



REPORT

To: **COUNCIL**

Date of Meeting: November 24, 2014

Prepared By: Paul Smithson, Senior Policy Planner

Approved By: Hardy Bromberg, Commissioner of Planning and Development

Department: Planning and Development Department

Date to Senior Management Team: November 12, 2014

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Ward No.: All

<p>COMPREHENSIVE COMMERCIAL REVIEW</p>

Recommendations:

THAT Cambridge Council receive and approve the Comprehensive Commercial Review prepared by Malone, Given, Parsons Ltd., dated September, 2014 (Executive Summary and Table of Contents provided as Attachment No. 1);

AND THAT Cambridge Council direct that the conclusions and recommendations of the Malone, Given, Parsons Ltd. report be used in the review of Official Plan commercial policies as a 2015 Planning and Development Department work plan item.

Background:

On August 12, 2013 Council approved the Terms of Reference for the Comprehensive Commercial Review (Report P/13-42). On September 30, 2013 Council approved awarding the contract to undertake the Comprehensive Commercial Review to the firm of Malone, Given, Parsons Ltd. (the consultant) for a total price of \$142,380.00 (Report Corpser/13-149). As part of the market analysis the consultant:

- prepared a comprehensive inventory of commercial uses, including floor space;
- undertook a licence plate trace at major commercial centres to determine the primary and secondary markets;
- conducted a statistically valid telephone survey to determine shopper patterns; and
- reviewed the potential population and commercial growth trends and projections.

In addition to the market analysis the consultant reviewed existing Official Plan commercial policies and Zoning By-law provisions regarding commercial development to determine their appropriateness given the market analysis and changing commercial trends.

A draft report was released by the consultant in June 2013 for review by City staff and interested parties, in order that any input could be used to refine the final report and address issues raised.

Existing Policy/By-Law:

The commercial policies contained in the 2012 Cambridge Official Plan are very similar to those in the 1999 Official Plan. This was done to allow time to complete the Comprehensive Commercial Review.

Financial Impact:

This study was funded from a previously approved allocation in the 2013 capital budget. The cost of this study was less than the capital budget allocation.

Public Input:

A draft report was made available for public review in June, 2013 and interested parties were made aware of its availability. A public open house was held at City Hall on June 23, 2014 to provide information and obtain comments from the public. All comments received by July 18, 2014 were forwarded to the City's consultant in order that they could be addressed in the final report. Given this is not a development application made under the Planning Act, there is no minimum prescribed public consultation requirements.

Some of the public comments received requested that specific policies or designations be changed for a particular property or that some current provisions be relaxed to allow additional or a different form of retail development on certain properties. Other public comments requested further clarification regarding certain information contained in the draft report.

Internal/External Consultation:

The City Technical Advisory Committee involved members of the Planning and Development Department along with representatives from the Economic Development Division of the C.A.O's Office.

The draft report was also circulated to Region of Waterloo planning staff for comments. These comments identified that the projected amount of additional commercial land needed in Cambridge could be reduced through more intensive, transit supportive redevelopment along major transit corridors, such as Hespeler Road. There is also a need to address the higher vacancy rates in core areas compared to some other commercial centres when addressing applications for new or expanded commercial development.

Comments/Analysis:

The Comprehensive Commercial Review prepared by Malone, Given, Parsons Ltd. provides a basis for estimating the amount of commercial development needed to 2031. It also provides an independent review of the current Official Plan Commercial Policies and Zoning regulations, with recommendations on how these documents can best be updated to reflect current and emerging trends in commercial development. It can be used to prepare the appropriate amendments to the City's Official Plan and Zoning By-law.

Some of the major findings of the Comprehensive Commercial Review include:

- The Cambridge market is fairly self-contained, meaning Cambridge residents tend to shop in Cambridge. As a result commercial growth is closely linked to population growth;
- Cambridge currently has over 6.7 million square feet (662,430 sq. m.) of retail / commercial space;
- By 2031 there is a potential opportunity for approximately 3.3 million square feet (306570 sq. m.) of additional retail and service commercial space in Cambridge; and
- In order to accommodate the projected increase in retail / service commercial space it is estimated that approximately 103.8 hectares (255 acres) of additional commercial land will be needed in Cambridge, which exceeds the approximately 20.5 hectares (50 acres) of undeveloped/ vacant land currently designated for future commercial development.

Attachment No. 1: Comprehensive Commercial Review - Table of Contents and Executive Summary

ATTACHMENT NO. 1

City of Cambridge Comprehensive Commercial Review

Cambridge, Ontario



Prepared By:

 MALONE GIVEN
PARSONS LTD.

Prepared For:

 CAMBRIDGE

September 2014



City of Cambridge

Comprehensive Commercial Review

Cambridge, Ontario

Prepared By:

Malone Given Parsons Ltd.

140 Renfrew Drive, Suite 201

Markham, Ontario

L3R 6B3

mward@mgp.ca

dgiven@mgp.ca

Prepared For:

City of Cambridge

50 Dickson St., 3rd Floor

P.O. Box 669

Cambridge, Ontario

N1R 5W8

September, 2014

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This report reflects AODA font requirements

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Appendix B: Retail/Commercial Inventory

Appendix C: Customer Origin Survey Results

Appendix D: Consumer Telephone Survey Results

Appendix E: Per Capita Expenditure Derivation

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EXECUTIVE SUMMARY

Malone Given Parsons Ltd. (MGP) was retained by the City of Cambridge to conduct a Comprehensive Commercial Review of the Commercial policies and designations of the City of Cambridge Official Plan.

The City of Cambridge recently completed an Official Plan Review and update of the 1999 Cambridge Official Plan which, among other items, was conducted in order to achieve conformity with the Provincial Growth Plan and the approved Regional Official Plan. The new City of Cambridge Official Plan was approved by the Regional Municipality of Waterloo in November, 2012 ("the 2012 Cambridge Official Plan"). The 2012 Cambridge Official Plan is now partially in full force and effect, including the commercial policies.

One part of the 2012 Cambridge Official Plan which was not comprehensively reviewed and updated, was the Commercial policies. Considering the past and projected growth in Cambridge and current and evolving retail trends, the City has initiated a Comprehensive Commercial Review of the Official Plan Commercial policies and designations.

Purpose of the Study

The Comprehensive Commercial Review is intended to provide the basis for any refinement and update of the Cambridge Official Plan Commercial policies and designations and is to provide guidance in the review of the City's Zoning By-law which has commenced. The Comprehensive Review Study is also intended to provide input to the preparation of Secondary Plans for Community Nodes as identified in the 2012 Cambridge Official Plan.

Based on the study findings, recommendations are provided which are intended to direct the City's update and/or refinement of the Official Plan Commercial designations and related policies, are intended to direct the formulation of Secondary Plans for Community Nodes, and are intended to provide input for the review of the City's Zoning By-law.

Planning Context

The City of Cambridge commercial structure is defined in the City's Official Plan. The Cambridge OP provides an organization of the city's built-up commercial areas grouped into *Community Core Areas*, *Commercial* designations, and *Nodes* as outlined below.

OP Section 8.3 Community Core Areas

- Hespeler Village
- Preston Towne Centre
- Galt City Centre (also an Urban Growth Centre)

OP Section 8.6 Commercial

8.6.1 Hespeler Road Retail Centre

- Retail and Service Commercial Corridor (Hespeler Road Commercial District)
- Regional and Community Shopping Centres
- Regional Power Centre

8.6.2 Commercial Areas - Classification of Commercial Designations

- Class 1 (Regional Shopping Centre) Commercial
- Class 2 (Community Shopping Centre) Commercial
- Class 3 (Neighbourhood Shopping Centre) Commercial
- Class 4 (Hespeler Road) Commercial
- Class 5 (Regional Power Centre) Commercial

8.6.3 Unclassified Commercial Uses

- Local Shopping Centres
- Commercial Strips
- Existing Commercial Uses
- Home Occupations
- Service Stations

OP Section 8.7 Nodes

- Regional Scale Node
- Community Nodes
- Neighbourhood Nodes

Cambridge Zoning By-Law 150-85

The Commercial zones identified in the City of Cambridge Zoning By-law to some extent reflect the commercial designations provided in the Official Plan. More commercial categories are provided in the By-law compared with the various commercial designations provided in the Official Plan.

It is recommended that the City of Cambridge Zoning By-law should be brought into conformity with any changes in the Official Plan commercial designations and policies.

Cambridge Commercial Context

Cambridge has over 6.7 million square feet of retail/commercial space of which more than half (57%) is composed of retail space and over a third (36%) is service space.

The retail/commercial space in Cambridge is clustered into various forms and formats including: regional shopping centres; community, neighbourhood, local and convenience serving shopping centres and plazas; commercial nodes, corridors, and commercial strips; and three downtown *Community Core Areas*.

- The “Hespeler Road Retail Centre” (including Cambridge Centre, SmartCentres Cambridge, and other areas along Hespeler Rd.) is the largest retail/commercial area in Cambridge with almost half of the city’s space.
- Galt City Centre *Community Core Area* is the second largest retail/commercial area accounting for over one million square feet of space.
- The three *Community Core Areas* of Cambridge account for about a fifth of the city’s retail/commercial space.

There are approximately 20 hectares (50 acres) of undeveloped/vacant commercial lands in Cambridge some of which have active proposals and some do not. However, most sites are small, less than 1 acre each.

The 20 hectares (50 acres) is composed of approximately 3 hectares (8 acres) of proposed and approved development on commercial land, plus approximately 17 hectares (42.5 acres) of undeveloped/vacant commercial land with no active proposal.

However, most of the undeveloped/vacant land parcels in Cambridge are composed of small site sizes i.e. land parcels which are less than one acre each. A quarter of the undeveloped/vacant commercial land parcels are composed of sites which are greater than one acre.

Cambridge Study Area

The Cambridge Study Area includes the City of Cambridge and a surrounding market area to the west and east of the city.

The Study Area is comprised of four consumer market zones.

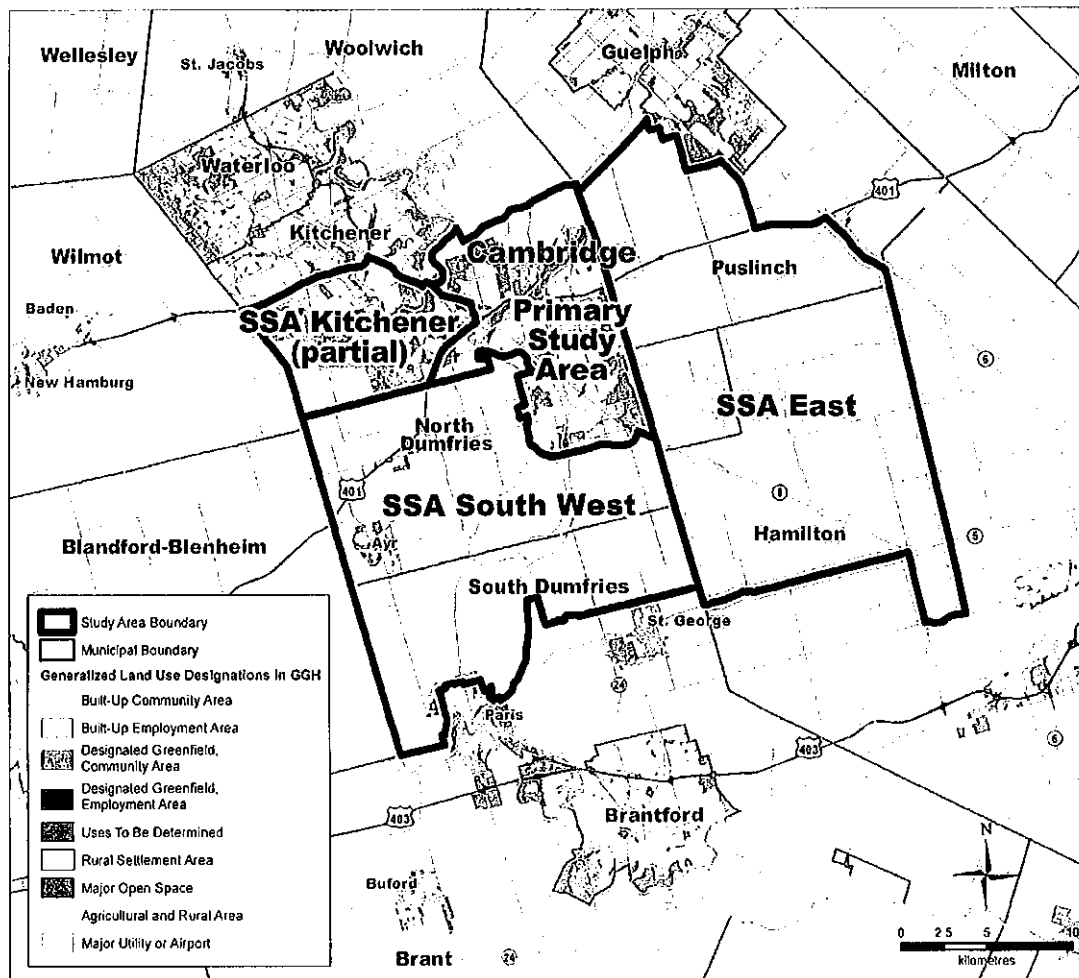
The Primary Study Area (PSA) Cambridge includes the City of Cambridge.

The Secondary Study Area South Kitchener (SSA South Kitchener) consists of an area of Kitchener, south of Highway 8.

The Secondary Study Area Southwest (SSA Southwest) includes part of North Dumfries generally west of Branchton Rd./Regional Rd. 48 and the northern part of South Dumfries excluding Paris and St. George.

The Secondary Study Area East (SSA East) includes a part of North Dumfries generally east of Branchton Rd./Regional Rd. 48, parts of the Township of Puslinch, and parts of Flamborough.

Cambridge Study Area



Study Area Population and Expenditure Potential

The Study Area population is forecast to increase from approximately 238,300 in 2013 to 319,600 in 2031.

Census population within the Study Area increased at a growth rate of about 1.4% per annum from 217,100 in 2006 to 232,400 in 2011 (adjusted for undercount).

The Study Area population is forecast to increase by approximately 81,300 people from approximately 238,300 in 2013 to 319,600 in 2031 as summarized on the following table. Population in Cambridge is forecast to increase by approximately 45,300 people from approximately 132,700 in 2013 to approximately 178,000 in 2031.

Cambridge Study Area Population and Expenditure Potential (2013 Constant Dollars)

	2013	2016	2019	2021	2031
PSA - City of Cambridge	132,700	139,200	146,700	152,000	178,000
SSA - South Kitchener	84,200	89,900	95,600	99,400	118,400
SSA - Southwest	10,700	10,900	11,000	11,100	11,700
SSA - East	10,700	10,800	11,000	11,100	11,500
Total Study Area	238,300	250,800	264,300	273,600	319,600
Total Study Area					
Retail Expenditure (\$m)	\$1,845.8	\$1,983.9	\$2,135.4	\$2,242.1	\$2,815.4
Cumulative Increase from 2013 (\$m)		\$138.1	\$289.6	\$396.3	\$969.6

The retail expenditure of Study Area residents is forecast to increase by approximately \$969.6m from 2013 to 2031.

Food store expenditures generated from Study Area residents are forecast to increase by approximately \$184.0m from \$540.2m in 2013 to \$724.2m in 2031.

Non-food retail expenditures generated from Study Area residents are forecast to increase by approximately \$785.6m from \$1,305.6m in 2013 to \$2,091.2m in 2031.

Additional Warranted Retail/Commercial Space

Market support for additional retail/commercial space in Cambridge is derived from a combination of population growth in Cambridge, population growth in the Secondary Study Area, real growth in expenditures, and recapture of outflow spending captured by stores located outside of Cambridge.

The market demand forecast illustrates that there is opportunity for approximately 3.3 million square feet of additional retail and service commercial space in Cambridge by 2031.

A large portion of Cambridge residents shop in Cambridge stores, however, the market demand analysis illustrates that there is an opportunity for Cambridge to increase the level of retail service and improve its market position as a regional service centre. As well, growth in Cambridge generates demand and opportunity for additional retail and service commercial space in future years.

Additional Warranted Retail and Service Commercial Space Opportunity in Cambridge to 2031 (with no sales transfers)

	Existing Space in 2013 (sq.ft.)	Additional Space Demand and Opportunity in Cambridge From 2013 (With No Sales Transfers)				Total Forecast of Space in 2031
		2016	2019	2021	2031	
Supermarket and Grocery Space	531,400	38,000	69,000	91,000	199,000	730,400
Other Food Store Space (1)	173,600	30,000	40,000	47,000	82,000	255,600
Department Store Space	544,900	95,000	156,000	201,000	441,000	985,900
Home Improvement Related	507,700	60,000	106,000	139,000	320,000	827,700
Other DSTM (2)	1,875,500	411,000	587,000	714,000	1,404,000	3,279,500
Service and Other Commercial (3)	2,632,400	130,000	280,000	384,000	900,000	3,532,400
Total (sq.ft.)	6,265,500	764,000	1,238,000	1,576,000	3,346,000	9,611,500

- 1) Excludes convenience stores in gas stations.
- 2) Other Department Store Type Merchandise (DSTM) excludes department store and home improvement space.
- 3) Includes Other Retail and Service Space categories shown on Table 4.1. Does not include office buildings.

Based on an analysis of the residual demand and opportunity, there is opportunity for new retail and commercial development in Cambridge for a variety of shopping facilities ranging from local/convenience to district and regional serving, destination, fashion, and comparison shopping retailing.

The forecast of approximately 3.3 million square feet of retail/commercial space requires approximately 125 hectares (305 acres) of land by 2031 (at an estimated 25% coverage).

There are approximately 20 hectares (50 acres) of undeveloped/vacant commercial lands in Cambridge some of which have active proposals and some do not. Approximately 450,000-550,000 sq.ft. of retail/commercial space could theoretically be accommodated on planned and designated commercial land in Cambridge. However, most of the land is contained in small parcel sizes, i.e. less than one acre. Only one land parcel is larger than 10 acres in size.

The following table illustrates the estimated additional commercial land requirement in Cambridge to 2031 (tested at an estimated 25% coverage), net of the existing planned and approved but undeveloped commercial land.

Additional Commercial Land Requirement in Cambridge

	2016	2019	2021	2031
Planned and Approved Commercial Land				
Hectares	20	20	20	20
Acres	50	50	50	50
Estimate of Additional Land Requirement (@ 25% coverage)				
Hectares	30	45	60	125
Acres	70	115	145	305
Additional Land Requirement (Net of Planned and Approved)				
Hectares (Rounded)	10	25	40	105
Acres (Rounded)	20	65	95	255

Although forecasts are more accurate over the near term, an analysis to 2031 is useful in providing guidance for planning targets and overall commercial planning strategies.

By 2031 the analysis illustrates market demand and opportunity for approximately 3.3 million square feet of additional retail and service commercial space which is significantly more than the amount of space which could be accommodated on undeveloped/vacant commercial land in Cambridge. Therefore, a significant deficit of commercial land exists.

Strategic Framework

There is an opportunity for new retail and commercial development in Cambridge for all types of shopping facilities ranging from convenience and local serving to district and regional serving, fashion, and comparison shopping retailing, and destination shopping, big box retail and power centre formats. Mixed use areas should also be provided with a focus on commercial intensification within existing commercial areas, in particular, the *Community Core Areas*.

In order to accommodate existing and future retail/commercial demand, there is a need to create new locations for local serving and district or regionally oriented commercial space. Based on a review of the city's existing commercial structure, planned and proposed commercial development, undeveloped designated commercial land, and directions of growth in Cambridge, there is opportunity for a full range of shopping centre types, sizes, and formats. Therefore, the commercial space could take the form of:

- Regional scaled shopping centre(s) anchored by department stores and possibly a supermarket. These centres may take on a non-enclosed format and may even take on elements of mixed use centres.

- A district shopping centre or centres anchored by a department store and/or large format supermarket.
- Several community and neighbourhood shopping centres anchored by a supermarket and/or drug store, and/or discount department store at larger sized community centres.
- Convenience plazas.
- Commercial corridor areas.
- Mixed use commercial/residential areas.
- Limited commercial space to provide for Employment areas.

Commercial Strategy Recommendations

The planning strategy should clearly articulate and differentiate the role and function of each commercial designation within the commercial structure. The planning strategy should provide for locations that will accommodate demand and opportunity for additional retail/commercial space at strategic locations.

The following provides a summary of the commercial strategy recommendations and a recommended commercial structure.

Regional Commercial

It is recommended that the *Class 1 – Regional Shopping Centre* and *Class 5 – Regional Power Centre* be consolidated into a *Regional Commercial* designation considering both have a regional role and function. It is recommended that *Regional Commercial* designations include enclosed and non-enclosed shopping centre formats generally greater than 500,000 sq.ft. Site specific minimum and maximum sizes, and any specific use permissions/restrictions should be identified in the OP and/or Zoning By-law.

The planning strategy should clearly identify the role and function of the *Regional Commercial* designation which serves customers of a regional trade area extending beyond the city. As such, *Regional Commercial* centres generally range in size from over 500,000 sq.ft., typically anchored by department stores, home improvement stores, and/or warehouse membership clubs.

Community Commercial

The planning strategy should clearly identify the role and function of a *Community Commercial* designation intended to serve the daily, weekly, and more specialized shopping requirements of residents from the community area and up to a larger district area.

As such *Community Commercial* centres and/or clusters of space can generally range in size from approximately 150,000 sq.ft. to 500,000 sq.ft. typically anchored by a supermarket and/or drug store, and/or discount department store at larger sized centres. Minimum and maximum sizes, and any specific use permissions/restrictions should be identified in the Zoning By-law.

The designation should allow for a commercial structure which reflects current conditions, the role and function of space and areas, as well as providing an opportunity to accommodate the form, format, and demand and opportunity for additional community and up to district serving retail/commercial space.

The designation could be called "District Commercial" and/or district serving commercial centres could be differentiated through a new "District Commercial" designation and/or differentiated through zoning.

Neighbourhood Commercial

The planning strategy should clearly identify the role and function of a *Neighbourhood Commercial* designation providing for the day-to-day and weekly needs of the local and neighbourhood population.

Neighbourhood Commercial centres generally range in size from approximately 50,000 sq.ft. to 150,000 sq.ft., typically anchored by a supermarket or grocery store but may also be anchored by a drug store. Within the designation, the differentiation of uses and/or sizes could be established through zoning.

Considering the role and function of neighbourhood serving plazas which is intended to serve the day to day needs of surrounding residential neighbourhoods, district and regional serving stores such as department stores, home improvement stores, and warehouse membership clubs should not be permitted on *Neighbourhood Commercial* designations.

Commercial Corridor -- Hespeler Road

Within the structure of commercial designations and policies, a consolidated designation reflecting the role and function of the Hespeler Road *Commercial Corridor* is recommended.

The planning strategy should clearly articulate and differentiate the role and function of the *Commercial Corridor* and the range of retail and service commercial facilities in the area which includes local, district, and regional serving uses. This will explicitly recognize the reality of the role and function of this area and enable the designation to be used to permit redevelopment opportunities.

It is recommended that the Hespeler Road *Commercial Corridor* continue to focus on commercial service uses while recognizing an opportunity to transition to other commercial uses such as mixed use, higher density commercial and residential while protecting other commercial areas.

Attention should be directed to the integration of vehicular and pedestrian movements, turning movements, and design matters. Opportunities should be provided to facilitate high quality, well designed, mixed use, live/work projects through redevelopment or intensification initiatives. The rapid transit route and planned stations provide redevelopment and/or intensification opportunities along Hespeler Road.

Other Commercial

It is recommended that any commercial facilities which are located on land designated *Unclassified Commercial Uses* be recognized as Commercial and as such could be incorporated within the structure of commercial designations and policies.

Convenience Commercial

Convenience Commercial developments generally range in size up to 50,000 sq.ft. and typically include drug stores, convenience stores, banks, and services. Considering the convenience commercial role and function and small sized development scale, department stores, supermarkets, and home improvement stores would not be accommodated.

Convenience Commercial locations should be directed to intersections and centrally focused on the local areas for which they are intended to serve.

Mixed Use

It is recommended that Commercial designations and *Nodes* provide the opportunity for mixed use development.

Nodes

In order to accommodate future demand and opportunity for additional retail and service commercial space, opportunities should be provided to intensify and expand various areas defined as *Nodes*.

Zoning By-law - Commercial

It is recommended that the City of Cambridge Zoning By-law be brought into conformity with any changes in the OP commercial designations and policies.

Summary Conclusions

In summary, the future planning policy should reflect the size, form, role and function of existing uses accounting for the existing commercial areas and should encourage development of new and appropriate local, district and regional serving uses on appropriately located lands. Policies should account for growth in Cambridge while at the same time protect the role and planned function of the existing commercial areas in particular, the three *Community Core Areas*.

Cambridge can accommodate the present and future needs of residents, employees, and visitors by providing a broad range of retail/commercial opportunities and services. The policy requirements for implementation should encourage fully articulated commercial policies within a structure of designations that reflect the existing commercial uses and facilities in Cambridge today, as well as encourage planned and controlled development in the future. Commercial designations should provide distinct and clear policies, balanced with flexibility, to accommodate growth and change.

The Zoning By-law should be brought into conformity with any changes in the Official Plan commercial designations and policies.

