Dear Ms. Smith:

**RE: Interim Commercial Strategy Discussion Paper, Downtown Burlington**

urbanMetrics inc. and The Planning Partnership are pleased to submit our Interim Downtown Commercial Strategy Discussion Paper, which provides a summary of our preliminary findings as they relate to the current state of Downtown Burlington; the various functions it serves; how well it is currently meeting the needs of the City; and how well current land use planning policies are supporting its vibrancy. This discussion paper has been prepared as part of the City of Burlington’s broader *Official Plan Review Commercial Strategy Study*, which is being undertaken jointly by urbanMetrics inc. and The Planning Partnership, with input and feedback by City of Burlington staff.

The primary purpose of this paper is to inform the Downtown Task Group so that it can proceed with informed consultation with stakeholders and the community; raise insightful consideration to facilitate public communication and engagement; and to explore strategic options to address the vibrancy of Downtown Burlington. It has been a pleasure conducting this part of our assignment on behalf of the City of Burlington and the Downtown Task Group, and we look forward to discussing our results.

Yours truly,
urbanMetrics inc.

Rowan F. J. Faludi, CMC, MCIP, RPP, PLE
Partner
rfaludi@urbanmetrics.ca

February 21, 2013

Ms. Andrea Smith, MCIP, RPP
Senior Planner – Policy, Planning and Building Department
City of Burlington
426 Brant Street
Burlington, Ontario L7R 3Z6
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EXECUTIVE SUMMARY

BACKGROUND

urbanMetrics and The Planning Partnership have been retained by the City of Burlington to undertake a Commercial Strategy Study, which is being prepared as part of the City’s ongoing Official Plan Review process.

This *Interim Commercial Strategy Discussion Paper* represents one component of the broader *Commercial Strategy Study* being undertaken by urbanMetrics and The Planning Partnership. It focuses on the following key topics relating to Downtown Burlington:

- The current state of Downtown Burlington;
- The various functions served by Downtown;
- How well Downtown is currently meeting the needs of the City;
- Trends and other factors that will influence the future state of the Downtown; and,
- How well current land use planning policies are supporting its vibrancy.

THE CURRENT STATE OF DOWNTOWN

Downtown Burlington compares very favourably to other successfully functioning downtowns in the GTA. All of the following characteristics point to the vibrancy of Downtown Burlington as it currently exists today:

- the scale of the commercial core;
- low vacancy rates in prime areas;
- recent residential development activity and interest;
- public sector investment in the downtown and waterfront; and,
the continued focus on civic events.

Equally as important, is the confidence that Burlington residents have in the core, which has been exhibited through the Downtown workshop, and other direct consumer survey information gathered as part of this study. This will be particularly important going forward, as Downtown Burlington expands its role as an Urban Growth Centre and Mobility Hub.

Downtown Burlington currently contains approximately 1.09 million square feet (101,000 square metres) of retail/service commercial space.

As with many downtowns, the majority (69.3%) of this space is currently tenanted by service-based commercial facilities, such as Banks; Food Services and Drinking Places (i.e., full-service restaurants, fast-food restaurants, bars, pubs, and cafes), Personal Care Services (i.e., hair and beauty salons, barber shops, tattoo parlours, laundry services) and Health Care service facilities (e.g., doctors, dentists, and other offices of health practitioners). Retail tenants currently represent one fifth (19.5%) of the total commercial space in Downtown Burlington. By comparison, retail tenants comprise approximately 56% of the inventory for the entire City.

Downtowns are more limited in terms of their ability to attract the full range of store categories found in an urban market due to limitations with regards to land area, space and unit configurations. Stores that often have difficulty locating in downtown's include:

- Chains with large and inflexible floor plates (e.g. department stores; many big box stores; warehouse membership clubs; furniture and appliance superstores; and building supply centres).
- Stores which, due to the nature of their operations and merchandise, rely almost exclusively on automobile traffic (e.g. many furniture and appliance stores; automotive parts and repair outlets; home and auto stores; and,
- Chains, which have an exclusive affinity to locating in enclosed malls or power centres.

In the case of Downtown Burlington, the vast majority of retail units are under 5,000 square feet, with some 65% under 2,000 square feet. With only a few exceptions, the units over 5,000 square feet are occupied by specialized uses such as restaurants, offices or public services that would not lend themselves to retail uses.

For these reasons, it would be difficult to significantly change the general retail mix in downtown Burlington, although there are certain store categories that might be expanded in keeping with current trends in other downtown areas, including: a medium-to-large scale pharmacy; electronics; office supplies; sporting goods/sports apparel; dollar stores; gift and specialty retail outlets.
The current retail and service commercial vacancy rate in Downtown Burlington is 11.2%. Although this is a relatively high vacancy rate – with “typical” or “normal” vacancy rates ranging between 5.0% and 8.0% – it is important to note that most of the vacant space in Downtown Burlington is concentrated in three aging commercial plazas; Village Square (422 Pearl St), Tudor Square (2022 – 2028 Caroline Street and 515 John Street) and Burlington Square Plaza (760 Brant Street). For a variety of reasons, Village Square and Burlington Square have perennially struggled as retail destinations and Tudor Square is under currently under redevelopment. Excluding these properties, the vacancy rate in the downtown is a healthy 4.8%.

There are a number of undeveloped and under-developed properties, which offer the potential for new development. Among the most notable of these sites are the two City-owned parking lots located immediately east of Brant Street between James Street and Pine Street in the north and south, respectively (i.e., Parking Lots “4” and “5”). The downtown also contains a number of aging strip retail sites and smaller commercial centres, which could potentially support new, more intensified development in coming years. From a planning perspective, these sites should be recognized as possible candidates for mixed-use intensified development. However, in terms of addressing the short-term supply they should be considered speculative.

FUNCTIONS SERVED BY DOWNTOWN BURLINGTON

Downtown Burlington currently contains a wide range of land uses and serves a variety of different functions; both locally and within the context of the City as a whole.

The downtown serves as an important place for:

- **Shopping** – representing the commercial core of the City and containing approximately 1.1 million square feet of retail and service commercial space;

- **Working & Learning** – supporting a wide range of employment activities, particularly office and retail/service commercial based employment, with a number of major employers, including City Hall and Joseph Brant Memorial Hospital.

- **Living** – containing a mix of both established residential neighbourhoods with predominantly detached housing, as well as newer medium and high density condominium apartment residential developments;
Playing – offering opportunities for a variety of leisure, recreational and entertainment activities, including those focused along the waterfront and others located at various cultural attractions throughout the downtown (e.g., Burlington Performing Arts Centre, Burlington Art Centre, etc.);

Civic Presence – containing City Hall and other important municipal and local institutions.

Community Activities – providing space for residents, employees and visitors of Burlington to gather and serving as the focal point of many of the City’s festivals and community events, and,

Transportation – containing Burlington Transit’s John Street Bus Terminal, as well as supporting a variety of other modes of active transportation (e.g., walking and biking) via the City’s waterfront trail system.

A number of surveys were conducted as part of this study, three of which included an on-street downtown visitor survey, a telephone survey of Burlington residents, and an on-line survey of Burlington residents. Survey respondents were also asked to rate how important it was to them that Downtown Burlington perform a number of pre-defined functions. The results of the surveys were similar, with all functions scoring well.

The top-rated functions related to social, entertainment, cultural and recreational activities, with the highest ranking response that the downtown serve as a place for the City’s festivals. Similarly, it was also important that Downtown Burlington be the cultural centre for the City, as well as serve as a place to meet friends; take out-of-town visitors; and enjoy recreational and leisure activities.

From a commercial perspective, it is also interesting to note that respondents of all three surveys suggested that it was more important that downtown be a neighbourhood shopping destination than a regional shopping destination.

The downtown on-street survey participants were asked why they had visited Downtown Burlington on the day of the survey. Approximately 26% of the respondents indicated that they lived in Downtown Burlington and an additional 15% indicated that they worked there. All other respondents indicated that they were in downtown to perform other activities, such as shopping; dining; for an appointment, or to hold business meetings.
Only about 13% of respondents travelled downtown specifically to shop. As with most downtowns not accessed by rapid transit, the majority of retail facilities exist to serve nearby residents and employees. The balance tends to consist of specialty retail with a more regional draw which benefits from the unique ambience provided by downtown environments. This further confirms that Downtown Burlington is a multi-functional centre with no one dominant activity.

The telephone and on-line surveys of Burlington residents were used to identify the share of Burlington expenditures in various categories captured by the downtown. The highest downtown market share relates to restaurants (23.6%), followed by specialty food (13.5%), miscellaneous retail 11.3%, and fashion (10.9%). These results point to the strength of the downtown as a restaurant destination, and a place for specialty retail.

The categories in which respondents felt needed bolstering the most were specialty food stores and supermarkets, illustrating the importance of food to the downtown retail mix.

Based on the results of the on-street survey, the Primary Trade Area for the downtown, which would represent the source of the most customers on consistent and on going basis, has been defined as the area east of King Road, south of 403/QEW, west of Walkers Line and north of the lake. The Secondary Trade Area has been defined as the balance of the City of Burlington.

The City or the entire Trade Area represents some 80% of customer origins The Primary Trade Area represents some 63% of downtown visitors with a population of 46,000. Based on Halton Region’s Best Planning estimates, this is expected to reach 53,000 by 2031, largely through infill and intensification.
Downtown Burlington, has also been designated as an Urban Growth Centre, under the Province’s Growth Plan for the Greater Golden Horseshoe. Its allocated target by 2031 is 200 persons and jobs per hectare or 23,400 persons and jobs. This represents a growth of approximately 9,400 persons and jobs over the estimated 2006 total of 14,000 (i.e. growth of more than 67%).

HOW WELL DOWNTOWN IS CURRENTLY MEETING THE NEEDS OF THE CITY

The downtown on-street intercept surveys also included questions relating to the level of satisfaction patrons of Downtown Burlington experienced in terms of the availability of specific types of retail and service facilities located in the downtown. Similarly, respondents were also asked to provide examples of the specific types of improvements that they would like to see in Downtown Burlington.

Approximately 37% of all respondents indicated that they would like to see a new movie theatre added to the downtown; particularly one that offers “first-run” films. This is particularly relevant, given that these responses were provided prior to the announced closing of the Encore Theatre in Upper Canada Place – the only cinema in the downtown core.

Some 21% of respondents desired more specialty food store options, such as bakeries and delis, while nearly one quarter (23%) indicated that they would make use of new restaurants, pubs, cafes and fast food establishments if they were located downtown.

Furthermore, approximately 25% of survey participants indicated that there were “other” types of commercial establishments that they would like to see added to the downtown as well. The majority of these responses related to the expansion of entertainment options for younger residents and visitors; particularly those in the 19-34 age group.

In terms of the additional improvements that the City could make to the downtown, responses were relatively evenly distributed across a wide variety of topics.

Among the most frequent responses included comments relating to finishing construction of the pier project at the foot of Brant Street and the waterfront.

Other commonly proposed improvements included:

- Better/more frequent transit options;
More affordable housing near the waterfront;

Establishing priority for pedestrians and cyclists;

Permanent/more frequent street closures;

Free parking to compete with larger shopping centres;

More public art installations;

 Beautification and streetscape improvements along Brant Street; and,

Expansion of available park space.

In addition to the downtown surveys, a Downtown Public Workshop public consultation event was held on November 7, 2012 at the Burlington Art Centre, which was attended by 130 local residents, business owners, and other members of the public. An interactive and confidential polling technique was used to obtain feedback on questions related to the current and future state of the downtown.

More than 87% of the people who attended the public consultation event agreed that Downtown Burlington already “has a lot going for it”. Less than one percent disagreed or strongly disagreed. These results strongly confirm that Burlington already has a very healthy and attractive downtown, which is generally meet the needs of local residents, employees and businesses.

Despite their overall satisfaction with the area, however, participants also confirmed that there were several aspects of the downtown that require improving. In particular, many respondents were of the opinion that the downtown needs to a better job of serving as a\n
neighbourhood shopping destination. A consensus was not reached on this topic, however, as votes were distributed relatively evenly among the options provided.

Participants at the event also voted on the top things that they would like to see added to Downtown Burlington. The top three categories were entertainment opportunities, retail stores and restaurants/cafes.
I addition to the interactive session, the workshop participants were divided into break-out groups for more detailed conversations with a moderator. These break-out sessions revealed a number of common topics.

- There was an overwhelming number of comments from the public indicating that they would like to see more **specialty food stores** in the downtown; including butchers, fish markets, bakeries, gourmet food shops, fresh produce/fruit stores; organic/health food stores and options for vegans/vegetarians/gluten-free shoppers.

- Similarly, participants also indicated that there was a need for a second **supermarket/grocery store** in the downtown, which confirm the results of both the on-street intercept surveys and visioning exercise.

- A **farmer’s market** was also frequently identified as a highly sought-after option for local residents to purchase fresh produce and related food items.

Other suggestions of the types of retail/service facilities that were desired in the downtown mainly related to neighbourhood-oriented retail establishments, such as **hardware stores** and **pharmacies/drug stores**.

Similarly, other frequently mentioned topics included:

- The redevelopment/revitalization of the **Village Square** site;

- Adding more **entertainment venues** (e.g., live music venues, etc.)

- **Expanding transit** options;

- Increasing the **supply of parking** (e.g., more multi-storey parking structures);

- Improving **cycling and pedestrian networks** (i.e., dedicated lanes, safer, better lighting, bicycle parking options, connections with downtown from waterfront);

- Improving **way-finding and signage** (e.g., maps, directories, street signs)

- Providing more **affordable shopping** options;

- Establishing more **affordable housing options** for all demographics (e.g., young families and singles);
- Attracting more **educational institutions** (e.g., university/college campuses or satellite campuses); and,
- Adding **more green space** and expanding other existing **public spaces**.

**TRENDS AND OTHER FACTORS THAT WILL INFLUENCE THE FUTURE STATE OF THE DOWNTOWN**

The future direction of downtown will be heavily influenced by a number of prevailing trends:

- Its mandated growth as a provincial Urban Growth Centre; and,
- The aging Ontario population
- Changing social and economic structural patterns.

As a mandated growth centre, the City will be required to plan for an expansion of nearly 70% more persons and jobs in the downtown than currently exists today. Additional population will require supporting services, such as new retail stores, personal services, schools, and similar activities. While there are some key development and intensification sites in the core, it is unlikely that the required population and employment can be accommodated within single function buildings. Future policies must encourage mixed use development and ensure that it occurs in a manner that can accommodate the required supporting commercial and institutional services.

The aging population will also place challenges on the public and private sector infrastructure and the downtown is uniquely suited to become a focal point for the City’s seniors; owing to its concentration of residential apartments, access to retail and services, the pedestrian friendly environment, proximity to the hospital and availability of transit.

Changing family structural patterns, and the resulting time crunch, have changed the way Canadians shop – giving rise to large format food retailing and an increase in the consumption of fast foods and processed foods. Seniors living alone, may be particularly challenged by recent retail development patterns, which favour large centralized retail destinations over neighbourhood shopping nodes. The challenge for planners will be to create a more efficient urban structure.

In terms of the retail sector, while growth in large format retailing is slowing and some major chains are developing more urban friendly modules, the entry of US and foreign retailers and the investments being made into revitalizing older suburban centres, will likely make it difficult for downtown to compete as a regional shopping destination within the City.
As indicated by the surveys, only a small portion of visitors came to the downtown to specifically shop, but shopped because they were there for some other purpose (e.g. downtown resident, downtown employee, visiting the waterfront, attending a performance, etc.). In our opinion, ensuring that this supporting function can continue to thrive should be the primary goal of a retail strategy for the core. More specialty and regional serving retail components will naturally evolve as the downtown grows.

PRELIMINARY POLICY RECOMMENDATIONS

Based on the information presented in the previous sections of this paper, as well as the various other research undertaken by our project team to date, the following provides a number of preliminary policy recommendations, which relate specifically to the downtown. Additional detail with regards to these recommendations is contained in the Phase 1: Commercial Policy and Design Review Background Report.

In particular, the recommendations presented on the following pages relate to the following:

- The Downtown Boundary and its Structure;
- Establishing Minimum Density Targets;
- Establishing Specific Mixed-Use Density Targets;
- Establishing a New Retail Structure; and,
- Providing Incentives for Intensification and Non-Residential Development.

Currently, the City's core is delineated by two boundaries: the Provincial Urban Growth Centre (UGC) boundary, and the City's Downtown Mixed Use Centre boundary. The Provincialy designated UGC boundary is an irregular boundary that extends across parts of the Downtown proper, mainly along the Maple Avenue, Lakeshore Road, and Brant Street corridors, terminating in the northwest at Prospect Street. The City's Downtown Mixed Use Centre boundary covers a broader area associated with the Downtown, bounded by Baldwin Street in the northwest, extending out to Clarke Avenue/Maple Street/the QEW in the west and southwest, and roughly Torrence Street in the east.

In support of the ongoing work regarding the Core Commitment for the Downtown, the City has identified the need to rationalize the Downtown boundaries. As part of this exercise, it is important to consider, what is the purpose of establishing a boundary? From a community planning perspective, a boundary is used to identify an area that functions as a system and/or has common built form characteristics and
transportation infrastructure, and to then develop a framework for managing change (i.e. growth) over time in a way that preserves the unique characteristics of the area, while enhancing the physical and social fabric of the established community. From a commercial planning perspective, boundaries are used to identify hubs of contiguous retail and other commercial activity that function as a system and/or have common characteristics in their built form and/or they types of products and services that are offered. The commercial planning boundary may also reflect the destinations (home addresses) of customers.

Using these criteria, strategic consideration should be given to generally maintaining the City’s existing boundary for the Downtown, with some minor modifications (e.g. removing the southern most portion of the current designation along the Burlington Skyway where the land uses and block configurations are inconsistent with the remainder of the core). To operationalize the UGC designation, strategic consideration should also be given to identifying an urban corridor northwest of the Downtown along Brant Street, and to revisiting the precinct designations within the Downtown to ensure density distributions are informed by the UGC boundary (i.e. the area where the highest densities should be directed).

EXISTING BOUNDARIES FOR DOWNTOWN BURLINGTON

PROPOSED DOWNTOWN BOUNDARY
Core Commitment has defined eight precincts within the downtown core. This work should be refined in policy by recognizing:

- **Core and Main Street Retail Areas**, which would generally be concentrated around the historic main street shopping district (i.e., Brant Street and other adjacent streets); reflecting the commercial hierarchy in downtown;

- **Opportunity Areas**, where opportunities for future development have been identified or are anticipated;

- **Stable/Established Residential Areas**, including those located to the immediate east and west of the commercial core of the downtown;

- **Transition Areas**, including the stretch of Brant Street directly north of the core commercial area of downtown, as well as east and west of Brant Street on Lakeshore Road; and,

- **Tourist & Cultural Areas**, which would be focused along the waterfront and near other existing or potential new cultural amenities in the downtown with restrictions on private development.

Currently, the Official Plan incorporates the Provincially mandated minimum density target of 200 people and jobs per hectare for the Downtown as a whole. Strategic consideration should be given to developing minimum density targets for different areas of the Downtown to facilitate density distributions that reflect the existing and planned built form and block configurations, in line with the UGC and mobility hub designations. These minimum density targets could be integrated with existing height and density policies for the various Downtown precincts and would help to comprehensively plan for and monitor the intensification of Burlington’s Downtown.

To optimize the use of transit and strengthen the area’s economic base, one of the objectives for the Downtown is to attract more office and institutional land uses. Beyond economic development activities, there are a number of policy strategies the City could consider to encourage this type of development, including establishing mixed use targets (i.e. % requirements) for the different precincts, and establishing a jobs-to-residents target ratio.

With regard to commercial uses in the Downtown, strategic consideration should be given to permitting retail and service---related uses more broadly throughout all areas of the Downtown. Currently, commercial uses are not permitted throughout much of the area, and this is inconsistent with the characteristics of a complete urban community. To better integrate commercial uses throughout Downtown neighbourhoods, retail permissions/requirements could be de---linked from the precinct designations and re---introduced through new “retail priority streets” designations.
In addition to establishing mixed use targets for different precincts in the Downtown, the City should consider identifying a Primary Office/Institutional Core Area, and providing incentives for new office development, such as reduced automobile parking standards and reduced parkland dedication requirements. The City could also consider a linkage requirement, whereby approval for residential development is tied to the inclusion of non-residential development within the development site.

SUMMARY

In summary, Downtown Burlington is generally functioning well and has the emotional support of residents across the entire City. It is multi-functional providing for both the local needs of downtown businesses and residents, as well as more broader civic functions, such as a cultural and recreation centre, the centre of government and a place for the City's festivals.

Future policy direction should ensure that downtown can continue to fulfill these functions effectively, while at the same time ensuring that the growth mandated by the Provincial Growth Plan can be accommodated in a manner which enhances rather than detracts from the existing characteristics currently enjoyed by Burlington residents.
urbanMetrics and The Planning Partnership have been retained by the City of Burlington to undertake a Commercial Strategy Study, which is being prepared as part of the City's ongoing Official Plan Review process.

The *Commercial Strategy Study* is intended to re-evaluate the commercial policies of the City of Burlington Official Plan in order to address Strategic Plan directions, and to ensure that:

- the City's policies address current and future commercial land use needs;
- commercial areas can be effectively and efficiently planned;
- policies are reflective of recent changes to commercial land use planning and other trends; and,
- policies can be effectively implemented.

One area of focus for the *Commercial Strategy Study* is the City's Downtown, which is an integral component of the current commercial system in Burlington. The Downtown is also an area which has been overlaid with an Urban Growth Centre designation, as set out in the Province of Ontario's Growth Plan for the Greater Golden Horseshoe. Within the Urban Growth Centre, planning must accommodate specific population and employment density targets.

This *Interim Commercial Strategy Discussion Paper* represents one component of the broader *Commercial Strategy Study* being undertaken by urbanMetrics and The Planning Partnership. It focuses on the following key topics relating to Downtown Burlington:

- The current state of Downtown Burlington;
- The various functions served by Downtown;
- How well Downtown is currently meeting the needs of the City;
- Trends and other factors that will influence the future state of the Downtown; and,
How well current land use planning policies are supporting its vibrancy.

As per the Terms of Reference, “Downtown Burlington” has been defined as the area centred on Brant Street; generally extending from Lake Ontario in the south to Fairview Street in the north; between the Queen Elizabeth Way (QEW) and Smith Avenue in the west and east, respectively1. (See Figure 1-1). This Area includes all of the Downtown Mixed Use Area as defined in the Official Plan, together with a northerly extension along Brant Street to Fairview Street. This area is larger than the Provincial Growth Centre Boundary in that: it generally extends further north along Brant Street; includes the low density neighbourhoods east and west of Brant Street; and extends southerly along Burlington Beach.

1 However, also as per the terms of reference, as part of the broader Commercial Strategy Study, the boundaries of downtown should be evaluated and redefined if appropriate.
FIGURE 1-1: DOWNTOWN BURLINGTON BOUNDARIES
2 CURRENT STATE OF DOWNTOWN

2.1 COMMERCIAL SPACE INVENTORY IN DOWNTOWN BURLINGTON

urbanMetrics completed a detailed inventory of all the retail and service commercial space located in Downtown Burlington in October 2012. Based on the results of this inventory, Downtown Burlington currently contains approximately 1.09 million square feet (101,000 square metres) of retail/service commercial space.

As summarized in Figures 2-1 to 2-3, more than two thirds (69.3%) of this space is currently tenanted by service-based commercial facilities, such as Banks; Food Services and Drinking Places (i.e., full-service restaurants, fast-food restaurants, bars, pubs, and cafes), Personal Care Services (i.e., hair and beauty salons, barber shops, tattoo parlours, laundry services) and Health Care service facilities (e.g., doctors, dentists, and other offices of health practitioners).

Retail tenants currently represent one fifth (19.5%) of the total commercial space in Downtown Burlington. By comparison, retail tenants comprise approximately 56% of the inventory for the entire City.

Similar to many downtown shopping districts, the majority of downtown retail space is tenanted by Apparel and Accessories and Furniture, Home Furnishings and Electronics stores. In fact, these two store categories account for approximately two thirds (67.2%) of the total retail space in Downtown Burlington, and amount to some 105,100 square feet combined.

Downtowns are more limited in terms of their ability to attract the full range of store categories found in an urban market due to limitations with regards to land area, space and unit configurations. Stores that often have difficulty locating in downtown’s include:

- Chains with large and inflexible floor plates (e.g. department stores; many big box stores; warehouse membership clubs; furniture and appliance superstores; and building supply centres.

- Stores which, due to the nature of their operations and merchandise, rely almost exclusively on automobile traffic (e.g. many furniture and appliance stores; automotive parts and repair outlets; home and auto stores; and,

- Chains, which have an exclusive affinity to locating in enclosed malls or power centres.
In the case of Downtown Burlington, the vast majority of retail units are under 5,000 square feet, with some 65% under 2,000 square feet. With only a few exceptions, the units over 5,000 square feet are occupied by specialized uses such as restaurants, offices or public services that would not lend themselves to retail uses.

For these reasons, it would be difficult to significantly change the general retail mix in downtown Burlington, although there are certain categories that could be expanded in keeping with current trends in other downtown areas, including: a medium-to-large scale pharmacy; electronics; office supplies; sporting goods/sports apparel; dollar stores; gift and specialty retail outlets.

**FIGURE 2-1: DOWNTOWN ESTABLISHMENTS BY SIZE AND CATEGORY**

<table>
<thead>
<tr>
<th>RETAIL/SERVICE CATEGORY</th>
<th>STORE SIZE (sq ft)</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0 - 1,999</td>
<td>2,000 - 4,999</td>
</tr>
<tr>
<td>Food Store Retail (FSR)</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>Non-Food Store Retail (NFSR)</td>
<td>42</td>
<td>25</td>
</tr>
<tr>
<td>Other Retail</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Services</td>
<td>188</td>
<td>81</td>
</tr>
<tr>
<td>Vacant</td>
<td>70</td>
<td>12</td>
</tr>
<tr>
<td>Total Retail &amp; Services</td>
<td>304</td>
<td>127</td>
</tr>
</tbody>
</table>

% of Total  | 65.1% | 27.2% | 7.7% | 100.0%

Source: urbanMetrics inc.
FIGURE 2-2: INVENTORY OF DOWNTOWN COMMERCIAL SPACE BY SUB-CATEGORY

<table>
<thead>
<tr>
<th>Retail/Service Category</th>
<th>Total Floor Area (SF)</th>
<th>% of Total</th>
<th>Number of Businesses</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>RETAIL</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food Store Retail (FSR)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supermarkets and Grocery</td>
<td>26,300</td>
<td>2.4%</td>
<td>1</td>
<td>0.2%</td>
</tr>
<tr>
<td>Convenience and Specialty Food</td>
<td>22,955</td>
<td>2.1%</td>
<td>11</td>
<td>2.4%</td>
</tr>
<tr>
<td><strong>SUB-TOTAL - Food Store Retail (FSR)</strong></td>
<td><strong>49,255</strong></td>
<td><strong>4.5%</strong></td>
<td><strong>12</strong></td>
<td><strong>2.6%</strong></td>
</tr>
<tr>
<td>Non-Food Store Retail (NFSR)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pharmacies &amp; Personal Care</td>
<td>12,000</td>
<td>1.1%</td>
<td>6</td>
<td>1.3%</td>
</tr>
<tr>
<td>General Merchandise</td>
<td>11,850</td>
<td>1.1%</td>
<td>4</td>
<td>0.9%</td>
</tr>
<tr>
<td>Apparel and Accessories</td>
<td>58,300</td>
<td>5.4%</td>
<td>34</td>
<td>7.3%</td>
</tr>
<tr>
<td>Furniture, Home Furnishings and Electronics</td>
<td>46,800</td>
<td>4.3%</td>
<td>9</td>
<td>1.9%</td>
</tr>
<tr>
<td>Miscellaneous Retail</td>
<td>23,833</td>
<td>2.2%</td>
<td>15</td>
<td>3.2%</td>
</tr>
<tr>
<td>Building and Outdoor Home Supplies</td>
<td>3,500</td>
<td>0.3%</td>
<td>2</td>
<td>0.4%</td>
</tr>
<tr>
<td>Automotive</td>
<td>-</td>
<td>0.0%</td>
<td>-</td>
<td>0.0%</td>
</tr>
<tr>
<td><strong>SUB-TOTAL - Non-Food Store Retail (NFSR)</strong></td>
<td><strong>156,283</strong></td>
<td><strong>14.4%</strong></td>
<td><strong>70</strong></td>
<td><strong>15.0%</strong></td>
</tr>
<tr>
<td>Other Retail</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Liquor, Beer and Wine Stores</td>
<td>6,400</td>
<td>0.6%</td>
<td>2</td>
<td>0.4%</td>
</tr>
<tr>
<td><strong>SUB-TOTAL - Other Retail</strong></td>
<td><strong>6,400</strong></td>
<td><strong>0.6%</strong></td>
<td><strong>2</strong></td>
<td><strong>0.4%</strong></td>
</tr>
<tr>
<td><strong>SERVICES</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finance</td>
<td>33,000</td>
<td>3.0%</td>
<td>5</td>
<td>1.1%</td>
</tr>
<tr>
<td>Health Care</td>
<td>121,538</td>
<td>11.2%</td>
<td>48</td>
<td>10.3%</td>
</tr>
<tr>
<td>Cultural, Entertainment and Recreation</td>
<td>69,800</td>
<td>6.4%</td>
<td>16</td>
<td>3.4%</td>
</tr>
<tr>
<td>Food Services &amp; Drinking Places</td>
<td>150,866</td>
<td>13.9%</td>
<td>55</td>
<td>11.8%</td>
</tr>
<tr>
<td>Consumer Goods Rental</td>
<td>2,700</td>
<td>0.2%</td>
<td>1</td>
<td>0.2%</td>
</tr>
<tr>
<td>Personal and Household Goods Repair</td>
<td>4,000</td>
<td>0.4%</td>
<td>1</td>
<td>0.2%</td>
</tr>
<tr>
<td>Personal Care Services</td>
<td>76,000</td>
<td>7.0%</td>
<td>51</td>
<td>10.9%</td>
</tr>
<tr>
<td>Selected Civic and Social Organizations</td>
<td>81,563</td>
<td>7.5%</td>
<td>18</td>
<td>3.9%</td>
</tr>
<tr>
<td>Social Services</td>
<td>4,300</td>
<td>0.4%</td>
<td>4</td>
<td>0.9%</td>
</tr>
<tr>
<td>Other Services</td>
<td>209,310</td>
<td>19.3%</td>
<td>98</td>
<td>21.0%</td>
</tr>
<tr>
<td><strong>SUB-TOTAL - Services</strong></td>
<td><strong>753,077</strong></td>
<td><strong>69.3%</strong></td>
<td><strong>297</strong></td>
<td><strong>63.6%</strong></td>
</tr>
<tr>
<td><strong>VACANT</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vacant</td>
<td>121,684</td>
<td>11.2%</td>
<td>86</td>
<td>18.4%</td>
</tr>
<tr>
<td><strong>SUB-TOTAL - Vacant</strong></td>
<td><strong>121,684</strong></td>
<td><strong>11.2%</strong></td>
<td><strong>86</strong></td>
<td><strong>18.4%</strong></td>
</tr>
<tr>
<td><strong>GRAND TOTAL</strong></td>
<td><strong>1,086,699</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>467</strong></td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>
FIGURE 2-3: DOWNTOWN SPACE INVENTORY (SQUARE FEET GLA)

Source: urbanMetrics inc.

NFSR = Non-food Store Retail
FSR = Food Store Retail
2.2 CHANGE IN DOWNTOWN COMMERCIAL SPACE 2002-2012

Figure 2-4 summarizes the total change in commercial space in Downtown Burlington between 2002 and 2012 by retail/service sub-category. The data for 2002 is based on the results of a commercial inventory of Downtown Burlington that was undertaken by Robin Dee & Associates as part of the City's previous Official Plan Review Retail Commercial Study (May 2003). The geographic areas inventoried in 2002 and 2012 are identical.

As shown, Downtown Burlington experienced a slight increase in commercial space during the indicated period, with the most significant growth in the service sector; particularly the Medical/Dental and Restaurant and Fast-Food subcategories.

Overall, the amount of retail/service commercial space in Downtown Burlington increased by 18.9% between 2002 and 2012; representing an average annual growth rate of 1.9%.

The overall increase in downtown commercial space reflects primarily new additions through new construction or reuse of space, as the total amount of vacant space has remained relatively static although there has been considerable re-lease activity since 2002. Only about 10% of the vacant space recorded in 2012 was in the same units vacant in 2002.

In our opinion, the increase in occupied commercial space over this period reflects a number of factors, including: public and private investment in the waterfront and the core; overall growth of the City of Burlington; and potentially changes to the local and Provincial health care delivery system, which has increased the need for non-hospital related medical services.
### FIGURE 2-4: CHANGE IN DOWNTOWN COMMERCIAL SPACE 2002-2012 (SQUARE FEET) GLA

<table>
<thead>
<tr>
<th>Category</th>
<th>2002</th>
<th>2012</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Retail/Service Commercial Space</td>
<td>913,000</td>
<td>1,086,000</td>
<td>18.9%</td>
</tr>
<tr>
<td>Food and Drug Space</td>
<td>47,000</td>
<td>61,000</td>
<td>29.8%</td>
</tr>
<tr>
<td>All Other Retail Space</td>
<td>141,000</td>
<td>151,000</td>
<td>7.1%</td>
</tr>
<tr>
<td>Restaurant/Fast Food Space</td>
<td>114,000</td>
<td>151,000</td>
<td>32.5%</td>
</tr>
<tr>
<td>Banks/Credit Unions/Trust Companies</td>
<td>37,600</td>
<td>33,000</td>
<td>-12.2%</td>
</tr>
<tr>
<td>Medical/Dental Services</td>
<td>68,400</td>
<td>121,500</td>
<td>77.6%</td>
</tr>
<tr>
<td>All Other Services Space</td>
<td>388,000</td>
<td>447,500</td>
<td>15.3%</td>
</tr>
<tr>
<td>Vacancy Rate (%)</td>
<td>12.9%</td>
<td>11.2%</td>
<td>-1.7%</td>
</tr>
</tbody>
</table>

Source: urbanMetrics inc.

### 2.3 VACANT COMMERCIAL SPACE

As indicated in the figure on the previous page, the current retail and service commercial vacancy rate in Downtown Burlington is 11.2%.

Although this is a relatively high vacancy rate – with “typical” or “normal” vacancy rates ranging between 5.0% and 8.0% – it is important to note that the Downtown Burlington rate has decreased somewhat over the past decade. Since 2002, for example, the vacancy rate in this area has fallen by 1.7% from a high of nearly 13%.

Furthermore, it is evident that most of the vacant space in Downtown Burlington is concentrated in three aging commercial plazas; Village Square (422 Pearl St), Tudor Square (2022 – 2028 Caroline Street and 515 John Street) and Burlington Square Plaza (760 Brant Street). This
clustering of vacant commercial space is highlighted on Figure 2-5, which illustrates the relative size and location of all the vacant commercial units in Downtown Burlington, as of October 2012.

When combined, these three commercial plazas contain a total of some 76,200 square feet of vacant commercial space; representing well over half (62.6%) of the total vacant space in Downtown Burlington. Excluding these three centres, the vacancy rate for the balance of Downtown Burlington is only 4.8%; a very healthy level. Future commercial space growth required to support new downtown residents and businesses will, therefore, generally still need to be accommodated through new building construction rather than the lease up of existing vacant space.

Overall, therefore, it is evident that the relatively high vacancy rate in Downtown Burlington is skewed by only a small number of aging commercial plazas, which are in need of updating. Otherwise, commercial vacancy rates in Downtown Burlington remain at very healthy levels.

Furthermore, it is important to note that at least two of the older commercial plazas identified are undergoing a period of transition; with redevelopment and/or revitalization efforts expected at these sites in the near future.

In fact, an active development application for the block containing Tudor Square at 515 John Street is expected to result in a complete redevelopment of this site. Similarly, the Village Square complex at 422 Pearl Street is currently for sale, and may be subject to some form of revitalization or redevelopment by future owners of the property.

Recognizing that there will be a need for additional commercial space to support population and employment growth required by the Province’s Urban Growth Centre targets and that there are limited opportunities for new development in downtown, it will be important that at least a portion of the retail space lost in Tudor Square and Village Square projects is replaced as part of any redevelopment/revitalization. The location and internal space configuration of Burlington Square has never been conducive for retail space. In the long term, in any redevelopment of this site, more street related commercial space should be considered. As Burlington Square it outside of the downtown pedestrian area, the requirement for street related retail space will have to take into consideration the ultimate land use configuration in the vicinity of the site.
FIGURE 2-5: SIZE AND LOCATION OF VACANT COMMERCIAL UNITS
2.4  DOWNTOWN COMMERCIAL SPACE IN COMPARABLE COMMUNITIES

Figure 2-6 provides a comparison of the total amount of retail and service space located in Burlington’s downtown relative to other comparable communities, including neighbouring Oakville, as well as Waterloo and Whitby. These communities were chosen because they are affluent GTA and area municipalities with historic downtowns and with similar populations to Burlington. For reference, the 2011 population for each of these communities – plus the number of individuals residing within a one kilometre radius of each of the downtowns in these communities – have also been provided.

Whitby’s downtown can be described as “functional”. It has a strong neighbourhood serving function with a large convenience commercial function. Its tourism and cultural base is limited, although the recent addition of a new central library has acted as an anchor.

Oakville’s downtown plays largely a specialty retail and service function for the affluent Oakville community. It contains no supermarkets and contains a limited selection of local serving retail outlets. None the less it is has performed this function successfully with reasonable vacancy levels. Although it suffers from a lack of civic administration presence, it has benefited from significant downtown investment.

Waterloo’s downtown, like downtown Burlington plays a variety of functions, catering to both the local needs of the growing downtown population and providing a more regional specialty retail function, in part through the redevelopment of Waterloo Town Centre. Like Burlington, the City’s greenfield potential is nearing capacity. Unlike the other cores, Downtown Waterloo caters to the large surrounding university student population.

As shown, Burlington contains far more commercial space in its downtown than any of the other communities identified. It is important to note, however, that Downtown Burlington also contains a larger residential population, and based on on-street customer surveys, it draws support from the population in the adjoining communities, including Hamilton and Oakville. In addition, the surveys also pointed to a large walk-in population from the adjoining neighbourhoods.

In fact, when considering the amount of commercial space in Downtown Burlington on a per capita basis for the entire City, it is nearly identical to that of both Waterloo and Whitby (i.e., 6.2, 6.0, and 6.1 square feet per capita, respectively).

Furthermore, it is also interesting to note that Downtown Burlington contains a comparable amount of retail space (i.e., food/drug and other retail stores) to other communities, whereas it contains an above-average supply of service-based commercial facilities.
Relative to the population within one kilometre, Downtown Burlington has about 25% more space than Waterloo andOakville and a similar supply as Downtown Whitby, which may relate to the importance of the local serving retail function in Burlington and Whitby compared to the other downtowns.

**FIGURE 2-6: COMPARISON OF DOWNTOWN COMMERCIAL SPACE WITH COMPARABLE COMMUNITIES**

<table>
<thead>
<tr>
<th></th>
<th>Burlington</th>
<th>Oakville</th>
<th>Waterloo</th>
<th>Whitby</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011 Population*</td>
<td>175,779</td>
<td>182,520</td>
<td>98,780</td>
<td>122,022</td>
</tr>
<tr>
<td>Population Within 1 Kilometre of Downtown*</td>
<td>10,686</td>
<td>7,467</td>
<td>7,852</td>
<td>7,898</td>
</tr>
<tr>
<td>Total Retail/Service Commercial Space (sq ft)</td>
<td>1,086,000</td>
<td>585,000</td>
<td>595,000</td>
<td>748,000</td>
</tr>
<tr>
<td>Food and Drug Space (sq ft)</td>
<td>61,000</td>
<td>22,000</td>
<td>51,200</td>
<td>99,000</td>
</tr>
<tr>
<td>All Other Retail Space (sq ft)</td>
<td>151,000</td>
<td>149,000</td>
<td>208,000</td>
<td>140,000</td>
</tr>
<tr>
<td>Restaurant/Fast Food Space (sq ft)</td>
<td>151,000</td>
<td>54,200</td>
<td>127,000</td>
<td>78,000</td>
</tr>
<tr>
<td>All Other Services Space (sq ft)</td>
<td>602,000</td>
<td>310,000</td>
<td>174,000</td>
<td>392,000</td>
</tr>
<tr>
<td>Vacancy Rate (%)</td>
<td>11.2%</td>
<td>8.5%</td>
<td>5.8%</td>
<td>5.3%</td>
</tr>
</tbody>
</table>

*Downtown Commercial Space Per City Resident (sq ft per capita) 6.2 3.2 6.0 6.1

*Downtown Commercial Space Per Population within 1 KM (sq ft per capita) 101.6 78.3 75.8 94.7

*Population based on 2011 Census
2.5 OFFICE COMMERCIAL SPACE

The majority of office space in downtown Burlington is contained in street front/plaza units, small buildings, and second floor units.

As indicated in Figure 2-7, Downtown Burlington contains a variety of local-serving office space, including approximately 33,000 square feet of financial services space (e.g., banks); 121,500 square feet of health care space (e.g., offices for doctors and other health care professionals); and upwards of 85,000 square feet of space tenanted by social service offices and other civic and social organizations. In addition, the 209,000 square feet of Other Services space identified earlier is comprised of a mix of offices for lawyers, real estate professionals, insurance companies, financial advisors, and other professional, scientific and technical service tenants.

A detailed summary of the distribution of this type of office space is included in Figure 2-7. As shown, Downtown Burlington currently contains a total of approximately 450,000 square feet of service-based office space.

In addition to this space, based on a 2012 Study prepared for Burlington Economic Development by Deloittes, Downtown Burlington contains an estimated 130,000 square feet of Class “A” office space in two buildings – 390 Brant Street (Sims Square) and 760 Brant Street (Burlington Square), as well as large administrative/government functions, including City Hall and 414 Locust Street. It is important to recognize that Class A office space, in this context, is a subjective and term, and relates primarily to the size of the buildings classified relative to the competition in the local market.

Overall, however, the proportion of office space in the downtown represents a small fraction of the total space in the City, which has been calculated at 4.3 million square feet based on Colliers Q3 Toronto Office Market Report.

In summary, while downtown does contain a number of office projects that serve as important draws and activity generators, it is not a major office centre within the City as a whole.

2 Office and Retail Markets in Downtown Burlington, Deloittes, May 2, 2012.
FIGURE 2-7: DISTRIBUTION OF SERVICE BASED OFFICE SPACE BY SUB-CATEGORY

<table>
<thead>
<tr>
<th>Service Category</th>
<th>Total Floor Area (SF)</th>
<th>% of Total</th>
<th>Number of Businesses</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance (Banks &amp; Credit Unions)</td>
<td>33,000</td>
<td>7.3%</td>
<td>5</td>
<td>2.9%</td>
</tr>
<tr>
<td>Health Care Services</td>
<td>121,538</td>
<td>27.0%</td>
<td>48</td>
<td>27.7%</td>
</tr>
<tr>
<td>Civic &amp; Social Organizations</td>
<td>81,563</td>
<td>18.1%</td>
<td>18</td>
<td>10.4%</td>
</tr>
<tr>
<td>Social Services</td>
<td>4,300</td>
<td>1.0%</td>
<td>4</td>
<td>2.3%</td>
</tr>
<tr>
<td>Other Services</td>
<td>209,310</td>
<td>46.5%</td>
<td>98</td>
<td>56.6%</td>
</tr>
<tr>
<td>Other Financial Services (e.g., advisors, mortgage brokers)</td>
<td>26,130</td>
<td>5.8%</td>
<td>19</td>
<td>11.0%</td>
</tr>
<tr>
<td>Accountants, Tax Preparation Services, Bookings, Payroll</td>
<td>8,300</td>
<td>1.8%</td>
<td>8</td>
<td>4.6%</td>
</tr>
<tr>
<td>Offices of Lawyers</td>
<td>12,900</td>
<td>2.9%</td>
<td>8</td>
<td>4.6%</td>
</tr>
<tr>
<td>Other Legal Services</td>
<td>1,100</td>
<td>0.2%</td>
<td>1</td>
<td>0.6%</td>
</tr>
<tr>
<td>Offices of Real Estate Agents and Brokers</td>
<td>15,752</td>
<td>3.5%</td>
<td>7</td>
<td>4.0%</td>
</tr>
<tr>
<td>Insurance Agencies and Brokerages</td>
<td>5,500</td>
<td>1.2%</td>
<td>5</td>
<td>2.9%</td>
</tr>
<tr>
<td>Management Consulting Services</td>
<td>3,300</td>
<td>0.7%</td>
<td>5</td>
<td>2.9%</td>
</tr>
<tr>
<td>Public Relations Services</td>
<td>3,864</td>
<td>0.9%</td>
<td>2</td>
<td>1.2%</td>
</tr>
<tr>
<td>Research &amp; Development</td>
<td>4,800</td>
<td>1.1%</td>
<td>2</td>
<td>1.2%</td>
</tr>
<tr>
<td>Survey and Mapping Services</td>
<td>500</td>
<td>0.1%</td>
<td>1</td>
<td>0.6%</td>
</tr>
<tr>
<td>Other Professional, Scientific and Technical Services</td>
<td>110,222</td>
<td>24.5%</td>
<td>23</td>
<td>13.3%</td>
</tr>
<tr>
<td>Other Scientific and Technical Consulting</td>
<td>1,000</td>
<td>0.2%</td>
<td>2</td>
<td>1.2%</td>
</tr>
<tr>
<td>Employment Services</td>
<td>6,402</td>
<td>1.4%</td>
<td>6</td>
<td>3.5%</td>
</tr>
<tr>
<td>Computer Systems Design and Related Services</td>
<td>1,700</td>
<td>0.4%</td>
<td>1</td>
<td>0.6%</td>
</tr>
<tr>
<td>Advertising Agencies</td>
<td>700</td>
<td>0.2%</td>
<td>1</td>
<td>0.6%</td>
</tr>
<tr>
<td>Graphic Design Services</td>
<td>900</td>
<td>0.2%</td>
<td>1</td>
<td>0.6%</td>
</tr>
<tr>
<td>All Other Services</td>
<td>6,240</td>
<td>1.4%</td>
<td>6</td>
<td>3.5%</td>
</tr>
<tr>
<td><strong>GRAND TOTAL</strong></td>
<td><strong>449,711</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>173</strong></td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>

Source: urbanMetrics inc.
2.6 FUTURE DEVELOPMENT SITES

Most of the lands in Downtown Burlington have already been developed for a variety of land uses, including existing retail/service commercial facilities, office buildings, established low density residential neighbourhoods with predominantly detached housing; residential apartment buildings (e.g., condominiums and senior’s residences), as well as cultural, entertainment, and recreational facilities along the water’s edge.

Downtown Burlington does, however, contain a number of undeveloped and under-developed properties, which offer the potential for new development. Among the most notable of these sites are the two City-owned parking lots located immediately east of Brant Street between James Street and Pine Street in the north and south, respectively (i.e., Parking Lots “4” and “5”).

Together, these two sites include a total of approximately 1.5 acres (0.6 hectares) of developable land area.

Similarly, the downtown also contains a number of aging strip retail sites and smaller commercial centres, which could potentially support new, more intensified development in coming years. From a planning perspective, these sites should be recognized as possible candidates for mixed-use intensified development. However, in terms of addressing the short-term supply they should be considered more speculative than the sites highlighted on the following maps.

Figures 2-8 and 2-9 illustrate the location of some of the specific sites that are expected to support new commercial development in the near future:

- Parking Lot 4 – municipally-owned parking lot available for new development;
- Parking Lot 5 – municipally-owned parking lot available for new development;
- Tudor Square site – proposed commercial development of approx. 21,500 sq ft (2,000 sq metres) GFA;
- 392-398 Pearl Street – proposed senior’s housing residential development to include approx. 5,400 sq ft (500 sq metres) commercial GFA; and,
- 2042 Lakeshore Road – proposed development to contain a mix of uses, including an estimated 11,000 sq ft (1,025 sq metres) of commercial space.
In addition to these sites, the Brant Street spine north of Caroline, is largely comprised of low density uses, including detached-homes, auto dealerships and low-rise residential and commercial buildings, that in the longer term have the potential for intensification. There is also a small site on the northeast corner of Ghent and Brant, diagonal from Burlington Square, currently used as a parking lot that may have development potential.

**FIGURE 2-8: LOCATION OF FUTURE DEVELOPMENT SITES (SOUTH)**
FIGURE 2-9: LOCATION OF FUTURE DEVELOPMENT SITES (NORTH)

(F) 779 Brant St Parking Lot
3 FUNCTIONS OF THE DOWNTOWN

Downtown Burlington currently contains a wide range of land uses and serves a variety of different functions; both locally and within the context of the City as a whole.

The downtown serves as an important place for:

- **Shopping** – representing the commercial core of the City and containing approximately 1.1 million square feet of retail and service commercial space;

- **Working & Learning** – supporting a wide range of employment activities, particularly office and retail/service commercial based employment, with a number of major employers, including City Hall and Joseph Brant Memorial Hospital.

- **Living** – containing a mix of both established residential neighbourhoods with predominantly detached housing, as well as newer medium and high density condominium apartment residential developments;

- **Playing** – offering opportunities for a variety of leisure, recreational and entertainment activities, including those focused along the waterfront and others located at various cultural attractions throughout the downtown (e.g., Burlington Performing Arts Centre, Burlington Art Centre, etc.);

- **Civic Presence** – containing City Hall and other important municipal and local institutions.

- **Community Activities** – providing space for residents, employees and visitors of Burlington to gather and serving as the focal point of many of the City’s festivals and community events, and,

- **Transportation** – containing Burlington Transit’s John Street Bus Terminal, as well as supporting a variety of other modes of active transportation (e.g., walking and biking) via the City’s waterfront trail system.
3.1 POPULATION AND EMPLOYMENT

In 2006, Burlington’s Urban Growth Centre – which generally corresponds to the highest intensity portions of Downtown Burlington– contained a total of some 8,000 residents. Similarly, the Urban Growth Centre supports a total of some 6,000 employees in the downtown at this time. As per the 2011 Census, the Urban Growth Centre has increased its population by approximately 10%.

With a total land area of some 117 hectares, this total of 14,000 residents and jobs in the Urban Growth Centre represents a density of 120 residents and jobs per hectare.

Based on the intensification targets set out in the Province’s Growth Plan, however, the City of Burlington is required to plan for a density of 200 residents and jobs per hectare by 2031 in this area.

This suggests that the target density for Downtown Burlington in 2031 would include a total of 23,400 residents and jobs combined; representing an increase of approximately 9,400 from 2006 levels (i.e., growth of more than 67%).

The January,2008 Burlington Intensification Study, based on a site-by-site review estimates that some 2,200 units with a population of 3,750 could be developed in the Urban Growth Centre. This figure may be low in relation to the Provincial Growth Plan target. As per the Growth Plan, between 2012 and 2031, the Urban Growth Centre itself is targeted to increase from a total of 14,000 residents and jobs in 2006 to 23,400 persons and jobs by 2031, based on a density target of 200 persons and jobs per hectare in 2031. This represents growth of some 9,400 persons and jobs over this period. Based on Census population data, it is estimated that the Urban Growth Centre population in 2006 was 7,600 persons and the workforce is approximately 7,400. This represents a population/employment ratio of 54%/46%. Future growth will likely be more heavily oriented to residential development. This is because the current ratio is heavily influenced by a number of large-scale employers, including Joseph Brant Hospital and Burlington Civic Offices, which have limited growth potential. If 75% of downtown growth is comprised of new residents, this would result in an increase of approximately 7,000 new residents downtown or a growth of 88% between 2006 and 2031. Based on Census data, between 2006 and 2011, the Downtown population grew by some 800 persons. This would result in a future growth between 2011 and 2031 of approximately 6,200 persons in the Urban Growth Centre alone.

In other words, in order to achieve the Growth Plan target, additional opportunities may need to be identified beyond those considered in the Intensification Study.
This growth will have significant implications in terms of attracting and accommodating sufficient retail and services space to serve these new residents and workers.

### 3.2 DOWNTOWN ON-STREET INTERCEPT SURVEY RESULTS

urbanMetrics conducted some 300 of on-street intercept interviews in Downtown Burlington during September and October, 2012. The results of this survey provide additional insight as to the current role of Downtown Burlington and the specific types of activities that are being performed in this area.

As illustrated on Figure 3-1, interviews were completed at each of the following four locations within the central portion of Downtown Burlington.

- **Location 1** – Intersection of Caroline Street & Brant Street (74 responses, 26%)
- **Location 2** – Intersection of James Street & Brant Street (85 responses, 29%)
- **Location 3** – Intersection of Lakeshore Road & Brant Street (64 responses, 22%)
- **Location 4** – Intersection of Elizabeth Street & Pine Street (Village Square) (73 responses, 25%)

---

3 The statistical margin of error varies depending on the question and the percentage answering each response. In our experience, overall the sample size provides reliable results for the questions asked and the size of the population.
FIGURE 3-1: LOCATION OF ON-STREET INTERCEPT SURVEYS

1) Intersection of Caroline Street & Brant Street
2) Intersection of James Street & Brant Street
3) Intersection of Lakeshore Road & Brant Street
4) Intersection of Elizabeth Street & Pine Street (Village Square)
As indicated in Figure 3-2, the sample included a balanced distribution of males and females from all age groups.

**FIGURE 3-2: GENDER AND AGE DISTRIBUTION OF SURVEY PARTICIPANTS**

- **Gender Distribution**
  - Male: 136 (47%)
  - Female: 156 (53%)

- **Age Distribution**
  - 15-19: 4.8%
  - 20-24: 5.8%
  - 25-34: 21.9%
  - 35-44: 14.7%
  - 45-54: 19.2%
  - 55-64: 16.1%
  - 65-74: 11.3%
  - 75+: 6.2%
As illustrated in Figure 3-3, the survey respondents indicated that they visited downtown for a variety of different reasons. One quarter (26%) of the respondents indicated that they lived in Downtown Burlington and an additional 15% who worked there. All other respondents indicated that they were in downtown to perform other activities, such as shopping; dining; for an appointment, or to hold business meetings.

This further confirms that Downtown Burlington is a multi-functional centre with no one dominant activity.

**FIGURE 3-3: PRIMARY REASON FOR VISITING DOWNTOWN BURLINGTON**
Only about 13% of respondents travelled downtown specifically to shop. As with most downtowns not accessed by rapid transit, the majority of retail facilities exist to serve nearby residents and employees. The balance tends to consist of specialty retail with a more regional draw which benefits from the unique ambience provided by downtown environments.

Figure 3-4 illustrates the frequency which survey respondents indicated they visit Downtown Burlington – in total and specifically in the evening. As shown, the reported frequency of visits was quite high, with approximately 70% indicating that they visit Downtown Burlington more than once a week and an additional 12% visiting at least once a week. This is particularly noteworthy given that only 41% of the respondents live or work in the area.

Based on the survey results illustrated in Figure 3-4, however, it is also evident that respondents visit the downtown much less frequently during the evening. In fact, more than half of the respondents (57%) indicated that they visit Downtown Burlington during the evening at a frequency of less than once a week; and nearly one third (30%) visit less than once a month.
FIGURE 3-4: FREQUENCY OF VISITS TO DOWNTOWN BURLINGTON

FREQUENCY OF VISITS (TOTAL)

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than once a week</td>
<td>69.8%</td>
</tr>
<tr>
<td>Once a week</td>
<td>12.2%</td>
</tr>
<tr>
<td>1 - 3 times per month</td>
<td>9.4%</td>
</tr>
<tr>
<td>Less than once a month</td>
<td>6.3%</td>
</tr>
<tr>
<td>First time</td>
<td>2.4%</td>
</tr>
</tbody>
</table>

FREQUENCY OF VISITS (EVENING)

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than once a week</td>
<td>26.8%</td>
</tr>
<tr>
<td>Once a week</td>
<td>16.8%</td>
</tr>
<tr>
<td>1 - 3 times per month</td>
<td>26.8%</td>
</tr>
<tr>
<td>Less than once a month</td>
<td>23.0%</td>
</tr>
<tr>
<td>Never</td>
<td>6.5%</td>
</tr>
</tbody>
</table>

Source: urbanMetrics inc.
Nearly half (47.4%) of the respondents indicated that they travelled to Downtown Burlington by automobile (i.e., car, motorcycle, etc.) on the day that they were surveyed.

Overall, however, the majority of visitors surveyed travelled by some means other than by car; with 44% either walking or riding their bicycle and approximately 8% taking public transit.

**FIGURE 3-5: MODE OF TRANSPORTATION DOWNTOWN ON DAY OF SURVEY**

- Car / Motorcycle: 47.4%
- Walk: 40.2%
- Bicycle: 3.8%
- Public Transit: 7.6%
- Taxi: 0.0%
- Other: 1.0%

Source: urbanMetrics inc.
Survey respondents were also asked to rate – on a scale from one to ten – how important it was to them that Downtown Burlington perform a number of pre-defined functions; as summarized in Figure 3-6.

The five top-rated functions related to social, entertainment, cultural and recreational activities. For example, it was most important to respondents that the downtown serve as a **place for the City’s festivals**, which received an average response rating of 9.1 out of 10.

Similarly, it was also important that Downtown Burlington be the **cultural centre for the City**, as well as serve as a place to **meet friends; take out-of-town visitors; and enjoy recreational and leisure activities**. All of these functions received an average rating of at least 8 out of 10.

From a commercial perspective, it is also interesting to note that respondents suggested that it was more important that downtown be a **neighbourhood shopping destination** than a regional shopping destination, with ratings of 7.7 and 6.4 out of ten, respectively.
FIGURE 3-6: PERCEIVED FUNCTIONS FOR DOWNTOWN

HOW IMPORTANT IS IT THAT DOWNTOWN BURLINGTON BE...

- A place for the City's Festivals: 9.1
- A place to meet friends: 8.7
- A place to take out-of-town visitors: 8.6
- A place to enjoy recreation and leisure activities: 8.4
- The cultural centre for the City: 8.2
- A neighbourhood shopping destination: 7.7
- A place for people to work: 7.5
- A regional shopping destination: 6.4

Source: urbanMetrics inc.
3.3 CITY OF BURLINGTON TELEPHONE AND ON-LINE SURVEYS

A total of some 885 consumer surveys (364 fully-completed telephone surveys, 261 fully-completed on-line surveys and 260 partially complete on-line surveys\(^4\) with Burlington residents were completed to determine the existing expenditure patterns of municipal residents; establish the existing market shares being captured by City of Burlington retail facilities; and the outflow of sales to stores located outside the City.

The following charts summarize the results as they relate to Downtown Burlington. Figure 3-7 summarizes the share of Burlington residents expenditures by category made in downtown. The highest downtown market share relates to restaurants (23.6%), followed by specialty food (13.5%), miscellaneous retail 11.3%, and fashion (10.9%). These results point to the strength of the downtown as a restaurant destination, and a place for specialty retail.

\(^4\) Partially complete surveys were terminated by the respondents prior to reaching the end of the survey document. Where sufficient information to categorize the respondent was available, some results from partially completed surveys were incorporated.
Figure 3-8 summarizes the respondents' assessment of the supply of various types of retail stores downtown. The categories in which respondents felt needed bolstering the most were specialty food stores (36% of respondents) and supermarkets (31% of respondents), illustrating the importance of food to the downtown retail mix. The only category in which more respondents indicated “too many” rather than “needs more”, was fast food restaurants. These results are not that dissimilar from the respondents' perceptions of the supply of store categories for the City as a whole. In both cases specialty food was the highest rated category for which respondents perceived more stores were needed and fast food was the category for which respondents overwhelmingly reported was over represented.
Figure 3-9 summarizes the frequency which Burlington residents visit downtown. For the City as a whole, the frequency of visitation was much lower than for the respondents of the on-street surveys. Almost 19% of City residents indicated that they never visit downtown Burlington. Overall, over 50% indicate that they visit Downtown either never or less than once per month. These results indicate the more local serving nature of downtown. The majority of Burlington residents travel downtown infrequently, whereas the downtown market is made up largely of persons visiting more than once per week.
Figure 3-10 summarizes the mode of transportation most frequently used by Burlington residents when travelling downtown. Unlike the respondents to the Burlington on-street survey in which over 40% of the respondents walked downtown, almost 80% of Burlington residents as a whole drive. Only 13% of all residents walk. These results stress the importance of parking and vehicular access if the downtown is going to expand its penetration into non-downtown neighbourhoods.

Alternatively, these results in combination with the downtown on-street survey, indicate that downtown residents are much less likely to drive than the Burlington population as a whole. A strategy which focuses on bolstering the population of downtown and its adjacent neighbourhoods will reduce the demand for downtown parking.
Figure 3-11 summarizes Burlington residents’ satisfaction with downtown parking, in terms of price, convenience and adequacy. As indicated, although the majority of residents indicated that parking was adequate, convenient and reasonably priced, there was still a significant proportion of respondents who had a more negative perceptions of downtown parking. For example almost half of the respondents indicated that the amount of parking spaces was not adequate.

It is important to recognize that there is a very significant perceptual component in parking related questions. For example, persons who travel downtown infrequently may do so because of their perception of parking issues. As a result, they may not be as fully aware of the parking supply and alternative parking strategies as someone who travels downtown on a regular basis. For example, of the respondents to the downtown on-street survey, some 77.5 % indicated that parking was adequate, while over 70% indicated that it was convenient and reasonably priced.
These results suggest that, to some extent, parking issue can be addressed through better communications with the Burlington population as a whole. For example, publishing on-line parking maps which show not only the location and cost of downtown parking areas, but also average occupancy rates during varies times of the day. Where technologies are available, up-to-the-minute parking availability can be shown on the web site. A public relations campaign addressing parking issues and solutions would also assist in easing misperceptions regarding the availability of downtown parking.

**FIGURE 3-11: SATISFACTION WITH DOWNTOWN PARKING**

![Bar chart showing satisfaction with downtown parking](image)

Source: urbanMetrics inc.

Figure 3-12 summarizes Burlington residents perceptions of the role played by Downtown. While the magnitude of scores were generally slightly lower than those given by the respondents to the downtown survey, the overall pattern of results was similar. “A place for the City’s festivals” ranked highest and a regional shopping destination ranked lowest. Downtown was ranked lower as a neighbourhood shopping
destination by residents of the City as a whole than the downtown survey respondents. On the whole, however, these functions were generally supported by both the respondents to the downtown on-street survey and residents of the City as a whole.

**FIGURE 3-12: PERCEIVED FUNCTIONS FOR DOWNTOWN (SCORE OUT OF 10)**

![Bar chart showing perceived functions for downtown Burlington](image)
3.4 DOWNTOWN TRADE AREA

The following provides an overview of the geographic distribution of patrons of Downtown Burlington, based on postal code information obtained directly from respondents who participated in the on-street intercept surveys.

As summarized in Figure 3-13, approximately 80% of the respondents surveyed originated from within the City of Burlington. In fact, the majority of the individuals surveyed (69%) currently reside in the southern portion of Burlington (i.e., south of the Queen Elizabeth Way (QEW) and Highway 403).

As a reference, in 2002 a similar survey of downtown shoppers indicated that 70% lived in downtown Burlington, suggesting a slight contraction of the trade area.

An additional 14% of respondents originated from other nearby communities, including 11% and 3% from various parts of Hamilton and Oakville, respectively.

**FIGURE 3-13: GEOGRAPHIC DISTRIBUTION OF DOWNTOWN VISITORS**

<table>
<thead>
<tr>
<th>Location/Community</th>
<th># of Survey Respondents</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of Burlington</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Burlington South (south of QEW and Highway 403)</td>
<td>201</td>
<td>68.8%</td>
</tr>
<tr>
<td>Burlington North (north of QEW and Highway 403)</td>
<td>31</td>
<td>10.6%</td>
</tr>
<tr>
<td>Other Nearby Communities</td>
<td>40</td>
<td>13.7%</td>
</tr>
<tr>
<td>Town of Oakville</td>
<td>9</td>
<td>3.1%</td>
</tr>
<tr>
<td>City of Hamilton</td>
<td>31</td>
<td>10.6%</td>
</tr>
<tr>
<td>All Other Locations</td>
<td>20</td>
<td>6.8%</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td>292</td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>

Source: urbanMetrics inc.
Figures 3-14 and 3-15 further illustrate the geographic distribution of patrons of Downtown Burlington, based on the results of the on-street intercept surveys.

Figure 3-14 includes a plot of all the respondent origin locations, and clearly illustrates the clustering of patrons in and around the downtown area.

Similarly, the "heat" maps on Figure 3-15 illustrate the relative intensity of areas with the highest number of survey respondents. For reference, it should be noted that areas in purple represent a relatively low concentration of respondent origins while orange shading represents a very high concentration.

Although all of these maps confirm that the majority of Downtown Burlington patrons originate from within a relatively short distance of the core, it is also important to note that the downtown appears to attract individuals from across the City; from neighbouring communities such as Hamilton and Oakville, and from as far away as communities like Guelph and Mississauga5.

As illustrated by the following map, the Primary Trade Area for the downtown, which would represent the source of the most customers on consistent and on going basis, has been defined as the area east of King Road, south of 403/QEW, west of Walkers Line and north of the lake. The Secondary Trade Area has been defined as the balance of the City of Burlington.

As noted previously, the City or the entire Trade Area represents some 80% of customer origins, while the Primary Trade Area represents some 63% of downtown visitors with a population of 46,000. Based on Halton Region's Best Planning estimates, this is expected to reach 53,000 by 2031, largely through infill and intensification. The largest share of this growth would occur within the Urban Growth Centre.

5 This type of survey may slightly overestimate the walk-in population as it may not capture persons who drive directly to a point of origin downtown and do not take typical pedestrian routes where the surveys were conducted.
FIGURE 3-14: ON-STREET INTERCEPT SURVEYS - RESPONDENT ORIGINS

Source: urbanMetrics inc.
FIGURE 3-15: CUSTOMER ORIGINS - HEAT MAPPING
Further to the Trade Area information presented above, the following provides a more detailed summary of the actual expenditure patterns of survey respondents, based on the results of the on-street intercept surveys.

In particular, Figures 3-16 and 3-17 summarize the total amount that survey respondents spent – or planned to spend – in Downtown Burlington on the day that they were surveyed. For simplicity, these expenditures have been summarized into one of three major retail/service categories, as follows:

- **Restaurants & Fast Food** (i.e., service-based food expenditures);
- **Grocery & Food** (i.e., retail-based food expenditures); and,
- **Other Retail** (e.g., all other retail expenditures, including those made at apparel & accessories stores, home furnishings stores, gift shops, etc.).

For reference purposes, the expenditure data presented in the tables on the following pages have also been summarized by respondent origin, based on the home location of each survey respondent (i.e., City of Burlington vs. other communities).

As illustrated in the table below, survey respondents indicated that they spent – or planned to spend – a total of $11,178 in Downtown Burlington on the days that they were surveyed. Of this total, approximately 31%, 24%, and 45% was spent at Restaurants & Fast Food, Grocery & Food, and Other Retail establishments, respectively.

Furthermore, it is evident that the majority of downtown expenditures were made by residents of Burlington; particularly those who live near the downtown (i.e., in the Burlington South area). Overall, Burlington South respondents accounted for more than half (60.5%) of the total value of all expenditures. This relationship was particularly strong for Grocery & Food expenditures, which is typical of such local-serving and neighbourhood-oriented retail facilities.
FIGURE 3-16: DISTRIBUTION OF EXPENDITURES BY STORE CATEGORY AND RESPONDENT ORIGIN

<table>
<thead>
<tr>
<th>Location/Community</th>
<th>Restaurant &amp; Fast Food</th>
<th>Grocery &amp; Food</th>
<th>Other Retail</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$ $</td>
<td>%</td>
<td>$ $</td>
<td>%</td>
</tr>
<tr>
<td>City of Burlington</td>
<td>$2,713</td>
<td>78.4%</td>
<td>$2,370</td>
<td>87.5%</td>
</tr>
<tr>
<td></td>
<td>$2,405</td>
<td>69.5%</td>
<td>$2,210</td>
<td>81.5%</td>
</tr>
<tr>
<td></td>
<td>$308</td>
<td>8.9%</td>
<td>$160</td>
<td>5.9%</td>
</tr>
<tr>
<td>Other Nearby Communities</td>
<td>$328</td>
<td>9.5%</td>
<td>$260</td>
<td>9.6%</td>
</tr>
<tr>
<td>Town of Oakville</td>
<td>$70</td>
<td>2.0%</td>
<td>$20</td>
<td>0.7%</td>
</tr>
<tr>
<td>City of Hamilton</td>
<td>$258</td>
<td>7.5%</td>
<td>$240</td>
<td>8.9%</td>
</tr>
<tr>
<td>All Other Locations</td>
<td>$419</td>
<td>12.1%</td>
<td>$80</td>
<td>3.0%</td>
</tr>
<tr>
<td>Grand Total</td>
<td>$3,460</td>
<td>87.9%</td>
<td>$2,710</td>
<td>97.0%</td>
</tr>
<tr>
<td>% of Total</td>
<td>$3,460</td>
<td>31.0%</td>
<td>$2,710</td>
<td>44.8%</td>
</tr>
</tbody>
</table>

Source: urbanMetrics inc.

It is also interesting to note that residents from other communities – particularly those originating from beyond neighbouring Oakville and Hamilton – spent more than residents of the City of Burlington on average (i.e., on the day of the survey).

As summarized in Figure 3-17, for example, respondents from the City of Burlington spent an average of $36 per respondent, whereas out-of-town visitors from All Other Locations (i.e., excluding Oakville and Hamilton) spent approximately 142% more per respondent (i.e., $87 on average).
This difference was particularly evident for spending in the Other Retail category, where the average expenditure for patrons originating from beyond Burlington, Oakville and Hamilton was more than four times greater than that of Burlington residents (i.e., $62 and $14 per respondent, respectively).

**FIGURE 3-17: AVERAGE EXPENDITURE PER RESPONDENT BY CATEGORY AND ORIGIN OF RESPONDENT**

<table>
<thead>
<tr>
<th>Location/Community</th>
<th>Restaurant &amp; Fast Food</th>
<th>Grocery &amp; Food</th>
<th>Other Retail</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of Burlington</td>
<td>$11.69</td>
<td>$10.22</td>
<td>$14.01</td>
<td>$35.92</td>
</tr>
<tr>
<td>Burlington South (south of Queen Elizabeth Way and Highway 403)</td>
<td>$11.97</td>
<td>$11.00</td>
<td>$10.70</td>
<td>$33.66</td>
</tr>
<tr>
<td>Burlington North (north of Queen Elizabeth Way and Highway 403)</td>
<td>$9.94</td>
<td>$5.16</td>
<td>$35.48</td>
<td>$50.58</td>
</tr>
<tr>
<td>Other Nearby Communities</td>
<td>$8.20</td>
<td>$6.50</td>
<td>$12.93</td>
<td>$27.63</td>
</tr>
<tr>
<td>Town of Oakville</td>
<td>$7.78</td>
<td>$2.22</td>
<td>$17.78</td>
<td>$27.78</td>
</tr>
<tr>
<td>City of Hamilton</td>
<td>$8.32</td>
<td>$7.74</td>
<td>$11.52</td>
<td>$27.58</td>
</tr>
<tr>
<td>All Other Locations</td>
<td>$20.95</td>
<td>$4.00</td>
<td>$62.00</td>
<td>$86.95</td>
</tr>
<tr>
<td>Grand Total</td>
<td>$11.85</td>
<td>$9.28</td>
<td>$17.15</td>
<td>$38.28</td>
</tr>
</tbody>
</table>

Source: urbanMetrics inc.
4 HOW WELL IS DOWNTOWN SERVING THE CITY

4.1 ON-STREET VISITOR INTERCEPT SURVEY

Further to the information presented in the previous section, the on-street intercept surveys also included questions relating to the level of satisfaction patrons of Downtown Burlington experienced in terms of the availability of specific types of retail and service facilities located in the downtown.

Similarly, respondents were also asked to provide examples of the specific types of improvements that they would like to see in Downtown Burlington.

The various types of retail, service and entertainment facilities that respondents would like to see added to Downtown Burlington are summarized in Figure 4-1.

As shown, approximately 37% of all respondents indicated that they would like to see a new movie theatre added to the downtown; particularly one that offers “first-run” films. This is particularly relevant, given that these responses were provided prior to the announced closing of the Encore Theatre in Upper Canada Place – the only cinema in the downtown core.

Similarly, more than one fifth (21%) of respondents desired more specialty food store options, such as bakeries and delis, while nearly one quarter (23%) indicated that they would make use of new restaurants, pubs, cafes and fast food establishments if they were located downtown.

Furthermore, approximately 25% of survey participants indicated that there were “other” types of commercial establishments that they would like to see added to the downtown as well. The majority of these responses related to the expansion of entertainment options for younger residents and visitors; particularly those in the 19-34 age group. The following provides a sample of some of the specific entertainment-based facilities desired:

- Night clubs;
- Amphitheatre / concert stage on the waterfront;
- Amusement park;
- Live music venues and/or clubs; and,
- Pool halls and bowling alleys.
FIGURE 4-1: RETAIL, SERVICE AND ENTERTAINMENT FACILITIES DESIRED

- Movie Theatre: 37.3%
- Specialty Food Stores (bakeries, delis, etc): 20.5%
- Clothing, Jewellery & Accessories stores: 9.9%
- Full-Service Restaurants & Pubs: 9.6%
- Cafes: 7.5%
- Fast Food Restaurants: 6.2%
- Hair Salon/Beauty Parlour/Spa: 3.1%
- Furniture, Home Furnishings & Electronics stores: 2.4%
- Other: 25.0%

Source: urbanMetrics inc.
In terms of the additional improvements that the City could make to the downtown, responses were relatively evenly distributed across a wide variety of topics.

Among the most frequent responses included comments relating to finishing construction of the pier project at the foot of Brant Street and the waterfront. In fact, more than one quarter of respondents (26%) offered this suggestion as one of the top improvements the City could make to the downtown.

Other commonly proposed improvements included:

- Better/more frequent transit options;
- More affordable housing near the waterfront;
- Establishing priority for pedestrians and cyclists;
- Permanent/more frequent street closures;
- Free parking to compete with larger shopping centres;
- More public art installations;
- Beautification and streetscape improvements along Brant Street; and,
- Expansion of available park space.
4.2 DOWNTOWN PUBLIC WORKSHOP VISIONING

During the Downtown Public Workshop public consultation event – which was held on November 7, 2012 at the Burlington Art Centre – local residents, business owners, and other members of the public were asked to participate in an interactive “visioning” exercise. This exercise involved polling participants based on questions that related to both the current and future states of the downtown.

In total, more than 130 members of the public participated in this exercise, of which approximately 64% were residents of the downtown. In addition, approximately 18% of these participants indicated that they were the owner of a business located in Downtown Burlington.

The following provides a brief summary of the results of this exercise and generally focuses on the following topics considered during the public consultation event:

- Participants’ overall satisfaction with the current state of Downtown Burlington;
- The specific functions that require the most attention by the City;
- The top things that participants would like to see added to Downtown Burlington; and,
- The specific types of retail and service commercial facilities that people would like to see added to Downtown Burlington.

As indicated in Figure 4-2, the majority of people who attended the public consultation event agreed that Downtown Burlington already “has a lot going for it”. In fact, more than 87% of respondents either agreed or strongly agreed with this statement, whereas less than one percent disagreed or strongly disagreed. The balance of the participants (11.5%) were neutral in their opinion on the current state of the downtown.

These results strongly confirm that Burlington already has a very healthy and attractive downtown, which is generally meet the needs of local residents.
FIGURE 4-2: CONFIDENCE IN DOWNTOWN

"DOWNTOWN BURLINGTON CURRENTLY HAS A LOT GOING FOR IT"

Source: urbanMetrics inc.
Despite their overall satisfaction with the area, however, participants also confirmed that there were several aspects of the downtown that require improving.

In particular, many respondents were of the opinion that the downtown needs to a better job of serving as a **neighbourhood shopping destination**. A consensus was not reached on this topic, however, as votes were distributed relatively evenly among the options provided.

![Figure 4-3: Functions Most Needing Attention by the City](image)

Source: urbanMetrics inc.
Participants at the event also voted on the top things that they would like to see added to Downtown Burlington. As summarized in Figure 4-4, the top three selections related to the addition of new retail/service commercial and entertainment facilities in the City's core.

Specifically, the top three categories identified below accounted for more than half of the responses; with **entertainment opportunities**, **retail stores** and **restaurants/cafes** receiving approximately 54% of the votes overall (i.e., 21.6%, 17.1% and 15.2%, respectively).

FIGURE 4-4: TOP THINGS BURLINGTON NEEDS MORE OF

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment Opportunities</td>
<td>21.6%</td>
</tr>
<tr>
<td>Retail Stores</td>
<td>17.1%</td>
</tr>
<tr>
<td>Restaurants &amp; Cafes</td>
<td>15.2%</td>
</tr>
<tr>
<td>Parks and Open Space</td>
<td>13.6%</td>
</tr>
<tr>
<td>Places to Live</td>
<td>10.9%</td>
</tr>
<tr>
<td>Office Space</td>
<td>8.5%</td>
</tr>
<tr>
<td>Personal Services</td>
<td>6.7%</td>
</tr>
<tr>
<td>Activities for Kids</td>
<td>5.1%</td>
</tr>
<tr>
<td>Fast Food Establishments</td>
<td>1.3%</td>
</tr>
</tbody>
</table>

Source: urbanMetrics Inc.
4.2.1 ROUND TABLE DISCUSSIONS (TABLE TOPICS)

In addition to the visioning portion of the meeting which was conducted with the entire group of some 130 stakeholders, the participants were redistributed into smaller round tables to further develop the ideas and issues presented previously. The following provides a high-level overview of the types of comments that were collected during these table topic discussions; particularly as they relate to how well Downtown Burlington is currently meeting the needs and wants of the City’s residents from a commercial perspective.

- There was an overwhelming number of comments from the public indicating that they would like to see more specialty food stores in the downtown; including butchers, fish markets, bakeries, gourmet food shops, fresh produce/fruit stores; organic/health food stores and options for vegans/vegetarians/gluten-free shoppers.

- Similarly, participants also indicated that there was a need for a second supermarket/grocery store in the downtown, which confirm the results of both the on-street intercept surveys and visioning exercise.

- A farmer’s market was also frequently identified as a highly sought-after option for local residents to purchase fresh produce and related food items.

Other suggestions of the types of retail/service facilities that were desired in the downtown mainly related to neighbourhood-oriented retail establishments, such as hardware stores and pharmacies/drug stores.

Similarly, other frequently mentioned topics included:

- The redevelopment/revitalization of the Village Square site;

- Adding more entertainment venues (e.g., live music venues, etc.)

- Expanding transit options;

- Increasing the supply of parking (e.g., more multi-storey parking structures);

- Improving cycling and pedestrian networks (i.e., dedicated lanes, safer, better lighting, bicycle parking options, connections with downtown from waterfront);
- Improving **way-finding and signage** (e.g., maps, directories, street signs)
- Providing more **affordable shopping** options;
- Establishing more **affordable housing options** for all demographics (e.g., young families and singles);
- Attracting more **educational institutions** (e.g., university/college campuses or satellite campuses); and,
- Adding **more green space** and expanding other existing **public spaces**.
5 FUTURE CHALLENGES AND TRENDS

The following provides a brief summary of some of the specific trends and challenges that Downtown Burlington can expect to face in the coming years and the types of factors that will drive future change in the area. A more detailed summary of the future challenges and trends faced by the retail sector in general has been provided in the Burlington Commercial Market Analysis Report, which has been compiled as part of this assignment.

5.1 AGING RESIDENTIAL POPULATION

Similarly to most communities across Ontario, the City of Burlington will need to plan for an aging residential population; particularly as the "baby-boomer" generation reaches post-retirement (i.e., 65+).

This will mean significant adjustments to the housing stock across the entire City, from more compact low maintenance residential formats, to retirement homes and assisted living facilities. Downtown, with its pedestrian environment, access to services and proximity to the hospital can play an important role in housing and serving the City's aging population.

From a commercial perspective, this demographic shift will require new types of retail/service facilities to serve this expanding senior population. For example, the City can expect an increase in demand for pharmacies and drug store space, as well as other health-care related services in the downtown.

With the aging population, there will also be an decreased reliance on single person private automobile trips and the need to enhance transit and pedestrian travel to and within the downtown core.

5.2 CHANGING SOCIAL AND ECONOMIC STRUCTURAL PATTERNS

The social circumstances of consumers are also undergoing significant change. Is the movement of the baby-boom generation through the lifecycle leading to a much older population with different shopping patterns, but traditional family structures are also changing, with fewer children, a larger proportion of two-parent families in which both parents work, more lone parents and more people living on their own. Many consumers in these groups, particularly two-parent working families, and especially lone parents, have significant time management
issues, which has led to different shopping patterns than in the past. For example, there has been a trend towards fewer shopping trips, with larger volumes consumed per trip. This “stocking-up” behaviour has led to the rise of large format food stores, warehouse membership clubs, and the inclusion of major food components in non-food stores, such as department stores and drug stores. As discussed below, internet shopping at sites owned by both traditional retailers, as well as, new retail players, such as Amazon, E-Bay, Craig’s List, and Kijiji, are taking on an ever expanding role in terms of catering to the time-starved shopper.

Consumers are becoming more culturally diverse and more urban. Although Burlington is less culturally diverse than much of the GTA, the overall growth in the new-Canadian market will be significant and will likely spread into new areas in the future. Many parts of the GTA, such as Markham, Scarborough, Toronto, and Brampton, have already experienced ethnically influenced retail developments that have challenged traditional planning policies.

It has been several decades, since Canada’s households were typified by the “dad, stay-at-home mom and kids” scenario. The modern Canadian Family is smaller, and a majority include no children. Increasing numbers of Canadians are actually living alone, and for seniors in particular, this household arrangement can be problematic depending on their access to transportation. It is becoming increasingly important to ensure that residential areas, likely to attract seniors, have easy access to food shopping, services and other required commercial and institutional resources. As for those Canadian families that do have children, family formation is on average occurring later in life, at a time of greater financial stability, and family resources support a smaller number of children. A significant number of children, however, live in lone-parent homes, putting additional pressures on the time strapped consumer.

More than three quarters of food expenditures go towards purchases from stores, where consumers have benefited from a sustained, long-term decline in most commodity prices. Changing household time constraints over the last two decades have brought significant changes in food consumption patterns. For example, the average meal preparation time has fallen, reliance on processed and store-prepared food has increased, and purchases of fast foods have grown. While there has been a movement towards, healthy alternatives to processed and fast foods, the issue is less centred on consumer education and more on the time-strapped lifestyles of the modern Canadian consumer.

The challenge faced by planners is how to increase personal time and cater to new consumer needs by creating more efficient urban environments.
5.3 POPULATION & EMPLOYMENT GROWTH

As detailed in the second section of this paper, in order for Burlington’s Urban Growth Centre to meet the intensification and density targets set out in the Province’s Growth Plan, it would need to accommodate an additional 9,400 new residents and jobs between 2006 and 2031. Depending on the ratio of jobs to residents, the Growth Centre would likely represent the single largest concentration of new population growth in the City over the next 20 years. In addition to the Growth Centre, other corridors and nodes within the Primary Trade Area for the Downtown (i.e. bounded by King Road, the QEW, Walkers Line and the Lake), also represent prime intensification areas. As a result, the population within downtown’s Primary Trade Area will accommodate the majority of new growth in the City to 2031.

Based on the inventory and population in the core, the commercial space in the downtown is adequately serving the local residential population, although as noted previously, some gaps do exist. There does not appear to be an oversupply in the area of local serving uses. And in some categories, such as restaurants and services, the downtown population benefits from activities supported by a much broader population.

Future population growth will ultimately require an increase in local serving retail facilities, such as food stores, pharmacies/drug stores, and personal services.

To a large extent, residents and employees require different retail and services. Overall local residents will require more space locally, particularly in the categories of supermarkets, specialty food, pharmacies, personal services, medical/dental services, financial services and some other services. Employees and businesses have a strong need for nearby services, such as, restaurants and fast food outlets, financial services, business support services, professional office; as well as, selected retail outlets, such as pharmacies and office supply stores. The ability of a downtown to draw on a multiple number of markets (e.g. local residents, businesses, tourists, students, etc.) allows for a broader merchandise mix than would other wise be the case, to the benefit of all downtown stakeholders.

Based on the analysis conducted in The Commercial Market Study, the growth in downtown’s Primary Trade Area to 2031 could support some 190,000 square feet of additional retail and services space in the downtown.

The six future development sites in the core (Parking Lots A and B, 2042 Lakeshore, Tudor Square, 392 Pearl, 779 Brant Street) currently comprise some 273,000 square feet of land area (6.2 acres/2.5 ha). In order to accommodate future commercial space requirements on
these sites, it would be necessary to achieve a ground floor commercial coverage of approximately 70%. This will be difficult to achieve given the need for parking, setbacks, landscaping, and non-commercial uses.

For this reason, it will be important to promote the development of ground floor commercial space on these sites. There will likely be a need to identify other opportunities to integrate new ground floor commercial space and to discourage conversions from functional retail commercial space in existing buildings.

It will be particularly important to plan for a mix of unit sizes, including larger units for food stores and to ensure that parking requirements are sufficiently flexible to encourage new retail development in the core.

5.4 E-RETAILING AND NON-STORE RETAILING

With the birth of the Internet in 1993 came E-commerce or on-line shopping. For Canadian consumers, the value of internet shopping comprised $15 billion in 2009, compared to almost $8 billion in 2005. Although E-commerce continues to grow, it still represents only a small portion of total retail trade ($415 million in 2009 in Canada). It is expected that as younger, Internet-savvy customers mature and Internet-usage becomes more widespread over time among consumers of all ages, E-commerce will become increasingly relevant. Furthermore, on-line powerhouses, such as EBay and Amazon, are aggressively growing the overall on-line market. Because there for most shoppers, the in-store experience is still an essential part of their shopping trip, the majority of internet shopping has tended to be concentrated in a relatively small number of retail categories. According to a Statistics Canada survey, the most common types of online shopping continue to be travel services; entertainment products such as concert tickets; books and magazines; and clothing, jewellery and accessories.

Statistics Canada indicates that the Internet has become a supplement to traditional retail shopping more than a substitute for many Canadians. Most major “brick and mortar” chains, as well as many independent retailers, also now provide on-line shopping.

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* Retail commercial ground floor coverage in a suburban single use setting is approximately 25%.
Based on the surveys conducted by urbanMetrics in Burlington, some 22% of telephone survey respondents and 43% of on-line survey respondents made internet purchases over the past month. The most popular purchasers were retail items including books, movies, music and other merchandise, whereas tickets and other travel related services accounted for the greatest value of online expenditures.

Recent bankruptcies and store closures (Borders bookstores; Blockbuster Video; HMV; Best Buy) are testimony to the impact of on-line competition in some of these categories.

In addition to Internet shopping, home shopping through catalogues continues to expand. There are hundreds of companies, many of which are USA based, which provide catalogues for telephone or on-line shopping (e.g. LL Bean, Lands End, Avon, Sears). Canada Post is promoting BorderfreeTM for barrier-free and hassle free shopping by partnering with international companies in an effort to simplify shipping procedures. Most of these companies have catalogues.

Although it still represents a relatively small share of overall spending, internet shopping is growing and is making a number of retail stores and service providers redundant to varying degrees. Many of these have been commonly found in downtowns, including:

- Book stores;
- Recorded music stores;
- Electronics stores;
- Travel agencies; and
- Computer and gaming software.

At the same time, however, e-retailing has reduced the importance of location for specialized retailing. This provides an opportunity to attract specialized retailers with e-retailing capabilities to downtown to take advantage of lower rents than would be found in shopping centres and an ambience that may support their product’s image.
5.5 RETAIL DEVELOPMENT TRENDS

With urban intensification and the saturation of many power centre markets, many retailers are developing “urban-scale” formats targeted at more densely populated areas. In particular, many of the major Canadian and American retail chains that typically locate in low density power centres are now introducing smaller store formats that could potentially locate in a downtown environment, such as that in Burlington (e.g., Best Buy, Future Shop, Walmart, Target).

Of particular relevance are the urban formats of the major supermarket chains, including Loblaws, Metro, Sobeys and Longos; all of which now operate stores in mixed use projects with underground parking.

In addition, the Canadian market has also recently seen the introduction of several new American and other international retail chains, such as Target, Marshall’s, Victoria’s Secret and J Crew. Initially these chains will locate in power centres and shopping centres. In the short term, this may add to the regional retail competition faced by the Downtown. In the longer term, with increased population in the core, this may increase opportunities to attract new tenants.

**FIGURE 5-1: LONGOS - MAPLE LEAF SQUARE, TORONTO WATERFRONT**
5.6 CHALLENGES

Unlike shopping centres and power centres, downtowns face unique challenges, which must be recognized in future planning, including:

- The cost and perceived inconvenience of parking;
- Traffic circulation;
- Reduced access for delivery trucks;
- Shorter and un-co-ordinated store hours;
- Pedestrian movement during inclement weather;
- Absentee landlords and varying resources to maintain private buildings; and,
- Above average costs to repair, maintain and upgrade older buildings.

It must be remembered that these issues can be addressed to varying degrees and for successful downtowns, they are able to thrive in spite of these challenges.

Downtown Burlington also has a challenge in that most of its retailing is situated on a single linear spine on Brant Street extending some two kilometres from Lakeshore Road to Fairview Street. This lack of concentration will impede cross-shopping, pedestrian movement and a critical mass attraction.
6 SUMMARY AND CONCLUSIONS

The following provides a summary of our professional recommendations and conclusions, based on the various research and information presented in this paper.

6.1 CURRENT STATE OF THE DOWNTOWN

Downtown Burlington compares very favourably to other successfully functioning downtowns in the GTA, such as Oakville, Waterloo, and Whitby. All of the following characteristics point to the vibrancy of Downtown Burlington as it currently exists today:

- the scale of the commercial core;
- low vacancy rates in prime areas;
- recent residential development activity and interest;
- public sector investment in the downtown and waterfront; and,
- the continued focus on civic events.

Equally as important, is the confidence that Burlington residents have in the core, which has been exhibited through the Downtown workshop, and other direct consumer survey information gathered as part of this study. This will be particularly important going forward, as Downtown Burlington expands its role as an Urban Growth Centre and Mobility Hub.

6.2 FUNCTIONS OF THE DOWNTOWN

Downtown Burlington is a multi-functional core, which has strength in a number of areas:

- Neighbourhood Retail Centre;
Specialty Retail Destination;
Place to Live;
Place to Work;
Cultural and Recreation Centre;
Government Centre; and,
Service Centre.

While the Downtown, appropriately serves the City through these functions today, in the future some of these roles will have to expand to meet the requirements of the Growth Plan. It will have to adopt new residents, largely through intensification. This will ultimately increase the need for additional neighbourhood serving commercial opportunities, such as food stores, services, restaurants, and convenience retail outlets. Similarly, the increase in employment called for by the Growth Plan, will also require additional commercial space to support the enlarged workforce and business base.

Based on the extensive consumer research conducted as part of this study, both downtown stakeholders (i.e. downtown residents, workers and business owners) and the broader City population support these functions for downtown and would like to see policies that allow them to thrive.

Functions, which are less readily acknowledged by downtown stakeholders and the broader Burlington population, include:

Regional serving retail, including large format retailers, department stores, and the types of uses that would be more likely to locate in power centres and the large shopping centres;
Centre for major office buildings; and,
Education Centre.

In terms of regional retail, while there was support to expand this function, it was less prevalent than the other existing functions. The stakeholders were stronger in their desire to attract more office development and educational uses to downtown Burlington.
We would note that the challenge faced by the City will be how to make downtown Burlington attractive to major office and educational uses and how to accommodate them within the existing urban fabric.

6.3 FUTURE CHALLENGES AND TRENDS

The future direction of downtown will be heavily influenced by a number of prevailing trends:

- Its mandated growth as a provincial Urban Growth Centre; and,
- The aging Ontario population
- Changing social and economic structural patterns.

As a mandated growth centre, the City will be required to plan for an expansion of nearly 70% more persons and jobs in the downtown than currently exists today. Additional population will require supporting services, such as new retail stores, personal services, schools, and similar activities. While there are some key development and intensification sites in the core, it is unlikely that the required population and employment can be accommodated within single function buildings. Future policies must encourage mixed use development and ensure that it occurs in a manner that can accommodate the required supporting commercial and institutional services.

The aging population will also place challenges on the public and private sector infrastructure and the downtown is uniquely suited to become a focal point for the City’s seniors; owing to its concentration of residential apartments, access to retail and services, the pedestrian friendly environment, proximity to the hospital and availability of transit.

Changing family structural patterns, and the resulting time crunch, have changed the way Canadians shop – giving rise to large format food retailing and an increase in the consumption of fast foods and processed foods. Seniors living alone, may be particularly challenged by recent retail development patterns, which favour large centralized retail destinations over neighbourhood shopping nodes. The challenge for planners will be to create a more efficient urban structure.
In terms of the retail sector, while growth in large format retailing is slowing and some major chains are developing more urban friendly modules, the entry of US and foreign retailers and the investments being made into revitalizing older suburban centres, will likely make it difficult for downtown to compete as a regional shopping destination within the City.

As indicated by the surveys, only a small portion of visitors came to the downtown to specifically shop, but shopped because they were there for some other purpose (e.g. downtown resident, downtown employee, visiting the waterfront, attending a performance, etc.). In our opinion, ensuring that this supporting function can continue to thrive should be the primary goal of a retail strategy for the core. More specialty and regional serving retail components will naturally evolve as the downtown grows.
7 PRELIMINARY POLICY RECOMMENDATIONS

Based on the information presented in the previous sections of this paper, as well as the various other research undertaken by our project team to date, the following provides a number of preliminary policy recommendations, which relate specifically to the downtown. Additional detail with regards to these recommendations is contained in the Phase 1: Commercial Policy and Design Review Background Report.

In particular, the recommendations presented on the following pages relate to the following:

- The Downtown Boundary and its Structure;
- Establishing Minimum Density Targets;
- Establishing Specific Mixed-Use Density Targets;
- Establishing a New Retail Structure; and,
- Providing Incentives for Intensification and Non-Residential Development.

7.1 DOWNTOWN BOUNDARIES & STRUCTURE

Currently, the City’s core is delineated by two boundaries: the Provincial Urban Growth Centre (UGC) boundary, and the City’s Downtown Mixed Use Centre boundary (Figure 7-1). The Provincially designated UGC boundary is an irregular boundary that extends across parts of the Downtown proper, mainly along the Maple Avenue, Lakeshore Road, and Brant Street corridors, terminating in the northwest at Prospect Street. The City’s Downtown Mixed Use Centre boundary covers a broader area associated with the Downtown, bounded by Baldwin Street in the northwest, extending out to Clarke Avenue/Maple Street/the QEW in the west and southwest, and roughly Torrence Street in the east.

In support of the ongoing work regarding the Core Commitment for the Downtown, the City has identified the need to rationalize the Downtown boundaries. As part of this exercise, it is important to consider, what is the purpose of establishing a boundary? From a community
planning perspective, a boundary is used to identify an area that functions as a system and/or has common built form characteristics and transportation infrastructure, and to then develop a framework for managing change (i.e. growth) over time in a way that preserves the unique characteristics of the area, while enhancing the physical and social fabric of the established community. From a commercial planning perspective, boundaries are used to identify hubs of contiguous retail and other commercial activity that function as a system and/or have common characteristics in their built form and/or they types of products and services that are offered. The commercial planning boundary may also reflect the destinations (home addresses) of customers.

Using these criteria, strategic consideration should be given to generally maintaining the City's existing boundary for the Downtown, with some minor modifications (e.g. removing the southern most portion of the current designation along the Burlington Skyway where the land uses and block configurations are inconsistent with the remainder of the core). To operationalize the UGC designation, strategic consideration should also be given to identifying an urban corridor northwest of the Downtown along Brant Street, and to revisiting the precinct designations within the Downtown to ensure density distributions are informed by the UGC boundary (i.e. the area where the highest densities should be directed).

**FIGURE 7-1: EXISTING BOUNDARIES FOR DOWNTOWN BURLINGTON**

**FIGURE 7-2: PROPOSED DOWNTOWN BOUNDARY**
Core Commitment has defined eight precincts within the downtown core. This work should be refined in policy by recognizing:

- **Core and Main Street Retail Areas**, which would generally be concentrated around the historic main street shopping district (i.e., Brant Street and other adjacent streets); reflecting the commercial hierarchy in downtown;

- **Opportunity Areas**, where opportunities for future development have been identified or are anticipated;

- **Stable/Established Residential Areas**, including those located to the immediate east and west of the commercial core of the downtown;

- **Transition Areas**, including the stretch of Brant Street directly north of the core commercial area of downtown, as well as east and west of Brant Street on Lakeshore Road; and,

- **Tourist & Cultural Areas**, which would be focused along the waterfront and near other existing or potential new cultural amenities in the downtown with restrictions on private development.

### 7.2 Minimum Density Targets

Currently, the Official Plan incorporates the Provincially mandated minimum density target of 200 people and jobs per hectare for the Downtown as a whole. Strategic consideration should be given to developing minimum density targets for different areas of the Downtown to facilitate density distributions that reflect the existing and planned built form and block configurations, in line with the UGC and mobility hub designations. These minimum density targets could be integrated with existing height and density policies for the various Downtown precincts and would help to comprehensively plan for and monitor the intensification of Burlington’s Downtown.

### 7.3 Specific Mixed Use Targets

To optimize the use of transit and strengthen the area’s economic base, one of the objectives for the Downtown is to attract more office and institutional land uses. Beyond economic development activities, there are a number of policy strategies the City could consider to encourage this type of development, including establishing mixed use targets (i.e. % requirements) for the different precincts, and establishing a jobs-to-residents target ratio.
7.4 A NEW RETAIL STRUCTURE

With regard to commercial uses in the Downtown, strategic consideration should be given to permitting retail and service-related uses more broadly throughout all areas of the Downtown. Currently, commercial uses are not permitted throughout much of the area, and this is inconsistent with the characteristics of a complete urban community. To better integrate commercial uses throughout Downtown neighbourhoods, retail permissions/requirements could be de-linked from the precinct designations and re-introduced through new “retail priority streets” designations. Proposed retail street categories are outlined in Table 7-1.

FIGURE 7-1: PROPOSED RETAIL STREET CATEGORIES

<table>
<thead>
<tr>
<th>Retail Street Category</th>
<th>General Description</th>
<th>Principles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Street Retail</td>
<td>Historic/traditional mixed use areas with existing small-scale street-oriented retail</td>
<td>At-grade retail required, City-wide and neighbourhood commercial function, with a broad range of retail types, including specialty shops and restaurants, Reflect existing built form, with narrow, active street frontages</td>
</tr>
<tr>
<td>Mixed Use Major Street</td>
<td>Mixed use areas with a broad range of retail formats, including small and large</td>
<td>At-grade retail required, City-wide commercial function, Street-oriented, with narrow street frontage, Encourage articulation of storefront and frequent entries for large format uses</td>
</tr>
<tr>
<td>General Mixed Use Street</td>
<td>Mixed use streets that are primarily residential</td>
<td>At-grade retail permitted, but not required, Neighbourhood commercial function, Require commercial-grade design for first storey (e.g. minimum floor-to-ceiling heights) to facilitate land use flexibility and adaptability over time, Avoid creating barriers for future at-grade retail</td>
</tr>
<tr>
<td>No Retail</td>
<td>Select low-rise residential streets</td>
<td>At-grade retail not permitted as-of-right</td>
</tr>
</tbody>
</table>
7.5 PROVIDE INCENTIVES FOR INTENSIFICATION AND NON-RESIDENTIAL DEVELOPMENT

In addition to establishing mixed use targets for different precincts in the Downtown, the City should consider identifying a Primary Office/Institutional Core Area, and providing incentives for new office development, such as reduced automobile parking standards and reduced parkland dedication requirements. The City could also consider a linkage requirement, whereby approval for residential development is tied to the inclusion of non-residential development within the development site.