Economic Analysis

Redevelopment of 2030 Caroline Street, City of Burlington

July 1, 2024

KPEC
Planning + Economics

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Redevelopment of 2030 Caroline Street, City of Burlington

Prepared for:

Inaria Burlington Inc.

Keleher Planning & Economic Consulting Inc.

75 Main Street East, Milton ON, L9T 1N4

July 1, 2024

EXECUTIVE SUMMARY

Background

Keleher Planning & Economic Consulting Inc. (KPEC) was retained by Inaria Burlington Inc. ("client") to review the redevelopment proposal for 2030 Caroline Street in the City of Burlington for the economic and planning implications for the Region, City and surrounding area.

The subject site is located in Downtown Burlington, at 2030 Caroline Street, with frontage on Caroline Street, as well as John Street to the west, and Elizabeth Street to the east. To the south is a recently constructed building ("The Berkeley") that fronts onto Maria Street. Located one block to the west along Caroline Street is Brant Street, the main north-south spine of the City of Burlington.

The proposed development, within the northern portion of the block bound by Caroline Street, John Street, Elizabeth Street and Maria Street, would see a 28-storey mixed-use building, with an above-grade parking garage constructed between The Berkeley. The subject building would include 302 residential dwelling units, and ground-level retail spaces fronting onto both John Street and Caroline Street.

Economic Analysis and Housing Need in Burlington

To achieve its planned growth, given that the City's greenfield areas are built-out, the City will need to increasingly rely on intensification within the City's nodes, corridors and other development areas in the built-up area, including Downtown Burlington.

Increased activity in the City's GO Station MTSAs will be needed not only to accommodate population growth, but also to offset the decline in development potential in the City's greenfields and low-density neighbourhoods.

There continues to be a need for continued intensification of areas in the City outside of the its Primary Growth Areas, with the City's Downtown particularly suitable given its range of amenities, employment opportunities, commercial uses and other features that make it a desirable, complete community unlike anywhere else in the City.

To achieve the City's growth of 70,160 persons over the 2021-2051 period, the City's MTSA study finds that achievement of planned density targets and residential/non-residential ratios would result in the MTSAs able to accommodate only 43% of the City's population growth. Other locations in the City, including the Downtown, will be required to accommodate the remaining 57% share of City-wide population growth (41,100

persons over the 30-year period), meaning that the rest of the City outside the three MTSAs will see 35% more growth than the MTSAs combined.

The City's development pipeline report shows 45,126 dwelling units in the housing pipeline, however only 5,424 of these units (12%) have full planning permissions. Given the timelines to gain planning approvals and building permissions, the risk of developing from a financial perspective, and need to match location of supply with demand, the City needs to leverage any and all opportunities for new housing in its existing pipeline to achieve housing forecasts and targets.

The bulk of population growth in the City over the last 20 years has occurred during periods where its large greenfield areas were developed, and has slowed since the City has begun to increasingly rely on higher-density forms of intensification, with the City's historic housing construction falling short of future-looking forecasts. The City will need to significantly accelerate housing growth over recent and longer-term historic levels to fulfill the housing targets set out in the Halton Region Official Plan.

The Downtown Burlington Secondary Regional Node is the strategic growth area in the City that is best positioned to accommodate projected population growth, given the range of existing public service facilities, commercial uses, employment opportunities, public transit options, and is the best example of a complete community in the City, ideally suited for continued intensification. Even assuming that the City's three MTSAs are built-out to the planned minimum densities, areas outside of the MTSAs like the Downtown will need to accommodate roughly 57% of the City's residential growth.

Estimated Economic and Fiscal Benefits

The development of 2030 Caroline will generate the following in annual property taxes and one-time fees and charges:

- An estimated $135.7 million in assessment value, which would, based on 2023 property tax rates, generate $1.15 million per year in property tax revenues, including approximately $572,600 per year for the City of Burlington, $392,700 for Halton Region and $217,800 for education.
- $2.8 million in DCs for the City of Burlington, which includes funds for capital works including Transportation works, Parks & Recreation, Storm Drainage, among other DC services.
- $6.8 million in DC revenues for Halton Region.
- $3.3 million in EDC revenues for the local school boards.

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1. INTRODUCTION

Keleher Planning & Economic Consulting Inc. (KPEC) was retained by Inaria Burlington Inc. ("client") to review the redevelopment proposal for 2030 Caroline Street in the City of Burlington for the economic and planning implications for the Region, City and surrounding area.

1.1. Overview of Subject Site

The subject site is located in Downtown Burlington, at 2030 Caroline Street, with frontage on Caroline Street, as well as John Street to the west, and Elizabeth Street to the east. To the south is a recently constructed building that fronts onto Maria Street ("The Berkeley"). Located one block to the west along Caroline Street is Brant Street, the main north-south spine of the City of Burlington.

Figure 1

Location of Subject Site (2030 Caroline)



Source: Google Earth

1.2. Proposed Development

The proposed development, which is Phase 2 of the overall development of the block bound by Caroline Street, John Street, Elizabeth Street and Maria Street, would see a 28-storey mixed-use building, with an above-grade parking garage constructed between the Berkeley. The subject building would include 302 residential dwelling units, and ground-level retail space fronting onto John Street.

Figure 2

Development Statistics, 2030 Caroline Street, City of

Residential	Unit Count	
Studio Apartments	38	
1-Bedroom Apartments	137	
1-Bedroom + Den Apartments	14	
2-Bedroom Apartments	108	
Townhouses - 3BR	5	
Total	302	
Retail Space		
Square Metres	383	m2
Square Feet	4,121	ft2

Source: Chamberlain Architects Services Limited

2. POLICY ANALYSIS

2.1. Provincial Policy Statement

Part IV of the Provincial Policy Statement 2020 ("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 and avoiding significant or sensitive resources and areas which may pose a risk to public health and safety. Planning authorities are encouraged to permit and facilitate a range of housing options, including new development as well as residential intensification, to respond to current and future needs.*
>
> *Efficient development patterns optimize the use of land, resources and public investment in infrastructure and public service facilities. 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. They support the financial well-being of the Province and municipalities over the long term, and minimize the undesirable effects of development, including impacts on air, water and other resources. They also permit better adaptation and response to the impacts of a changing climate, which will vary from region to region.*

Policy 1.1.1 of the PPS states that:

> *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 of the PPS states that:

> *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 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 requires municipalities responsible for planning to maintain the ability to accommodate growth for a minimum of 15 years through residential intensification:

1.4.1 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; and

b) maintain at all times where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units available through lands suitably zoned to facilitate residential intensification and redevelopment, and land in draft approved and registered plans.

Upper-tier and single-tier municipalities may choose to maintain land with servicing capacity sufficient to provide at least a five-year supply of residential units available through lands suitably zoned to facilitate residential intensification and redevelopment, and land in draft approved and registered plans.

Policy 1.4.3 states that municipalities responsible for planning are to provide for an appropriate range and mix of housing options and densities to meet market-based needs of current and future residents by permitting and facilitating all types of residential intensification and directing the development of new housing to locations where infrastructure and public service facilities will be available:

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

a) establishing and implementing minimum targets for the provision of housing which is affordable to low and moderate income households and which aligns with applicable housing and homelessness plans. However, where planning is conducted by an upper-tier municipality, the upper-tier municipality in consultation with the lower-tier municipalities may identify a higher target(s) which shall represent the minimum target(s) for these lower-tier municipalities;

b) permitting and facilitating:

1. all housing options required to meet the social, health, economic and well-being requirements of current and future residents, including special needs requirements and needs arising from demographic changes and employment opportunities; and

2. all types of residential intensification, including additional residential units, and redevelopment in accordance with policy 1.1.3.3;

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;

e) requiring transit-supportive development and prioritizing intensification, including potential air rights development, in proximity to transit, including corridors and stations; and

f) establishing development standards for residential intensification, redevelopment and new residential development which minimize the cost of housing and facilitate compact form, while maintaining appropriate levels of public health and safety.

Policy 1.6.7.4 states that:

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.

According to the PPS, 'active transportation' is defined as:

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.

Policy 1.7.1 states that 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

One of the Guiding Principles of the Growth Plan is to prioritize intensification and higher densities in strategic growth areas to make efficient use of land and infrastructure and support transit. 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.

Policy 2.2.1.4 states that applying the policies of the Growth Plan will support the achievement of complete communities

> *a) feature a diverse mix of land uses, including residential and employment uses, and convenient access to local stores, services, and public service facilities;*
>
> *b) improve social equity and overall quality of life, including human health, for people of all ages, abilities, and incomes;*
>
> *c) provide a diverse range and mix of housing options, including additional residential units and affordable housing, to accommodate people at all stages of life, and to accommodate the needs of all household sizes and incomes;*
>
> *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;*
>
> *e) provide for a more compact built form and a vibrant public realm, including public open spaces;*
>
> *f) mitigate and adapt to the impacts of a changing climate, improve resilience and reduce greenhouse gas emissions, and contribute to environmental sustainability; and*
>
> *g) integrate green infrastructure and appropriate low impact development*

Policy 2.2.2 of the Growth Plan sets out the applicable minimum intensification targets for upper-tier municipalities such as Halton Region:

> *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 each of the Cities of Barrie, Brantford, Guelph, Hamilton, Orillia and Peterborough and the Regions of Durham, Halton, Niagara, Peel, Waterloo and York will be within the delineated built-up area; and …*
>
> *3. All municipalities will develop a strategy to achieve the minimum intensification target and intensification throughout delineated built-up areas, which will:*
>
> *a) identify strategic growth areas to support achievement of the intensification target and recognize them as a key focus for development;*
>
> *b) identify the appropriate type and scale of development in strategic growth areas and transition of built form to adjacent areas;*
>
> *c) encourage intensification generally throughout the delineated built-up area;*

> *d) ensure lands are zoned and development is designed in a manner that supports the achievement of complete communities;*
>
> *e) prioritize planning and investment in infrastructure and public service facilities that will support intensification; and*
>
> *f) be implemented through official plan policies and designations, updated zoning and other supporting documents.*

Section 2.2.3 of the Growth Plan deals with Urban Growth Centres (UGC), which required the City of Burlington's Downtown Burlington UGC to be planned to achieve a minimum density target of 200 residents and jobs per hectare by 2031 or earlier.

> *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 Brampton, Downtown Burlington, Downtown Hamilton, Downtown Milton, Markham Centre, Downtown Mississauga, Newmarket Centre, Midtown Oakville, Downtown Oshawa, Downtown Pickering, Richmond Hill Centre/Langstaff Gateway, Vaughan Metropolitan Centre, Downtown Kitchener, and Uptown Waterloo urban growth centres; and …*

The definition of "public service facilities" contained in the Growth Plan is as follows:

> *Lands, buildings and structures for the provision of programs and services provided or subsidized by a government or other body, such as social assistance, recreation, police and fire protection, health and educational programs, long term care services, and cultural services. Public service facilities do not include infrastructure. (PPS, 2020)*

"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.*

Section 2.2.6 of the Growth Plan includes the following policies to, among other things, support housing choice through the achievement of minimum intensification and density targets in the Growth Plan:

> *1. Upper-and single-tier municipalities, in consultation with lower-tier municipalities, the Province, and other appropriate stakeholders, will:*
>
> > *a) support housing choice through the achievement of the minimum intensification and density targets in this Plan, as well as the other policies of this Plan by:*
> >
> > > *i. identifying a diverse range and mix of housing options and densities, including additional residential units and affordable housing to meet projected needs of current and future residents; and*
> > >
> > > *ii. establishing targets for affordable ownership housing and rental housing;*
> >
> > *b) identify mechanisms, including the use of land use planning and financial tools, to support the implementation of policy 2.2.6.1 a);*
> >
> > *c) align land use planning with applicable housing and homelessness plans required under the Housing Services Act, 2011;*
> >
> > *d) address housing needs in accordance with provincial policy statements such as the Policy Statement: "Service Manager Housing and Homelessness Plans"; and*
> >
> > *e) implement policy 2.2.6.1 a), b), c) and d) through official plan policies and designations and zoning by-laws.*
>
> *2. Notwithstanding policy 1.4.1 of the PPS, 2020, in implementing policy 2.2.6.1, municipalities will support the achievement of complete communities by:*
>
> > *a) planning to accommodate forecasted growth to the horizon of this Plan;*
> >
> > *b) planning to achieve the minimum intensification and density targets in this Plan;*
> >
> > *c) considering the range and mix of housing options and densities of the existing housing stock; and*
> >
> > *d) planning to diversify their overall housing stock across the municipality. …*
>
> *4. Municipalities will maintain at all times where development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units. This supply will include, and may exclusively consist of, lands suitably zoned for intensification and redevelopment.*

Policy 3.2.3.2 of the Growth seeks to prioritize transit investments in areas with existing or planned higher residential densities to optimize return on investment.

> *2. All decisions on transit planning and investment will be made according to the following criteria: a) aligning with, and supporting, the priorities identified in Schedule 5; 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; c) increasing the capacity of existing transit systems to support strategic growth areas;*

Policy 5.2.5.1 of the Growth Plan encourages municipalities to go beyond the minimum density targets, such as those for an Urban Growth Centre, as well as go beyond the intensification targets.

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

Policy 5.2.5.1 and 5.2.5.3 of the Growth Plan reinforce that the intensification targets are minimum standards, and encourage municipalities to go beyond these minimum targets:

1. *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 targets, where appropriate, except where doing so would conflict with any policy of this Plan, the PPS or any other provincial plan.*
2. *The minimum intensification and density targets in this Plan or established pursuant to this Plan will be identified in upper-and single tier official plans. Any changes to the targets established pursuant to this Plan may only be implemented through a municipal comprehensive review.*
3. *For the purposes of implementing the minimum intensification and density targets in this Plan, upper-and single-tier municipalities will, through a municipal comprehensive review, delineate the following in their official plans, where applicable:*

   a) delineated built-up areas;

   b) urban growth centres;

   c) major transit station areas;

   d) other strategic growth areas for which a minimum density target will be established; and

   e) excess lands

Schedule 3 of the Growth Plan establishes a minimum population forecast of 1,100,000 persons and an employment forecast of 500,000 jobs in the Region by 2051.

2.3. Halton Region Official Plan

The section below relies upon the November 4, 2022 consolidation of the Regional Official Plan, including the adopted ROPA 48 (November 10, 2021) and ROPA 49 (November 4, 2022). The following analysis relies upon ROPA 49 as adjusted by Bill 150.

2.3.1. Population Forecasts

Table 1 of the Region's Official Plan allocates the City a 2041 population of 240,500 persons, an increase of 45,500 persons over the 2021 population of 195,000 persons. The adopted Regional OP includes the Region-wide 2051 population forecasts of 1,100,000 persons, but does not allocate them by lower-tier municipality beyond 2041.

Table 2 of the Regional OP sets out the following intensification and density targets for the City:

- 20,500 housing units in the built-up area between 2022 and 2041, which represents 38.4% of all intensification units throughout the Region (53,300 units).
- Density target of 76 persons and jobs per hectare in designated greenfield area lands.

Table 2A sets out the Regional Phasing strategy, which for the City of Burlington shows a roughly even distribution of the 20,500 intensification units that the City is to accommodate over the 2022-2041 period:

Figure 3

Period	Total Units in Period	Average Units per Year
2022-2026	4,790 units	958 units / year
2027-2031	5,090 units	1,018 units / year
2032-2036	5,170 units	1,034 units / year
2037-2041	5,270 units	1,054 units / year
Total 2022-2041 BUA	20,500 units	1,025 units / year
Total 2022-2041 DGA (medium- and high-density only)	1,630 units	82 units / year
Total Medium/High-Density	22,130 units	1,107 units / year

On average, the City will need to accommodate 1,025 units each year over a 20-year period within its built-up area.

In addition, Table 2A allocates 2,120 units over the 20-year period in the designated greenfield area, of which 1,630 units are to be medium- and high-density units, or 82 units per year.

Assuming that the majority of the 1,025 units per year in the built-up area would be medium- or high-density units, combined with the 82 units/year, the City would need to

see 1,107 medium- and high-density units constructed each year over the 20-year period.

Table 2B of the Regional OP shows that each of the Primary Regional Nodes have been assigned a minimum density target of 160 persons and jobs per hectare to be achieved by 2051. The Strategic Growth Areas in Table 2B that are located in Burlington that have been assigned minimum density targets are as follows, as well as their associated 'general target' for a resident and job mix in each:

Figure 4

Strategic Growth Area	Minimum Density Target (residents and jobs combined per hectare)	General Target Proportion of Residents	General Target Proportion of Jobs
Downtown Burlington / Burlington GO	200	65%	35%
Appleby GO	120	40%	60%
Aldershot GO	150	80%	20%

An analysis of the amount of population generation the City's three MTSAs can be expected to accommodate if the minimum density targets and general targets for residents/jobs are reached is provided later in this report. However, in summary, a September 2020 analysis prepared for the City found that as of 2016, the density in the UGC was 157 people and jobs per hectare, based on 104 hectares, and 9,217 persons (89 people per hectare) and 7,162 jobs (69 jobs per hectare). Achievement of the minimum density and the general target proportion of residents would see the residential density increase to 130 people per hectare, and the job density would be 70 jobs per hectare.

2.4. City of Burlington Official Plan 1997

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 is identified on Schedule B of the 1997 Burlington Official Plan.

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 …*

2.5. City of Burlington Official Plan 2020

The Region of Halton approved the new Burlington Official Plan on November 30, 2020 ("New City OP"). Parts of the City OP that were not appealed came into effect on December 22, 2020. However, the New City OP needs to be updated to be updated to reflect Regional Official Plan updates (ROPA48 and ROPA49), including the extension of population forecasts to 2051.

The OLT confirmed that no parts of the New City OP are in effect on lands with site-specific appeals, as the site-specific policies and other policies relevant to the City's urban structure have been appealed. The proposed policies applicable to 2030 Caroline have also been appealed by the client. Therefore, the New City OP is not in effect and is instead informative, but not determinative.

2.5.1. Downtown Urban Centre

Downtown Burlington is identified as an "Urban Centre" in the City's Official Plan ("City OP"). The City's OP includes policies regarding Mixed-Use Intensification Areas, which include the City's "existing urban centres, emerging MTSAs and other mixed-use nodes and intensification corridors". The policies for the Urban Centres notes that the Downtown Urban Centre "will continue to develop as the city's centre, taking advantage of the unique qualities that contribute to its distinct identity".

Section 5.4.5 of the City OP states that the Downtown has a 'spectrum' of major public service facilities and institutional uses, and that the Downtown Urban Centre is "also a MTSA".

> *5.4.5 DOWNTOWN URBAN CENTRE*
>
> *a) The Downtown is a centre where jobs are found in a spectrum of major public service facilities and institutional uses as well as a wide range of offices and retail and service commercial uses. The Downtown Urban Growth Centre will see further intensification. There will be opportunities in the Urban Growth Centre to add new employment through mixed use development.*

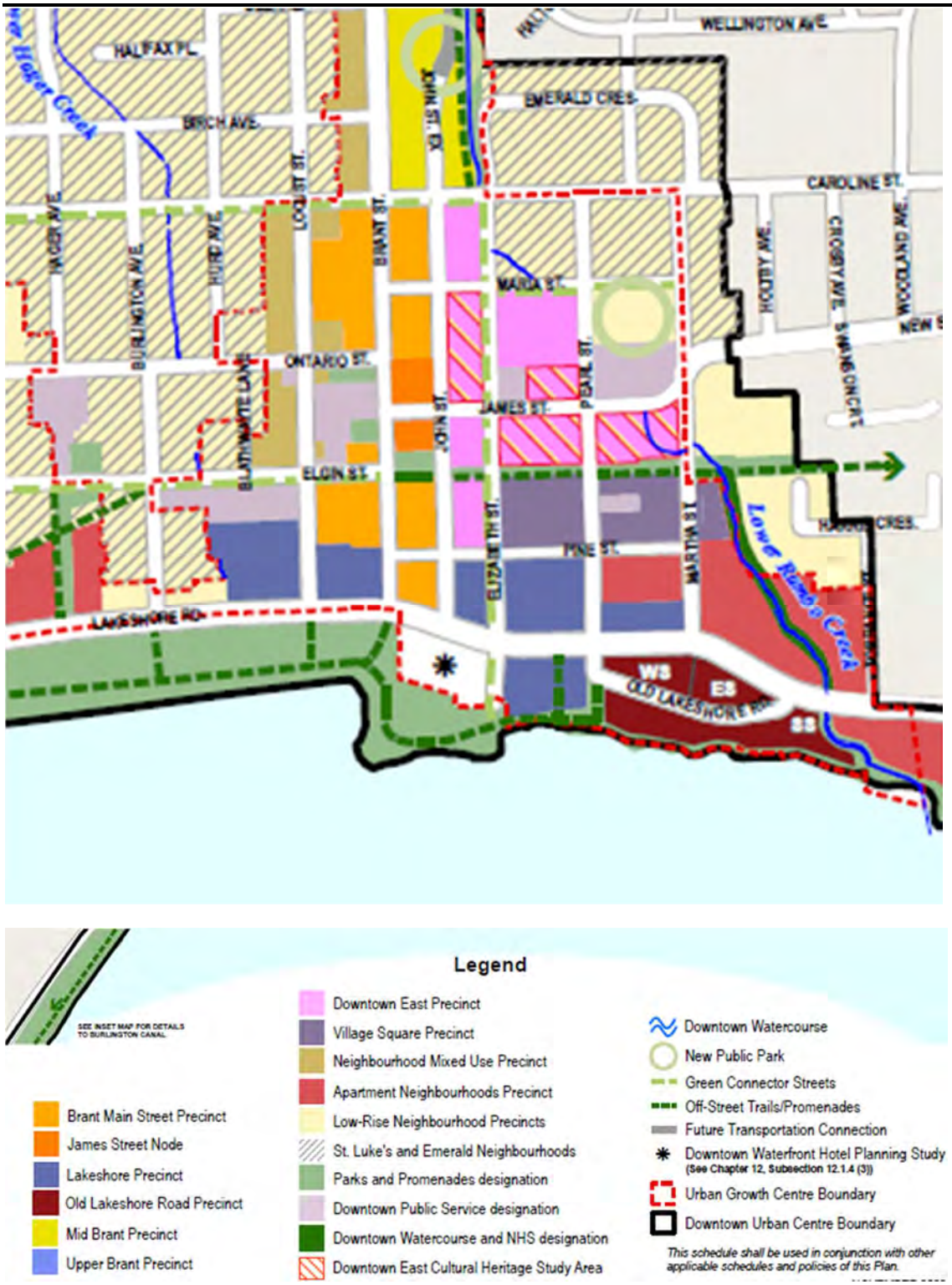
> *b) Over the long-term, the Downtown Urban Centre, also a MTSA, will continue to contribute to accommodating jobs and will significantly contribute to accommodating employment and meeting the City's economic objectives*

Schedule A of the City's Official Plan sets out the City's Urban System. The Downtown Urban Centre is identified as a Major Transit Station Area (MTSA), similar to the City's three GO station areas.

2.5.2. Downtown East Precinct

Schedule D shows the subject site as being within the Downtown East Precinct. Schedule D-2 sets the maximum height for the subject property at 11 storeys. The parcel immediately to the south (Phase 1?) is shown as having a maximum height of 17 storeys.

Figure 5 – Schedule D, City of Burlington Official Plan



2.5.3. Transportation Facilities

Schedule O-1 of the City Official Plan shows the Downtown Terminal as a Major Transit Station area. Schedule O-3 sets out the City's classification of transportation facilities, with the subject site bound by four streets identified in the map:

- Caroline Street – Neighbourhood Connector;
- Maria Street – Local Street;
- John Street – Neighbourhood Connector;
- Elizabeth Street – Neighbourhood Connector.

Table 1 describes Neighbourhood Connectors as serving inter-community travel demands, linked urban arterial and urban local streets, supporting land use that is primarily residential, including related uses such as public service facilities, accommodate a high level of pedestrian and cycling activity and a moderate level of vehicular traffic, and accommodate a moderate degree of people moving capacity.

On Schedule P, Caroline Street is identified as a "Bicycle Priority Street".

3. REVIEW OF RELEVANT STUDIES

3.1. City of Burlington Strategic Plan (2016)

Among the Key Strategic Objectives of the 2016 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 that intensification in Burlington's downtown is attracting 'both businesses and people" to enjoy the quality of life in the downtown.

> *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 that that City has a downtown that supports intensification:

> *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 higher-density development that is walkable and accessible as well as transit-oriented in areas with appealing streetscapes:

> *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 that walkability has guided the development of, among other areas, the downtown so that people can rely less on automobiles:

> *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 that the City will be become a leader in walkability, and that future development in key mixed nodes will be higher density density, walkable and serviced by public transportation.

> *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.*

3.2. Dillon Consulting - Growth Analysis Study (June 2019)

In June 2019, a Growth Analysis Study was released, as authored by Dillon Consulting, with the report addressing questions regarding land supply in the City. The Executive Summary provides an overview of the report's conclusions:

> *The residential land supply analysis shows that there is potential for the City of Burlington to accommodate an additional 58,321 to 85,863 persons … between now and its build-out (depending on the density target used for the Mobility Hubs, the low range represents the Growth Plan target of 150 ppl + jobs/ha while the high range represents the adopted 2018 OP density target of 300 ppl + jobs/ha). The analysis shows that the majority of opportunities for future growth are within the City's built-up area, with a high concentration of future population and jobs planned to be accommodated in its Primary and Secondary Growth Areas. This means that the vast majority of future growth will occur through intensification and redevelopment. …*

The Study notes that the development context in the City will be changing in the years ahead as the City's greenfield areas are built-out, and it will need to increasingly rely on intensification within the City's nodes, corridors and other redevelopment areas within the built-up area. This suggests that the increased activity in the GO Station MTSAs will be needed to offset the decline in development potential in the City's greenfields, rather than solely replacing the need for significant intensification in the Downtown.

> *Over the past 25 years, the City of Burlington has experienced strong population growth across all major demographic groups (i.e. children, adults and seniors), largely driven by steady net migration across all ages and, to a lesser extent, natural increase (i.e. births less deaths). Since 1991, the City's population has grown at a rate well above the provincial average, fueling steady housing construction throughout the City. Historically, residential development activity within Burlington has been dominated by ground oriented housing forms (i.e. single/semi-detached and townhouses) which have largely occurred within the City's greenfield areas. As the City's designated urban lands continue to mature and build out, a growing share of new residential and non-residential development is expected to occur within the City's intensification nodes, corridors and other redevelopment areas within the BUA, as directed by the City's current in-effect 2017 Official Plan and the adopted 2018 Official Plan. This shift in development patterns is anticipated to result in a steady increase in the share of high-density housing forms (i.e. low-, medium- and high-rise apartments) over the medium and long term (i.e. post 2021). As the larger urban centres within the GTHA continue to mature, there is an increasing need to increase utilization of available, designated urban lands to accommodate new development. This represents both an opportunity and a challenge for the City of Burlington and its residents. On the one hand, population growth and increased urbanization are likely to bring new urban amenities and municipal services to the City (i.e. increased transit services, indoor recreation facilities, shopping centres, arts and cultural facilities, etc.) as well as local employment opportunities, which will benefit both the City and local residents. On the other hand, the City's finite supply of greenfield lands ultimately requires the City to accommodate an increasing share of families in high-density households. However, recent PPU trends within the BUA do not suggest that this is occurring.*

The Growth Analysis Study notes the importance of Mobility Hubs, which includes the area within walking distance to the Downtown Bus Terminal, with Downtown identified as an "Anchor Hub" in the Regional Official Plan.

> *Mobility Hubs: Consists of lands within walking distance to major transit station areas, including the Downtown Bus Terminal and GO Rail Stations. Four Mobility Hubs have been identified. Two of these hubs, Downtown Burlington and lands around Burlington GO, have been identified by Metrolinx included in the Halton Regional Official Plan and classified as an Anchor Hub and Gateway Hub, respectively. Two additional mobility hubs have been identified by the City as the lands around Aldershot GO and Appleby GO. The high level of existing and planned transit in these areas provides an opportunity for significant population and employment growth to achieve transit supportive densities. These four hubs have been identified as areas that will be subject to further detailed area specific planning. The adopted 2018 Official Plan identifies a density target of 300 residents and jobs combined per hectare for consideration as part of the area-specific planning process for Aldershot GO, Burlington GO and Appleby GO mobility hubs (policy 12.1.3(4)d)9.*

3.3. NBLC – Downtown Burlington Mobility Hub Market Analysis (August 2017)

The 2017 NBLC market analysis of the Downtown Burlington Mobility Hub included the following insights into the evolution of Downtown Burlington:

> *Downtowns are concentrated urban areas that allow for the efficient use of land and municipal resources for the social and economic benefit of the community. A vibrant mix of residential, commercial and public uses creates a lively area that can become a source of community pride and identity. Large or small, well-defined and healthy Downtowns create a sense of place that yields benefits in terms of improving the quality of life for residents, creating a strong investment environment, and supporting growth.*
>
> *Thanks to continued public investment, Burlington's Downtown has evolved from a deteriorated commercial centre to one of the most vibrant urban cores in the GTA over the past 30 years. Investments in the public realm, especially on the waterfront, as well as high quality programming have helped encourage new investment especially in high-density residential development. Downtown has now become the premier location for new apartment investment in Burlington. The combined effect of these private and public sector investments have, in turn, created a market for new retail and commercial services that further enhances the desirability of the Downtown.*
>
> *Transit in the Downtown Mobility Hub Area is centred around the Burlington Transit Terminal on John Street which sees seven different local bus lines connecting through it, as well as Greyhound buses which provide interregional transit service.*
>
> *Brant Street has continued to serve as an ever-evolving main street strengthened through recent development. Downtown Burlington includes a mix of restaurants, office space, retailers, residential neighbourhoods, civic buildings, and high quality open spaces. Walkable access to Joseph Brant Hospital is a unique feature in this Mobility Hub that drives residential demand from both employees and community members, as well as supporting commercial services. Commercial uses range from small scale storefronts to larger chains focused primarily on population serving retail. Office development is primarily located above retail on Brant Street in addition to a small number of standalone buildings. (page 14)*

The NBLC report compared the Downtown Burlington area with the other three mobility hubs, the three MTSAs located around the City's three GO stations, noting that the Downtown is the only area that offers "all of the features" associated with a complete community.

> *Amongst the four Mobility Hubs, Downtown is the only area that offers all the features typically associated with a complete community. Its broad range of amenities, character streets and open spaces, access to the waterfront, and established walkable character ensure that Downtown is likely to attract a significant component of the City's high and medium density development interest in the future.*

3.4. Watson – MTSA Planning Areas Market Analysis (June 2022)

The City retained Watson & Associates to undertake a Market Analysis of its MTSA areas ("Watson MTSA Study").

Figure 13 of the Watson MTSA Study shows the trends in average household sizes in the City, which have fallen from 2.63 persons per unit (PPU) in 2001 to 2.56 PPU in the 2021 Census. According to the Watson MTSA Study, the "downward trend in housing

occupancy in Burlington has been driven by the aging of the population which increases the proportionate share of empty-nester and single-occupancy households". Any estimate of housing needs to achieve 2031 or 2051 population forecasts needs to account for the falling population in existing units, and provide additional housing units to offset the decline in average household sizes.

Figure 16 of the Watson MTSA Study shows that over the 2006-2021 period, roughly 15% of the City's housing development has been in the MTSAs, with 85% of the City's housing development activity being in "other locations", which would include the former Downtown Burlington UGC. To-date, the City's MTSAs have not been a significant source of new housing in the City.

Figure 6

Housing Development Activity by Area, City of Burlington, 2006-2021, Building Permits

MTSA	2006-2010	2011-2015	2016-2021	Total 2006-2021	% of Total 2006-2021
Downtown Burlington UGC / Burlington GO MTSA	-	175	385	560	5%
Aldershot GO MTSA	470	400	245	1,115	10%
Appleby GO MTSA	5	-	-	5	0%
Other Locations	4,570	2,335	2,845	9,750	85%
Total	5,045	2,910	3,475	11,430	100%

Source: Watson MTSA Study, Figure 16

The Watson MTSA study estimates the existing population and jobs in each of the City's three MTSAs (as of the 2021 Census)[1], and based on the number of existing residents and jobs in each MTSA, and the approximate planned split between residents and jobs in each MTSA as set out in Table 2B of the Halton Region Official Plan, to achieve the minimum densities in each MTSA, a total of 28,272 persons would need to be accommodated in these areas of the City.

[1] The reference to Downtown Burlington UGC/Burlington GO MTSA reflects the new boundaries of the Burlington GO MTSA, and does not include the former Downtown Burlington UGC.

Figure 7

Existing and Planned Density, City of Burlington MTSAs

	Downtown Burlington GO MTSA	Appleby GO	Aldershot GO	Total
Gross Hectares	102	179	86	
Planned Minimum Density (Persons & Jobs/Hectare)	200	120	150	
General Target Proportion (Table 2B ROP)				
Residents	65%	40%	80%	
Jobs	35%	60%	20%	
Needed Persons and Jobs				
Residents	13,260	8,592	10,320	32,172
Jobs	7,140	12,888	2,580	22,608
Total	20,400	21,480	12,900	54,780
Existing Persons and Jobs				
Residents	1,700	1,100	1,100	3,900
Jobs	2,700	6,400	1,100	10,200
Total	4,400	7,500	2,200	14,100
Existing Density	43	42	26	
Additional Persons and Jobs				
Residents	11,560	7,492	9,220	28,272
Jobs	4,440	6,488	1,480	12,408
Total	16,000	13,980	10,700	40,680

Source: Halton Region Official Plan Table 2B, Watson MTSA Study, Figure 31

Based on Table 1 from the adopted Regional OP (and approved as modified by the Minister prior to Bill 150 reversing the changes), the City was projected to grow from 195,000 persons in 2021 to 265,160 persons in 2051, an increase of 70,160 persons. The additional 28,272 persons that would need to be accommodated in the MTSAs to fully achieve the minimum density targets for each, represents 40.3% of the Region's needed population growth. The other 41,888 persons will need to be accommodated in other areas of the City.

The estimate of population growth in the MTSAs presented in the Watson MTSA study is 30,400 persons over the 2021-2051 period. The Watson MTSA study estimates that the MTSAs will accommodate 43% of the City's population growth, and 71% of the City's employment growth. Other Burlington locations are projected by the Watson MTSA Study to accommodate 41,100 persons, or 35% more growth than the MTSAs combined.

3.5. Land Needs Analysis

Halton Region's February 2022 Land Needs Assessment prepared by Hemson Consulting provided estimates of the City of Burlington's residential unit potential including an estimate of the development potential in the City's remaining undeveloped Designated Greenfield Area, which consists of 270 hectares of development land, and is projected to accommodate 6,000 net new residents over the 2021-2051 period.

3.6. Community Benefits Charge

The City's 2022 CBC Study, in listing the capital costs to be recovered through CBCs included the following benefits:

- Future Downtown Public Off-Street Parking Facilities (gross cost $18.5 million);
- Technology for the Performing Arts Center ($200,000);
- Public Art ($1,794,300);
- EV Charging Stations – Downtown ($200,000);
- Revitalization of Infrastructure – City Hall ($6,082,095);
- Information Technology (New Staff Startup Costs, CRM);
- Various Growth-Related Studies (CBC Studies, MTSA Study, Downtown Cultural Heritage Landscapes Policy, Housing Strategy – phases 1&2) (gross cost $1,190,000);

Of these capital costs ($29.5 million), the City was seeking $4.1 million to be recovered from CBC-eligible higher-density development, which based on the forecast amount of CBC-eligible dwelling units (9,218 units), and a prevailing density assumption for these units of 364 units per hectare, which is a necessary step to derive the total land value of anticipated high-density dwelling units to the year 2036

3.7. City of Burlington Development Pipeline (July 2023)

The City of Burlington prepares an ongoing report to update stakeholders on the current pipeline of development, including approved developments available to apply for building permit, those pending a decision from the OLT (including those still waiting for a hearing), those with additional planning applications to undertake despite prior approvals, and applications pending recommendation by City staff or approval via Council or other delegated authority, and those in pre-consultation stages.

- In total, the City of Burlington's report finds that there are 38,219 dwelling units in the "housing pipeline", of which only 9.5% (3,642 units) are fully approved and able to apply for building permits.
- The City's pipeline includes 7,948 units that are under appeal to the OLT, and another 26,629 units require planning approvals.
- The City's 10-year housing target is 29,000 units, or 2,900 units per year – therefore, the 3,642 units that are fully approved with planning permissions and ready for building permit application (and become a 'housing start' consistent with the metric of the housing pledges), represents just over 1-year of supply that can be converted to permitted and under construction.
- Assuming all 3,642 units with full planning approval are commenced in the next 10 years, to achieve the 29,000 unit target based on these 'pipeline' units becoming 'housing starts', the remaining 25,358 units needed to reach targets would require that of the 73.6% of the other 34,477 'pipeline' units without full approval from OLT, City Council, or often without a decision, and most frequently without an application would have to commence construction by 2032 to achieve the City's housing target.

The more robust the City's development approvals pipeline is, the lower the percentage of 'pipeline' units need to clear numerous hurdles in the remaining planning, legal, design, and marketing processes, including:

- Being built with as many units as approved;
- Being approved with as many units as originally proposed and captured in the City's estimates;
- Being approved by the OLT, and being approved without reductions in unit counts;
- Being approved with sufficient units to be feasible to construct given other policy requirements, fees, charges, property taxes, financing costs; that can change and deteriorate from the time the application was made to the time the application was approved, permitted or built;
- The proportion of development units in pre-consultation stages that will result in development applications – many prospective development applications in pre-consultation stages can be aborted due to differences in perceived permissions, density allowances and appetite for continuing with prospective development application.

Figure 8

Categories of Units in City of Burlington's Planning Application Housing Pipeline, (July 2023)

Application Status	Units	Notes:
Approved	3,642	Received all planning approvals from City and are able to apply for building permit
Appealed to OLT	7,948	Pending a decision from OLT
Waiting for Site Plan Application	3,112	Received zoning approval, but have not yet applied for site plan approval
Under Review	7,754	Applications received by City for consideration
Pre-Application	15,763	Developer consultations with City prior to submitting a planning application
Total	38,219	
Share of Units Approved in Pipeline	9.5%	

Source: City of Burlington

3.8. Estimated Units Needed to Meet 2051 Population Forecasts

The City's 2019 Development Charges Background Study assumed that over the 2019-2031 period, that the population in existing units would fall by 0.0657 persons per unit, or a decline of 4,839 persons from the City's existing 73,687 units.

Not only will new residential units need to be built to accommodate population growth, additional units will be required to offset the population decline in existing units, which at the weighted average PPU set out in the 2019 DC Study of 1.773, equates to 2,839 units being needed to 2031 just to maintain population levels in the City.

In a scenario where there is no decline in occupancy in existing units, at the weighted average PPU set out in the City's 2019 DC Study, to reach the population growth of 70,160 persons to 2051, the City would need to add 39,571 units. Adding on the 2,839 units necessary to offset population decline in existing units, the total number of dwelling units the City needs to 2051 may be 42,410 units.

Therefore, based on this estimate, the City's existing development pipeline of 38,219 units will not be sufficient to meet the City's dwelling unit need to meet minimum population forecasts to 2051. Even if each unit in the pipeline is approved as proposed, marketable as approved, and built, the City would need (at least) an additional 4,191 units to be proposed, approved and built. Additionally, any reduction in unit counts among units in the pipeline through adjusted proposals, refusals, or projects that are deemed no longer feasible by proponents will need to be added to the City's pipeline.

4. DATA ANALYSIS

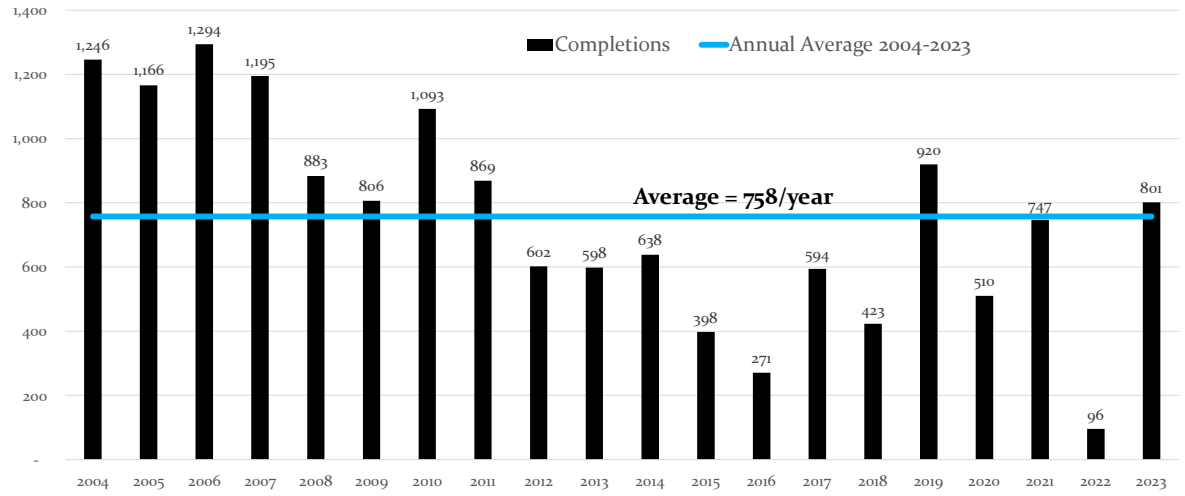
4.1. Housing Trends

4.1.1. Housing Completions

Over the past 20 years, the City has seen an average of 758 units completed per year, but has only reached this average twice since 2011 (920 units in 2019, and 801 units in 2023), and saw only 96 units completed in 2022.

Figure 9

Housing Completions, City of Burlington, 2004-2023



Source: CMHC

Over the past 20 years, the City has seen 6,691 apartment units completed, or 335 units of that type, per year. Combined with the 156 row units completed on average per year, the City has seen 490 units 'medium or high-density units' completed per year.

The Region Official Plan requires that 1,107 medium- and high-density units completed per year to meet the phasing set out in Table 2A.

The City will therefore need to see these unit types increase by 126% over the next 20 years than what it saw over the preceding 20 year period from 2003-2022.

Figure 10

Housing Completions by Year and by Unit Type, City of Burlington, 2004-2023

Year	Single-Detached	Semi-Detached	Row	Apartment	Total
2004	531	94	553	68	1,246
2005	577	12	266	311	1,166
2006	364	146	344	440	1,294
2007	411	32	440	312	1,195
2008	521	108	254	-	883
2009	284	70	214	238	806
2010	246	220	139	488	1,093
2011	287	60	140	382	869
2012	298	-	154	150	602
2013	107	2	161	328	598
2014	74	8	77	479	638
2015	113	2	78	205	398
2016	57	4	22	188	271
2017	66	-	13	515	594
2018	159	-	-	264	423
2019	62	68	11	779	920
2020	55	-	76	379	510
2021	90	50	104	503	747
2022	58	12	26	-	96
2023	95	-	44	662	801
Total	4,455	888	3,116	6,691	15,150
Last 5 Years	72	26	52	465	615
Last 10 Years	83	14	45	397	540
Last 15 Years	137	33	84	371	624
Last 20 Years	223	44	156	335	758

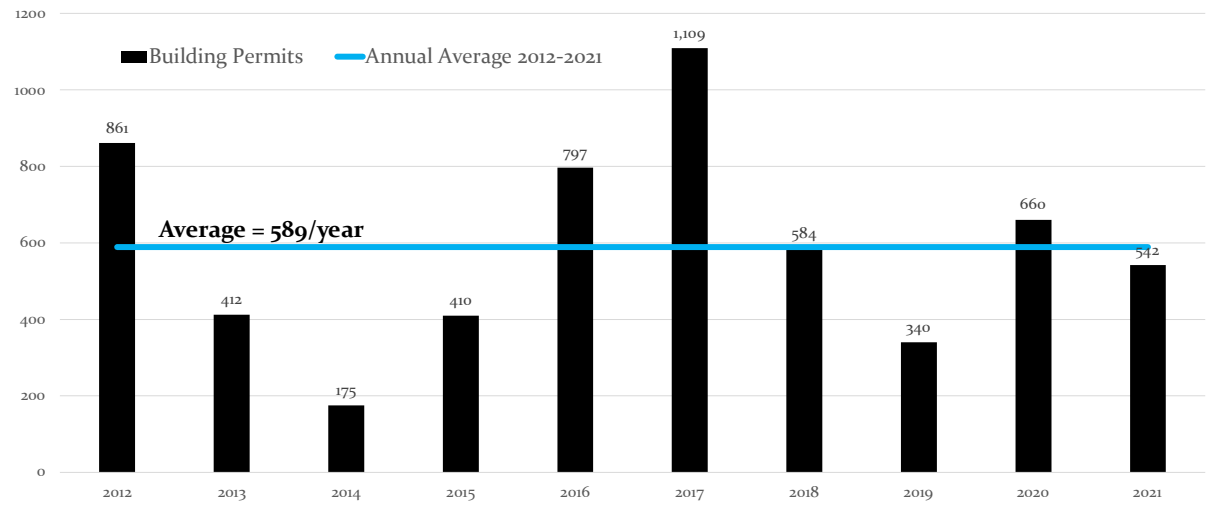
Source: CMHC

4.1.2. Building Permits

Over the 10 years from 2012 to 2021, the City saw an average of 589 units receive building permits per year, ranging from an annual low of 175 units (2014) to a high of 1,109 units (2017).

Figure 11

Building Permits, City of Burlington, 2012-2021



Source: City of Burlington based on Statistics Canada building permit data

4.2. Population Growth

Over the 2001-2021 period, the City saw its population increase from 150,836 persons to 186,948 persons, which equates to annual population growth of approximately 1,800 persons per year. The five-year growth rates have slowed considerably in each subsequent five-year Census period, from growth of 13,579 persons from 2001-2006, decreasing each period to growth of just 3,634 persons from 2016-2021.

Figure 12

Change in Population and Occupied Private Dwellings, City of Burlington 2001-2021

Year	Population	Occupied Private Dwellings	Population % Change	Population Change	Population Avg. Annual Change
2001	150,836	57,340			
2006	164,415	63,159	9%	13,579	2,716
2011	175,779	68,779	7%	11,364	2,273
2016	183,314	71,373	4%	7,535	1,507
2021	186,948	73,180	2%	3,634	727
Change 2001-2021					
Total	36,112	15,840			
Avg. Annual	1,806	792			
Growth 2021-2041					
Total	45,500				
Avg. Annual	2,275				

Source: Statistics Canada Census data

To grow to 240,500 persons by 2041 (from the population of 195,000 persons in 2021 which includes Census undercount), the City will need to grow by an average of 2,275 persons per year – this amount of annual population growth is:

- 213% higher than the population growth seen in the City over the 2016-2021 period;
- 104% higher than the growth seen over the 2011-2021 period;
- 26% higher than the average annual population growth seen over the past 20 years.

Given that the bulk of the population growth in the City over the past 20 years has occurred during periods when its large greenfield areas were developed, and has since slowed as the City has increasingly relied on higher-density forms of housing, the City will need to significantly accelerate housing growth over recent and longer-term levels to fulfill the housing targets set out in the Halton Region Official Plan.

4.3. Estimated Population and Jobs from Proposed Development

Based on the mix and number of units and proposed retail space, the proposed development is estimated to accommodate 464 persons and 11 jobs. The residential units are converted to estimated population based on average household sizes of new dwelling units and ratio of floor space to workers, taken from the City's 2024 Development Charges Background Study.

Figure 13

Estimated Population and Job Generation, 2030 Caroline Street, City of Burlington

Residential	Unit Count	Persons per Unit	Estimated Population
Studio Apartments	38	1.361	52
1-Bedroom Apartments	137	1.361	186
1-Bedroom + Den Apartments	14	1.361	19
2-Bedroom Apartments	108	1.800	194
Townhouses - 3BR	5	2.431	12
Total	302		464

Retail Space	Gross Floor Area	FSW Factor	Estimated Jobs
Square Metres	383	34	11

Source: City of Burlington 2024 DC Study

4.4. Integrated Mobility Plan

The City's Integrated Master Plan provides several insights into the existing and planned transportation context in Downtown Burlington:

- Page 63 – "Downtown Burlington is well-connected from a pedestrian point of view. There are wide sidewalks throughout downtown that are complemented by the Waterfront Trail that connects downtown to the broader area.";
- Page 81 – regarding Neighbourhood Character Typology and the Downtown – "This is the urban core of the city, generally the oldest part of town with the most diverse mix of land uses developed around a tight, walkable block pattern.".

The IMP sets out the current mode splits, and the proposed target mode shares. The Downtown currently has the highest transit mode share at 3.5%, and the highest proposed target mode share at 20%, as well as the lowest auto mode share at 50%.

4.5. Estimated and Approved Density in Downtown Burlington

An analysis completed by the City in September 2020 estimated the density of the original Downtown Burlington UGC at 188 people and jobs per hectare based on "current and approved development projects".

The measurement of density excludes the Spencer Smith Park lands, which would reduce the 'denominator' of the density calculation and make the calculated density higher than it would be had the park lands been included. Density Measurements

Based on review of this analysis, the estimate of density in the Downtown includes the following elements:

- Estimate of 2016 density – 157 people/jobs per hectare ("pj/ha"), including 9,217 persons and 7,162 jobs over a land area that is 104.3 hectares;
- Projects completed or under construction would add another 2,068 persons and jobs to the area, bringing the density to 177 pj/ha. This grouping includes:
    - 2030 Caroline Street
    - Bridgewater (2050 Lakeshore);
    - Hospital Expansion (1000 jobs);
- Projects with draft approved site plans would add 922 persons and jobs to the area, bringing the density to 186 pj/ha;
- Projects with some approvals, but awaiting site plan approval would add another 285 jobs to the area, bringing the density to 189 pj/ha;
- Development applications without approvals are estimated to add another 2,891 people and jobs to the area, bringing the density to 217 pj/ha;

There are numerous issues with the assumptions and inclusions in the above density estimates:

- The land area excludes the Spencer Smith Park, resulting in a land area of only 104 hectares. The Provincial document from Spring 2008 showing the size and location of UGCs showed the Downtown Burlington UGC as being 125 hectares, with the difference in size is due to the removal of the Spencer Smith Park from the land area.
- If the 125 hectares was used, using the same estimates of population and employment from the baseline 2016 estimates, the 9,217 persons and 7,162 jobs would equate to 131 pj/ha instead of 157 pj/ha, and the 'planned' density would fall from 217 pj/ha to 180 pj/ha.
- The UGC land area of 104 hectares is only roughly half of the land area that a full 800-metre radius around the John Street Bus Terminal would include (201 hectares), meaning that the calculated density per hectare leaves out vast areas of low-density homes within proximity to the John Street Bus Terminal, meaning that the overall estimates of density per hectare in the area are somewhat overstated.

- A footnote on page 2 of the City's analysis states that the population estimates are "based on 2011 Statistics Canada custom data plus Statistics Canada population growth by Dissemination Area (2011-2016) which includes the UGC and portions of adjacent neighbourhoods. This assumes that all new growth over the 2011-2016 timeframe occurred in the UGC"
- Despite the low-density residential areas not being part of the 'denominator', the density analysis by virtue of including Dissemination Areas in the UGC, includes numerous land areas in the estimated 'baseline' population that are not within the UGC boundaries, meaning that the estimated baseline density is overstated.
- Of the additional density reviewed in the September 2020 report there are 2,711 residential units estimated to generate a population in new units of 4,285 persons. In addition, there are 1,807 new jobs estimated to be generated through non-residential developments (Hospital Expansion) or non-residential components of mixed-use developments, including 7,638 m2 of commercial and 8,512 m2 of office space, the latter of which was largely to be provided through an 8-storey office building provided on 2030 Caroline Street, which would generate 271 jobs.
- The version of the 2030 Caroline Street application in the September 2020 analysis would include 190 persons and a total of 330 jobs, for a total of 520 persons and jobs. The updated application would include 302 residential units and 382.83 m2 of retail space, which would generate 464 persons and 11 jobs, or 495 persons and jobs, or a combined 25 persons and jobs less than contained in the September 2020 report.

Figure 14

Sources of Additional Density, Downtown Burlington, August 2020 Analysis

PPU/FSW Factors		3.42	2.31	1.58		40	30	37	1			
		Residential				Non-Residential				Persons & Job Estimates		
Under Construction	Address	Low-Density	Medium-Density	High-Density	Total	Comm. (m2)	Office (m2)	Inst. (m2)	Hotel (rooms)	Persons	Jobs	Total Persons & Jobs
Carriage Gate	2025 Maria / 2030 Caroline etc.	-	-	120	120	2,329	8,147	-	-	190	330	519
Bridgewater	2050 Lakeshore	-	-	150	150	1,677	-	-	151	237	193	430
Saxony	452 Locust	-	-	60	60	444	-	-	-	95	11	106
M.Wellens	514 Pearl	1	-	-	1	-	-	-	-	3	-	3
Hospital Expansion	1230 North Shore Blvd	-	-	-	-	-	-	37,031	-	-	1,001	1,001
M&G Eade	616 Brant	-	-	4	4	-	-	-	-	6	-	6
Subtotal Under Construction		1	-	334	335	4,450	8,147	37,031	151	531	1,535	2,066
Draft Approved Site Plans												
Cherish Homes	730-760 Brant	-	-	146	146	-	-	-	-	231	-	231
Adi Development Group	374 Martha	-	-	240	240	-	-	-	-	379	-	379
421 Brant St Inc.	421-431 Brant	-	-	156	156	-	-	-	-	246	-	246
Subtotal Draft Approved		-	-	542	542	-	-	-	-	856	-	856
No Site Plan Approval												
Roman Home Builders	2085 Pine	-	-	15	15	-	-	-	-	24	-	24
Molinaro Group	490-492 Brock / 1298 Ontario	-	-	162	162	-	-	-	-	256	-	256
Subtotal Draft Approved		-	-	177	177	-	-	-	-	280	-	280
Applications Under Consideration												
Reserve Properties	401-413 Brant / 444-450 John e	-	-	161	161	760	365	-	-	254	31	286
Mattamy	2082-2090 James	-	-	164	164	345	-	-	-	259	9	268
Spruce Partners	1157-1171 North Shore	-	-	419	419	-	-	-	-	662	180	842
Carriage Gate	2069-2079 Lakeshore etc.	-	-	276	276	666	-	-	-	436	17	453
Better Life Retirement Residence	441 Maple	-	-	153	153	-	-	-	-	242	-	242
Pine Street Burlington	2085 Pine	-	-	24	24	112	-	-	-	38	3	41
Core Development Group	2093-2021 Lakeshore etc.	-	-	310	310	707	-	-	-	490	18	507
Old Lakeshore Burlington Inc.	2107 Old Lakeshore etc.	-	-	150	150	598	-	-	-	237	15	252
Subtotal Under Construction		-	-	1,657	1,657	3,188	365	-	-	2,618	272	2,890
Total		1	-	2,710	2,711	7,638	8,512	37,031	151	4,285	1,807	6,092

Source: City of Burlington Memo (September 3, 2020)

4.6. Summary

Over the past 20 years, the City has seen 6,691 apartment units completed, or 335 units of that type, per year. Combined with the 156 row units completed on average per year, the City has seen 490 units 'medium or high-density units' completed per year.

The Region Official Plan requires that 1,107 medium- and high-density units completed per year to meet the phasing set out in Table 2A.

The City will therefore need to see these unit types increase by 126% over the next 20 years than what it saw over the preceding 20 year period from 2003-2022.

To grow to 240,500 persons by 2041 (from the population of 195,000 persons in 2021 which includes Census undercount), the City will need to grow by an average of 2,275 persons per year – this amount of annual population growth is substantially higher than both recent and longer-term historic trends, and 213% higher than the growth seen over the last five-year Census period.

Given that the bulk of the population growth in the City over the past 20 years has occurred during periods when its large greenfield areas were developed, and has since slowed as the City has increasingly relied on higher-density forms of housing, the City

will need to significantly accelerate housing growth over recent and longer-term levels to fulfill the housing targets set out in the Halton Region Official Plan.

Based on the mix and number of units and proposed retail space, the proposed development is estimated to accommodate 464 persons and 11 jobs. The 425 persons equates to 1.01% of the City's forecast population growth to 2041.

The proposed redevelopment will provide a significant contribution to the City in achieving its future growth allocation, by locating in the only area of the City that currently has the necessary services, facilities and infrastructure already in place, which is consistent with Provincial policy objectives to locate development in areas where public service facilities and infrastructure exist and are available, promoting cost-effective development.

5. AMENITY ANALYSIS

The definition of 'public service facilities' in the Growth Plan is as follows:

> *Lands, buildings and structures for the provision of programs and services provided or subsidized by a government or other body, such as social assistance, recreation, police and fire protection, health and educational programs, long term care services, and cultural services. Public service facilities do not include infrastructure. (PPS, 2020)*

Within 1km of the subject site and/or generally within the area of Downtown Burlington are the following types of public service facilities based on the contents of the definition contained in the Growth Plan:

Figure 15

Programs and services provided by or subsidized by a government or other body	Type of land, building or structure for provision of programs and services:
Social Assistance:	Burlington City Hall
Recreation:	Wellington Park Coronation Park Lions Park Centennial Bikeway Spencer Smith Park Apeldoorn Park Brock Park
Police and Fire Protection:	Not applicable
Health and Educational Programs:	Central Public School Burlington Central High School St. John Catholic Elementary School
Long-Term Care Services:	Wellington Park Care Centre Maple Villa LTC Centre
Cultural Services:	St. John Baptist Church St. John Orthodox Church St. Lukes Anglican Church Knox Presbyterian Church Wellington Square Burlington Performing Arts Centre

6. ECONOMIC BENEFITS

6.1. Property Taxes

Based on assessment assumptions from the City's 2020 Downtown Burlington Fiscal Impact Study, the proposed development would generate an estimated $135.7 million in assessment value, which would, based on 2023 property tax rates, generate $1.15 million per year in property tax revenues, including approximately $572,600 per year for the City of Burlington, $392,700 for Halton Region and $217,800 for education.

Figure 16

Estimated Annual Property Tax Revenues at Build-Out, 2030 Caroline Redevelopment

	Residential	Retail	Total
Units	302		
Square Footage		4,121	
Assessment / Unit	443,000		
Assessment / SF		412	
Assessment	$ 133,786,000	$ 1,697,748	$ 135,483,748
Tax Rates (2023)			
City	0.420266%	0.612116%	
Region	0.288176%	0.419729%	
Education	0.153000%	0.770552%	
Total	0.861442%	1.802397%	
Tax Revenues			
City	$ 562,257	$ 10,392	$ 572,649
Region	$ 385,539	$ 7,126	$ 392,665
Education	$ 204,693	$ 13,082	$ 217,775
Total	$ 1,152,489	$ 30,600	$ 1,183,089

Source: KPEC based on City of Burlington 2023 Tax Rates, Watson & Associates Downtown Burlington Fiscal Impact Analysis, (August 26, 2020)

6.2. Development Charges

Based on the 302 proposed residential units and 383 square metres of commercial gross floor area, it is estimated that the proposed development would generate $2.8 million in DCs for the City of Burlington, which includes funds for capital works including Transportation works, Parks & Recreation, Storm Drainage, among other DC services.

Figure 17

Estimated Development Charge Revenues, 2030 Caroline Street, City of Burlington

Units/GFA		5		108		189		383	
DC Rates	Townhouse (3BR+)		Apartment 2BR+		Apartments <2BR		Retail ($/m2)		Total
Transportation	$	9,542	$	6,409	$	4,846	$	99.57	
Storm Drainage	$	139	$	93	$	71	$	3.01	
Fire	$	1,617	$	1,086	$	821	$	16.47	
Transit	$	1,283	$	862	$	651	$	13.13	
Parks & Recreation	$	3,556	$	2,388	$	1,806	$	8.18	
Library	$	203	$	136	$	103	$	0.43	
Studies	$	-	$	-	$	-	$	-	
Total	$	16,340	$	10,974	$	6,804	$	162.96	
DC Revenues									
Transportation	$	47,710	$	692,172	$	915,894	$	38,118	$ 1,646,184
Storm Drainage	$	695	$	10,044	$	13,419	$	1,152	$ 24,615
Fire	$	8,085	$	117,288	$	155,169	$	6,305	$ 278,762
Transit	$	6,415	$	93,096	$	123,039	$	5,027	$ 221,162
Parks & Recreation	$	17,780	$	257,904	$	341,334	$	3,132	$ 602,370
Library	$	1,015	$	14,688	$	19,467	$	165	$ 34,320
Studies	$	-	$	-	$	-	$	-	$ -
Total	$	81,700	$	1,185,192	$	1,568,322	$	53,899	$ 2,807,413

Source: City of Burlington DC By-law 041-2024

The development would also be subject to Halton Region DC rates, which based on the DC rates effective as of June 2024, it is estimated that the proposed development would generate $6.8 million in DC revenues for Halton Region.

6.3. Education Development Charges

Both the Halton District School Board (HDSB) and Halton Catholic District School Board (HCDSB) impose Education Development Charges (EDCs) on development, which is used to fund school site acquisition. The EDC rates imposed by both Boards combine to be $10,765 per residential unit and $29.60 per square metre for non-residential uses. Based on these EDC rates, it is estimated that the proposed development would generate $3.3 million in EDC revenues for the local school boards.

7. CONCLUSIONS

The Regional Official Plan forecasts an increase in the City of Burlington's population over the 2021-2051 period of 70,160 persons. Table 2 of the ROP targets 20,500 new housing units in the City's built-up area between 2022 and 2041, which equates to an annual average of 1,025 units per year, most of which can be expected to be medium- and high-density residential units. These are in addition to the 82 medium- and high-density units per year forecast for the City's remaining Designated Greenfield Area.

The City's new Official Plan designates the surrounding area as the Downtown Urban Centre, with the City OP noting that the area has a spectrum of public service facilities, and that the Downtown is a MTSA. Policy 82.2 of the Regional OP states that it is the policy of the Region to direct development with higher densities to Regional Nodes based on the hierarchy, but also based on the level of existing and planned transit service.

The City's Integrated Master Plan (IMP) provides several insights into the existing and planned transportation context in Downtown Burlington, noting that the Downtown is well-connected from a pedestrian point of view, and is connected to the City more broadly. The IMP provides details of the mode splits in various parts of the City finding that the Downtown has the highest current transit mode share (3.5%), and the highest proposed target transit mode share at 20%, with the City-wide transit mode share being 14.8%.

In undertaking a market analysis of the Downtown, a 2017 NBLC study found that Downtown Burlington was "one of the most vibrant urban cores in the GTA", and that the Downtown has become "the premier location for new apartment investment in Burlington", which combined has added to the market for retail and commercial services in the Downtown, all of which "further enhances the desirability of the Downtown.". Given the significant amount of amenities and public service facilities in the Downtown, these attributes and market demand will persist, even with the change in land use planning orientation away from the "Urban Growth Centre" designation. The NBLC report noted that the Downtown, among the other Mobility Hubs in the City "is the only area that offers all of the features typically associated with a complete community".

A June 2022 Study of the City's MTSAs found that 85% of the City's housing activity since 2006 has occurred outside the City's three GO station areas, and that even with achievement of minimum density targets in each of the three GO station areas, those areas would only account for 43% of the City's population growth, with the remaining areas of the City needing to accommodate the remaining 57% of the City's projected

growth, or 35% more growth than the three GO station MTSAs combined. Given the amenities, existing and planned density continuing, the Downtown area can be expected to continue to accommodate a significant proportion of City-wide housing growth.

While the City requires 1,025 units per year in the built-up area over the 2022-2041 period, the City-wide housing completions have averaged just 790 units per year (Rural, BUA and DGA combined), with no single year reaching 1,025 units (of any type) since 2010, despite a strong housing market over this period. To achieve the full quantum of 1,107 medium- and high-density units per year to achieve the Regional OP targets, the City would need to see housing activity of this type increase by 125% over the next 20 years from what was built over the 2003-2022 period.

According to the MTSA Study, there has been a downward trend in housing occupancy in Burlington, driven by increased proportions of empty-nester and single-occupancy households. Therefore, any estimate of housing need to achieve population forecasts need to account for the falling population in existing units, and provide additional housing units to not only accommodate population growth, but also to offset the decline in average household sizes.

Over the past 20 years, the City has seen 6,691 apartment units completed, or 335 units of that type, per year. Combined with the 156 row units completed on average per year, the City has seen 490 units 'medium or high-density units' completed per year.

The Region Official Plan requires that 1,107 medium- and high-density units completed per year to meet the phasing set out in Table 2A.

The City will therefore need to see these unit types increase by 126% over the next 20 years than what it saw over the preceding 20 year period from 2003-2022.

To grow to 240,500 persons by 2041 (from the population of 195,000 persons in 2021 which includes Census undercount), the City will need to grow by an average of 2,275 persons per year – this amount of annual population growth is substantially higher than both recent and longer-term historic trends, and 213% higher than the growth seen over the last five-year Census period.

Given that the bulk of the population growth in the City over the past 20 years has occurred during periods when its large greenfield areas were developed, and has since slowed as the City has increasingly relied on higher-density forms of housing, the City will need to significantly accelerate housing growth over recent and longer-term levels to fulfill the housing targets set out in the Halton Region Official Plan.

Based on the mix and number of units and proposed retail space, the proposed development is estimated to accommodate 464 persons and 11 jobs. The 464 persons equates to just over 1% of the City's forecast population growth to 2041.

The development as proposed can contribute to the City and Region meeting the minimum population targets and intensification targets set out in the Halton Region Official Plan, by providing residential supply in the area of the City that is the most complete community and based on market analyses prepared for the City, the most likely to proceed based on marketability considerations.

Estimated Economic and Fiscal Benefits

The development of 2030 Caroline will generate the following in annual property taxes and one-time fees and charges:

- An estimated $135.7 million in assessment value, which would, based on 2023 property tax rates, generate $1.15 million per year in property tax revenues, including approximately $572,600 per year for the City of Burlington, $392,700 for Halton Region and $217,800 for education.
- $2.8 million in DCs for the City of Burlington, which includes funds for capital works including Transportation works, Parks & Recreation, Storm Drainage, among other DC services.
- $6.8 million in DC revenues for Halton Region.
- $3.3 million in EDC revenues for the local school boards.