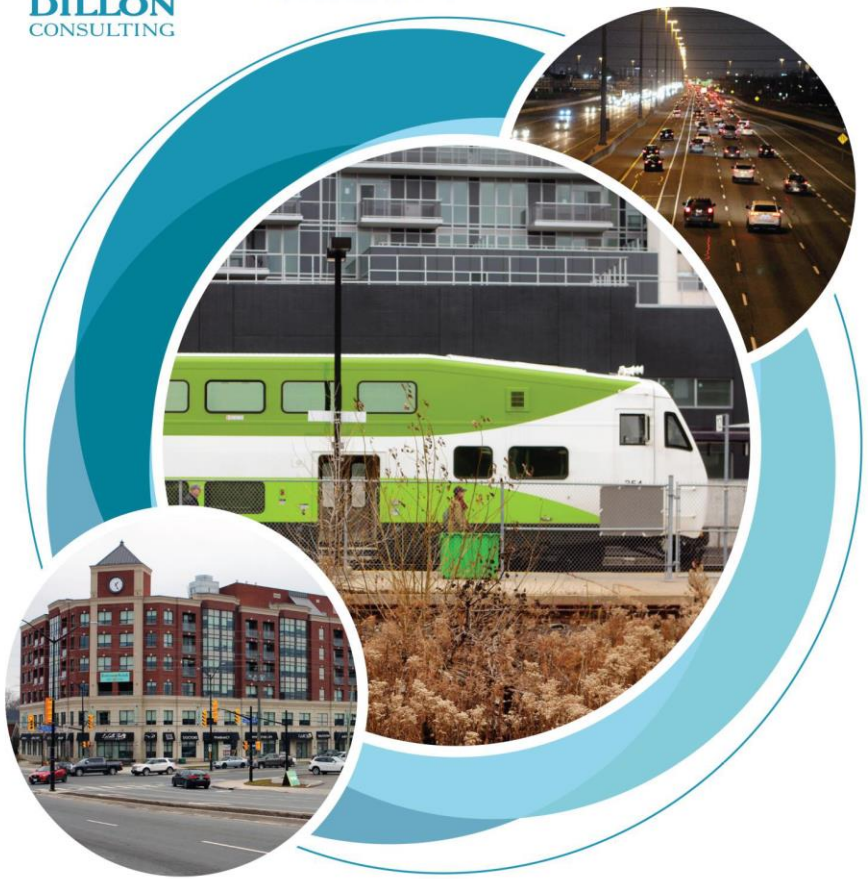
PB-19-19 COW-
Workshop
September 12, 2019
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Growth Analysis Council Workshop



September 12, 2019 | City Hall

Agenda

1. Introductions, Purpose of the Project and Council Workshop (15 min)
2. Supply (30 min)
3. Demand (45 min)
4. Forecast (20 min)
5. Next Steps (10 min)

1.0

Introductions, Purpose of Project and Council Workshop

Context/Background

- The Region of Halton is in the process of undertaking an Official Plan Review.
- Phase 1 - Directions Report (completed in October 2016)
- **Phase 2- Discussion Papers on key themes:**
  - **Integrated Growth Management**, Rural and Agricultural Systems, Natural Heritage System, Climate Change, and Implementation.
- Phase 3 - Confirm Policy Directions and preparation of a Regional Official Plan Amendment

Context/Background

- Halton Region's Integrated Growth Management Strategy (IGMS)
  - Based on the integration of land use, infrastructure and financial considerations.
  - Will allocate population and employment targets across Halton to 2041 based on the Province's Growth Plan for the Greater Golden Horseshoe
  - The Region will use the population and employment allocations to generate finer-grain projections (Best Planning Estimates/BPEs) which are used as the basis for infrastructure master planning and investment

Context/Background

- November 9, 2016– Regional Council
  - IGMS Framework

- April 10, 2019 – Regional Council Workshop
  - Primer on the Region Official Plan and the review underway
  - History of growth management planning in Halton
  - Summary of work done to date on the IGMS
  - Overview of growth scenarios, preliminary findings and next steps

Context/Background

- June 19, 2019 – Regional Council
  - Progress update on IGMS
  - Technical Paper – IGMS Growth Scenarios
  - Evaluation Framework

- September 11, 2019 – Regional Council
  - Fall update on IGMS
  - Regional Council Motion (June 19th) – Information on Next Steps

Purpose of the City's Growth Analysis Study

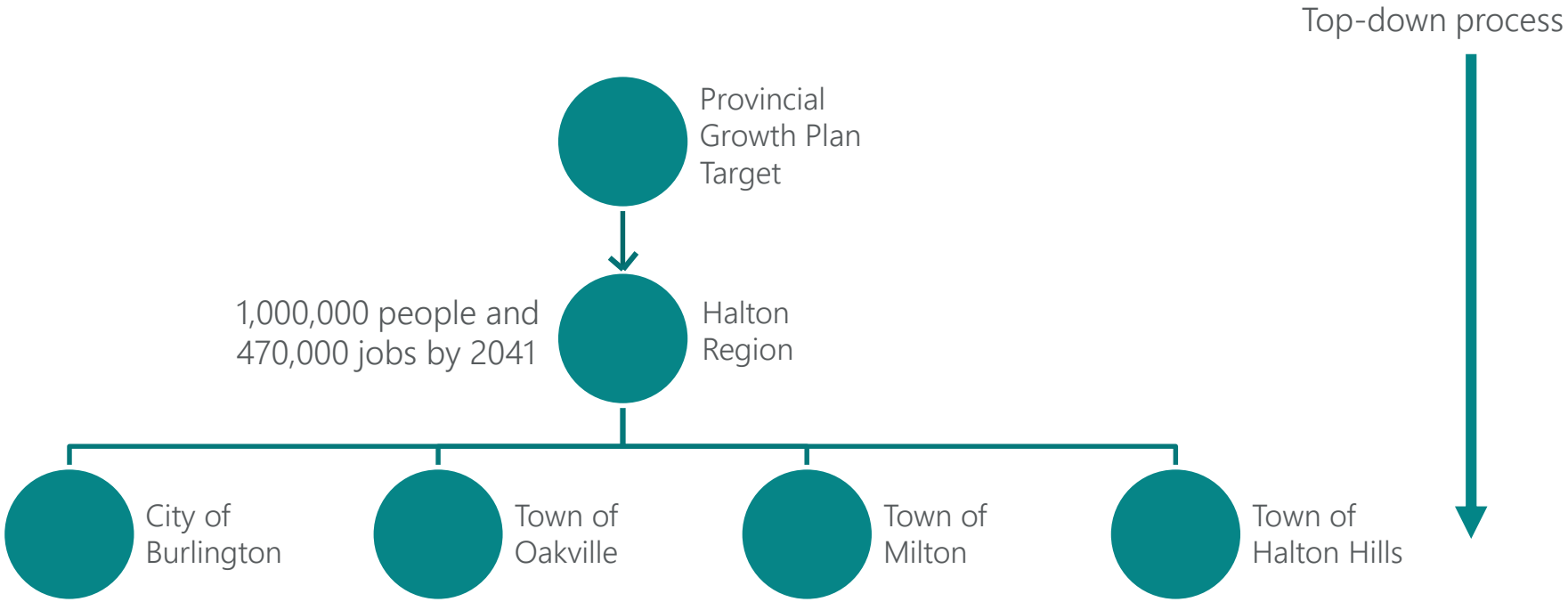
- The findings of this study are intended to inform the Region's IGMS by providing a finer grain analysis of growth opportunities within Burlington
- This is study is not intended to supersede the Region's process
- There may be aspects of this study which can inform other City projects

Project Team

- City of Burlington
  - Laura Daly
  - Leah Smith
  - Alison Enns
  - City Building, Finance, Transportation, Capital Works, Transit, Legal, BEDC, City Manager's Office
- Dillon
  - Paddy Kennedy, Project Manager
  - Justine Giancola, Senior Planner
- Watson
  - Jamie Cook, Senior Land Economist

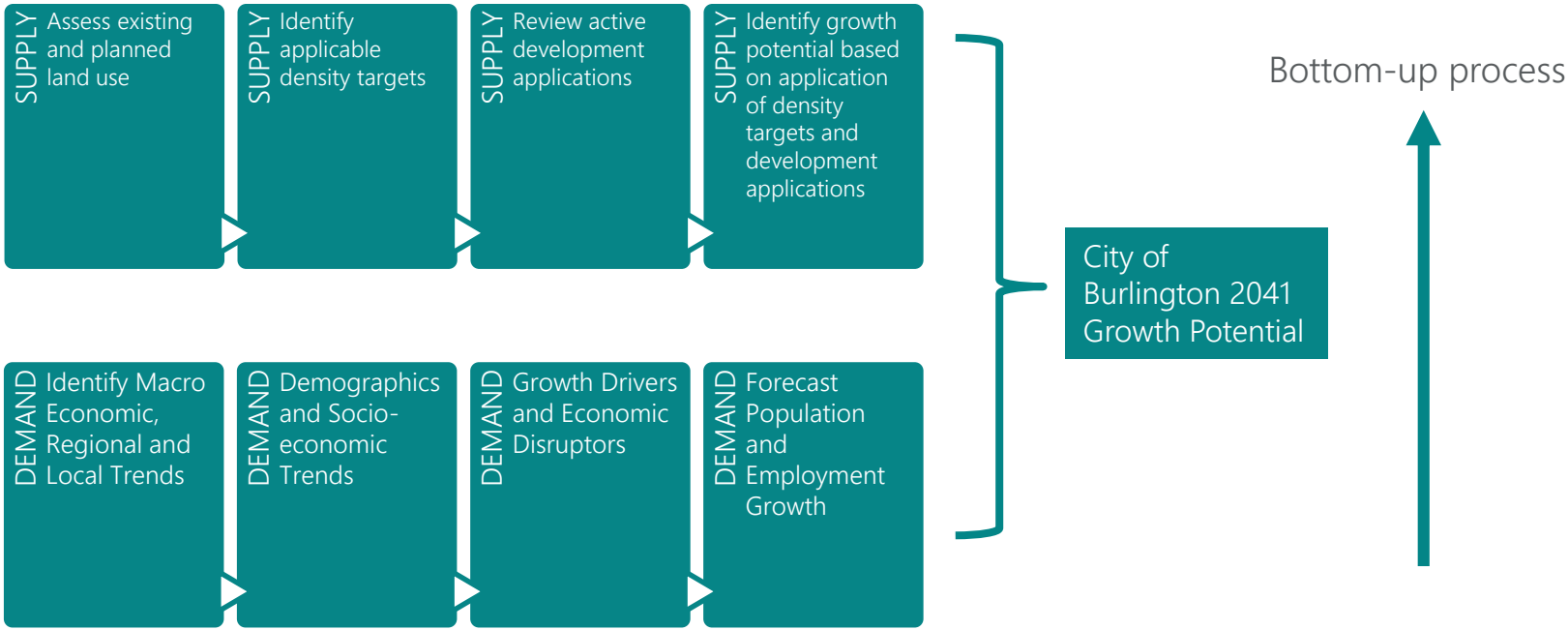


Allocation of Growth



Study Purpose

The purpose of this study is to identify the potential level of population and employment growth for Burlington between now and 2031 and from 2031 to 2041




1. How much land supply is there to accommodate future population and employment growth in the City?



2. What are some of the recent broader macro-economic and regional growth trends which will influence growth in Burlington?



3. What do the City's recent economic, demographic and real estate market trends tell us about the future growth potential?



4. What is the potential range of population and employment growth that the City can expect between now and 2041?

Purpose of the Workshop

- An opportunity for Council to learn about the growth analysis work



Key Objectives of the Workshop

- Present the findings of the City's Population and Employment Growth Analysis work
- Distinguish the IGMS from local Growth Analysis work and why it was necessary to complete at this time
- Understand how the City's growth work will be used to inform and provide input into the Region's process

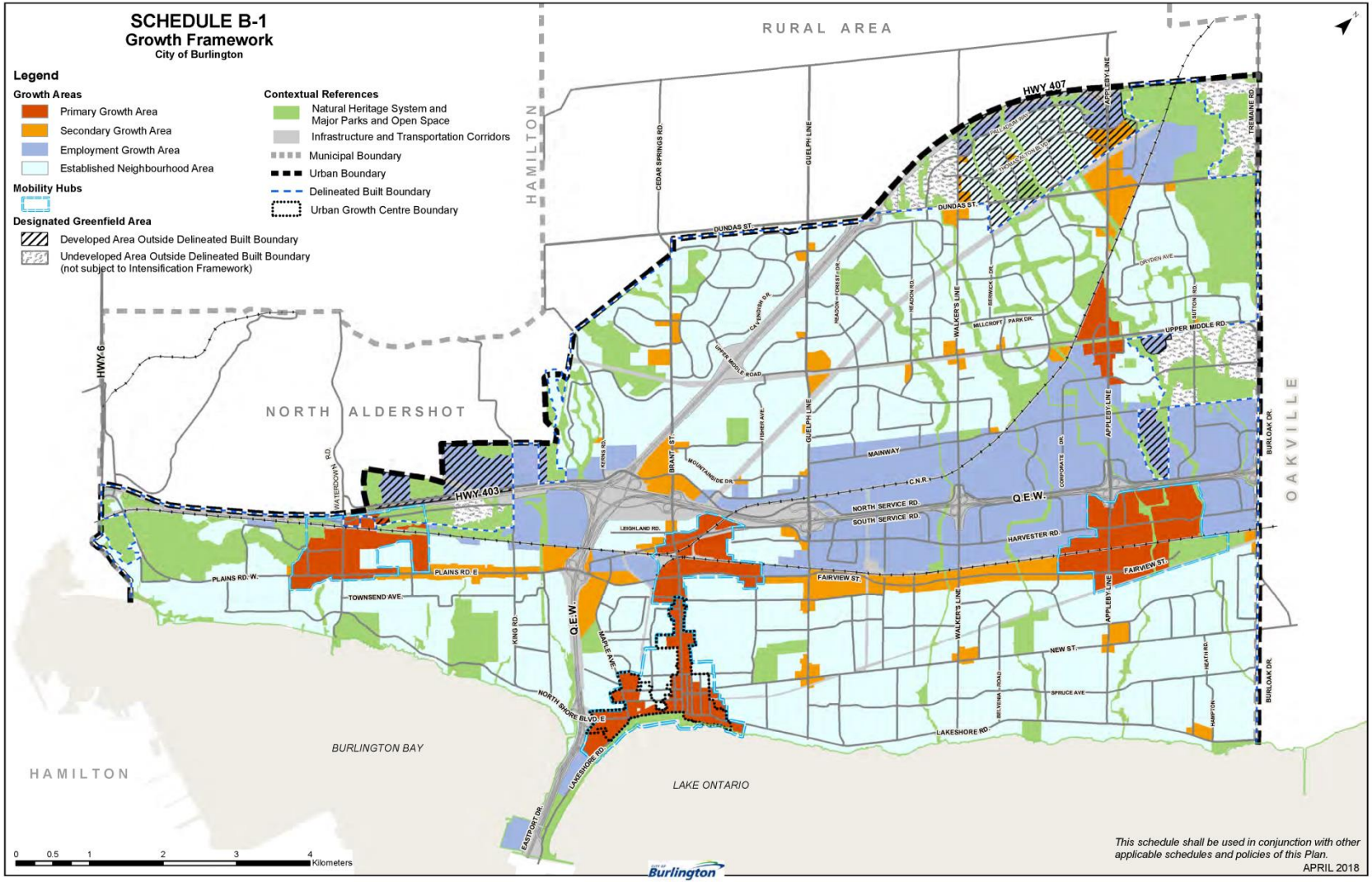
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Supply

Approach to Land Supply Estimates

- The residential and employment land supply analysis is based on a policy driven approach
- Uses the following
  - City-wide analysis
  - Leverages the City's planned urban structure and growth framework
  - Examines density targets (considers a couple scenarios recognizing aspects of the City's OP are under review)
  - Considers active development applications

SCHEDULE B-1
Growth Framework
City of Burlington



1. How much land supply is there to accommodate future population and employment growth in the City?

- Based on Provincial targets for the Mobility Hubs, there is potential to accommodate an additional 58,320 people and 22,670 jobs (when using 150 ppl+jobs/ha which is the minimum density target for Burlington GO and Appleby GO in Places to Grow) between now and build-out
- At the upper limit, there is potential for the City to accommodate an additional 85,860 people and 53,140 jobs (when using 300 ppl+jobs/ ha for Mobility Hubs as per the adopted 2018 OP) between now and build out

Residential Supply (people)

Growth Area	Population Growth (2016 to Build Out*)	Assumptions
Primary Growth Area		
Urban Centres (Downtown and Uptown)	6,200	Based on build out of downtown to 200 people and jobs/ha and Uptown to 80 people and jobs/ha (at 70% people and 30% jobs).
GO Station Mobility Hubs (Growth Plan/adopted 2018 Official Plan)	23,300/ 50,800	Based on 150 (Growth Plan) / 300 (adopted OP) people and jobs/ha (at 70% people and 30% jobs for Burlington GO and Aldershot GO and 20% people and 80% jobs for Appleby GO).
Secondary Growth Areas	12,500	Based on build out of 80 people and jobs/ha for those areas serviced by frequent transit service (at 50% people and jobs) and 50 people and jobs for those served by basic transit (at 40% people and 60% jobs).
Established Neighbourhood Area (plus secondary suites)	11,200	Based on the redevelopment of lands designated Residential High-density to 195 people and jobs/ha (at 95% people and 5% jobs), as well as 5% of the 2016 residential units adding a secondary residential suite.
Non-Employment Undeveloped Area Outside Delineated Built Boundary (Greenfield Area)	800	Based on build out of remaining lands at a density of 45 people and jobs/ha (at 90% people and 10% jobs).
3505 Dundas Street (Alton West Subdivision)	800	Based on the registered development application for 398 residential units.
Tremaine Road Special Policy Area	1,400	Based on active development application for 752 residential units and 33,700 sq.ft. of non-residential space.
North Aldershot	2,000	Based on active development applications for 870 residential units and approximately 64,000 sq.ft. of non-residential space.
Rural Areas	100	Based on the Region's Best Planning Estimates (2031).
Total Residential Growth	**58,300/85,900**	Growth Plan/adopted 2018 Official Plan

* Numbers rounded to closest 100, therefore numbers may not add precisely.

Employment Supply (jobs)

Growth Area	Job Growth Potential (2016 to Build Out*)	Assumptions
Job Growth in Primary and Secondary Growth Areas (Growth Plan/adopted 2018 Official Plan for the Mobility Hubs)	6,300/36,800	Based on build out of downtown to 200 people and jobs/ha and Uptown to 80 people and jobs/ha jobs/ha (at 70% people and 30% jobs). Mobility Hubs based on 150 (Growth Plan) / 300 (adopted OP) people and jobs/ha (at 70% people and 30% jobs for Burlington GO and Aldershot GO and 20% people and 80% jobs for Appleby GO).
Job growth in other non-employment areas	1,500	Based on a small portion of the growth in the Established Neighbourhood Area, Greenfield Areas, Tremaine Special Policy Area, North Aldershot and the Rural Areas being employment.
Non-Residential Active Development Applications (Employment Growth Areas)	2,000	Based on non-residential sq.ft. proposed in active development application data and employment density factor of 1 employee/500 sq.ft. (46 sq.m).
Vacant Employment Lands	3,500	Those not subject to an active development application assumed to be developed at density of 45 jobs/ha.
Employment Undeveloped Area Outside of Delineated Built Boundary (Greenfield Areas)	4,000	Those not subject to an active development application assumed to be developed at density of 45 jobs/ha.
Employment Land Infill Opportunities	5,400	Of the remaining occupied Employment Growth Area, 12% of the land was identified for infill opportunities in the long term.
Total Job Growth	**22,700/ 53,100**	Growth Plan/adopted 2018 Official Plan

* Numbers rounded to closest 100, therefore numbers may not add precisely.

Discussion

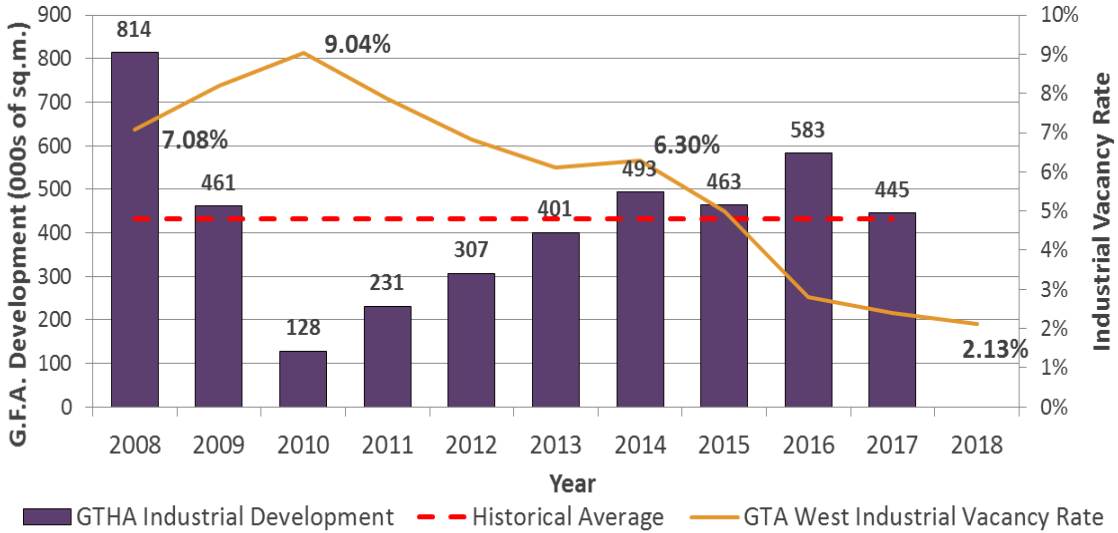
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Demand

2. What are some of the recent broader macro-economic and regional growth trends which will influence growth in Burlington?

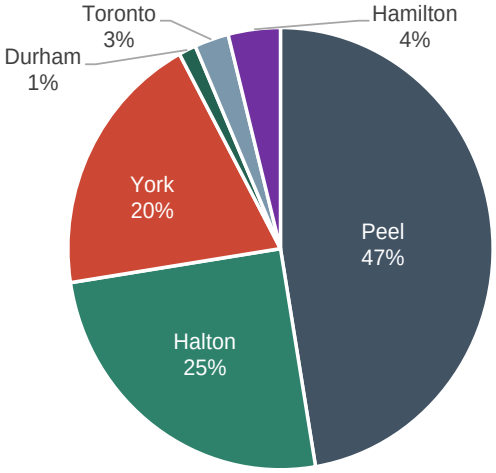
GTHA Industrial Market

Industrial Development within the GTHA, 2008 to 2017



Source: Industrial G.F.A. data from Cushman & Wakefield and vacancy rate data from DTZ Barnicke/Cushman Wakefield Quarterly Industrial Reports by Watson & Associates Economists Ltd.

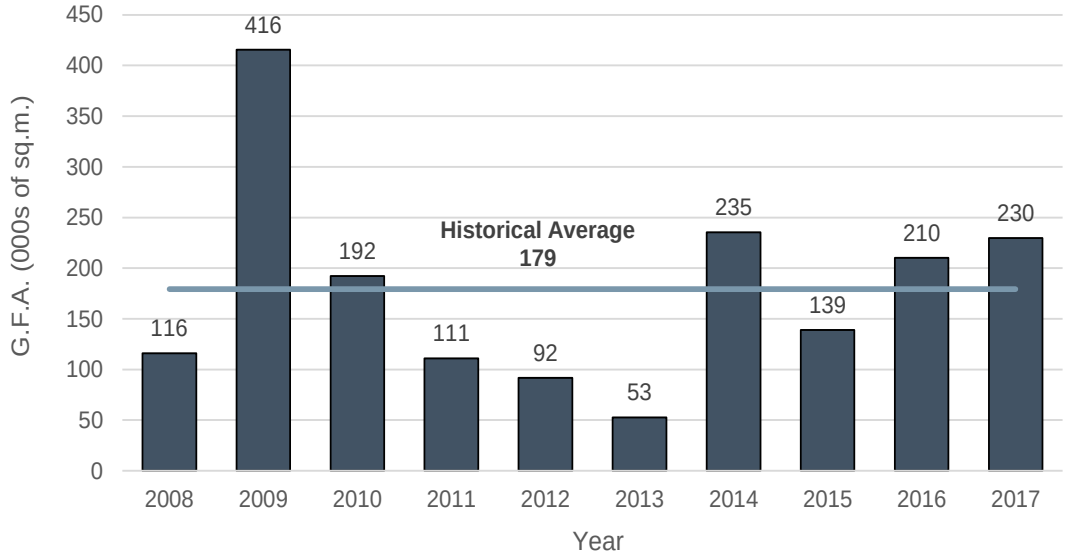
GTHA Industrial Development by Area, 2011 to 2017



Source: Data from Cushman & Wakefield compiled by Watson & Associates Economists Ltd.

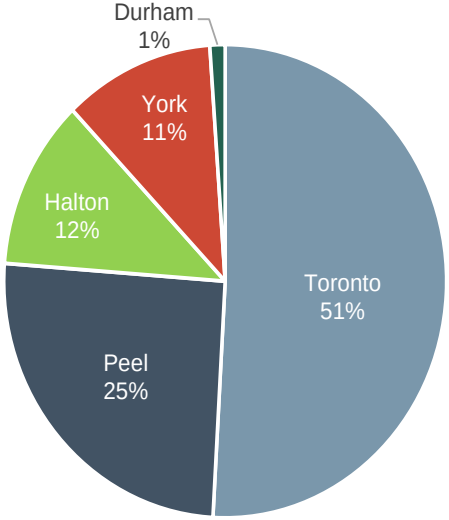
GTA Office Market

Major Office Development within the GTA, 2008 to 2017



Source: Data from Cushman & Wakefield compiled by Watson & Associates Economists Ltd.

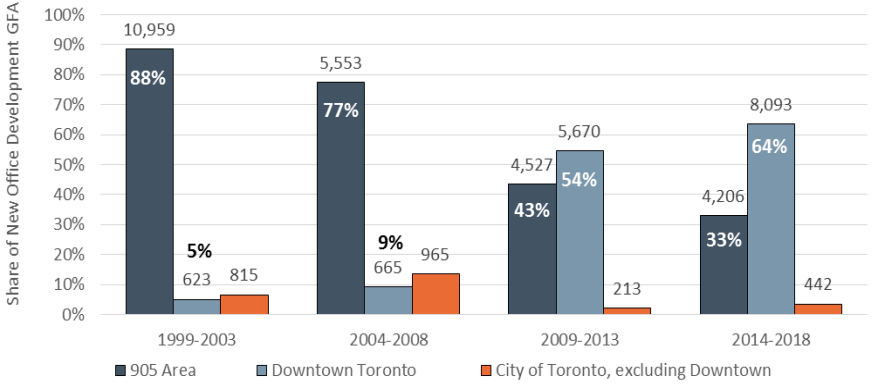
GTA Major Office Development by Area 2011 to 2017



Source: Data from Cushman & Wakefield compiled by Watson & Associates Economists Ltd.

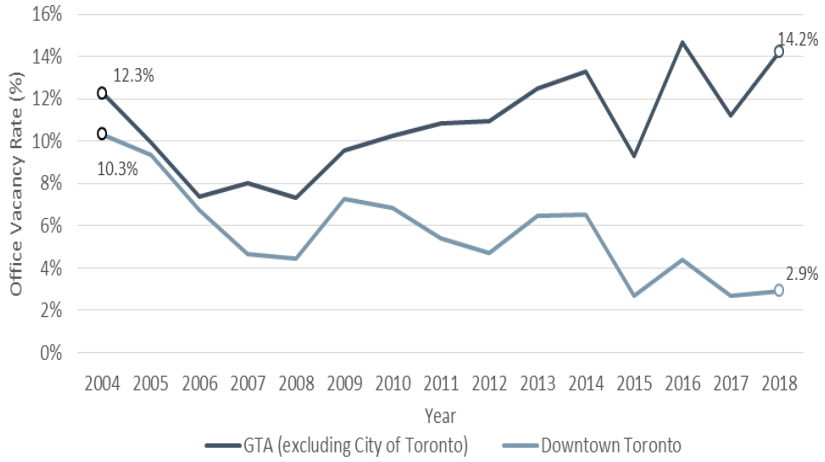
GTA Office Market

GTA Share of New Office Space Construction by Area 1999 to 2018



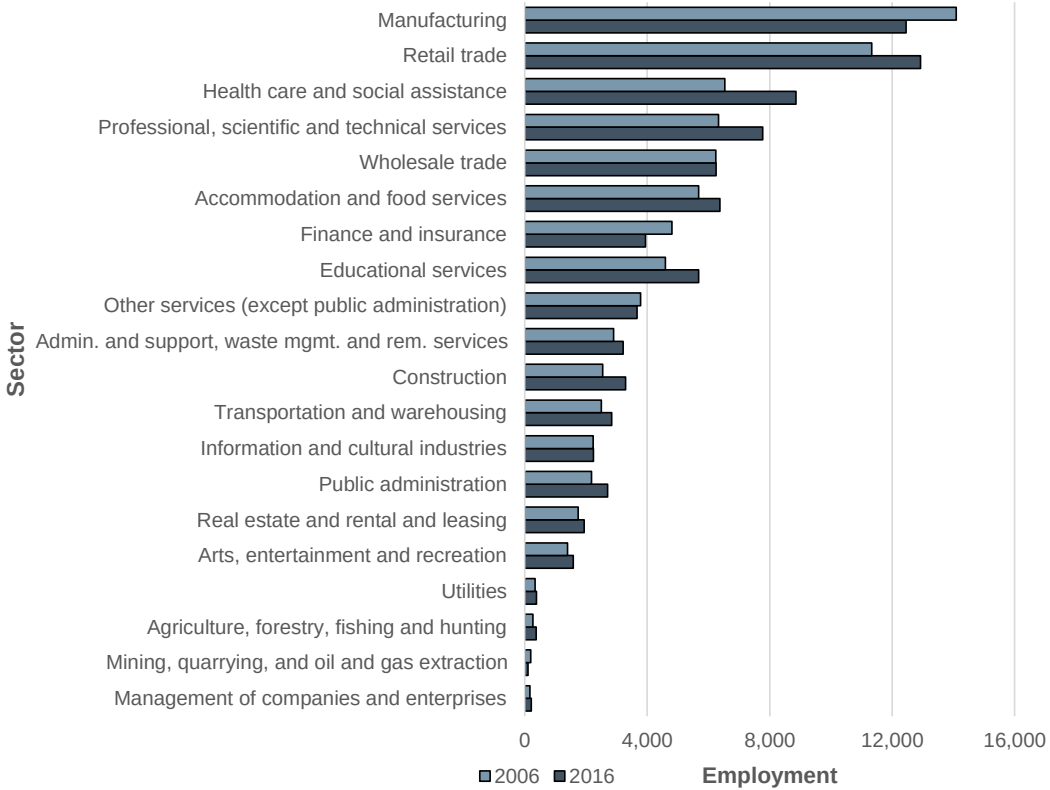
Source: 1999-2013 derived from Office Space Financial/Market Analysis and Marketing Plan Study prepared by Watson & Associates Economists Ltd. 2014-2018 derived from Colliers International Office Market Reports by Watson & Associates Economists Ltd. 2018 excludes development in the fourth quarter of 2018.

GTA and Downtown Toronto Office Vacancy Rates 2004 to 2018



Source: Derived from Altus InSite and Colliers International data by Watson & Associates Economists Ltd, 2019.

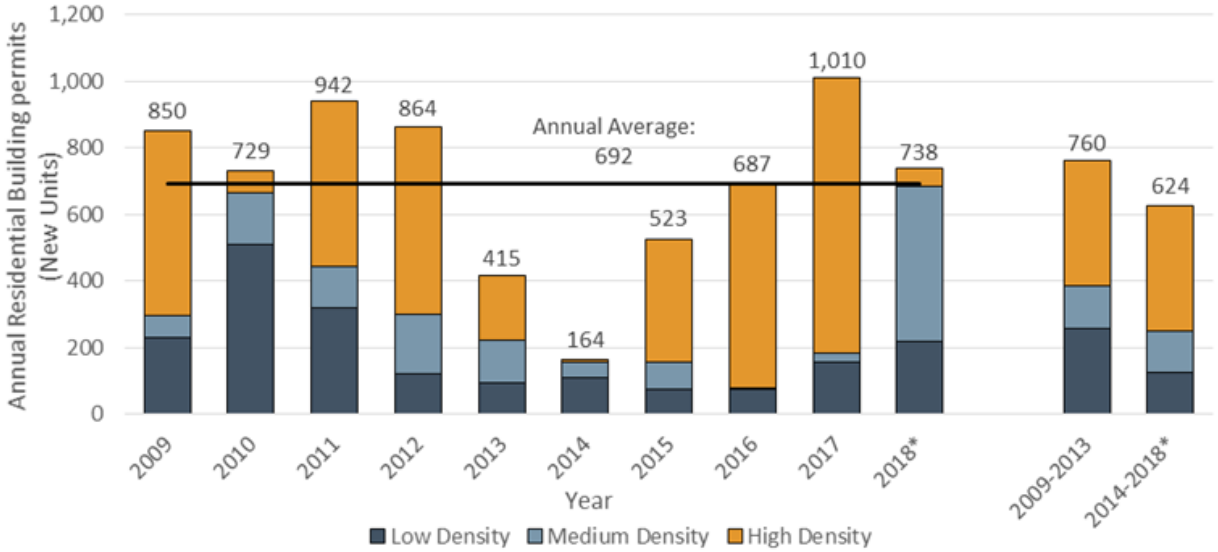
3.2 Burlington Employment Trends



Note: Employment includes Usual Place of Work and Work at Home employment.
Source: Derived from 2006 and 2016 Statistics Canada Census data by Watson & Associates Economists Ltd., 2019.

Burlington Residential Market Development Trends

Residential Building Permits (New Units) by Type, 2009 to 2018



Note: 2018 Includes development activity from January to September from City of Burlington building permit data, and October to December estimated by Watson & Associates Economists Ltd.
Source: Derived from City of Burlington data by Watson & Associates Economists Ltd., 2019.

3. What do the City's recent economic, demographic and real estate market trends tell us about the future growth potential?

- Regional Infrastructure Assets
- Quality of Life
- Competitive Regional Economy
- Technological Change as a Growth Driver
- Attracting Millennials and Future Generations

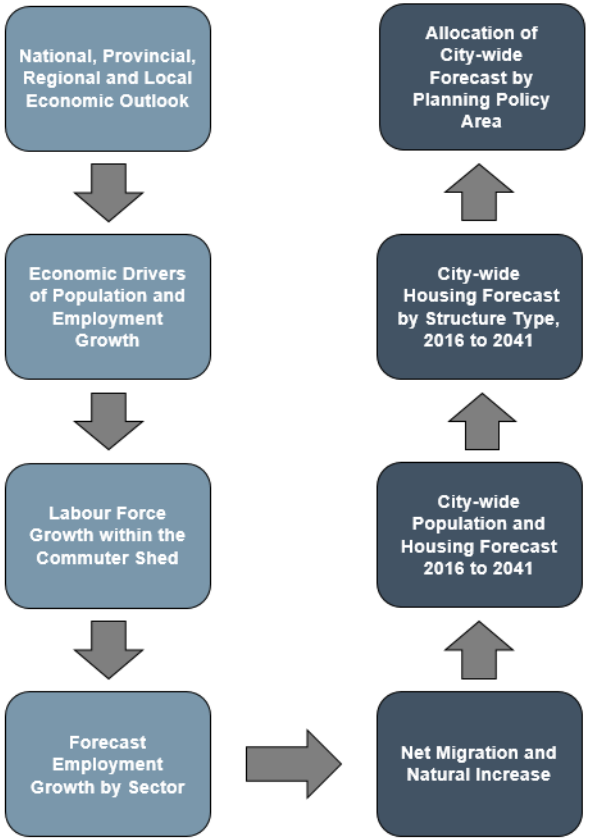
Discussion

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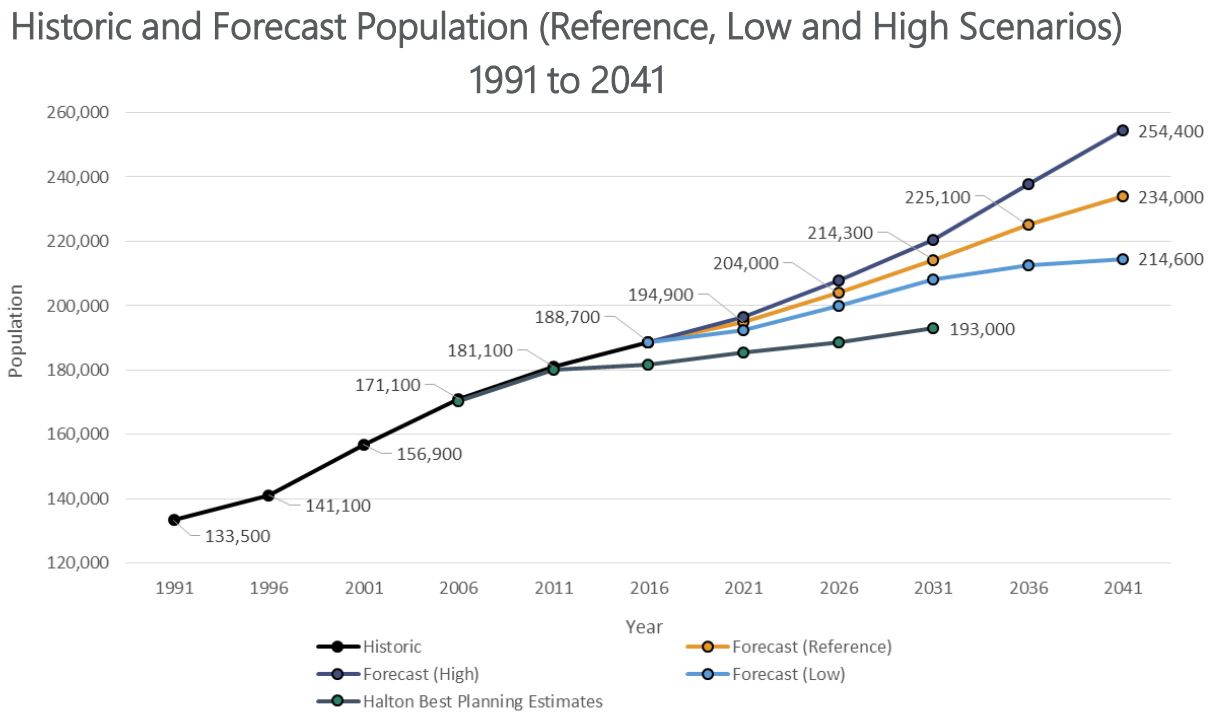
Forecast

4. What is the potential range of population and employment growth that the City can expect between now and 2041 based on available supply and market trends?

What Drives Population and Housing Growth?

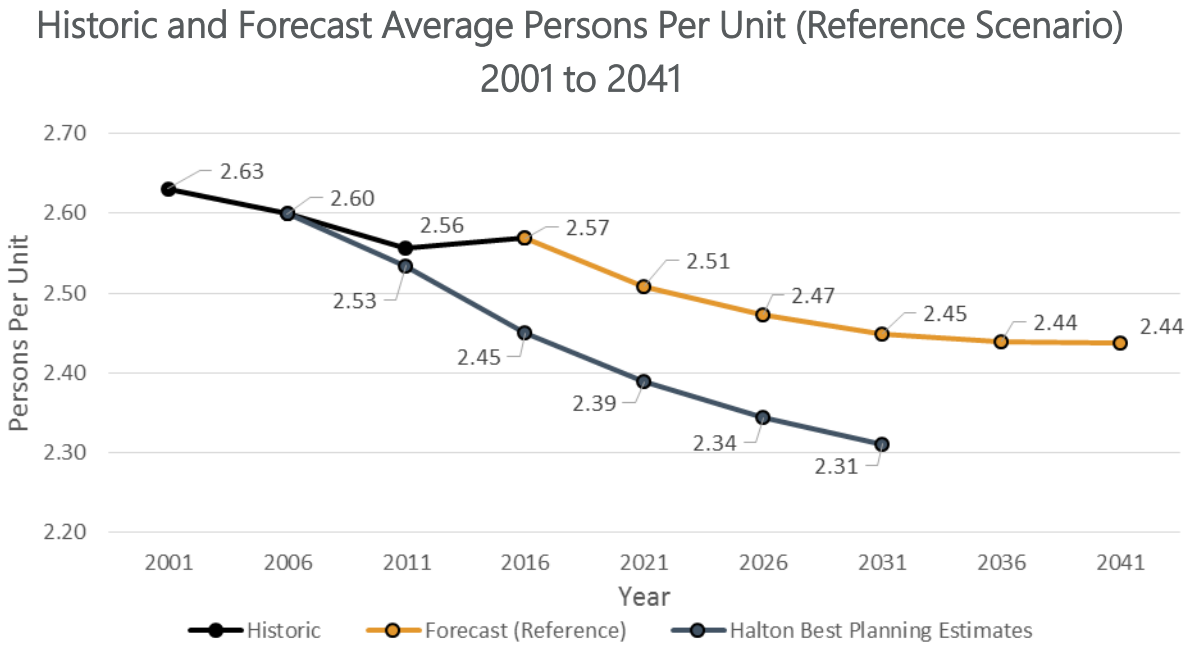


Burlington Population Forecast, 2016 to 2041



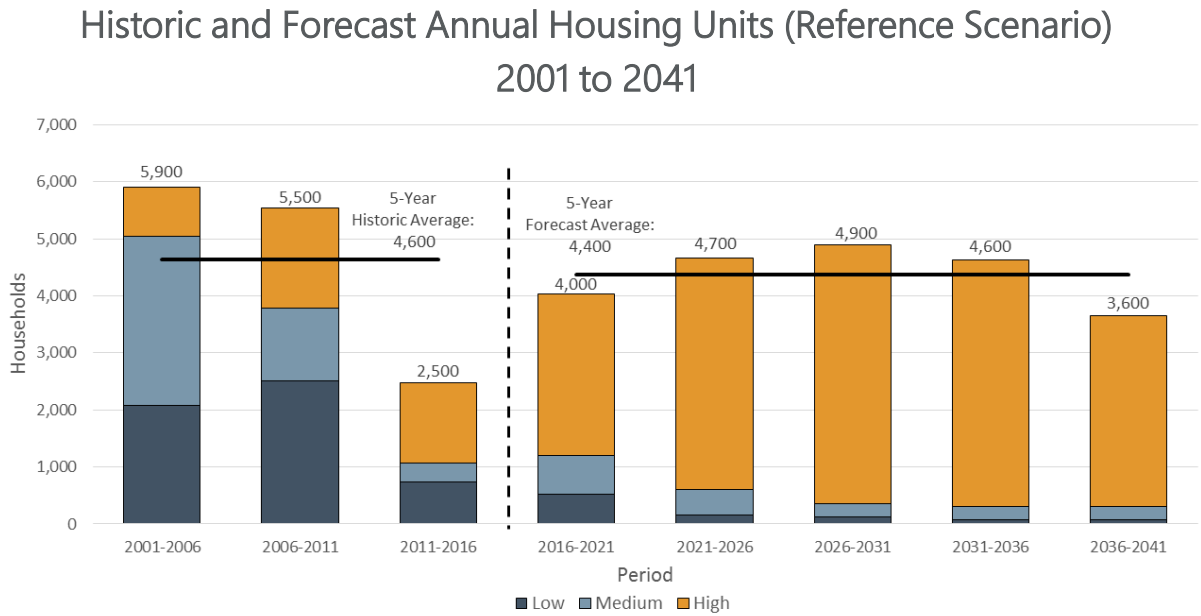
Note: Population includes Net Census Undercount of 3.0%
Source: Historical data derived from Statistics Canada Census, 2001-2016, Halton Best Planning Estimates based on (City of Burlington) Best Planning Estimates of Population, Occupied Dwelling Units and Employment, 2011-2031, June 2011, Regional Municipality of Halton. 2041 Population forecasts (Low, Reference, High) prepared by Watson & Associates Economists Ltd., 2019.

Burlington PPU Forecast, 2016 to 2041



Source: Historical data derived from Statistics Canada Census, 2001-2016, Halton Best Planning Estimates based on (City of Burlington) Best Planning Estimates of Population, Occupied Dwelling Units and Employment, 2011-2031, June 2011, Regional Municipality of Halton. 2041 Persons Per Unit forecast (Reference) prepared by Watson & Associates Economists Ltd., 2019.

Burlington Housing Forecast, 2016 to 2041



Note:
- Low density includes singles and semi-detached houses.
- Medium density includes townhouses and apartments in duplexes.
- High density includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Source: Historical data derived from Statistics Canada Census, 2001-2016. 2016 to 2041 Forecast by Watson & Associates Economists Ltd., 2019.

Burlington Employment Forecast Approach

Our employment forecast approach incorporates a comprehensive assessment of the key "Top Down" and "Bottom Up" factors which are anticipated to influence the City's long-term employment forecast to the year 2041.

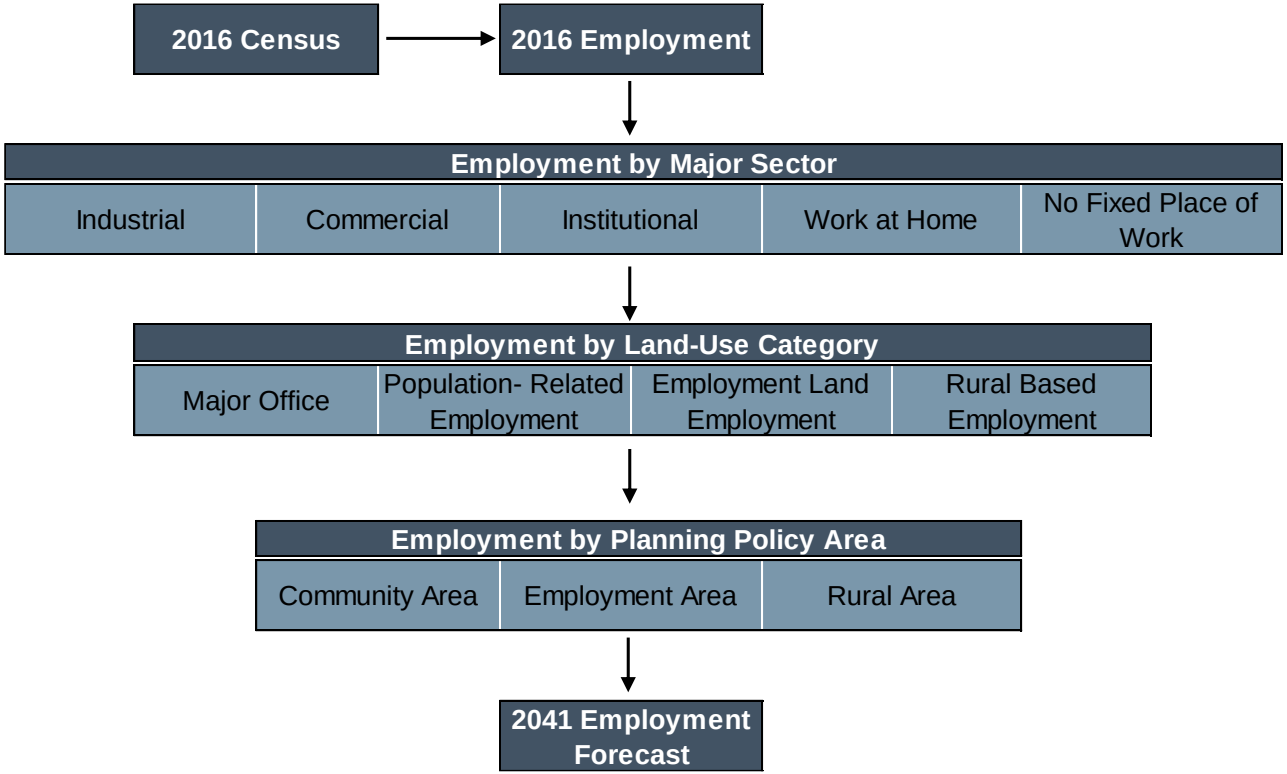
"Top Down" Inputs

- Schedule 3 employment allocations to Halton Region, Growth Plan for the G.G.H., 2019
- Macro-economic growth drivers
- G.T.H.A. industrial and office market trends

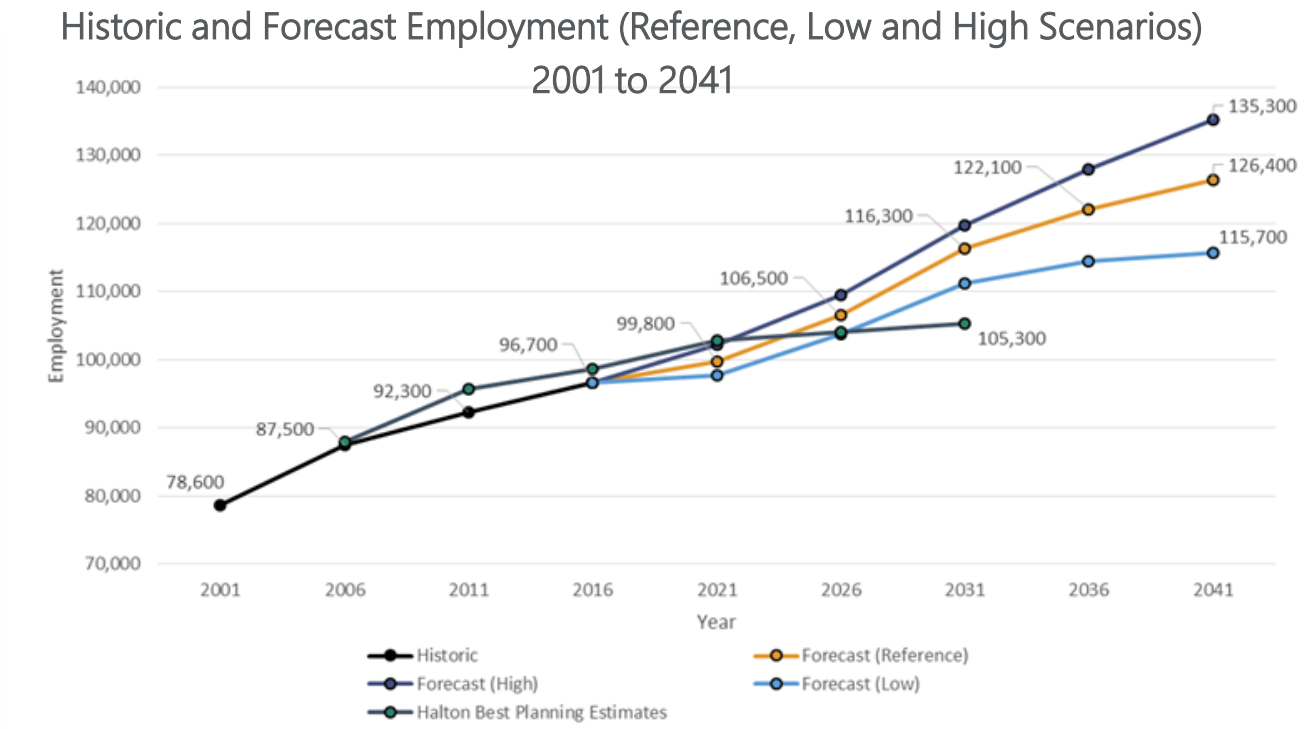
"Bottom Up" Inputs

- Employment strategies by local municipality in Halton Region
- Halton Region Employment Survey
- Historical non-residential building permit activity
- Non-residential activity in the development pipeline
- Employment sector/cluster analysis
- Population to employment ratio trends

Burlington Employment Forecast Approach



Burlington Employment Forecast, 2016 to 2041



Note: Employment includes Work at Home, Usual Place of Work and No Fixed Place of Work.
Source: Historical data derived from Statistics Canada Census, 2001-2016, Halton Best Planning Estimates based on (City of Burlington) Best Planning Estimates of Population, Occupied Dwelling Units and Employment, 2011-2031, June 2011, Regional Municipality of Halton. 2041 Employment forecasts (Low, Reference, High) prepared by Watson & Associates Economists Ltd., 2018.

Burlington Employment Forecast, 2016 to 2041

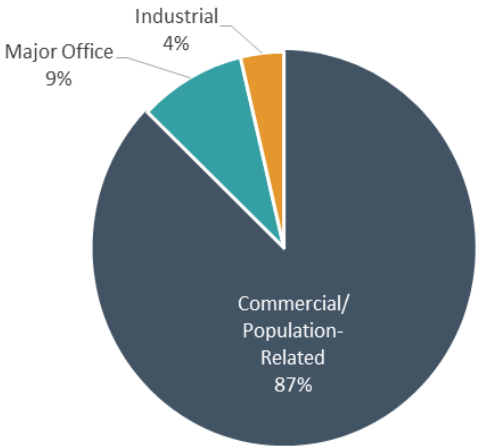
Allocation of Employment Growth by Area:

Community Areas → 50%

Employment Areas → 49%

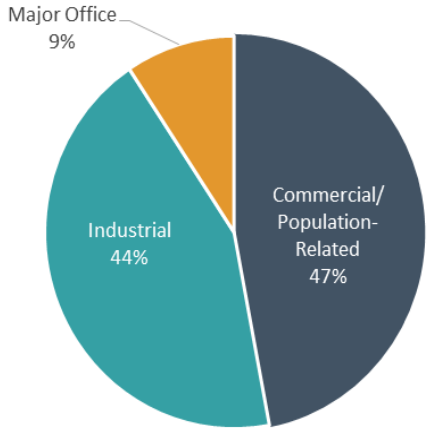
Rural-Based → 1%

Community Areas



Source: Watson & Associates Economists Ltd., 2019.
Note: No Fixed Place of Work and Work at Home Employment is included in the categories.

Employment Areas



Source: Watson & Associates Economists Ltd., 2019.
Note: No Fixed Place of Work and Work at Home Employment is included in the categories.

Burlington Population Forecast Comparison, 2016 to 2041

Year	Halton Region I.G.M.S.	Burlington Growth Analysis			Reference Scenario Compared to Halton I.G.M.S.
		Reference	Low	High	
2031	219,900	214,300	208,100	220,500	-5,600
2041	236,800 to 247,700[1]	234,000	214,600	254,400	-2,800 to -13,700

[1] Halton Region I.G.M.S. 2041 forecast is based on a range of 8 scenarios, 4 Existing Planned Pattern Scenarios ("A" Scenarios) and 4 Local Plans and Priorities Scenarios ("B" Scenarios).

Note: Population includes net Census undercount.

Source: Halton Region I.G.M.S. forecasts adapted from Integrated Growth Management Strategy Growth Scenarios: Halton Region to 2041 Technical Report, Attachment #4 to LPS41-19. Burlington Growth Analysis forecasts prepared by Watson & Associates Economists Ltd., 2019, and 2016 base derived from 2016 Statistics Canada Census data.

Burlington Employment Forecast Comparison, 2016 to 2041

Year	Halton Region I.G.M.S.	Burlington Growth Analysis			Reference Scenario Compared to Halton I.G.M.S.
		Reference	Low	High	
2031	115,400	116,300	111,200	119,700	900
2041	120,000 to 125,300[1]	126,400	115,700	135,300	1,100 to 6,400

[1] Halton Region I.G.M.S. 2041 forecast is based on a range of 8 scenarios, 4 Existing Planned Pattern Scenarios ("A" Scenarios) and 4 Local Plans and Priorities Scenarios ("B" Scenarios).

Note: Employment includes Work at Home, Usual Place of Work and No Fixed Place of Work.

Source: Halton Region I.G.M.S. forecasts adapted from Integrated Growth Management Strategy Growth Scenarios: Halton Region to 2041 Technical Report, Attachment #4 to LPS41-19. Burlington Growth Analysis forecasts prepared by Watson & Associates Economists Ltd., 2019, and 2016 base derived from 2016 Statistics Canada Census data.

Discussion

5.0

Next Steps

Next Steps

- Report back to City Council on the IGMS Evaluation Criteria in response to the Regional Council Motion

Discussion