OFFICIAL PLAN REVIEW – COMMERCIAL STRATEGY STUDY
CITY-WIDE STRATEGIC RECOMMENDATIONS

SEPTEMBER 12, 2013 (9:30 AM – 12:00 PM)

COMMERCIAL STAKEHOLDER MEETING PRESENTATION (1)
Stakeholder Meeting Overview

- Introduction
- Commercial Market Supply & Demand Analysis (urbanMetrics inc.)
- Questions and Comments – Market Conclusions
- Commercial Policy & Design Recommendations (The Planning Partnership)
- Questions and Answers – Recommendations
- Next Steps
Introduction
Purpose of Phase 1 Studies

- Determine Future Commercial Facilities Required.
Purpose of Phase 2-3 Studies

- Formulate Strategic Commercial Policy and Design Recommendations
- Provide Generic Urban Design guidelines for Development, Redevelopment and Revitalization of Commercial Lands (Excluding Downtown)
Purpose of Stakeholder Meetings

- To solicit feedback from the business community as it relates to:
  - Identifying areas of concern and opportunities; and,
  - Identifying potential policies and actions.

- To provide participants with an opportunity to provide feedback on our preliminary research findings, policy directions and design recommendations.
Commercial Market Supply & Demand Analysis
10.6 million square feet of retail and services space

On per resident basis, higher than most GTA municipalities

Growth in retail and services space has outpaced population growth in past 10 years

But vacancy rate of 5% still indicative of balanced market

Above average space related to higher incomes and strategic location of City
DISTRIBUTION OF EXISTING COMMERCIAL SPACE

- Food Store Retail (FSR) 9.4%
- Non-Food Store Retail (NFSR) 45.3%
- Other Retail (LBW) 1.0%
- Services 39.3%
- Vacant 5.0%
Per Capita Retail Space

**PER CAPITA RETAIL SPACE (NFSR)**

<table>
<thead>
<tr>
<th>City</th>
<th>Per Capita Retail Space</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ajax (2009)</td>
<td>14.9</td>
</tr>
<tr>
<td>Brampton (2009)</td>
<td>15.4</td>
</tr>
<tr>
<td>Oakville (2005)</td>
<td>17.7</td>
</tr>
<tr>
<td>Markham (2004)</td>
<td>19.3</td>
</tr>
<tr>
<td>Whitby (2006)</td>
<td>19.4</td>
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<tr>
<td>Vaughan (2009)</td>
<td>19.7</td>
</tr>
<tr>
<td>Newmarket (2009)</td>
<td>25.6</td>
</tr>
<tr>
<td>Average</td>
<td>37.8</td>
</tr>
<tr>
<td>Burlington (2012)</td>
<td>20.8</td>
</tr>
<tr>
<td>Burlington (2002)</td>
<td>26.2</td>
</tr>
<tr>
<td>Average</td>
<td>20.4</td>
</tr>
</tbody>
</table>

**PER CAPITA RETAIL SPACE (FSR)**

<table>
<thead>
<tr>
<th>City</th>
<th>Per Capita Retail Space</th>
</tr>
</thead>
<tbody>
<tr>
<td>Richmond Hill (2008)</td>
<td>3.2</td>
</tr>
<tr>
<td>Ajax (2009)</td>
<td>3.8</td>
</tr>
<tr>
<td>Pickering (2009)</td>
<td>4.3</td>
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<tr>
<td>Oakville (2005)</td>
<td>4.3</td>
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<tr>
<td>Whitby (2006)</td>
<td>4.7</td>
</tr>
<tr>
<td>Vaughan (2009)</td>
<td>4.7</td>
</tr>
<tr>
<td>Waterloo C (2009)</td>
<td>4.9</td>
</tr>
<tr>
<td>Markham (2004)</td>
<td>5.2</td>
</tr>
<tr>
<td>Newmarket (2009)</td>
<td>5.9</td>
</tr>
<tr>
<td>Average</td>
<td>6.2</td>
</tr>
<tr>
<td>Burlington (2012)</td>
<td>5.5</td>
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<tr>
<td>Burlington (2002)</td>
<td>5.4</td>
</tr>
</tbody>
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Commercial Market Characteristics

CITY OF BURLINGTON TRADE AREA (overlaid with Licence Plate Survey Results)

- PZ (49.5%)
- SZ EAST (6.1%)
- SZ WEST (5.2%)
Commercial Market Characteristics

- Projected Population Growth to 2031: 12,600
- Population Growth in and Near UGC: 7,000
- % of Burlington Non-Food $ Made in Burlington: 85%
- % Inflow into Burlington from Other Municipalities: 30%
# Market Demand and Supply

## Market Demand to 2031 (Square Feet)

<table>
<thead>
<tr>
<th>Category</th>
<th>Square Feet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Food Store Retail</td>
<td>1,192,200</td>
</tr>
<tr>
<td>Food and Liquor</td>
<td>108,000</td>
</tr>
<tr>
<td>Services</td>
<td>246,300</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,546,400</strong></td>
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</tbody>
</table>

## Committed Space (Square Feet)

<table>
<thead>
<tr>
<th>Category</th>
<th>Square Feet</th>
</tr>
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<tbody>
<tr>
<td>Immediate Prospect</td>
<td>125,268</td>
</tr>
<tr>
<td>Other Proposals</td>
<td>721,350</td>
</tr>
<tr>
<td>Unbuilt with Approvals</td>
<td>347,354</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,193,972</strong></td>
</tr>
</tbody>
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**Uncommitted Demand** 352,428
Required Future Commercial Space

- 352,428 sq ft – Uncommitted Demand
- 190,500 sq ft – Downtown (Urban Growth Centre)
- ~160,000 sq ft – Elsewhere in Burlington

Space should support new growth in:

- Urban Growth Corridors;
- Mixed Use Areas; and,
- Local Serving Commercial Areas.
Supply of Future Commercial Lands and Intensification Opportunities will Satisfy Demand to 2031

No Need to Designate Additional Commercial Land Other than to Support Intensification or Underserved Local Areas

Conversion of Employment Lands to Support Future Retail Development is Not Required
Commercial Policy & Design Recommendations
How should the current commercial planning policy and design framework be modified to address the current and future needs of the City?
Burlington’s land use policies for commercial uses already:

- promote higher quality urban design
- provide a number of safeguards against car-oriented development
- signal a transition to a mixed use approach to commercial land use planning that is based on the intensification framework
- include policies to guide the transformation of traditional commercial areas
Summary of Recommendations

1. A revised commercial hierarchy
2. Fine-grained dispersion of commercial uses
3. Restricting the scale and concentration of retail development
4. Incentives
5. Restricting auto-oriented land uses
6. Car parking supply
7. Parking lot design
8. Bicycle parking supply
9. Urban design guidelines
## 1. The Proposed Commercial/Mixed Use Hierarchy

<table>
<thead>
<tr>
<th>Proposed Designation</th>
<th>Existing Designation</th>
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<tbody>
<tr>
<td>Urban Core</td>
<td>Downtown Mixed Use Centre</td>
</tr>
<tr>
<td>Urban Centre</td>
<td>Uptown Mixed Use Centre</td>
</tr>
<tr>
<td></td>
<td>Regional Commercial</td>
</tr>
<tr>
<td></td>
<td>Community Commercial</td>
</tr>
<tr>
<td>Urban Corridor</td>
<td>Mixed Use Corridor - Commercial</td>
</tr>
<tr>
<td></td>
<td>Mixed Use Corridor - General</td>
</tr>
<tr>
<td></td>
<td>Mixed Use Corridor - Employment</td>
</tr>
<tr>
<td>Neighbourhood Centre</td>
<td>Community Commercial</td>
</tr>
<tr>
<td></td>
<td>Neighbourhood Commercial</td>
</tr>
<tr>
<td>Neighbourhood Corridor</td>
<td></td>
</tr>
<tr>
<td>Neighbourhood Node</td>
<td></td>
</tr>
</tbody>
</table>

Additional designation of commercial interest:
- Employment Commercial
Built Form Precedents

Urban Core

Urban Centre

Urban Corridor

Neighbourhood Centres and Corridors

Neighbourhood Node

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2. Fine-grained Dispersion of Commercial Use

Permitting convenience commercial and service commercial uses in close proximity to where people live and work is essential for fostering a transition towards complete communities.

Recommendations:

- Amend land use policies under Part III of the Official Plan to permit small-scale, pedestrian-oriented convenience and service commercial uses throughout Residential Areas subject to size restrictions, locational criteria, and any other conditions deemed necessary.
3. Restricting the Scale & Concentration of Retail Development

GFA and percentage limits are used to prevent the proliferation of car-oriented large-format retail uses and an over-concentration of large retail uses in one area.

Recommendation:

- Establish retail GFA limits/composition caps for all of the proposed mixed use/commercial designations.
4. Incentives

Incentives can be used to encourage developers to build the type and form of development that is desired by the City to meet its planning objectives.

Recommendations:

- Develop a set of incentives that may include reduced parking requirements, increased commercial floor space limits, increased density and other tools.

- Use the incentives to promote the dispersion of street-related commercial uses within mixed use buildings and in proximity to where people live and work.
5. Restricting Auto-oriented Land Uses

By their very form and function, auto-oriented land uses such as drive-throughs, car washes, car dealerships, detract from the walkability of places.

Recommendations:

- Prohibit specified auto-oriented land uses in intensification areas and other important nodes and corridors.
6. Car Parking Supply

Reduced car parking requirements can minimize the negative impact of parking on walkability and the design of commercial areas.

Recommendations:

- Allow developers to apply for reduced parking standards in exchange for TDM measures in all commercial and mixed use areas.
- Determine whether the use of maximum parking standards would be useful in any areas.
7. Parking Lot Design

The impact of surface parking lots on walkability and the quality of a place can be mitigated through a number of design strategies, which can be required or encouraged by a municipality.

Recommendations:

- Extend existing density incentives for providing underground parking to all commercial and mixed use areas.
- Strengthen the preference for locating parking at the side and rear of buildings by changing the wording from “should” to “shall”, and extend the requirement to all commercial and mixed use areas.
- Prohibit parking adjacent to intersections in all commercial and mixed use areas.
8. Bicycle Parking Supply

Mandatory bicycle parking requirements can be used to off-set the need for car parking and encourage cycling as a viable mode of travel for employees, visitors, and residents.

Recommendations:

- Establish more comprehensive standards and guidelines for the quantity, location and design of secure and short-term bicycle parking for all land uses in commercial/mixed use areas.
9. Urban Design Guidelines

Urban design policies and guidelines provide additional guidance for development within the public and private realm.

Recommendations:

- Develop policies that encourage transitions in scale and intensity between high, medium and low density areas
- Develop stronger policies for parking lot design in support of creating safe and walkable commercial and mixed use areas