535-551 Brant Street
Economic Analysis

Independent Real Estate Intelligence

November 23, 2020



535-551 Brant Street
Economic Analysis

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EXECUTIVE SUMMARY

Altus Group Economic Consulting was retained by Renimmob Properties Inc. to analyse the potential economic and housing implications of a high-density mixed-use development proposed in Downtown Burlington.

The 0.28-hectare site is located in the Downtown Burlington urban growth centre. The subject site is currently occupied by a commercial building with several retail units. Renimmob Properties Inc. has proposed a 26-storey mixed use development with 248 residential condominium units and street-related retail uses.

The objectives of provincial and municipal planning policies include:

- Efficient development patterns that optimize the use of land and public investment in infrastructure and public service facilities;
- A density and mix of uses which efficiently use land, infrastructure and public service facilities; and
- The achievement of complete communities that offer people convenient access to most of the necessities of daily living including jobs, stores and services, transportation options and public service facilities.

The location and density of the proposed development is supportive of these objectives. Residents of the proposed development will be able to walk to a wide range of community amenities (waterfront park, cultural facilities, multi-use trails, shopping, restaurants, churches, etc.). The subject site is located along Burlington Transit Route 2, which provides a minimum of service every 20 minutes and connections to the Highway 407 GO Bus Terminal at, Burlington GO Station on the Lakeshore Line and the John St Downtown Bus Terminal. Existing and planned multi-use trails and cycling facilities are easily accessible from the subject site.

The Halton Region Official Plan allocates approximately 7,220 new units to be achieved in the built-up area of Burlington over the 2019 to 2031 period (including carrying over of the shortfall from the 2012 to 2016 period and accounting for units constructed in 2017 and 2018). On an annual basis, the target (555 units per year) is roughly 25% higher than the amount of intensification achieved in Burlington over the 2006 to 2018 period (an average of 443 units per year). The scale of the high-density building

proposed for 535-551 Brant is modest relative to the minimum amount of intensification required across the City as a whole. At least 29 new buildings of similar scale would be needed within the built-up area of Burlington over the 2019 to 2031 period to achieve the minimum intensification required under the Halton Region Official Plan (7,220 units / 248 units).

Provincial and municipal planning policies require that a significant share of Burlington's population growth and residential intensification occur in the Downtown Burlington urban growth centre. Only a small share of the City's population growth and intensification is occurring in the Downtown urban growth centre.

Of the 528 permits issued for apartments in Downtown Burlington over the 2006 to 2016 period, 501 units were in 4 high-rise developments (12 storeys or higher). Only 27 units were in the 3 lower density developments. As taller apartment buildings can make more efficient use of the constrained supply of developable land in Downtown Burlington, they typically produce substantially more new dwelling units than low-rise apartments.

Provincial and municipal planning policies require that the Downtown urban growth centre achieve a minimum density target of at least 200 residents and jobs per hectare by 2031 or earlier. To reach the minimum density target, at least 19 developments of the scale proposed for 5315-551 Brant Street would be required in the Downtown over the 2014 to 2031 period (7,387 residents and jobs / 396 residents and jobs).

The Growth Plan for Greater Golden Horseshoe does not simply permit municipalities to exceed the minimum intensification and urban growth centre density targets required under the Plan. The Growth Plan encourages municipalities to go beyond the minimum targets.

The 2020 Growth Plan allocates 320,000 more residents to Halton Region by 2051, over and above the 780,000 residents provided for in the current Halton Region Official Plan. The minimum intensification target in the 2020 Growth Plan is substantially higher than the minimum intensification target in the Halton Region Official Plan.

Over the period leading up to the next Regional municipal comprehensive review, optimizing the use of land in locations that offer convenient access to jobs, stores and services, transportation options and public service facilities

will help set the stage for the accommodation of the additional amounts of intensification required under the 2020 Growth Plan.

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1 INTRODUCTION

Altus Group Economic Consulting was retained by Renimmob Properties Inc. to analyse the potential economic and housing implications of a high-density mixed-use development proposed in Downtown Burlington.

1.1 THE PROPOSED DEVELOPMENT

Renimmob Properties Inc. development proposal consists of a property known municipally as 535-551 Brant Street. The 0.28-hectare site is located south of Victoria Ave, north of Caroline St and is between Brant St and the John St. Figure 1 (on the next page) shows the location of the subject site.

The subject site is currently occupied by a commercial building with several retail units that includes a bank branch office, a convenience store, and other uses. Adjacent lands to the subject site include a number of large parking lots, a grocery store, other retail and food service businesses, as well as residential homes.

Renimmob Properties Inc. is proposing to build a 26-storey mixed-use development with 248 residential condominium units. The proposed development is designed to provide 1,068 square metres of street-related retail space. The residential component of the development is planned to include:

- 136 one bedroom units;
- 107 two bedroom units; and
- 5 three bedroom units.

Renimmob Properties Inc. is applying for the official plan amendment ("OPA") and zoning by-law amendment ("ZBA") required for the proposed development.

1.2 APPROACH

This report examines the economic and housing implications of the proposed development in the context of provincial and municipal planning policies.

Figure 1

Location of the Subject Site



Source: Altus Group Economic Consulting based on Google Map

2 PLANNING POLICY CONTEXT

This chapter reviews the provincial and municipal planning policies which set the context for the economic analysis in this report

2.1 PROVINCIAL POLICY STATEMENT, 2020

Part IV of the Provincial Policy Statement (PPS) sets out the Vision for Ontario's Land Use Planning System including the following:

> *… Land use must be carefully managed to accommodate appropriate development to meet the full range of current and future needs, while achieving efficient development patterns …*
>
> *Efficient development patterns optimize the use of land, resources and public investment in infrastructure and public service facilities. …* and,
>
> *These land use patterns promote a mix of housing, including affordable housing, employment, recreation, parks and open spaces, and transportation choices that increase the use of active transportation and transit before other modes of travel….*

Policy 1.1.1 says:

> *Healthy, liveable and safe communities are sustained by:*
>
> > *a) promoting efficient development and land use patterns …*
> >
> > *e) promoting the integration of land use planning, growth management, transit-supportive development, intensification and infrastructure planning to achieve cost-effective development patterns, optimization of transit investments, and standards to minimize land consumption and servicing costs; …*

Policy 1.1.3.2 says:

> *Land use patterns within settlement areas shall be based on densities and a mix of land uses which:*
>
> *a) efficiently use land and resources;*
> *b) are appropriate for, and efficiently use, the infrastructure and public service facilities which are planned or available, and avoid the need for their unjustified and/or uneconomical expansion*

c) minimize negative impacts to air quality and climate change, and promote energy efficiency

d) prepare for the impacts of a changing climate

e) support active transportation;

f) are transit-supportive, where transit is planned, exists or may be developed; …

Policy 1.4.1 says:

To provide for an appropriate range and mix of housing options and densities required to meet projected requirements of current and future residents of the regional market area, planning authorities shall:

a) maintain at all times the ability to accommodate residential growth for a minimum of 15 years through residential intensification and redevelopment, and if necessary, lands which are designated and available for residential development; ….

Policy 1.4.2 says:

Where planning is conducted by an upper-tier municipality:

a) the land and unit supply maintained by the lower-tier municipality identified in policy 1.4.1 shall be based on and reflect the allocation of population and units by the upper-tier municipality; and

b) the allocation of population and units by the upper-tier municipality shall be based on and reflect provincial plans where these exist.

Policy 1.4.3 says:

Planning authorities shall provide for an appropriate range and mix of housing types and densities to meet market-based and affordable housing needs of current and future residents of the regional market area by: …

c) directing the development of new housing towards locations where appropriate levels of infrastructure and public service facilities are or will be available to support current and projected needs;

d) promoting densities for new housing which efficiently use land, resources, infrastructure and public service facilities, and support

the use of active transportation and transit in areas where it exists or is to be developed; and

e) establishing development standards for residential intensification, redevelopment and new residential development which minimize the cost of housing and facilitate compact form …

According to policy 1.6.7.4:

A land use pattern, density and mix of uses should be promoted that minimize the length and number of vehicle trips and support current and future use of transit and active transportation.

Active transportation: means human-powered travel, including but not limited to, walking, cycling, inline skating and travel with the use of mobility aids, including motorized wheelchairs and other power-assisted devices moving at a comparable speed.

According to policy 1.7.1, long-term economic prosperity should be supported by:

b) encouraging residential uses to respond to dynamic market-based needs and provide necessary housing supply and range of housing options for a diverse workforce;
c) optimizing the long-term availability and use of land, resources, infrastructure and public service facilities;
d) maintaining and, where possible, enhancing the vitality and viability of downtowns and mainstreets; …

2.2 GROWTH PLAN FOR THE GREATER GOLDEN HORSESHOE, 2020

Among the guiding principles (section 1.2.1) of the Growth Plan are:

Support the achievement of complete communities that are designed to support healthy and active living and meet people's needs for daily living throughout an entire lifetime.

Prioritize intensification and higher densities in strategic growth areas to make efficient use of land and infrastructure and support transit.

Support a range and mix of housing options, including additional residential units and affordable housing to serve all sizes, incomes and ages of households.

Complete communities are defined in Chapter 7 of the Growth Plan:

> *Places such as mixed-use neighbourhoods or other areas within cities, towns and settlement areas that offer and support opportunities for people of all ages and abilities to conveniently access most of the necessities for daily living, including an appropriate mix of jobs, local stores and services, a full range of housing, transportation options and public service facilities. Compete communities are age-friendly and may take different shapes and forms appropriate to their contexts.*

In section 1.2.3, under Guidance Material, the Growth Plan says:

> *Guidance material may be issued to assist decision-makers with implementing the policies of this Plan. Information, technical criteria, and approaches outlined in guidance material are meant to support, but not add to or detract from, the policies of this Plan*.

According to policy 2.2.1.4, applying the policies of this Plan will support the achievement of complete communities that:

> *d) expand convenient access to:*
>
> *i. a range of transportation options, including options for the safe, comfortable and convenient use of active transportation;*
> *ii. public service facilities, co-located and integrated in community hubs;*
> *iii. an appropriate supply of safe, publicly-accessible open spaces, parks, trails, and other recreational facilities; and*
> *iv. healthy, local and affordable food options, including through urban agriculture.*

Policy 2.2.2 provides intensification targets for municipalities:

> 1. *By the time the next municipal comprehensive review is approved and in effect, and for each year thereafter, the applicable minimum intensification target is as follows.*
>
> *a) A minimum of 50 per cent of all residential development occurring annually within … the Regions of Durham, Halton, Niagara, Peel, Waterloo and York will be within the delineated built-up area; …*

The subject site is located within the delineated built-up area.

Section 2.2.3 of the Growth Plan says:

> *1.Urban growth centres will be planned:*
>
> > *a) as focal areas for investment in regional public service facilities, as well as commercial, recreational, cultural, and entertainment uses;*
> >
> > *b) to accommodate and support the transit network at the regional scale and provide connection points for inter- and intra-regional transit;*
> >
> > *c) to serve as high-density major employment centres that will attract provincially, nationally, or internationally significant employment uses; and*
> >
> > *d) to accommodate significant population and employment growth.*
>
> *2.Urban growth centres will be planned to achieve, by 2031 or earlier, a minimum density target of: …*
>
> > *b) 200 residents and jobs combined per hectare for each of the … Downtown Burlington …urban growth centres…*

The subject site is located within the Downtown Burlington urban growth centre.

The definition of Urban Growth Centres in the 2019 Growth Plan is:

> *Existing or emerging downtown areas shown in Schedule 4 and as further identified by the Minister on April 2, 2008.*

Schedule 4 of the Growth Plan shows the location of Downtown Burlington adjacent to Lake Ontario. The Ontario Growth Secretariat Technical Paper, *Proposed Size and Location of Urban Growth Centres in the Greater Golden Horseshoe* (Spring 2008), identifies the location of the Downtown Burlington Urban Growth Centre generally focused on Brant Street and Lakeshore Road.

The definition of Public Service Facilities in the Growth Plan is:

> *Lands, buildings and structures for the provision of programs and services provided by government or other body, such as social assistance, recreation, police and fire protection, health and educational programs and cultural services. Public service facilities do not include infrastructure.*

Among the policies in 2.2.4 (Transit Corridors and Station Areas) are:

8. *All major transit station areas will be planned and designed to be transit supportive and to achieve multimodal access to stations and connections to nearby major trip generators by providing, where appropriate:*
    a) *All major transit station areas will be planned and designed to be transit supportive and to achieve multimodal access to stations and connections to nearby major trip generators by providing, where appropriate:*
    b) *Infrastructure to support active transportation, including sidewalks, bicycle lanes, and secure bicycle parking; and*
    c) *commuter pick-up/drop-off areas.*
9. *Within all major transit station areas, development will be supported, where appropriate, by:*
    a) *planning for a diverse mix of uses, including second units and affordable housing, to support existing and planned transit service levels. …*
10. *Lands adjacent to or near to existing and planned frequent transit should be planned to be transit-supportive and supportive of active transportation and a range and mix of uses and activities. …*

In Chapter 7 of the Growth Plan, major transit station area is defined as:

> *The area including and around any existing or planned higher order transit station or stop within a settlement area; or the area including and around a major bus depot in an urban core. Major transit station areas generally are defined as the area within an approximate 500 to 800 metre radius of a transit station, representing about a 10-minute walk.*

The subject site is located near the Burlington Transit John Street Bus Terminal, which is located approximately 550 metres directly south of the subject site.[1] In addition, the subject site is located 60 metres away from a bus stop for Burlington Transit Route 2, which provides service to the John St.

[1] The area around the Burlington Transit John Street Bus Terminal is not a "major transit station area on a priority transit corridor" and, therefore, is not subject to policies 2.2.4.1 - 7 of the Growth Plan. Policies 2.2.4.8 and 9 apply to all major transit station areas, including areas around "a major bus depot in an urban core". Policy 2.2.4.10 applies to all lands near to existing or planned frequent transit and is not limited to areas within walking distance of higher order transit.

Downtown Bus Terminal, 407 GO Bus Terminal, and Burlington GO station a minimum of every 20 minutes[2].

Transit-supportive is defined in the Growth Plan as:

> *Relating to development that makes transit viable and improves the quality of the experience of using transit. It often refers to compact, mixed-use development that has a high level of employment and residential densities.*
>
> *Transit-supportive development will be consistent with Ontario's Transit Supportive Guidelines.*

Policy 2.2.5.2 says:

> *Major office and appropriate major institutional development will be directed to urban growth centres, major transit station areas or other strategic growth areas with existing or planned frequent transit service.*

Policy 3.2.3.2 says:

> *All decisions on transit planning and investment will be made according to the following criteria: …*
>
> > *b) prioritizing areas with existing or planned higher residential or employment densities to optimize return on investment and the efficiency and viability of existing and planned transit service levels; …*
> >
> > *e) facilitating improved linkages between and within municipalities from nearby neighbourhoods to urban growth centres, major transit station areas, and other strategic growth areas; …*

Policy 5.2.2.1 says:

> *To implement this Plan, the Minister will, in collaboration with other Ministers of the Crown where appropriate, identify, establish, or update the following: ….b. the size and location of the urban growth centres.*

Policy 5.2.5.1 encourages municipalities to go beyond the minimum density and intensification targets in the Growth Plan:

> *The minimum intensification and density targets in this plan, including any alternative targets that have been permitted by the Minister, are minimum standards and municipalities are encouraged to go beyond these minimum*

[2] Based on pre-COVID schedule effective November 3rd, 2019 to March 28th, 2020.

> *targets, where appropriate, except where doing so would conflict with any policy of this Plan, the PPS or any other provincial plan.*

Policy 5.2.5.4 says:

> *Except as provided for in policy 2.2.7.3, the minimum intensification and density targets in this Plan will be measured across all lands within the relevant area, including any lands that are subject to more than one target.*

Policy 5.2.7.3 deals with minimum density targets for designated greenfields.

Schedule 3 of the Growth Plan establishes a population forecast of 1,100,000 residents and an employment forecast of 2051 jobs for Halton Region for 2051.

2.3 PERFORMANCE INDICATORS FOR THE GROWTH PLAN

In 2015, the Ontario Ministry of Municipal Affairs and Housing produced a report titled "*Performance Indicators for the Growth Plan for the Greater Golden Horseshoe*". The description of the report on the Ministry's web site says:

> *Fourteen performance indicators were used to measure outcomes of the Growth Plan, 2006, policies. They were intended to provide information on how growth and development in the region were unfolding over time, and to inform the 10-year review of the Growth Plan for the Greater Golden Horseshoe (GGH), which was finished in 2017.*

The introduction to the report says:

> *…this document introduces and provides results for 14 performance indicators that will help track implementation of this Plan over time. (page 1)*

The indicators in the report are divided into two categories: core indicators and supporting indicators. One of the core indicators relates to the urban growth centre density target. The report says:

> *The purpose of the core indicators is to track whether growth is occurring as planned in key areas identified in the Growth Plan. (page 5)*

The bar graph on page 9 of the report shows the population and employment density for the 25 urban growth centres in the Greater Golden Horseshoe, compared to the minimum density targets established in the 2006 Growth Plan. The urban growth centre density targets in the 2019 Growth Plan are the same as the density targets in the 2006 Growth Plan. In 2011, the population and employment density in the Downtown Burlington urban

growth centre was substantially lower than the minimum density target of 200 residents and jobs per hectare as established by the Growth Plan.

2.4 DRAFT GUIDANCE TO SUPPORT IMPLEMENTATION OF THE GROWTH PLAN

Policy 5.2.2.1.b of the 2019 Growth Plan says:

> *The Minister will, in collaboration with other Ministers of the Crown where appropriate, identify, establish or update … the size and locations of the urban growth centres.*

In March 2018, the Ministry of Municipal Affairs released a draft technical guidance document to support implementation of the Growth Plan, titled "Application of the Intensification and Density Targets". Section 6.1 states:

> *The Government of Ontario issued a report: Size and Location of Urban Growth Centres in the Greater Golden Horseshoe, 2008 outlining the size and location of UCCs. This report is available on the Ministry of Municipal Affairs website. The delineated boundaries are available through Land Information Ontario. (page 42)*

The definition of an urban growth centre in the 2019 Growth Plan is:

> *Existing or emerging downtown areas shown in Schedule 4 and as further identified by the Minister on April 2, 2008.*

The analysis of the Downtown Burlington urban growth centre in the Ontario Growth Secretariat Technical Paper, *Proposed Size and Location of Urban Growth Centres in the Greater Golden Horseshoe* (Spring 2008) said:

> *The downtown is generally focused around Brant Street and Lakeshore Road and offers a mix of uses ranges from public institutions and cultural facilities to office and retail functions. …*
>
> *Downtown Burlington's waterfront is a key feature of the downtown that serves as an attractive destination for residents and employers.*
>
> *In planning the Downtown Burlington urban growth centre, the City of Burlington is encouraged to consider:*
>
> - *Reinforcing the connection between the downtown with the waterfront through current waterfront renewal initiatives.*

- *Promoting residential opportunities in order to balance the live/work ratio in the downtown.*

In Fall 2008, the Government of Ontario released a document titled Size and Location of Urban Growth Centres in the Greater Golden Horseshoe. The map showing the size and location of the Downtown Burlington urban growth Centre in the Fall 2008 document (page 10) is the same as the map showing the proposed size and location in the document from Spring 2008 (page 21).

2.5 HALTON REGION REGIONAL OFFICIAL PLAN

The 2031 population forecast for Halton Region in the *Regional Official Plan* (ROP) is 780,000 persons, consistent with the 2031 population forecast in Schedule 3 of the 2006 Growth Plan. Table 1 in the ROP allocates a total population of 193,000 persons to Burlington for 2031.

The population forecasts 2019 Growth Plan provided for 40,000 additional residents in Halton Region by 2031, over and above the population forecast currently in the ROP, and growth of 180,000 persons over the 2031 to 2041 period.

Policy 77(2.1) of the ROP says:

> *Direct, through Table 2 and Table 2a, to the Built-Up Area a minimum of 40 per cent of new residential development occurring annually within Halton in 2015 and every year thereafter.*

Table 2 sets out the intensification targets for lower-tier municipalities in Halton Region. For Burlington, a minimum of 8,300 new housing units shall be added to the Built-Up Area between 2015 and 2031.

Table 2A sets out the regional phasing to be achieved every five years from 2012 to 2031 between the Built-Up Areas and the Designated Greenfield Areas. For Burlington, the number of new units directed to the built-up area during each of the four time periods is:

- 2,525 units over 2012 to 2016;
- 2,758 units over the 2017 to 2021;
- 2,669 units over the 2022 to 2026; and
- 2,659 units over the 2027 to 2031.

Over the 20 years from 2012 to 2031, a total of 10,611 units are directed to Burlington's built-up area.

Policy 77(17) e says;

> *Unused Regional phasing from Table 2a will be carried forward to the following years to achieve the Regional phasing outlined in Table 2a.*

The intensification targets in the ROP reflect the forecasts and policies in the 2006 Growth Plan for the Greater Golden Horseshoe that sets a minimum intensification target of 40% for the Region as a whole.

The 2019 Growth Plan provides for substantially more population growth in Halton Region and a higher minimum intensification target (50%) to be achieved on a Region-wide basis.

Policy 253.3 of the ROP says:

> *Intensification Areas means lands identified by the Region or its Local Municipalities within the Urban Area that are to be the focus for accommodating intensification. Intensification Areas include Urban Growth Centres, Major Transit Station Areas (including Metrolinx-designated Mobility Hubs), Intensification Corridors, and Mixed Use Nodes.*

Among the objectives of Intensification Areas in the ROP are:

> *78(1) To provide an urban form that is complementary to existing developed areas, uses space more economically, promotes live-work relationships, fosters social interaction, enhances public safety and security, reduces travel by private automobile, promotes active transportation, and is environmentally more sustainable. …*
>
> *78(8) To support transit and active transportation for everyday activities …*
>
> *78(11) For Major Transit Station Areas and Intensification Corridors:*
>
> *a) To achieve increased residential and employment densities in order to ensure the viability of existing and planned transit infrastructure and service. …*

Policy 80 indicates that *Intensification Areas* include *Urban Growth Centres* and *Major Transit Station Areas (*including Metrolinx-designated *Mobility Hubs)*:

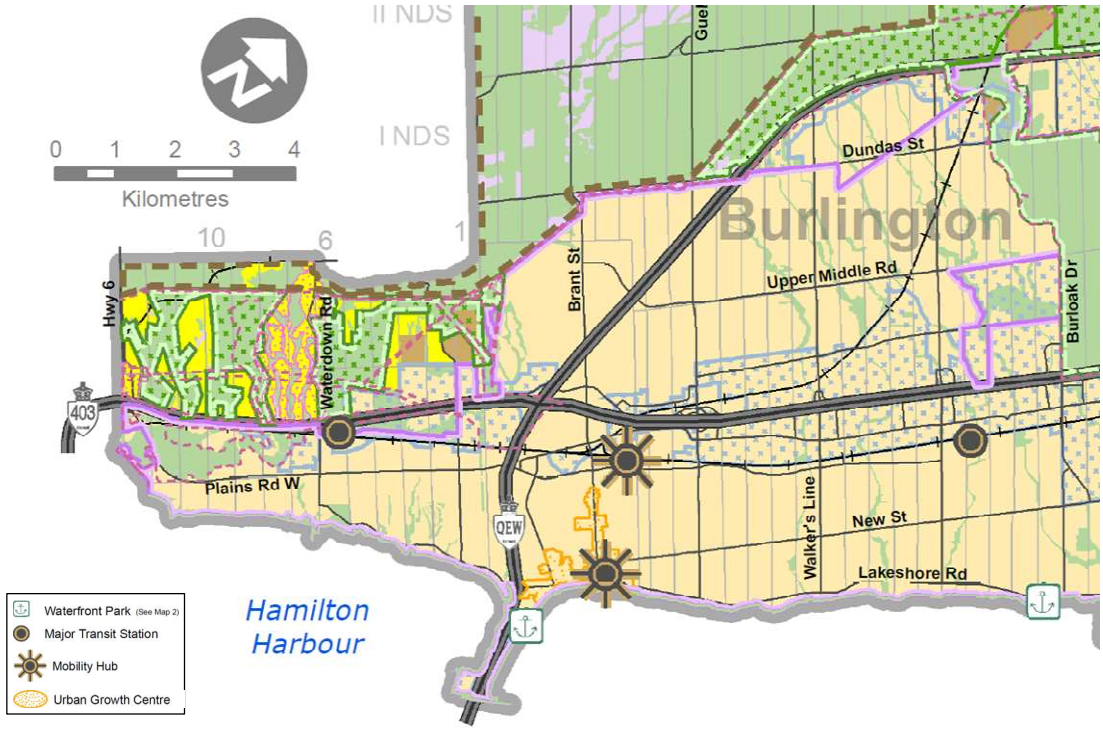
> *80. Intensification Areas are parts of the Urban Area and consist of:*

80(1) Urban Growth Centres, which are shown as an overlay on top of the Urban Area on Map 1, subject to specific policies in addition to those for Intensification Areas,

80(2) Major Transit Station Areas (including Metrolinx-designated Mobility Hubs) as identified on Map 1 and Map 3 and/or in Local Official Plans, which generally consist of areas within 500 m of the Major Transit Station, …

Map 1 Regional Structure of the ROP (Figure 2 below) identifies the Burlington Downtown urban growth centre. Burlington Transit John Street bus terminal, located within the Downtown urban growth centre, is identified as a Major Transit Station and a Mobility Hub. To the southwest of the Major Transit Station is a Waterfront Park.

Figure 2 Regional Structure, Halton Region



Source: Altus Group Economic Consulting based on Map 1 Regional Structure, *Halton Region Regional Official Plan*

The subject site is located in the Burlington urban growth centre, approximately 3 blocks north of the Major Transit Station/Mobility Hub identified in the Regional Official Plan

According to section 81.1 of the Halton Region Official Plan, the objectives of the urban growth centres are:

> *81.1(1) To serve as focal areas for investment in institutional and region-wide public services, as well as commercial, recreational, cultural and entertainment uses.*
>
> *81.1(2) To accommodate and support major transit infrastructure.*
>
> *81.1(3) To serve as high density major employment centres that will attract provincially, nationally or internationally significant employment uses.*
>
> *81.1(4) To accommodate a significant share of population and employment growth.*

Policy 81.3(1) says it is the policy of the Region to:

> *Require Urban Growth Centres to achieve a minimum development density target of 200 residents and jobs combined per gross hectare by 2031 or earlier.*

2.6 DEFINING MAJOR TRANSIT REQUIREMENTS IN HALTON REGION, 2019

In the summer of 2019, Halton Region Council adopted the recommendations of staff to proceed with a future study to identify options to operationalize the transit priority network ("TPN") that was identified in the report titled *Defining Major Transit Requirements* ("DMTR"). A key purpose of the DMTR study was:

> "*… identifying where Regional investments need to occur in order to unlock transit-oriented growth, and identify how mobility and connectivity in the transportation network can be enhanced between growth areas within the Region, with adjacent municipalities, and across the GTHA.*"

The report highlighted that the importance of transit orientated ("TOD") growth was:

> *"TOD in Halton Region would mean that growth is concentrated around areas that are served by higher order transit such as the MTSAs, Regional Transit Nodes, and TPCs* [Transit Priority Corridors]. *In those areas, where appropriate and directed through approved Regional and Local Official Planning documents, there will be a shift to more mixed-use*

developments with higher densities to provide opportunities to live and work within walking distance of a station" …

Building on the *Mobility Management Strategy for Halton* ("MMS"), this report took the transit priority corridors ("TCP") identified in the MMS one step further by classifying them. The report categorized the Brant Street (Regional Road 18) TCP from James Street to Dundas Street (Regional Road 5) as a "Mixed Traffic Corridor" in long range plans to 2031 (see Figure 3 on the next page) and 2041 (pages 18- 21), providing for future frequent bus service. While Mixed Traffic Corridors are not expected to have dedicated bus lanes or other physical transit infrastructure investments, they represent an important connector to higher-order TCPs, such as the Brant Street – Dundas Street to Burlington GO Priority Bus Corridor and connections to rapid regional transit option such as the 407 GO Bus Terminal and Burlington GO Station on the Lakeshore line.

Figure 3 Halton Region 2031 Recommended Transit Priority Corridor Network, Subject Site



Source: Altus Group Economic Consulting based on "Figure i-4" –Defining Major Transit Requirements in Halton Region, *2019*

2.7 CITY OF BURLINGTON OFFICIAL PLAN

The current *City of Burlington Official Plan* (December 2019 office consolidation) anticipates that the population of the City will not exceed approximately 182,000 persons within approximately 73,600 households and the employment level will be approximately 108,000 by 2021.

Among the Guiding Principles of the Burlington Official Plan (Section 3 in Part I) is:

> *h) Promote the efficient use of land through intensification within appropriate areas of the City, in accordance with Provincial growth management objectives, while recognizing the need for balancing this objective with other planning considerations. …*
>
> *The boundary of the Downtown Urban Growth Centre, referred to in the "Places to Grow" – the Growth Plan for the Greater Golden Horseshoe, 2006, has been identified on Schedule B and Schedule D of this Plan. It is anticipated that much of the residential and employment intensification will occur within this area. …*
>
> *The boundary of the Downtown Urban Growth Centre, referred to in the "Places to Grow" – the Growth Plan for the Greater Golden Horseshoe, 2006, has been identified on Schedule B and Schedule D of this Plan. It is anticipated that much of the residential and employment intensification will occur within this area. …*

The boundary of the Downtown Urban Growth Centre identified on Schedule B of the Burlington Official Plan is generally consistent with the boundary identified by the Province of Ontario is the 2008 report "Size and Location of Urban Growth Centres in the Greater Golden Horseshoe" and the delineated boundaries available through Land Information Ontario.

Section 4.3 in Part I of the Burlington Official Plan states: …

> *Changes that are encouraged by this Plan are: i) the development of a greater diversity of housing types to meet the changing needs of the population; ii) the development of a more self-contained city by encouraging a greater live-work relationship … iii) specified mixed use centres and along certain roads; iv) a move towards a more balanced transportation system; and v) a greater emphasis on the long term preservation and conservation of*

significant natural features with greater public access particularly to the waterfront …

To meet the needs of the changing population as shown by smaller households, an aging population, alternative family units and a broader range of income levels and in response to greater environmental awareness and fiscal restraints, new residential growth will be mainly in the form of more compact housing. This development will be served by various modes of transportation and located in closer proximity to jobs, shopping and leisure areas. …

Provision of residential support services and amenities are a priority of the Plan. New residential developments will be planned considering all forms of travel and be supportive of safe pedestrian and vehicular movement with convenient connections to employment areas, neighbourhood shopping areas, public open spaces and recreational facilities, schools, churches and other institutional uses. …

Burlington's historic Downtown is to maintain its role as the city centre. Special attention will be focused on this area to revitalize it as a traditional "people place" Downtown. This will involve encouraging retail and office development along the core streets, particularly Brant Street, basing government activities in this area, maintaining good quality housing stock, encouraging residential development, re-development and intensification in areas where appropriate, and providing a stronger link to the waterfront. …

… This Plan supports development of an integrated transportation system consisting of roads, public transit, pedestrian walkways and sidewalks and bikeways. While the automobile will remain the primary mode of transportation in the City, other forms of transportation will be encouraged to reduce congestion and improve environmental conditions. Land use decisions will coordinate transportation planning decisions so that higher density, mixed use and compact developments will be located where they can be well served by a safe, convenient and balanced transportation system. …

Section 5.5.1 in Part III of the Official Plan says:

a) … the principles of the Downtown Burlington Urban Growth Centre are as follows:

(i) this area shall accommodate a significant share of population and employment growth within the City; and

(ii) this area shall accommodate high density employment.

b) As a Mixed Use Centre the Downtown shall take advantage of the unique qualities that set it apart from all other areas of the City and contribute to a distinct identity. These qualities include the waterfront location and related activities, historic buildings, streetscapes and development pattern, cultural activities, pedestrian orientation, and recognition as a centre of business and civic activity.

c) The Downtown is a lively, vibrant "people place" with a wide variety of employment, shopping, leisure, residential and tourism opportunities. …

e) Specialty retail, community retail, and government and institutional, service and other business office development, as well as residential uses should be located in the Downtown. …

h) *The Downtown shall be re-developed through the infilling of existing surface parking lots, the rehabilitation of existing buildings and the intensification of under-utilized lands and buildings, in keeping with its role as Provincial Growth Centre, ensuring that such development shall encourage transit use and that an adequate supply of parking is provided. …*

Among the objectives for the Downtown Mixed Use Centre (Section 5.5.2 in Part III of the Plan) are: …

b) To establish minimum density targets for residents and jobs in accordance with "Places to Grow" Growth Plan for the Greater Golden Horseshoe.

c) To establish a unique role for the Downtown so that it provides for certain uses such as offices, and residential, as well as unique opportunities such as independent specialty, retail activities and waterfront recreational opportunities.

d) To establish and maintain the Downtown's primary role as the City centre for cultural, governmental, civic and waterfront activities.

e) To create a compact Downtown city core with a mix of residential, commercial and other uses, as an alternative to the car oriented shopping plazas, malls and business corridors. …

g) To increase the resident population and provide a variety of housing types mainly at medium and high densities that will strengthen the live/work relationship, ensure the Downtown is used after business hours, and create a local market for convenience and service goods. …

j) To create a unique waterfront area to accommodate recreational, cultural and leisure pursuits. …

Policy 5.5.3 b) in Part III of the Plan establishes the intensification target for the Downtown urban growth centre:

Within the Urban Growth Centre Boundary … the target is established of a minimum gross density of 200 residents and jobs per hectare …

2.8 CITY OF BURLINGTON STRATEGIC PLAN 2015-2040

The current *City of Burlington Strategic Plan* (adopted in April 2016) is the result of a year of engagement that includes input from residents, businesses, community groups, City employees and members of Burlington City Council.

Among the Key Strategic Objectives of the Strategic Plan are …

Population Growth

Focused and directed population growth that will lay the foundation for a larger economy, more jobs, fiscal sustainability, better infrastructure and public transportation.

Targeted Intensification

Higher densities in key intensification areas (including mobility hubs, downtown, uptown, along major roads and commercial plazas) that will build neighbourhoods that are environmentally friendly, infrastructure-efficient, walkable, bikeable and transit-oriented.

Healthier Lifestyles

Better health of residents that will positively impact resiliency and quality of life.

Mobility Choices

More mobility choice within the city and region through improved public transportation, active transportation and intensification that allows more residents to get where they need to go efficiently and with more choice.

Section 1.1 of the Strategic Plan, Promoting Economic Growth, states: …

> *g) Burlington's downtown is vibrant and thriving with greater intensification attracting both businesses and people to enjoy the quality of life.*

Section 1.2, Intensification, states: …

> *a) Growth is being achieved in mixed-use areas and along main roads with transit service, including mobility hubs, downtown and uptown.*
>
> *h) Burlington has a downtown that supports intensification and contains green space and amenities, has vibrant pedestrian-focused streets, is culturally active and is home to a mix of residents and businesses.*

Among the strategic objectives of section 1.2 of the Plan is:

> *The city will conduct and implement an intensification plan that will include a specific focus on the Urban Growth Centre and will develop a strategy for the downtown core that will promote residential and appropriate niche/boutique office development.*

Among the strategic objectives of section 1.3, Focused Population Growth, is:

> *Future development will be higher density, walkable and accessible, transit oriented with appealing streetscapes. The city will become a leader in walkability and bikeability scores in the province and will be fully aligned with provincial strategy and goals.*

Section 2.1 of the Strategic Plan, Increased Transportation Flows and Connectivity, states: …

> *g) Walkability and cycling has guided the development of new and transitioning neighbourhoods and the downtown so that people rely less on automobiles*

Among the strategic objectives of section 2.1 is:

> *Future development in key mixed nodes will be higher density, walkable, accessible and well serviced by public transportation. The city will become a leader in walkability in the province and will be fully aligned with provincial strategy and goals.*

2.9 SUMMARY OF PLANNING POLICY CONTEXT

The objectives of provincial and municipal planning policies include:

- Efficient development patterns that optimize the use of land and public investment in infrastructure and public service facilities;
- A density and mix of land uses which efficiently use land, infrastructure and public service facilities, and support active transportation and the use of transit; and
- The achievement of complete communities that offer people convenient access to most of the necessities of daily living including jobs, stores and services, transportation options, and public service facilities.

Under the PPS 2020, all municipalities must maintain at all times the ability to accommodate residential growth for a minimum of 15 years through intensification and redevelopment, and only if necessary, vacant lands designated for residential development. As of today (2020), a minimum 15 year supply means a planning horizon of 2035 or longer.

The subject site is located in the Downtown Burlington urban growth centre, within 550 metres of the Burlington Transit John Street bus terminal.

Figure 4 (on the next page) shows the boundaries of the Downtown Burlington urban growth centre (as delineated by Province) and the location of the Major Transit Station/Mobility Hub (as identified in the Halton Region Official Plan). The map also shows the 500-metre radius around the John St. Bus Terminal and the subject site.[3]

The Provincial Growth Plan, the Halton Region Official Plan and the City of Burlington Official Plan include policies for the urban growth centre. The Downtown Burlington urban growth centre is to be planned:

- As a focal area for public service facilities, commercial, recreational, cultural and entertainment uses;
- To accommodate and support the transit network; and
- To accommodate significant population and employment growth.

The City's Official Plan says that as a Mixed Use Centre, the Downtown shall take advantage of the unique qualities that set it apart from other areas of the

[3] According to the 2019 Growth Plan, major transit station areas are generally defined as the area within an approximate 500 to 800 metre radius of a transit station, representing about a 10-minute walk.

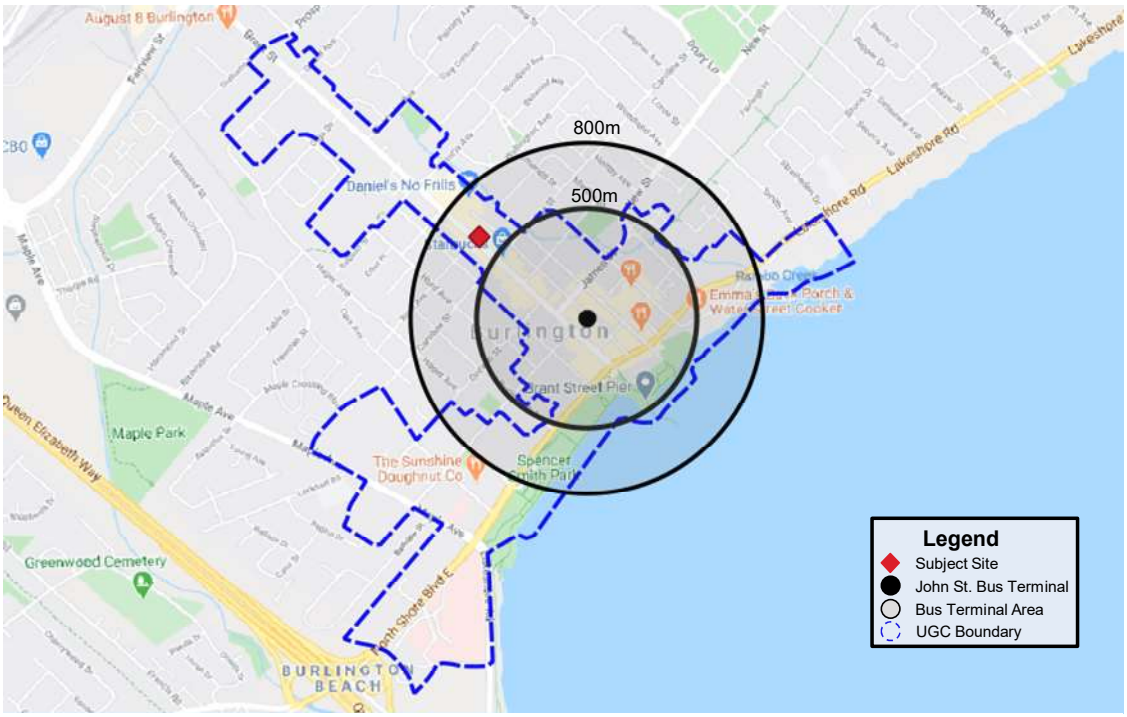
City and contribute to a distinct identity. These qualities include the waterfront location and related activities.

Under Provincial and Regional planning policies, a minimum intensification targets have been allocated to the City of and a minimum density target established for the urban growth centre (200 residents and jobs per hectare by 2031).

Under the Provincial Growth Plan, municipalities are not simply permitted to exceed the minimum intensification and density targets. Municipalities are encouraged to go beyond the minimum targets unless doing so would conflict with other provincial planning policies

Figure 4

Urban Growth Centre and John St Bus Terminal Area, City of Burlington



Source: Altus Group Economic Consulting based on Google Map and Urban Growth Centre boundary files from Land Information Ontario

3 DATA AND ANALYSIS

In this chapter, demographic and housing trends in Burlington are reviewed in the context of provincial and municipal planning policies.

3.1 HOUSING TRENDS

3.1.1 Residential Development in the Built-Up Area

Figure 5 shows residential building permits for units within the built-up area and elsewhere in Burlington for 2006 to 2018.

Figure 5

Residential Building Permit Activity, City of Burlington, 2006-2018

Year	GreenField	Built-Up Area	Other	Total
		Units		
2006	621	348	12	981
2007	733	275	15	1,023
2008	811	284	23	1,118
2009	212	265	6	483
2010	539	116	8	663
2011	270	656	9	935
2012	75	779	5	859
2013	47	362	5	414
2014	51	138	3	192
2015	7	491	13	511
2016	0	744	8	752
2017	79	866	8	953
2018	105	433	7	545
Total	3,550	5,757	122	9,429

Source: Altus Group Economic Consulting based on data from Halton Region, 2020

Over the 2006 to 2018 period, building permits were issued for a total 5,757 new units in the built-up area of Burlington – an average of 443 units per year. The intensification target allocated to Burlington in Table 2 of Halton Region Official Plan is a minimum of 8,300 new housing units to be added to the built-up area over the 2015 to 2031 period – an average of approximately 519 new units per year.

According to Table 2a of the Halton Region Official Plan, 2,525 new units were planned for the built-up area of Burlington over the 2012 to 2016 period. The "City of Burlington Growth Analysis Study" (2019) prepared by Dillon Consulting, reported that net new units (new units minus demolitions), amounted to 2,092 units over the 2012 to 2016 period (page 168). The shortfall amounted to 433 units.

The Regional Phasing set out in Table 2A of the Halton Region Official Plan requires that Burlington achieve within the built-up area 2,758 new units

over the 2017 to 2021 period, 2,669 new units over the 2022 to 2026 period and 2,659 units over the 2027 to 2031 period. The shortfall from the 2012 to 2016 period (approximately 433 units according to the Dillon report) must be carried forward to the following period, bringing the total to 8,519 units for the 2017 to 2031 period.

Between 2017 to 2018, Halton Region reported that 1,299 homes were built in the designated built boundary of Burlington. This leaves a shortfall of 7,220 homes to be built between 2019 to 2031 over 13 year, or an average of 555 per year ((8,519 – 1,299)/13).

Substantially more intensification will be required to achieve the minimum intensification target and planned phasing than Burlington experienced over the 2006 to 2018 period. Roughly 25% more units per year will need to be developed within the built-up area than were built over the 2006 to 2018 period ((555 units – 443 units) / 443 units)

The scale of the development proposed for 535-551 Brant Street (248 new units) is modest relative to the intensification allocated to Burlington in the Halton Region Official Plan. In order to achieve the intensification required under Table 2A, roughly 29 new residential developments of this scale would be required in the built-up area of Burlington over the 2019 to 2031 period (7,220units / 248 units) at a pace of approximately 2 buildings per year.

3.1.2 Residential Development in the Downtown Urban Growth Centre

Coriolis Consulting Corp. was retained by the City of Burlington to prepare a report on Market and Financial Inputs to Neighbourhood Centres Policy, which was released in November of 2016. The report included estimates of housing starts, including apartment and townhouse starts by sub-area.

Figure 6 shows total housing starts in Burlington over the 2010 to 2015 period as reported in the Coriolis report, as well as the number of apartment and townhouse starts located in the Downtown[4].

[4] The Downtown area defined in the Coriolis report is bounded by Queen Elizabeth Way to the west and Lake Ontario to the South, and its eastern boundary is generally in line with Waterloo Street/Woodland Avenue and northern boundary in line with Olga Drive/Deyncourt Drive. This area includes almost all of the Downtown Burlington urban growth centre (except the area between Prospect Street/Grahams Lane and Olga Drive).

Figure 6

Burlington Housing Starts, 2010 to 2015

	Total Housing Starts	Apartment Housing Starts in Downtown	Townhouse Building Starts in Downtown	Total Starts in Downtown	Share of City Total
2010	1,091	-	-	-	0%
2011	586	-	-	-	0%
2012	649	125 [1]	-	125	19%
2013	814	115 [1]	8	123	15%
2014	311	-	30	30	10%
2015	459	-	-	-	0%
Total 2010 to 2015	3,910	240	38	278	7%

[1] Located in Burlington Downtown urban growth centre
Source: Altus Group Economic Consulting based on Coriolis Consulting Group, Market and Financial Inputs to Neighbourhood Centres Policy

Over the 2010 to 2015 period, a total of 278 new apartment and townhouse units were started in the Downtown. Townhouse and apartment starts in the Downtown accounted for only 7% of total housing starts in the City over the six-year period.

3.1.3 Apartment Development Trends by Sub-Area

Figure 7 shows apartment building permits by sub-area of Burlington for the 2006 to 2015 period, as reported in the Coriolis report. Building permits were issued for a total of 528 new apartment units in the Downtown – accounting for 19% of the apartment building permits issued in Burlington over this period. Over the ten-year period, building permits were issued for an average of 53 new apartment units per year in the Downtown.

Figure 7

Downtown Burlington Apartment Building Permit Data, 2006-2016

Address	Year	Number of Units
551 Maple Avenue	2009	186
472 Brock Avenue	2013	115
2090 Bates Common	2006	5
360 Pearl Street	2007	75
390 Pearl Street	2012	125
445 Elizabeth Street	2006	13
384 Martha Way	2007	9

Note: All of the projects are located within the Downtown urban growth centre

Source: Altus Group Economic Consulting based on Coriolis Consulting Group, Market and Financial Inputs to Neighbourhood Centres Policy

Appendix A in the Coriolis report identifies the downtown apartment projects for which building permits were issued over the 2006 to 2016 period[5] (Figure 8).

Figure 8

Downtown Burlington Apartment Building Permit Data, 2006-2016

Address	Year	Number of Units
551 Maple Avenue	2009	186
472 Brock Avenue	2013	115
2090 Bates Common	2006	5
360 Pearl Street	2007	75
390 Pearl Street	2012	125
445 Elizabeth Street	2006	13
384 Martha Way	2007	9

Note: All of the projects are located within the Downtown urban growth centre

Source: Altus Group Economic Consulting based on Coriolis Consulting Group, Market and Financial Inputs to Neighbourhood Centres Policy

Of the 528 permits issued for apartments in Downtown Burlington over the 2006 to 2016 period, 501 units were in 4 high-rise developments (12 storeys or higher). Only 27 units were in the 3 lower density developments.

As taller apartment buildings can make more efficient use of the constrained supply of developable land in Downtown Burlington, they typically produce substantially more new dwelling units than low-rise apartments.

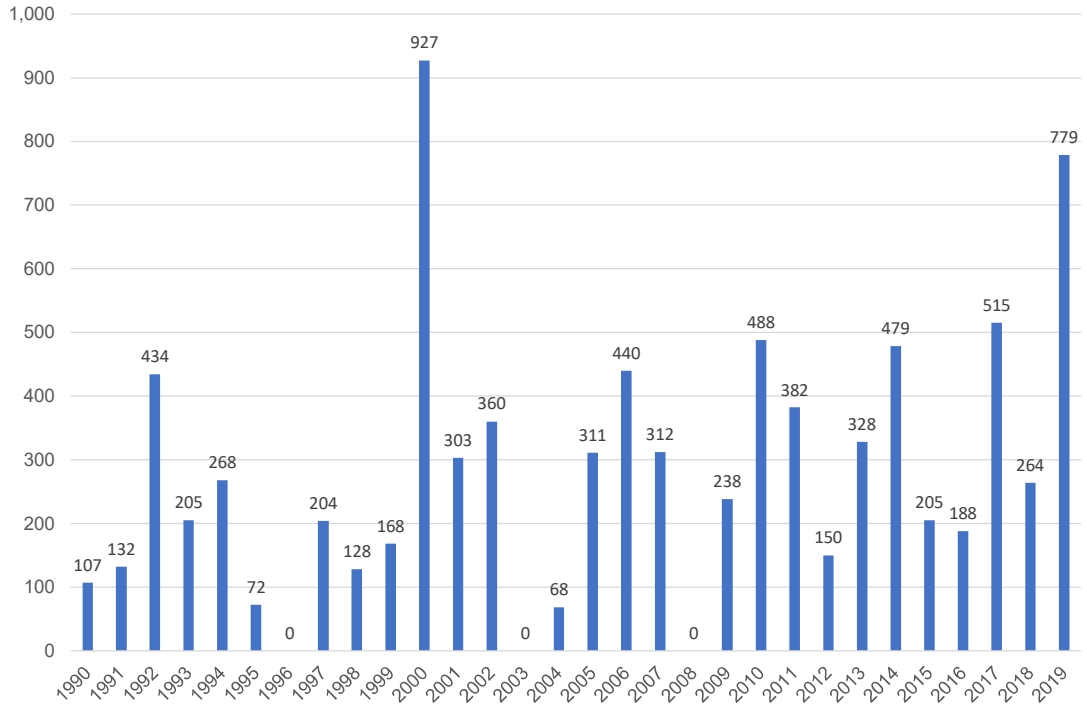
3.1.4 Trends in Apartment Construction

Figure 9 shows annual completions of new apartment units in Burlington over the period from 1990 to 2019. This includes new apartments built within the built-up area and elsewhere in the City

The figure illustrates the volatility of the rate of new apartment construction. Annual apartment completions peaked in 2000 when 927 new apartment units were built in Burlington. No new apartments were completed in 1996, 2003 and 2008.

[5] All of the projects are located within Downtown Burlington urban growth centre.

Figure 9 Annual Apartment Completions, City of Burlington, 1990-2019



Source: Altus Group based on data from CMHC

The volatility in the rate of new apartment construction reflects a wide range of factors including:

- Shifts in the market demand for condominium apartments;
- Availability of government funding for affordable housing projects;
- The availability of marketable sites designated and zoned for new apartments;
- Uncertainty, time and costs associated with the assembly of properties suitable for intensification; and
- The presence of income-generating existing uses on potential intensification sites.

3.2 POPULATION GROWTH

The 2011 Census reported a population of 13,275 residents living in the Census dissemination areas which include the Downtown urban growth centre. The 2016 Census reported 13,903 persons living in the same

dissemination areas. Over the 2011 to 2016 period, the population of these dissemination areas increased by 628 residents or 4.7%[6].

The total population of Burlington increased from 175,779 residents in 2011 to 183,314 residents in 2016 – an increase of 7,535 residents. Only 8% of the City's population growth over this period was located in the Census dissemination areas that include the Downtown urban growth centre.

Over the 2011 to 2016 period, the Downtown urban growth centre accommodated a small share of the City's population growth. Provincial, Regional and City planning policies require that the Downtown urban growth centre accommodate a significant share of the City's population growth.

3.3 GROWTH PLAN DENSITY TARGET

Provincial, Regional and City planning policies require that the Burlington Downtown urban growth centre achieve a minimum development density target of 200 residents and jobs combined per gross hectare by 2031 or earlier.

The minimum density target for the Downtown urban growth centre is a minimum standard. The Growth Plan encourages municipalities to go beyond the minimum target, where appropriate, except where doing so would conflict with the policies of the Growth Plan, the Provincial Policy Statement or any other provincial plan (policy 5.2.5.1).

Policy 5.2.2.1 of the 2019 Growth Plan says the Minister will, in collaboration with other Ministers of the Crown where appropriate, identify, establish or update the size and location of the urban growth centres. The Government of Ontario issued a report (*Size and Location of Urban Growth Centres in the Greater Golden Horseshoe*, 2008) which identified the size and location of the Downtown Urban Growth Centre.

According to the *Technical Report on Preliminary Performance Indicators for the Growth Plan for the Greater Golden Horseshoe (also prepared by the Government of Ontario)*, the area of the Downtown urban growth centre is 117 hectares. [7]

[6] ((13,903-13,275)/13,275

[7] According to Dillon Consulting, *City of Burlington Growth Analysis Study*, 2019, the gross area of the Downtown Burlington Urban Growth Centre is 104 hectares (page 54). The urban growth centre as delineated by Dillon Consulting (map on page 51) excludes lands that are included in the Provincial Government's Downtown Burlington urban growth centre in *the Size and Location of Urban Growth Centres in the Greater Golden Horseshoe*, 2008.

Based on data from the 2011 Census, there were 8,395 residents and 5,375 jobs (13,770 residents and jobs) in the area yielding a density of 118 residents and jobs per hectare.

A total of 23,400 residents and jobs would be required to achieve the minimum density target based on urban growth centre area as estimated in the Technical report (117 hectares X 200 residents and jobs per hectare). Therefore, at least 9,630 more residents and jobs need to be accommodated in the area over the 2011 to 2031 period to achieve the minimum density target (23,400 residents and jobs – 13,770 residents and jobs).

Based on estimates prepared by City of Burlington planning staff in 2015, the area of the urban growth centre is smaller than the area delineated by the Minister - 114 hectares vs. 117 hectares , and a minimum of 22,800 residents and jobs would be required to achieve the minimum growth plan density target of 200 residents and jobs per hectare by 2031 (114 hectares X 200 residents and jobs per hectare. According to City staff, there were approximately 15,417 residents and jobs in the urban growth centre in 2013, leaving 7,383 additional residents and jobs needed to achieve the minimum density target (22,800 residents and jobs – 15,417 residents and jobs). [8]

The population and employment that will be accommodated by the proposed development can be estimated using ratios from the 2019 *City of Burlington Development Charges Background Study*:

- 136 one-bedroom units at 1.282 PPU = 174 residents,
- 112 two and three bedroom units at 1.740 PPU = 195 residents,
- 1068 square metres of retail space at 40 square metres per employee = 27 employees,
- Approximately 396 residents and jobs (excluding people working at home) will be accommodated in the proposed mixed-use development.

The relative scale of the proposed development can be considered in the context of the minimum amount of growth required in the Downtown urban growth centre to meet the density target. Based on the estimates in the

[8] City of Burlington staff report PB-23-15, page 27.

Provincial technical report, growth equivalent to 24 developments of this scale would be needed over the 2011 to 2031 just to meet the minimum density target (9,630 residents and jobs / 396 residents and jobs). Based on the estimates prepared by City planning staff, growth equivalent to 19 developments of this scale would be needed over the 2014 to 2031 period just to meet the minimum density target (7,383 residents and jobs / 396 residents and jobs).

The Growth Plan encourages municipalities to go beyond the minimum density targets.

3.4 SUMMARY / IMPLICATIONS

In order to achieve the phasing policies of the Halton Region Official Plan, roughly 25% more units per year will have to be produced in Burlington's built-up area over the 2019 to 2031 period compared to the numbers produced over the 2006 to 2018 period ((555 units – 443 units) / 443 units).

The 248-unit building proposed for 535-551 Brant Street is modest relative to the Burlington intensification target. Roughly 29 new buildings of similar scale would be required within the built-up area of Burlington to achieve the target established in the Halton Region Official Plan (7,220 units /248 units).

Provincial and municipal planning policies require that a significant share of Burlington's population growth and residential intensification occur in the Downtown Burlington urban growth centre. Data regarding housing starts and Census population for the area indicate that only a small share of the City's population growth and new housing units have been located in the Downtown.

Provincial and municipal planning policies require that the Downtown Burlington urban growth centre achieve a minimum density target of at least 200 residents and jobs per hectare by 2031 or earlier. A range of estimates of the existing density have been prepared by provincial and City planners over the years. The mixed-use development proposed for 535-551 Brant Street will accommodate approximately 396 residents and jobs. At least 19 developments of this scale will be required in the Downtown urban growth

centre over the 2014 to 2031 period to achieve the minimum density target (7,387 residents and jobs / 396 residents and jobs).[9]

The Growth Plan not only permits municipalities to exceed the minimum intensification and urban growth centre density targets, it encourages municipalities to go beyond the minimum targets, except where doing so would conflict with other Provincial planning policies.

[9] City staff report PB-23-15 estimates 15,417 residents and jobs over 114 hectares for 2013. An additional 7,383 residents and jobs would be required to achieve a density of 200 residents and jobs per hectare.

4 PROXIMITY TO AMENITIES, SERVICES AND TRANSPORTATION OPTIONS

This chapter examines the proximity of the subject site to amenities, services and transportation options.

4.1 POLICY CONTEXT

Provincial planning policies:

- Direct the development of new housing to locations where infrastructure and public service facilities are or will be available to meet the needs of new residents.
- Promote densities for new housing which efficiently use land, infrastructure and public service facilities;
- Promote a land use pattern, density and mix of uses that support the use of active transportation and transit; and
- Support the achievement of complete communities that support opportunities for people to conveniently access a mix of jobs, local stores and services, transportation options and public service facilities.

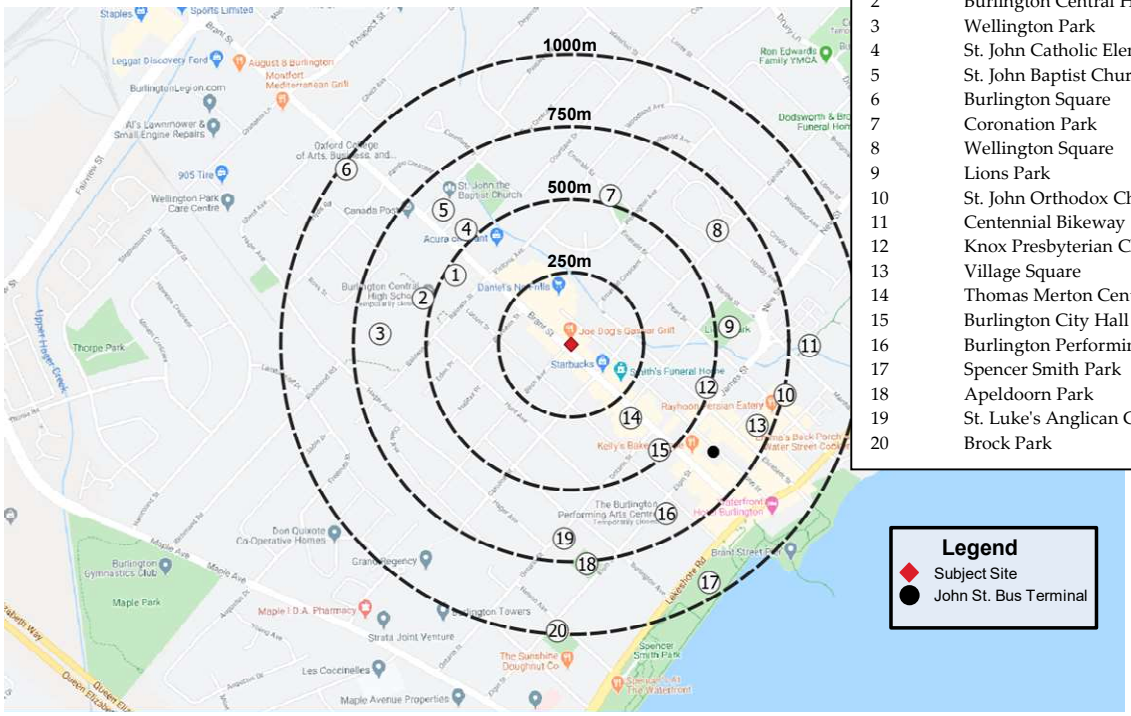
The City of Burlington Official Plan promotes:

- Development serviced by various modes of transportation and located in closer proximity to jobs, shopping and leisure areas;
- Taking advantage of the unique qualities that set the Downtown apart from all other areas of the City including the waterfront location and related activities, cultural activities, pedestrian orientation and business and civic activities.
- In this chapter, the location of the subject site is analysed with respect to its proximity to jobs, shopping and leisure areas, transportation options, cultural facilities and other public service facilities.

4.2 PROXIMITY TO AMENITIES

Figure 10 shows the distance between the subject site and various amenities in the Downtown urban growth centre. The site is located within a fifteen-minute walk (750 metres) of wide range of public service facilities, cultural and leisure activities.

Figure 10 Access to Amenities, Subject Site



1	Central Public School
2	Burlington Central High School
3	Wellington Park
4	St. John Catholic Elementary School
5	St. John Baptist Church
6	Burlington Square
7	Coronation Park
8	Wellington Square
9	Lions Park
10	St. John Orthodox Church
11	Centennial Bikeway
12	Knox Presbyterian Church
13	Village Square
14	Thomas Merton Centre
15	Burlington City Hall and Civic Square
16	Burlington Performing Arts Centre
17	Spencer Smith Park
18	Apeldoorn Park
19	St. Luke's Anglican Church
20	Brock Park

Source: Altus Group Economic Consulting based on Google Map and Urban Growth Centre boundary files from Halton Region

The subject site is within 500 metres of:

- Central Public School;
- Knox Presbyterian Church;
- Thomas Merton Centre;
- Burlington City Hall and Civic Square;

The subject site is within 750 metres of:

- Burlington Transit John Street bus terminal.
- Burlington Central High School;
- Wellington Park;
- St. John Catholic Elementary School;
- St. John Baptist Church;
- Coronation Park;
- Wellington Square;
- Lions Park;

- St. John Orthodox Church;
- Village Square;
- Burlington Performing Arts Centre;
- Apeldoorn Park;
- St. Luke's Anglican Church; and

The subject site is within 1,000 metres of:

- Burlington Square;
- Centennial Bikeway;
- Spencer Smith Park;
- Brock Park;

The subject site is located directly on the main retail node of downtown Burlington that is concentrated along Brant Street. Within a 20-minute walk (1 km) or less of the proposed development there is convenient access to many necessities of daily living, including:

- A grocery store;
- A movie theatre;
- Pharmacracies;
- Retail stores;
- Restaurants, Cafes, and Bars;
- Hair Salons and Barbershops
- Doctor Offices;
- Etc.

4.3 TRANSPORTATION OPTIONS

Figure 11 shows the location of the subject site relative to the bus routes provided by the City of Burlington Transit System. There are bus stops 60 metres to the north of the subject site and 140 metres to the south that provide access to Burlington Bus Route 2. This route connects to the John St. Downtown Bus terminals, Burlington GO Station on the Lakeshore line, and 407 GO Bus Terminal.

Figure 11 Access to Transit, Subject Site

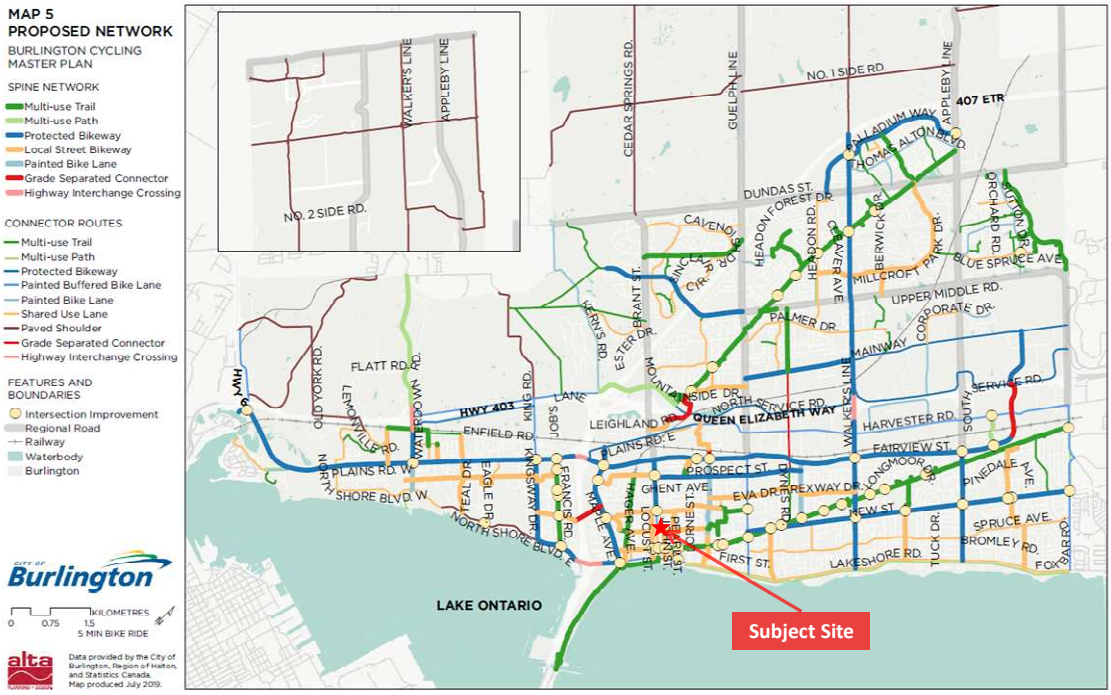


Source: Altus Group Economic Consulting based on City of Burlington Transit System Map, Effective September 2019

Figure 12 shows the location of the subject site relative to proposed and existing cycling routes in the City of Burlington.

According to the City of Burlington's Draft 2019 Cycling Plan, which is a work in progress update of the 2009 Cycling Plan, the subject site is directly on the existing painted bike lane on Brant St that connects with protected bike lanes to the north, as well as, other local bikeway lanes that travel east-west on Elgin St, Caroline St, Prospect St, Fairview St and Plains Rd East. As well, the Brant St bike lanes connects to multi-use trails along the lakeshore. In addition, there a proposed local bikeway lane proposed in close proximity to the site that run north-south along John St and Peral St.

Figure 12 Access to Cycling Network, Subject Site



Source: Altus Group Economic Consulting based on "Map 5" – Draft City of Burlington Cycling Plan, *2019*

4.4 PROXIMITY TO JOBS

The Burlington Downtown urban growth centre is intended to serve as a high-density major employment centre and a focus for public service facilities. In 2013, the Region of Halton employment survey estimated there were 6,238 jobs in the urban growth centre.[10][11]

Residents of the proposed development will have an opportunity to walk, cycle or use transit to access jobs in the urban growth centre, elsewhere in

[10] According to the data from the 2016 Halton Region Employment Survey, in Downtown Burlington urban growth centre there were 4,010 full-time employees on site, 164 full-time employees off site, 2,733 part-time employees on site, 28 part-time employees off site, and 227 seasonal employees on site in 2016.

[11] According to the 2018 Halton Region Employment Survey, there are 86,602 jobs in Burlington with 57,628 jobs located in employment designated areas of the town just north of the downtown along the Q.E.W.

Burlington and other employment areas accessible via GO Transit (including downtown Toronto).

4.5 CONCLUSIONS

In the context of provincial and municipal planning policies, the subject site is an excellent location for high density residential development. Residents will be able to walk to a wide variety of community amenities and services. They will have convenient access to the City's public transit system and the City's existing and planned network of trails and bike lanes.

5 FINANCIAL VIABILITY OF INTENSIFICATION

Under provincial planning policies, it is not sufficient for municipalities to permit intensification in certain locations. Municipalities are required to encourage and facilitate residential intensification. This chapter considers the factors that affect the financial viability of intensification projects and other constraints and impediments to intensification in the Downtown urban growth centre. The proposed development is assessed in this context

5.1 ISSUES AND CONSTRAINTS FOR INTENSIFICATION

5.1.1 The Coriolis Report

The City of Burlington retained Coriolis Consulting Corp. to undertake a market assessment and financial analysis for the redevelopment of neighbourhood centres. The Roseland Plaza and Lakeside Plaza (neither of which is located in Downtown Burlington) were used as case studies to explore issues and constraints surrounding residential intensification.

The Coriolis report identifies the main factors that affect project viability for the redevelopment of the case study sites including:

- The long development horizon - Low absorption rates extend the development horizon which negatively affects financial viability;
- High existing value – Potential redevelopment sites may be occupied by good income producing assets with high existing values;
- Sales prices – For the case study sites, current residential sales prices do not support high land values in the high-density scenario. Sales prices for concrete units are not enough to justify the high cost of construction and a long development horizon.
- Parking standards – The high cost of underground parking ($35,000 per stall at the time) and combined with high parking standards reduces the financial viability of redevelopment; and
- Lost income stream from commercial space - Even if existing retail space is replaced in the new building, rental income is lost during the construction period (pages 35 and 36).

These same factors affect the viability of residential intensification projects in the Downtown Burlington urban growth centre.

5.1.2 Additional Constraints in Downtown Burlington

In the Downtown Burlington, intensification is further constrained by:

- The need to assemble multiple properties to provide for a site of sufficient size for intensification;
- The presence of heritage buildings throughout much of urban growth centre; and
- The proximity of some parts of the urban growth centre to predominantly low-density neighbourhoods (St. Luke's neighbourhood precinct and Emerald neighbourhood precinct).

5.2 OVERCOMING IMPEDIMENTS TO INTENSIFICATION

The proposed development is ideally located to overcome factors that can constrain or impede high density residential development in other locations.

The same factors that make the subject site an excellent location for high-density residential intensification from a planning policy perspective (central location and convenient access to many amenities, daily necessities, parks, schools, and employment opportunities) will also affect the marketability of the proposed development. The subject site will be a particularly attractive location for potential homebuyers considering the move to an apartment in Burlington.

The attractiveness of the subject site for potential purchasers will translate into a faster absorption rate and higher sales prices for the proposed development (compared to sites that do not offer such convenient access to community amenities). The Coriolis report identified slow absorption rates and relatively low sales prices as factors which negatively impact the financial viability of intensification.

The high cost of building underground parking was identified as a constraint in the Coriolis report. Residents of the proposed development will be able to walk to a wide range of amenities, services and jobs, and will have convenient access to Burlington's transit system, multi-use trails and cycling routes. Because they will have access to other transportation options, potential homebuyers may choose to purchase fewer parking spaces than might be necessary for a condominium apartment with fewer transportation options.

6 CONCLUSIONS

From an economic and housing perspective, the proposed development is supportive of the provincial and municipal planning policy objectives.

- The location and density of the proposed development makes efficient use of land and public investment in infrastructure and public service facilities in the local area.
- The location and density of the proposed development supports the use of active transportation (walking and cycling) and public transit (Burlington Transit with connections to GO Transit).
- The proposed development will support achievement of a complete community that offers residents a convenient access to jobs, stores and services, a full range of housing options, transportation options and public service facilities.
- The proposed development will help Burlington achieve the minimum residential intensification target and development phasing established in the Halton Region Official Plan and the minimum density target for urban growth centres set out in provincial and municipal planning policies.

The 2020 Growth Plan allocates substantially more population growth to Halton Region – an additional 320,000 persons over and above the 780,000 persons forecast in the existing Halton Region Official Plan.

The phasing policies of the existing Halton Region Official Plan provide for the development of 23,305 new housing units within the built-up area over the 2022 to 2031 period – approximately 43% of all residential development forecast for this period.

Under the 2020 Growth Plan, at least 50% of all residential development in Halton Region must be located within the built-up area. The Hemson Consulting report, Greater Golden Horseshoe: Growth Forecasts to 2051 forecast the need for 174,500 new units over the 2021 to 2051 period to accommodate the forecast population growth for Halton Region. The Region must plan to facilitate the development of least 87,250 new housing units (50%) within the built up area over the 2021 to 2051 period.

Over the 2011 to 2018 period, an average of approximately 1,415 new housing units were built per year within the built boundary of Halton Region – well short of the average of 2,143 units per year required under the phasing

policies of the existing Halton Region Official Plan for the 2012 to 2021 period.[12] Conformity with the population and intensification policies of the 2020 Growth Plan will require the development of an average of 2,908 new housing units within the built up area – more than double what was actually accomplished in Halton Region over the 2011 to 2018 period.

Optimizing the use of underutilized lands in the Downtown Burlington urban growth centre that offer convenient access to existing jobs, stores and services, transportation options and public service facilities will help set the stage for the accommodation of the additional amounts of population growth and intensification required under Provincial planning policies.

[12] Residential intensification estimated based on average intensification rates as reported in "Integrated Growth Management Strategies Growth Scenarios – Halton Region to 2041" (page 70) and annual housing starts reported in Halton Region, "Residential Real Estate – Buildings", October 2019.