Retail Expenditure Forecast

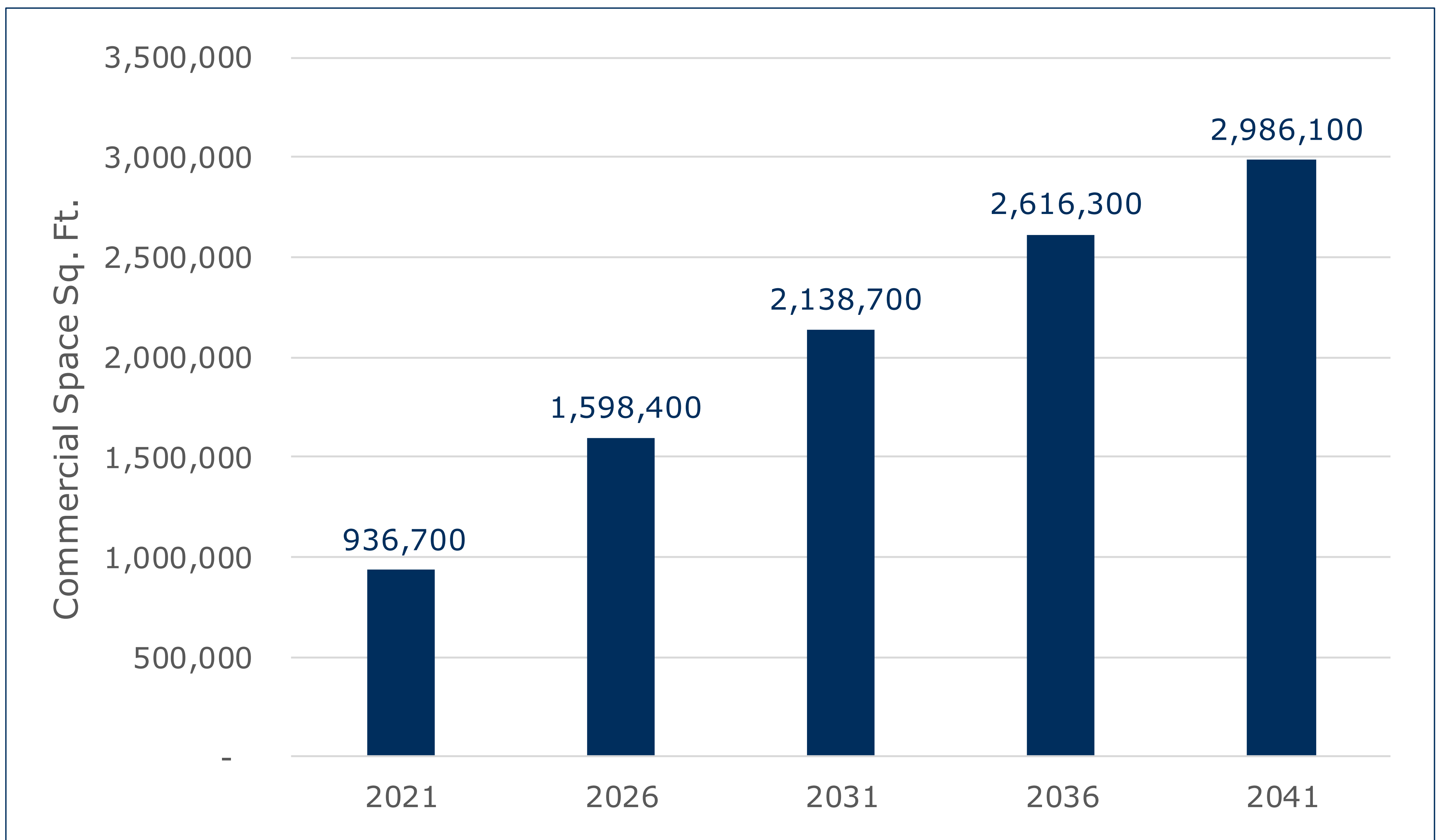


Source: Tate Economic Research Inc.

¹⁾ See Appendix E for background calculations.

Commercial Demand Analysis

Additional Warranted Commercial Space



Source: Tate Economic Research Inc.

Commercial Demand Analysis

City of Guelph Commercial Land Needs 2016 – 2041 ⁽¹⁾⁽²⁾⁽³⁾

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

Source: Tate Economic Research Inc.

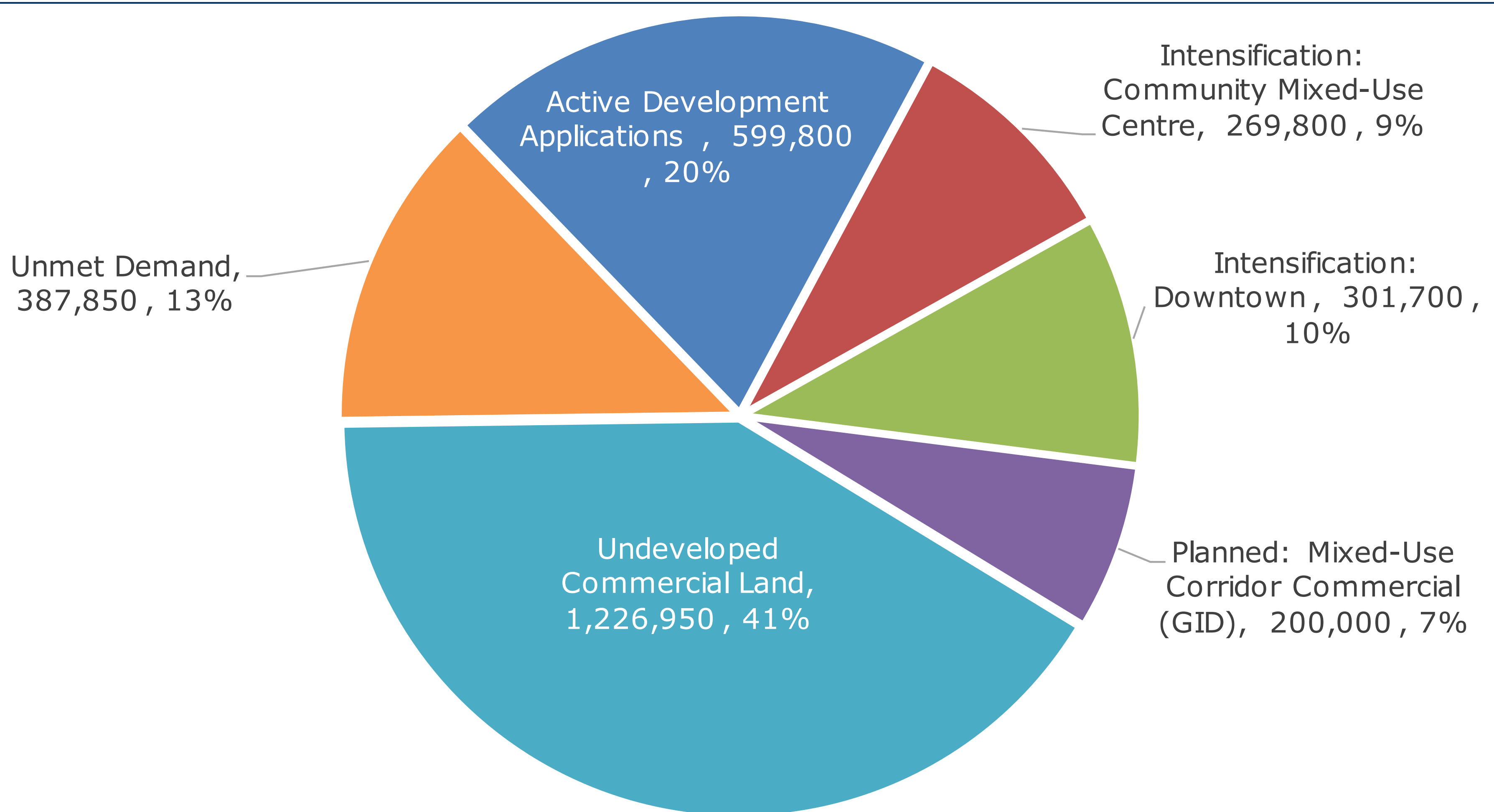
¹⁾ Replicated from Figure 6-5.

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

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

Commercial Demand Analysis

Distribution of Commercial Demand 2016 - 2041



Source: Tate Economic Research Inc.

Commercial Demand Analysis

Distribution of Undeveloped Commercial Sites by Parcel Size

