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 Comments - Recommendations
- Next Steps
Introduction
Purpose of Phase 1 Studies

- To provide a statistical summary of the supply of and future demand for commercial facilities in the City;

- To examine the City’s existing commercial hierarchy, Official Plan policies and commercial development design guidelines; and,

- To determine how well this existing policy framework addresses the current and future commercial needs of the City.
Purpose of Phase 2-3 Studies

- To formulate strategic commercial policy and urban design recommendations, which build on the various research and analyses conducted in Phase 1; and,

- To provide generic urban design guidelines for the development, redevelopment and revitalization of commercial lands in the City.
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.
Introduction

MAP OF DOWNTOWN BURLINGTON
Commercial Market Supply & Demand Analysis
Downtown Compares favourably to Other Successful Downtowns:

- Size of its Commercial Core
- Low Vacancy Rates in Prime Areas
- Recent and Ongoing Residential Activity
- Public Sector Investment
- Continued Focus on Civic Events
- Support by Burlington Residents
Multi-Functional Core:

- Shopping
- Working and Learning
- Living
- Playing
- Civic Presence
- Community Activities
- Transportation Hub
Where Downtown Fits

Urban Core

Urban Centre

Urban Corridor

Neighbourhood Centres and Corridors

Neighbourhood Node

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Approximately 450,000 square feet of locally-serving office space

Additional 130,000 square feet of Class “A” office space

Administrative/government functions (e.g., City Hall and 414 Locust Street)
- 1.09 million square feet of retail and services space
- 10% of total supply of retail/service space in Burlington
- 69% Services Tenants
- Vacancy Rate – 11.6%
- Excluding Chronically Underperforming Sites and Properties to be Redeveloped – 4.8%
INVENTORY OF DOWNTOWN COMMERCIAL SPACE BY MAJOR CATEGORY

- **SERVICES**: 753,077 (69%)
- **FSR**: 49,255 (5%)
- **NFSR**: 156,283 (14%)
- **OTHER RETAIL**: 6,400 (1%)
- **VACANT**: 121,684 (11%)
DOWNTOWN BURLINGTON TRADE AREA (overlaid with On-Street Intercept Survey Results)
Downtown Public Forum Findings

- Currently satisfied with downtown
- Could be improved as neighbourhood shopping destination
- Needs more:
  - Entertainment opportunities
  - Retail stores
  - Restaurants/cafes
  - Specialty food stores/farmer’s market/second supermarket
Downtown Public Forum Findings

TYPES OF RETAILERS DESIRED IN DOWNTOWN BURLINGTON

- Specialty Food (e.g., Bakery, Butcher, Cheese Shop): 25.0%
- A Farmers Market: 20.9%
- Another Supermarket: 14.1%
- Fashion & Accessories: 11.5%
- Shops for Tourists & Visitors: 9.6%
- Services: 7.6%
- Children’s Clothing Stores: 4.1%
- Discount Stores: 3.1%
- Convenience Stores: 2.3%
- None - Downtown Burlington Has Enough: 1.8%
Planned UGC Growth (2006-2031)
14,000 → 23,400 Persons and Jobs

Downtown Trade Area Growth (2012-2031)
46,000 → 53,000 Persons

Additional Retail and Services Space Needed to Serve Downtown Growth – 190,500 SQ FT
Downtown Market Conclusions

- It Will be Difficult to Accommodate All Required Space on Vacant Sites and in Vacant Units
- Need to Encourage New Development in Strategic Locations to Provide Ground Floor Retail Units
- Need to Ensure that Redevelopment Does Not Result in Net Loss of Retail Space
Commercial Policy & Design Recommendations
Downtown Recommendations

Summary of Recommendations

1. New retail structure
2. Minimum density targets
3. Mixed use targets
4. Incentives for office development
5. Enhanced design guidelines for commercial uses
1. New Retail Structure

Like food stores, retail and service-related uses help Downtown residents meet their daily needs by foot, and should be permitted more broadly throughout all areas of Downtown.

Recommendations:

- De-link the retail permissions/requirements from the Downtown precinct designations, and introduce new “retail priority streets” designations:
  - Main Street Retail (historic areas that may include small-scale retail)
  - Mixed Use Major Street (areas with larger-format retail)
  - General Mixed Use Street (primary residential streets where retail is permitted, but not required)
  - No Retail (select residential areas where retail is not permitted)

- Introduce minimum floor to ceiling heights for the ground floor of all buildings along General Mixed Use Streets to enable land use flexibility and adaptability over time.
## Proposed Downtown Retail Street Categories

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<thead>
<tr>
<th>Retail Street Category</th>
<th>General Description</th>
<th>Principles</th>
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| Main Street Retail     | Historic/traditional mixed use areas with existing small-scale street-oriented retail | 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 |
| Mixed Use Major Street | Mixed use areas with a broad range of retail formats including small and large. | 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 |
| General Mixed Use Street | Mixed use streets that are primarily residential | At-grade retail permitted but not required  
Neighbourhood commercial function  
Require commercial-grade design for first storey (e.g. minimum floor-to-ceiling heights)  
Avoid creating barriers for future at-grade retail |
| No Retail             | Select low-rise residential streets | At-grade retail not permitted as-of-right |
2. Minimum Density Targets

The Official Plan incorporates the Provincially-mandated minimum density target of 200 people and jobs per hectare for the Downtown Burlington urban growth centre

Recommendations:

- To operationalize the density target and achieve an appropriate density distribution, establish minimum density targets for different areas of the Downtown

- Consider if/how the density targets can be integrated with existing precinct designations
3. Mixed Use Targets

Mixed use development is essential to achieving a vibrant downtown, 24-7, 365 days a year.

Recommendations:

- Establish mixed use targets (i.e. % requirements) for the different precincts
- Establish a jobs-to-residents target ratio
4. Incentives for Office Development

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.

Recommendations:

- Identify a Primary Office/Institutional Core Area
- Provide incentives for office development within designated areas, such as reduced parkland dedication requirements
- Consider a linkage requirement, whereby approval for residential development is tied to the inclusion of non-residential development within the development site.
5. Enhanced Urban Guidelines for Commercial Uses

Commercial uses are distinct from other types of uses, and urban design guidance can be used to ensure commercial development contributes to a pedestrian-oriented Downtown.

Recommendations:

- Within the Downtown Urban Design Guidelines, incorporate additional details for the following categories:
  - Area-specific retail guidelines – provide greater direction for distinct areas on the appropriate scale, interface and character of retail uses and how they interface with the pedestrian realm.
  - Retail format type guidelines – provide greater direction for a variety of potential retail formats to ensure design considerations are supportive of the distinctive Downtown context.
  - Optimal retail design guidelines – provide specific direction for ensuring the optimal design of retail spaces to enhance their visibility, flexibility and prominence.