

Market Impact Assessment

Proposed Zoning Amendment

2966 – 2978 Carp Road, Ottawa

September 2, 2025

Prepared for: Nautical Lands Group

Prepared by: Tate Research

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555 Leggett Drive, Kanata, ON
K2K 3B8

September 2, 2025

Re: Market Impact Assessment
Proposed Zoning Amendment
2966 – 2978 Carp Road, City of Ottawa

Dear Ms. Mariani:

Tate Research is pleased to provide this Market Impact Assessment relating to the proposed addition of an *Instructional Facility* permission to the current Rural Commercial Zone 7 (RC7) at 2966-2978 Carp Road in the City of Ottawa.

We look forward to discussing the results with you.

Yours truly,

TATE RESEARCH

A handwritten signature in black ink, appearing to read 'S. Patel'.

Sameer Patel
Vice President

A handwritten signature in black ink, appearing to read 'James Tate'.

James Tate
President

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1 Introduction & Background

Tate Research (“TR”) has been retained by Nautical Lands Group to assess the impact of adding an *Instructional Facility* permission to the current Rural Commercial Zone 7 (RC7) zoning at the property municipally addressed as 2966-2978 Carp Road (“Subject Site” or “Site”).

The addition of the *Instructional Facility* permission is to facilitate the relocation of Cheer Sports Sharks (“Cheer Sports”), a cheerleading instructional facility.

The Subject Site is currently occupied by a vacant warehouse and former office space previously used by Nautical Lands Group.

The City of Ottawa defines an *Instructional Facility* as “a building or part of a building, other than a school or post-secondary educational facility, whose primary function is the instruction or teaching of an art, skill, hobby, trade or business, and includes tutoring businesses.”

1.1 Cheer Sports Sharks Background

Cheer Sports is a cheerleading instructional facility currently located at Hazeldean Mall in Kanata. It delivers training and instruction in competitive and recreational cheerleading, tumbling, and related athletic activities.

The proposed development involves modifications to the existing vacant warehouse building in order to accommodate the relocation of Cheer Sports. On the main floor, a new room will be built out to create a lobby for parents / visitors and a dedicated entrance for athletes. The existing kitchenette will be removed, with the potential for some cabinets to be relocated to an upstairs room for staff. New washrooms will be added, with a target of four to five stalls, subject to plumbing constraints. The remainder of the space will remain unchanged. The athletic area will be fitted with a sport-specific sprung loaded floor and mats, which will be laid directly on the existing concrete floor.

The training space will include four cheer floors, each measuring 54 by 42 feet. This configuration will allow up to three teams to train simultaneously, while also providing additional space for tumbling lessons, recreational classes, and

introductory-level teams. Each team typically consists of approximately 18 athletes, though some teams may have more or fewer participants.

The projected number of athletes using the facility is as follows:

- Weeknights
 - 3:00-5:00 p.m.: Tumbling lessons – 12 athletes
 - 5:00-7:00 p.m.: First practices – 3 teams (54 athletes) plus private lessons and recreational cheerleading (20 athletes) for a total of approximately 75 athletes
 - 7:15-9:15 p.m.: Second practices – 3 teams (54 athletes) plus tumbling (6-8 athletes) for a total of approximately 62 athletes
- Weekends (September to April)
 - 9:30 a.m. – 4:00 p.m.: Approximately 54 athletes, on average, per practice time slot.
- Summer Camps (July to August)
 - Weekdays 9a.m. – 5:00 p.m.: Approximately 30 athletes per day.

This program structure demonstrates that the facility will consistently attract a large number of participants throughout the week, including evening, weekends, and during summer. The steady flow of athletes and families will create a strong activity base that can generate positive spin-off benefits for surrounding businesses and services.

2 Findings & Recommendations

This section of the report summarizes the key findings of our review and provides recommendations with respect to the proposed relocation of the Cheer Sports instructional facility to the Subject Site. The analysis considers the policy framework, zoning context, and market environment surrounding the Site. These findings and recommendations are further outlined in the report.

It is the professional opinion of TR that the proposed addition of the *Instructional Facility* permission to facilitate the relocation of the Cheer Sports facility should be approved based on the following findings:

The proposed use is consistent with the intent of the Convenience Commercial Area land use designation in the Carp Road Corridor.

- The Convenience Commercial Area designation within the Carp Road Corridor is intended to provide services to local residents, employees, and the travelling public, while helping to reduce strip development and create a sense of place.
- As per the Official Plan, the permitted uses on lands designated as Convenience Commercial Area, include retail stores, restaurants, personal services, banks, professional offices and gas bars.
- The current operation of Cheer Sports at Hazeldean Mall in Kanata, a shopping mall environment, demonstrates that this type of use can operate effectively alongside other commercial uses such as retail stores, restaurants, etc., indicating consistency with the intent of the designation.

The proposed use is consistent with the proposed new Zoning on the Subject Site

- Ottawa will be implementing a new Zoning By-law in 2026. The *Instructional Facility* will be a conditional use in the RIL7 zone applicable to the Subject Site.

- The Cheer Sports would be a permitted use under the proposed new Zoning By-law, subject to a site specific size exception.

From a market context, the proposed Cheer Sports use at the Subject Site could catalyze further development within the Convenience Commercial Area centred around Carp Road and McGee Side Road.

- The Site is underutilized, and the Convenience Commercial Area is largely undeveloped.
- Cheer Sports will have regular weeknights, weekend, and seasonal programming. This programming will activate the Convenience Commercial Area, potentially increasing the attractiveness of the node and encourage complementary commercial uses.
- The Site does not occupy a key corner/landmark location within the Convenience Commercial Area, leaving prime sites available for retail stores, restaurants, personal services, banks, and gas bars, which typically require sites with stronger locational attributes.

From a market context, the proposed Cheer Sports use of the Subject Site will not impact the surrounding commercial uses including the uses in Carp Village.

- Carp Village, located approximately 5 km to the north, would not be negatively impacted and may benefit from interim spin-off activity (visits to cafés, restaurants, and services) generated by families and youth attending Cheer Sports.
- The commercial environment within a 5 kilometer area ranges from primarily light industrial along the Carp Road Corridor, to broader retail destinations such as Tanger Outlet. These nodes serve different market needs, from local to regional retail draw.

From a market context, the proposed Cheer Sports use at the Subject Site would not negatively impact the ability to attract employment users in the larger Carp Road corridor.

- There is an *Instructional Facility* use, Creative Edge Dance Academy, located at 2710 Carp Road. This facility has been in operation at this location for 10 years.

- To the best of our knowledge, the existence of this *Instructional Facility* has not precluded employment uses from locating within the Carp Road Corridor.
- This example provides a local precedent that a similar use can operate in the Carp Corridor without negative interference.

In summary, permitting the Cheer Sports facility as an Instructional Facility would activate an underutilized site, fit the intent of the Convenience Commercial Area, support complementary commercial activity, and maintain compatibility with the Rural Industrial and Logistics context. These benefits reinforce the rationale for a site-specific zoning amendment to permit Cheer Sports as an Instructional Facility at the Subject Site.

3 Planning Context

The Subject Site is located within the Carp Road Corridor and is guided by the City of Ottawa Official Plan and Zoning By-law.

3.1 Subject Site Land Use Designation

The Official Plan designates the Subject Site as Rural Industrial and Logistics. The Site is also identified within the Carp Road Corridor and includes lands designated Convenience Commercial Area.

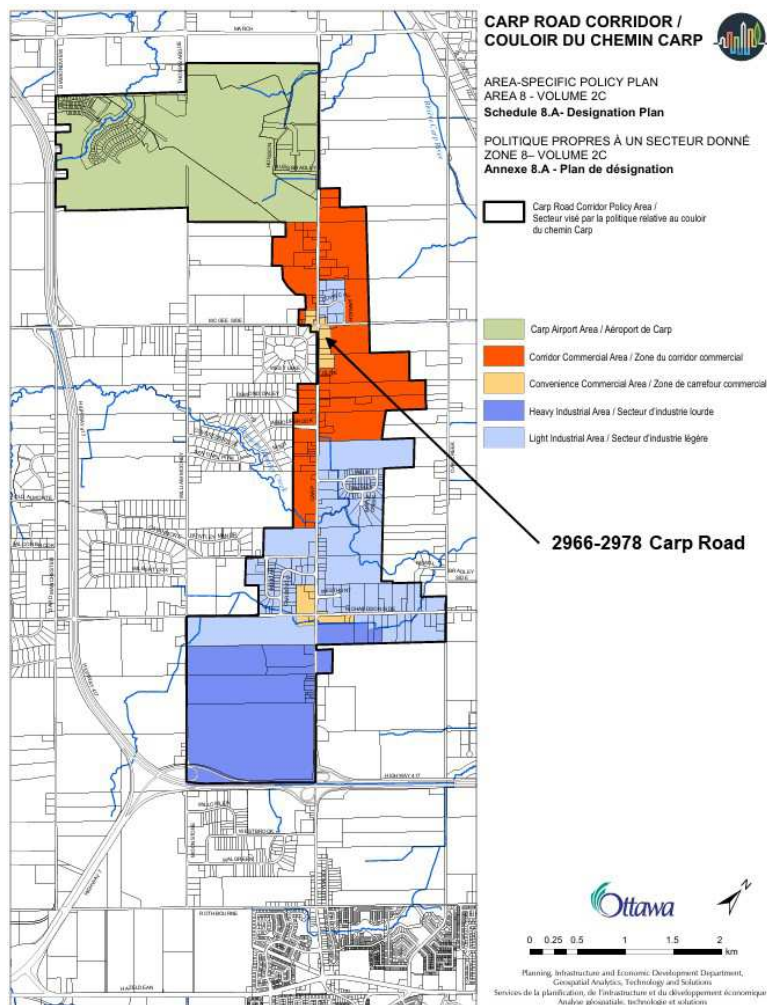
With respect to the Rural Industrial and Logistics, the key elements of the planning context are as follows:

- Intended to support uses not suitable in the Urban Area or Rural Countryside due to land requirements or separation from noxious activity.
- Provides for warehouse, distribution, light and heavy industrial uses, and small offices.
- Areas are served by arterial roads, close to 400 series highway interchanges, and are considered employment areas under the Provincial Policy Statement.
- Permit a range of industrial activity and functions to make the best use of rural locations.
- Maintain clusters of industrial uses to reduce incompatibilities with the rural area.

With respect to the Convenience Commercial Area designation within the Carp Road Corridor, the key elements of the planning context are as follows:

- As illustrated in Figure 3-1, the Subject Site is located within one of two Convenience Commercial Areas identified in the Carp Road Corridor (Figure 3-1). The areas are situated at key intersections of Carp Road and McGee Side Road and Carp Road and Richardson Side Road.
- These nodes are intended to provide services to local residents, employees, and the travelling public, and to create a sense of place within the Corridor.

Figure 3-1: Carp Road Corridor Area-Specific Policy Plan



Source: City of Ottawa Official Plan – Area-Specific policies. Schedule 8.A.

- Lands designated Convenience Commercial Area permit retail stores, restaurants, personal services, banks, professional offices, and gas bars, subject to size limits in the Zoning By-law.
- Existing legally established uses may continue until redevelopment.
- A limited range of agricultural uses are permitted.

3.2 Subject Site Zoning

The current zoning is Rural Commercial Zone 7 (RC7), transitioning to Rural Industrial and Logistics Subzone 7 (RIL7) in 2026.

With respect to the RC7 Zoning, the key elements of the zoning context are as follows:

- Permitted uses include commercial, automotive-related, warehouse, and storefront industry.
- Retail uses are limited to convenience stores and goods associated with permitted uses.
- Bank, office, and retail store are also permitted.

Under the new Zoning By-law, assumed to be implemented in 2026, the RC7 subzone will be replaced by the RIL7 subzone to reflect the Rural Industrial and Logistics Official Plan designation in the Carp Road Corridor. With respect to the RIL7 Zoning, the key elements of the zoning context are as follows:

- Permitted uses: automobile rental establishment, car wash, drive-through facility, gas bar, parking lot, storefront industry.
- Conditional uses: animal care establishment, artist studio, bank, instructional facility, medical facility, micro-distribution facility, office, personal service business, restaurant, retail store (underline added by TR).
- Conditional uses are limited to 300 square metres per use and 900 square metres cumulative per lot.

Instructional Facility is a defined use in the City's Zoning By-law. It is defined as: a building or part of a building, other than a school of post-secondary educational facility, whose primary function is the instruction or teaching of an art, skill, hobby, trade or business, and includes tutoring businesses.

3.3 Planning Context Summary

The Site's planning framework establishes its primary role for industrial activity within the Carp Road Corridor while recognizing limited commercial functions. With the transition to RIL7, instructional facilities are specifically contemplated as a conditional use, subject to size restrictions, providing the policy basis for evaluating the proposed development.

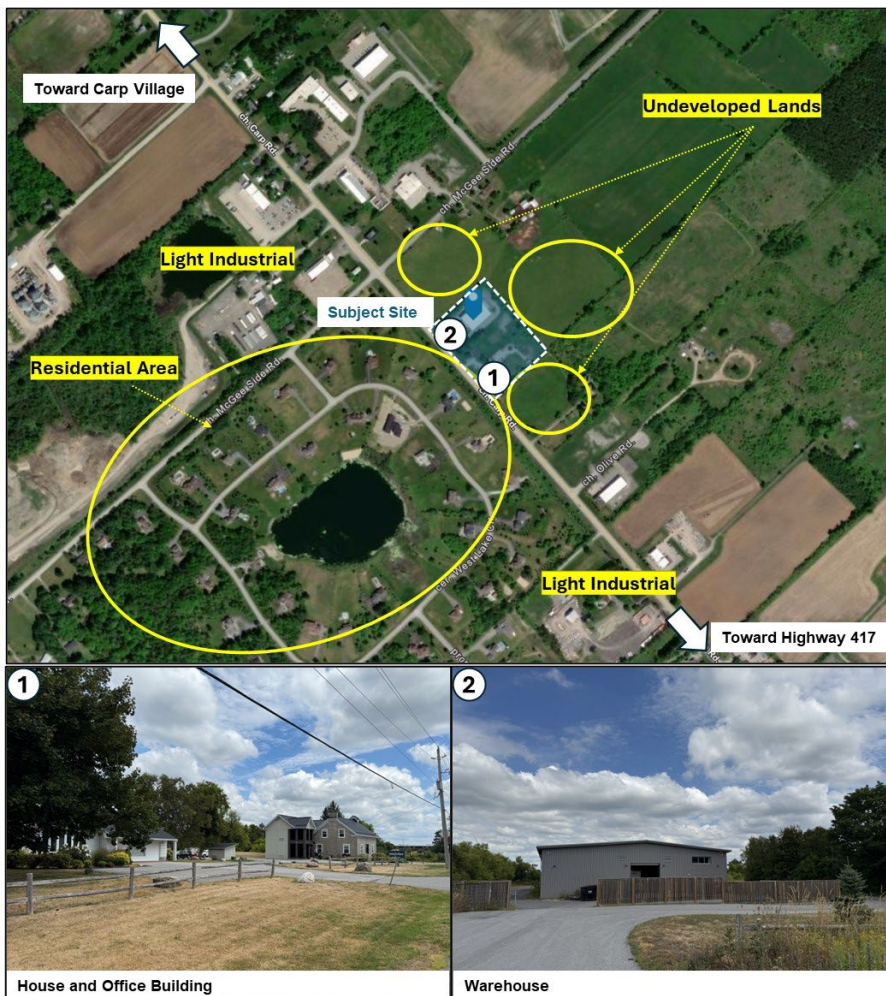
4 Existing Conditions

The following section outlines the current status of the Subject Site and its immediate surroundings along Carp Road. It also considers key aspects of accessibility and provides additional context for the analysis.

4.1 Subject Site

The Subject Site is located in the Carp Road Corridor Area approximately 5 kilometres south of Carp Village and approximately 5 kilometres north of Highway 417.

Figure 4-1: Subject Site Location and Access



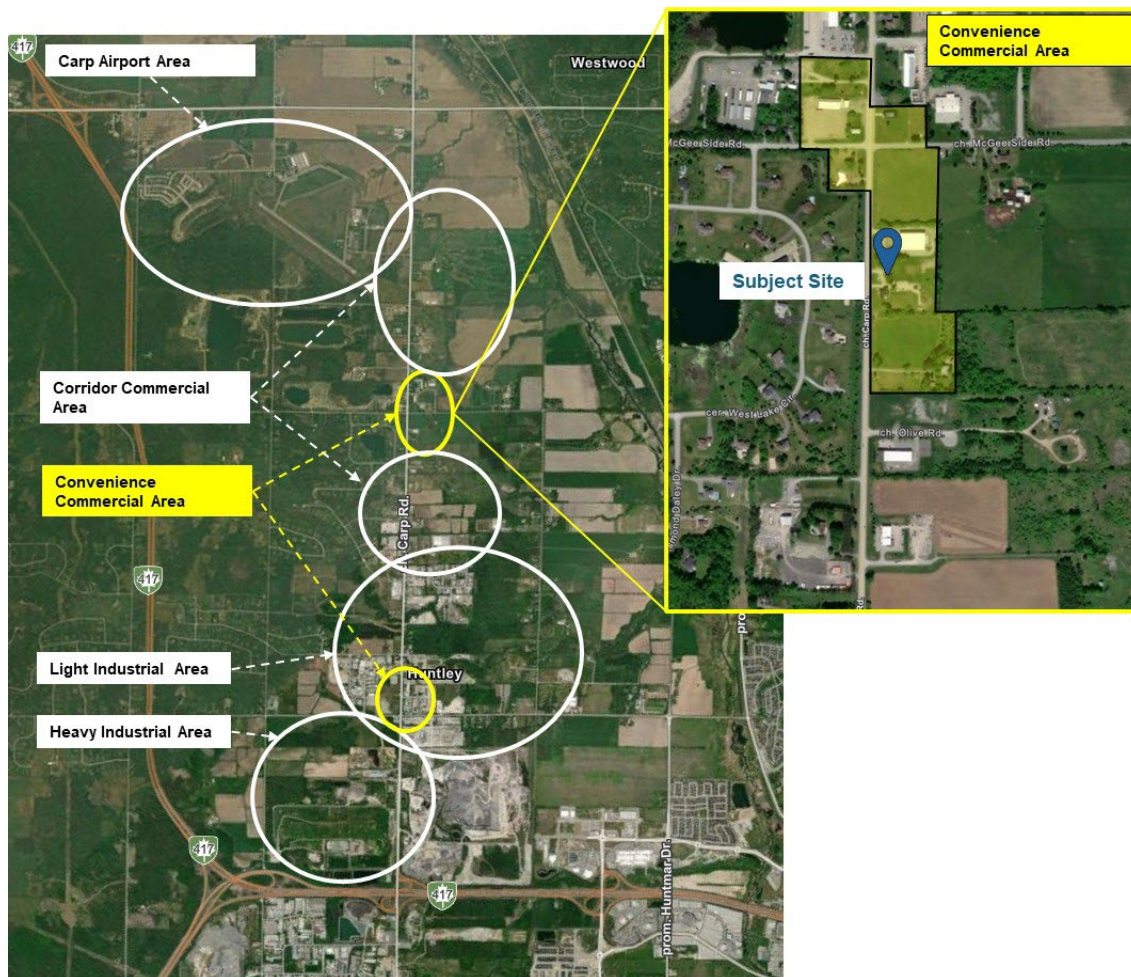
Source: Tate Research. Base map from ArcGIS.

The property currently contains a vacant warehouse, a house and a building that was previously used as offices by Nautical Lands Group. These buildings are all currently unoccupied.

4.2 Surrounding Land Uses

The uses surrounding the Subject Site are differentiated from the majority of the Carp Road Corridor. The following observations are made with respect to the surrounding uses:

Figure 4-2: Surrounding Land Uses



Source: Tate Research. Base map from ArcGIS.

- The lands immediately to the north, south and east are undeveloped.
- The lands to the west consist of a residential subdivision, the entrance to which is located on McGee Side Road

- The lack of heavier employment uses is more consistent with the Corridor Commercial Area as defined in Figure 3-1.

Beyond the immediate area, the Carp Road corridor consists of a broad mix of uses including, but not limited to, farmed plots, aggregates, light industrial operations and waste management.

4.3 Existing Conditions Summary

The Site is underutilized, and the Convenience Commercial Area is largely undeveloped. From a market context, the proposed Cheer Sports use at the Subject Site could catalyze further development within the Convenience Commercial Area centred around Carp Road and McGee Side Road.

5 Existing Commercial Supply

This section provides an overview of the existing commercial supply in the area surrounding the Subject Site. For the purposes of this analysis, a 5-kilometre radius from the Subject Site has been defined as the Study Area. This distance captures the commercial uses that are easily accessible from the Subject Site and reflects the immediate market context within which the proposed use will operate.

Within the Study Area, particular attention has been given to Carp Village, where a full inventory of commercial uses has been completed, including an estimation of the size of units. For the remainder of the Study Area, a high-level analysis of the existing commercial supply has been undertaken to provide context on the types and locations of uses.

The following subsections describe the overall commercial environment within the Study Area and then focus specifically on the commercial supply in the Carp Village.

5.1 Study Area Commercial Environment

To contextualise the commercial landscape around the Subject Site, TR reviewed key clusters and nodes of commercial activity within the defined 5 km Study Area, as illustrated in Figure 5-1.

Carp Road Corridor

- Predominantly light industrial uses such as construction companies, storage facilities, equipment providers, contractors, car dealers, mechanics, etc.

Figure 5-1: Study Area Commercial Supply



Source: Tate Research. Base map from ArcGIS.

2710 Carp Road (located within the Carp Corridor)

- A Commercial / Industrial Plaza consisting of four buildings with a mix of uses: an electric equipment supplier, an industrial equipment supplier, a dance school, and an environmental consulting firm, along with a few vacant units.

Heritage Hills Plaza

- A retail plaza in the Marchwood Lakeside area in Kanata.
- Includes an Anytime Fitness gym, a specialty grocery store, personal services, restaurants, and a dental clinic; reflecting a more diverse retail mix than found along the Carp Road Corridor.

Tanger Outlets Area

- A major outlet shopping centre featuring a wide array of brand-name outlets, and dining options.
- The surrounding area includes big box uses including AutoShack, Structube Megastore, Bass Pro Shops, and a dental clinic.

Carp Village – A detailed description of Carp Road is provided in the following Section 5.2.

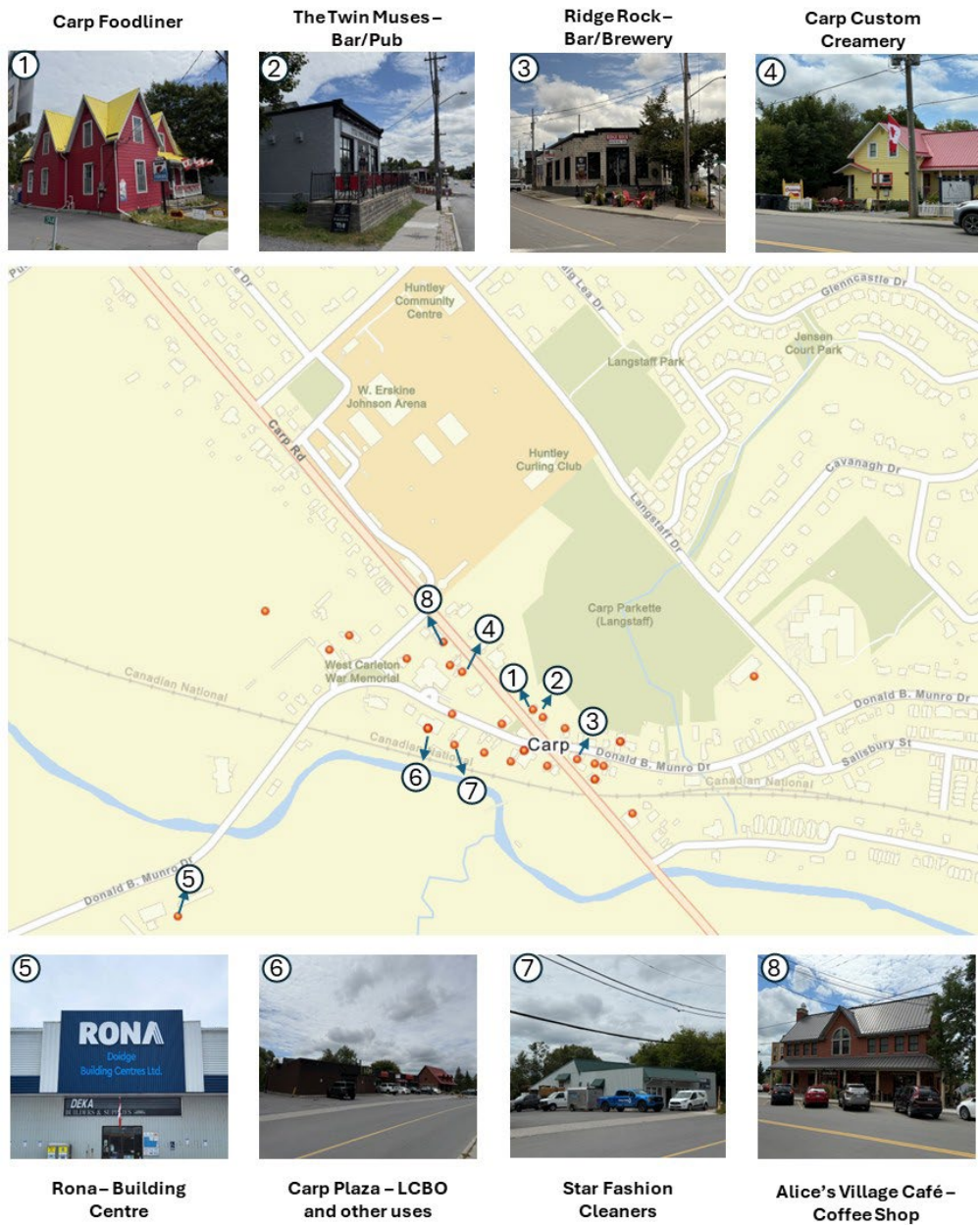
Within the 5 km Study Area, the commercial environment ranges from primarily light industrial along the Carp Road Corridor, to broader retail destinations such as Tanger Outlet. These nodes serve different market needs, from local to regional retail draw.

5.2 Carp Village Commercial Supply

TR conducted a full inventory of retail commercial space in the Carp Village. This included all retail, service and vacant space

Figure 5-2 represents the geographic distribution of the retail commercial supply within the Carp Village.

Figure 5-2: Carp Village Commercial Supply



Source: Tate Research. Base map from ArcGIS.

Figure 5-3 summarizes the amount and distribution by retail and service category of retail commercial space in the Carp Village. The following observations are made with respect to Figure 5-3:

Figure 5-3: Carp Village Commercial Inventory

	TOTAL sq. ft.	<i>Percent Distribution</i>
Food & Beverage Retail (FBR)		
Supermarkets & Grocery Stores	0	0.0%
Convenience & Specialty Food Stores	2,300	3.2%
Beer, Wine & Liquor	3,100	4.3%
Food & Beverage Retail (FBR)	5,400	7.6%
Non-Food & Beverage Retail (NFBR)		
Department Stores	0	0.0%
General Merchandise	0	0.0%
Clothing, Shoes & Accessories	0	0.0%
Furniture, Home Furnishings & Electronics	0	0.0%
Pharmacies & Personal Care Stores	900	1.3%
Building & Outdoor Home Supplies	8,600	12.0%
Miscellaneous Retailers	900	1.3%
Automotive	4,600	6.4%
Subtotal Non-Food & Beverage Retail (NFBR)	15,000	21.0%
Service Space		
Food Services & Drinking Places	13,600	19.0%
Personal Care & Laundry Services	14,800	20.7%
Financial, Insurance, Legal & Real Estate Services	2,300	3.2%
Health Care & Social Assistance Services	13,800	19.3%
Entertainment & Recreation Services	3,800	5.3%
Other Services	1,400	2.0%
Subtotal Service Space	49,700	69.5%
Total Occupied Retail & Service Space	70,100	98.0%
Vacant	1,400	2.0%
Vacancy Rate (%)	2.0%	
Total Retail & Service Space	71,500	100.0%
Percent Distribution	100.0%	

Source: Tate Research. Based on inventory and site inspections completed by TR in August 2025. Rounded to the nearest 100 square feet.

- Overall, there is 71,500 square feet of retail, service and vacant space in the Carp Village.
- The Carp Village includes 49,700 square feet of occupied retail and service commercial space and 1,400 square feet of vacant space.
- This vacant space represents a vacancy level of 2.0%, which is below the typical vacancy level for a balanced market of 5.0 – 7.5%.
- The majority of space is in service-based categories such as Personal Care and Laundry (20.7%), Health Care & Social Assistance (19.3%), and

Food Services & Drinking Places (19.0%). This distribution indicates more services rather than traditional retail.

The predominance of service-based businesses indicates that the supply is oriented toward small-scale daily needs services. This suggests that Carp Village is not vulnerable to competition from the proposed Cheer Sports facility and instead may benefit from additional spin-off activity generated by families and youth visiting the area.

5.3 Existing Commercial Supply Summary

The commercial environment within a 5 kilometre area ranges from primarily light industrial along the Carp Road Corridor, to broader retail destinations such as Tanger Outlet. These nodes serve different market needs, from local to regional retail draw.

Carp Village, located approximately 5 km to the north, would not be negatively impacted by Cheer Sports operating at the Subject Site. Instead, in our professional opinion, Carp Village, and other surrounding commercial uses, may benefit from interim spin-off activity (visits to cafés, restaurants, and services) generated by families and youth attending Cheer Sports.