



CITY OF BURLINGTON

Growth Analysis Study

June 2019

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Executive Summary

The following report addresses several important questions surrounding the City's future growth prospects, namely:

- How much land supply is there to accommodate future long-term (i.e. beyond 2041) population and employment growth in the City?
- What are some of the recent broader macro-economic and regional growth trends which will influence growth in Burlington?
- What do the City's recent economic, demographic and real estate market trends tell us about future growth potential?
- 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?
- Given the range of potential growth and the multiple opportunities for development, what are the phasing considerations for residential and employment growth?

The following provides some initial commentary on each of the above-noted questions. The detailed report includes a more fulsome treatment of the above-noted questions.

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

The City has a large supply of land to accommodate future growth. The residential land supply analysis shows that there is potential for the City of Burlington to accommodate an additional 58,321 to 85,863 people and 22,669 to 53,137 jobs 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. However, it is important to note that the available supply of land is only one of many factors that will shape the amount and pace of development in the City.



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

In recent years, the Ontario economy has experienced steady economic growth partially driven by a gradual recovery in the manufacturing sector which has been fueled by a lower-valued Canadian dollar and gradual strengthening of the U.S. economy. Looking forward, provincial GDP growth is anticipated to ease from over 2% in 2018 to approximately 1.3% by 2020, largely as a result of a tightening labour market, rising household debt and increased global economic uncertainty¹. Similar to national and provincial trends, the City of Burlington economy is transitioning from goods to services production. Looking forward, existing and emerging knowledge-based sectors such as professional, technical and scientific services, health care and social assistance, and educational services are expected to represent the fastest growing employment sectors for the City. The employment base is also highly concentrated in the “creative class” economy. People engaged in arts and culture as artists, actors, performers, writers and designers are a large part of the City’s growing economic base. In addition to growing the knowledge-based sector, the industrial sector which remains vitally important to the local and regional

¹ Royal Bank of Canada. Provincial Outlook. December 2018.

economy with respect to jobs and economic output. In terms of economic output, manufacturing represents the largest employment base of any industry despite job losses from 2006 to 2016. Other industrial related industries such as wholesale trade and construction also contribute a strong share to the employment base, with the latter expected to grow as development occurs in Burlington.

The suburban GTA office market has struggled over the past decade to compete with downtown Toronto. However, the City of Burlington office market is showing signs of strength returning to more balanced market conditions. The industrial real-estate market is very strong with sub 3% vacancy rates signifying high demand for new space in Burlington. The majority of employment growth over the last 15 years has largely been attributed to the commercial/population-related and institutional sectors and the City's economic base is also highly oriented to home-based occupations making up 10% of total employment in 2016.

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

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 analysis explored within this report suggests that residential market conditions in South Halton and the City of Burlington are generally moving in the same direction as provincial, regional and local planning policy. This emphasizes the need to build housing supply attractive to families in more compact residential development forms and an increasing share of high-density housing. While this represents good planning policy, it is important to recognize that historical residential development has been largely driven by demand from ground-oriented housing forms. To facilitate this shift towards more compact high-density urban development, the City will need to consider the use of planning and/or financial tools as well as other policies to attract development which implements the City's and Region's long-term vision (e.g. Secondary Plans, Zoning By-laws, Development Charges, CIPs, etc.).

It is also important to recognize that the demographic and socio-economic characteristics within the City are not homogenous. Understanding trends in household occupancy, age structure and income at the sub-municipal level is particularly important for the City of Burlington. These trends have broad implications on the amount, type and density of future housing needs associated with population growth, as well as the demands for public infrastructure, municipal services and schools.

This report identifies a number of key drivers which suggest that the City of Burlington is well positioned to accommodate a portion of the regional economic and population growth that is anticipated within the GTHA. It is also recognized that technological change and automation will continue to create economic opportunities and disruptions within an increasingly competitive regional labour market. While the City of Burlington has limited control over these evolving macro-economic trends, it does have control over local land use planning policy, programs and initiatives aimed at retaining/attracting investment, accommodating existing and new residents across all demographic groups and expanding its local labour force base.

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

There are a number of potential population growth scenarios for the City. On the lower end of the spectrum, the City could achieve a population of 214,600 by 2041 and the upper limits suggest the potential to achieve a population of 254,400 by 2041. The recommended population scenario for the City of Burlington envisions the City reaching a population of 234,000 people by 2041 (Reference Scenario). The Reference Scenario represents an increase over the share of population growth previously contemplated for the City; however, it is also important to note that there has been a considerable amount of change since the last Regional MCR (new City Official Plan, market shifts, etc.). The Reference Scenario takes into account the wide range of emerging demographic and socio-economic trends, as well as the availability of land. The population forecast aligns well with the City's planned urban structure, as the expectation is that the majority of future population growth will occur within the Primary and Secondary Growth Areas.

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

From an employment growth perspective, the City's future employment by 2041 could range between 115,700 (low scenario) to 135,300 (high scenario). For the purposes of long range planning, the recommended employment scenario for the City of Burlington is 126,400 by 2041. The growth in employment over the forecast period is expected to be fairly balanced, with approximately 49% of future growth being accommodated in Employment Areas and 51% being accommodated elsewhere in the City. It is noted that the forecast share of employment growth on employment lands in Halton Region between 2011 and 2041 is estimated at 44%, as per the Technical Report to Amendment No. 2 to the Growth Plan for the Greater Golden Horseshoe (G.G.H.).² Comparatively, during the Sustainable Halton process it was anticipated that 52% of employment growth between 2008 and 2031 would be employment land employment.³ This declining trend regarding the share of forecast employment growth on employment lands in Halton Region is also anticipated in the City of Burlington as a result of structural changes in the macro economy which has shifted employment away from goods producing sectors towards the service sector. Looking forward, the commercial/population-related sector is anticipated to represent the largest share of non-residential development in Burlington comprising just over two-thirds of the total forecast employment growth from 2016 to 2041. The industrial sector is anticipated to represent just under one quarter of total employment growth, and the major office category is forecast to accommodate approximately 9% of new jobs within the City over the same period.

Given the range of potential growth and the multiple opportunities for development, what are the phasing considerations for residential and employment growth?

There are several potential priority short, medium and long term areas for residential growth within the City of Burlington. In the short term, the City should prioritize development opportunities in the Downtown Urban Growth Centre, the Burlington and Aldershot GO Mobility Hubs and the remaining designated greenfield areas (which constitute a very small portion of the City's overall supply). As these areas mature, the City should begin to see increased interest in other areas, including the Uptown Urban Centre and a number of higher profile Secondary Growth Areas (e.g. Fairview, Plains Road, Appleby Line). The Uptown Urban Centre and the higher profile Secondary Areas represent medium-term priorities for the City. Over the longer term, the City can expect to see residential development interest in the Appleby GO Mobility Hub and the remaining Secondary Growth Areas (mainly those areas designated as Neighbourhood Centres in the City's Adopted 2018 Official Plan). However, as these lands are in private ownership, there is limited ability to control the phasing of development.

² Greater Golden Horseshoe Growth Forecasts to 2041, Technical Report (November 2012) Addendum, Hemson Consulting Ltd., June 2013.

³ Accommodating Growth to 2031, Phase 3 Sustainable Halton Report 3.07, Hemson Consulting Ltd., April 13, 2019. It is noted that including major office and population-related employment, the share of forecast employment on employment lands from 2008 to 2031 increases to 64%.

From an employment growth perspective, population-related employment associated with the residential priorities is expected to occur in alignment with the general phasing outlined above. Over the short term, the focus of employment land employment growth is expected to occur on the City's remaining vacant employment lands. Vacant employment lands represent a top priority for employment growth across the City. In addition, lands subject to an active non-residential development application are likely to be developed in the short term. Most of these lands are designated General Employment and Business Corridor in the adopted 2018 Official Plan and some are within the Delineated Built Boundary while others are outside of it. Although not all sites are being actively marketed for development, this represents the land most likely to accommodate short term employment land employment growth. Since the development of any privately-owned lands requires an interested owner, all vacant employment lands may not necessarily be developed within the short term. Over the medium and longer term, as the vacant land supply shrinks, the expectation is that the focus of growth will transition to employment land infilling and intensification.



1.0 Introduction

1.1 Report Context

The City of Burlington has a history of proactively planning for growth. In 2008, the City undertook an Intensification Study to better understand where opportunities for intensification could be anticipated. The Intensification Study was undertaken in response to the shrinking supply of Burlington’s greenfield lands and a recognition that the City needed to develop a more comprehensive approach to planning for intensification. The Intensification Study identified opportunities for infilling and intensification and laid out a general framework for longer term growth planning. More recently, the City adopted a new Official Plan which formally defines the City’s longer term planned urban structure and framework to guide development up to 2031. It focusses intensification and redevelopment in a number of priority areas across the City. A significant portion of the City’s growth is intended to be accommodated within the Mobility Hub areas (Downtown Burlington, Burlington GO, Aldershot GO and Appleby GO⁴) and a

⁴ The City’s Mobility Hubs are subject to an area specific planning exercise (Precinct Plans) that is currently on hold.

number of other key nodes and corridors. The City is currently undertaking Area Specific Plans for the lands around the four Mobility Hubs to define the growth potential at full build-out of these priority areas.

While the City continues to confirm the detailed land use plans for the Mobility Hub plans, the Region of Halton is undertaking a review of the Regional Official Plan through a process known as the Municipal Comprehensive Review (MCR). Part of the MCR process includes the Region's Integrated Growth Management Strategy (IGMS), a project which examines Region-wide growth opportunities. The IGMS will allocate growth to each of the area municipalities to 2041, along with intensification targets and density targets in conformity with the Growth Plan for each municipality in the Region.

1.2 Purpose

The purpose of this Growth Analysis Study is to identify the appropriate level of population and employment growth that the City can anticipate between now and 2031 and from 2031 to 2041. The Study considers supply factors and demand factors, addressing the following key questions:

- How much land supply is there to accommodate future population and employment growth in the City?
- What are some of the recent broader macro-economic and regional growth trends which will influence growth in Burlington?
- What do the City's recent economic, demographic and real estate market trends tell us about future growth potential?
- 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?
- Given the range of potential growth and the multiple opportunities for development, what are the phasing considerations for residential and employment growth?

The findings and results of this study should help to inform the Region's IGMS by providing a finer grain analysis of growth opportunities within the City of Burlington. The report is intended as a helpful analysis which can be used by the City as it reviews and participates in the Region's IGMS and inform the Best Planning Estimates process.

1.3 A Brief Note about the City of Burlington's Adopted New Official Plan

This report utilizes a variety of valid resources, including the City's Official Plan, Region of Halton Regional Official Plan, Provincial Growth Plan, etc. The following section outlines some context on the status of the City's Official Plan.

The 2017 Burlington Official Plan, which is in-force and effect, is an office consolidation based on the 1994 Official Plan. The City adopted a new Official Plan in April 2018 which is set to a 2031 planning horizon, but establishes a framework for growth management, land use planning and infrastructure planning for the City that extends beyond, towards a mature state (see Section 1.4 below about timeframes). At the time of drafting of this report City Council announced that it would be undertaking a scoped review of the building heights and densities contained within the adopted Official Plan, as indicated in the following council motion:

Direct the Director of City Building to immediately commence a process to re-examine the policies of the Official Plan adopted April 26, 2018 in their entirety related to matters of height and intensity and conformity with provincial density targets

The analysis presented in this draft report is based on the current policy framework including Provincial policies, Regional policies and City of Burlington in-effect and council-adopted policies that are under review. The methodology used builds upon the urban structure and intensification opportunities identified in the City's adopted 2018 Official Plan which build upon the policy direction established by the Province. The density targets used in the supply analysis are based on Provincial policy direction, and tests densities established in the adopted 2018 Official Plan for the Mobility Hubs. Any changes that may be recommended as a result of the City's scoped review of the building heights and densities contained within the adopted 2018 Official Plan are anticipated to be within the supply scenarios tested.

1.4 A Brief Note on Time Frames in Planning

This report makes reference to a number of different timeframes, which each have significance when planning for growth in Burlington. The following highlights the key elements of the timeframes identified:

- **2031:** Places to Growth distributed population and employment for the Greater Golden Horseshoe from 2001 – 2031. The Region of Halton in Regional Official Plan (ROPA) 38 and ROPA 39 distributed population and employment across the Region in the form of population and employment distributions and intensification and density targets set out in policy for each local municipality. The City of Burlington's adopted 2018 OP is set to a planning horizon of 2031.
- **2041:** Places to Grow was amended (Amendment 2, June 17, 2013) to revise Schedule 3 and establish new population and employment distributions for the Greater Golden Horseshoe to 2041. In the course of developing those revised distributions, the amendment had the effect of also developing a 2031B forecast. The Region of Halton's current IGMS will identify the distribution of population and employment across the Region to 2041. The purpose of this report is to help inform the 2041 allocation of growth for the City of Burlington.
- **Full Build Out or Mature State:** In order to examine the land supply as it relates to the ability to achieve the demand, consideration for the full build out or mature state must be given. Build-out or mature state is assumed to be post 2041 and is intended to represent a conceivable state

where land has been fully optimized based on existing frameworks (i.e. policy, technology, lifestyle, etc.). It is not possible, nor prudent, to establish a timeline associated with full build out, except that it is beyond the planning horizon of 2041.

1.5 Organization

The following report is organized into eight main sections. This first section provides an introduction and the second section presents the policy context for growth planning. The third section covers recent trends related to the housing market and the fourth section discusses the trends impacting the employment market in Burlington. Section five describes the growth drivers and economic disruptors influencing growth in the City, while section six presents forecast population and housing growth scenarios and section seven presents the employment growth scenarios. The final section provides summary commentary and recommendations.



2.0 Land Supply

2.1 Provincial and Regional Planning Context

Planning for growth in Burlington is guided by several Provincial, Regional and City planning documents, which provide direction on where and how to grow. The main documents include the Provincial Policy Statement (2014), the Growth Plan for the Greater Golden Horseshoe (2017), the Halton Regional Official Plan (June 19, 2018, date of consolidation) and the City's Adopted New Official Plan (2018). Both the PPS and the Growth Plan direct municipalities to proactively plan for growth and emphasize the importance of planning for complete communities. The Growth Plan is of particular relevance as it establishes long range population and employment forecasts for the Region of Halton (which in turn are allocated to the four municipalities in the Region) as well as a number of other targets and policies intended to guide how growth and development should occur. The Growth Plan was updated in 2017 to include new density targets for Greenfield Areas and for Major Transit Station Areas found on Provincially identified Priority Transit Corridors, increased intensification targets and new employment land conversion policies. A number of these recent changes to the Growth Plan are expected to be implemented through Region's MCR process. For the purposes of this Study, the analysis relies on a

range of different sources, including the City's adopted 2018 Official Plan, the current Regional Official Plan, Places to Grow and other guidelines⁵. The following sections summarize a number of the key policies which inform the City's long term growth potential, beginning with the City's 2018 Adopted Official Plan.

2.2 City of Burlington Official Plan

2.2.1 Burlington Adopted 2018 Official Plan

The City of Burlington recently adopted its new Official Plan (April 2018)⁶ and outlines the following vision for sustainable growth:

Growth will be focused in the Urban Area to protect Burlington's natural heritage and Rural Area; to build compact, vibrant, sustainable, resilient, transit-supportive, healthy and complete communities; to optimize use of existing and future infrastructure and services; to support active transportation; to reduce energy use and greenhouse gas emissions; and to support a strong and competitive economy.

The Plan establishes a City System, which describes the physical make-up of the city over the long term and provides a strategic framework to guide growth and development recognizing that different areas in the city perform different functions. The City System is comprised of the Urban Area, Rural Area and North Aldershot. The Urban Area represents the lands where forecasted population and employment growth will be accommodated, while the Rural Area comprises the agricultural system, natural heritage system, rural settlement areas and mineral resource extraction areas. The Plan also distinguishes between the built-up area (where intensification is intended to occur) and greenfield areas. For the built-up area, the Plan includes a residential intensification target of 40%, with a minimum of 8,300 units to be constructed in the built-up area between 2015 and 2031⁷. For greenfield areas, the Plan identifies a minimum density target of 45 people and jobs per hectare⁸. The Plan also includes the North Aldershot area, recognizing planning decisions from previous versions of the official plan which allow for residential development in this area. The Plan includes the Regional allocation of population for the City to 2031 of 193,000 people, and employment of 106,000 jobs by 2031.

⁵ It is important to note that at the time of drafting of this report that the Province is in the process of reviewing the Growth Plan's policies and had proposed a draft Amendment to the Growth Plan (Amendment 1) and is also considering changes to the PPS and the Planning Act. Depending on the nature of the changes, the outcomes of the scoped Provincial review could have implications on the findings of this report.

⁶ The City of Burlington adopted 2018 OP is currently with Halton Region for approval.

⁷ In accordance with the Halton Regional Official Plan.

⁸ in accordance with the Halton Regional Official Plan

2.2.2

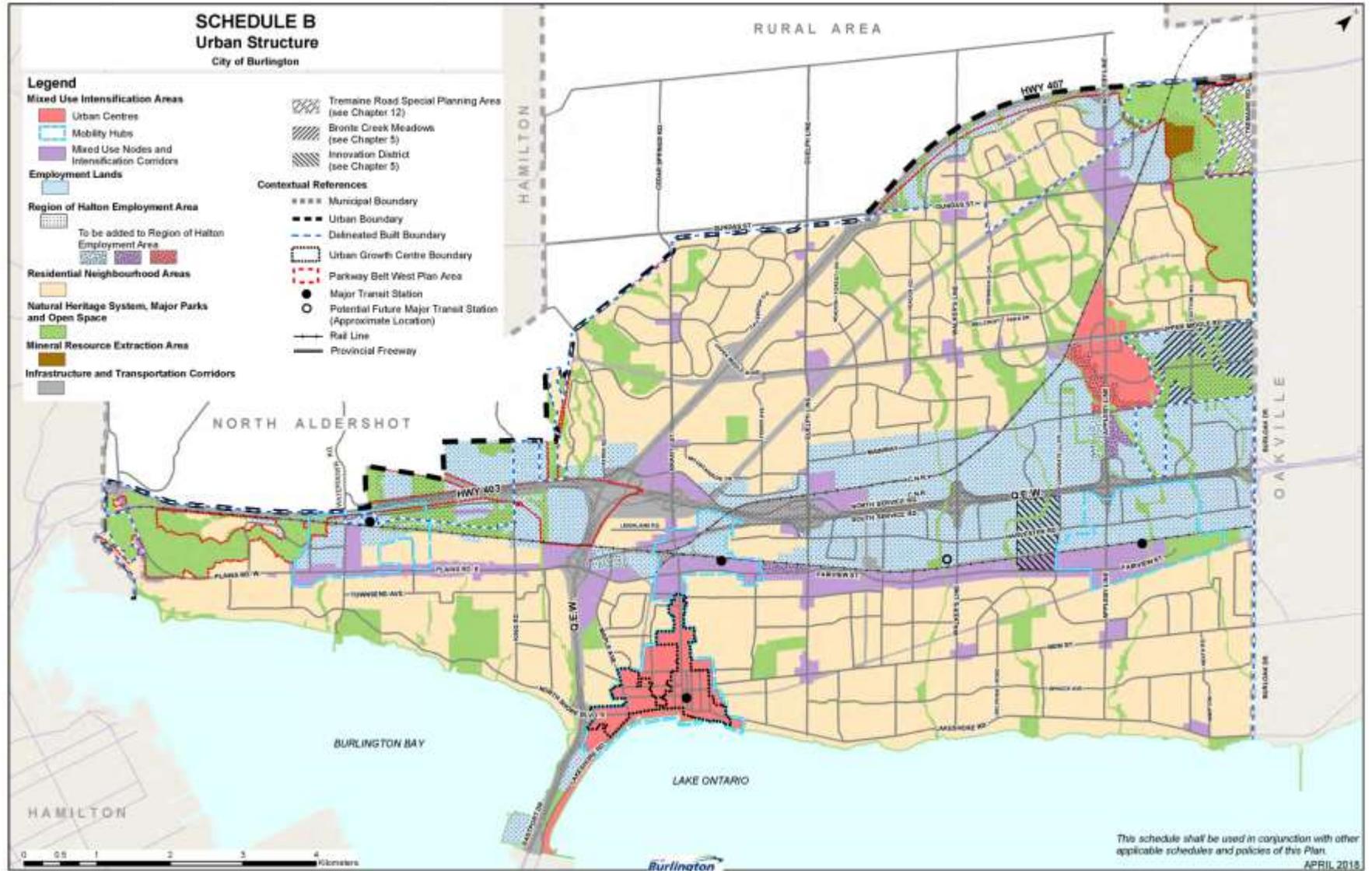
Urban Structure Plan

The City's Urban Area is organized around eight main components and is articulated in the City's Urban Structure Plan (Schedule B of adopted OP). The eight components include (see **Figure 2.1**):

1. Mixed Use Intensification Areas;
2. Region of Halton Employment Areas;
3. Employment Lands;
4. Residential Neighbourhood Areas;
5. Natural Heritage System;
6. Major Parks and Open Space;
7. Mineral Resource Extraction Area; and,
8. Infrastructure and Transportation Corridors.

Each element of the Urban Structure has a distinct function. For the purpose of this Study, the Mixed Use Intensification Areas, Region of Halton Employment Areas and Employment Areas are the key areas of focus, due to their intended role in accommodating growth. Residential Neighbourhood Areas are also considered in the analysis. Further details on these four components are described further in the following subsections.

Figure 2-1: Urban Structure (Schedule B, City of Burlington Adopted 2018 Official Plan)





2.2.2.1

Mixed Use Intensification Areas

Mixed Use Intensification Areas provide lands where a range of uses including employment, shopping, public service facilities, residential uses and complementary uses are to be developed with transit supportive densities in compact built forms. Intensification is intended to occur in either linear forms along a transportation corridor or nodal form as a concentrated group of parcels in proximity to a major intersection. The Mixed Use Intensification Areas includes the city's existing Urban Centres, emerging Mobility Hubs and other Mixed Use Nodes and Intensification Corridors, and policies on these distinct elements have been highlighted below:

- **Urban Centres:** The city has two existing Urban Centres, the Downtown Urban Centre and the Uptown Urban Centre. These areas are mixed use areas with both established neighbourhood areas and areas intended for growth. Urban Centres provides for a broad range of uses in higher intensity, transit-oriented built form (in relation to the surrounding neighbourhoods). These areas provide a cluster of public service facilities and retail uses that support residents and employees.

- 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.
- Mixed Use Nodes and Intensification Corridors:** Represent areas with a concentration of commercial, residential and employment uses with development intensities generally greater than surrounding areas. Nodes are generally located at the point where two or more transit routes intersect, while Intensification Corridors consist of areas with a mix of uses in street-oriented buildings along important transportation routes and higher order transit corridors. These areas are a focus of re-urbanization which is intended to support the frequent transit corridors and provide focus points of activity.

2.2.2.2 Employment Lands

Lands identified as Employment Lands represent the lands designated to accommodate a full range of manufacturing, warehousing and office uses. These lands provide for the location of significant diverse areas of current and future employment activity that is required for the city's long term economic development and competitiveness.

2.2.2.3 Region of Halton Employment Areas

Lands identified with the Region of Halton Employment Areas overlay are intended to provide an opportunity for a fully-diversified economic base, including maintaining a range of sites for employment uses which support a wide range of economic activities and ancillary uses. These lands prohibit residential and non-employment uses and are protected from conversion to non-employment uses outside of a municipal comprehensive review. The adopted 2018 Official Plan identifies lands to be added to the Region of Halton Employment Areas overlay.

⁹ The 2017 Growth Plan minimum density target is 150 people and jobs combined per hectare for the GO Station mobility hubs and 200 people and jobs combined per hectare for the Downtown Urban Growth Centre.

2.2.2.4 Residential Neighbourhood Areas

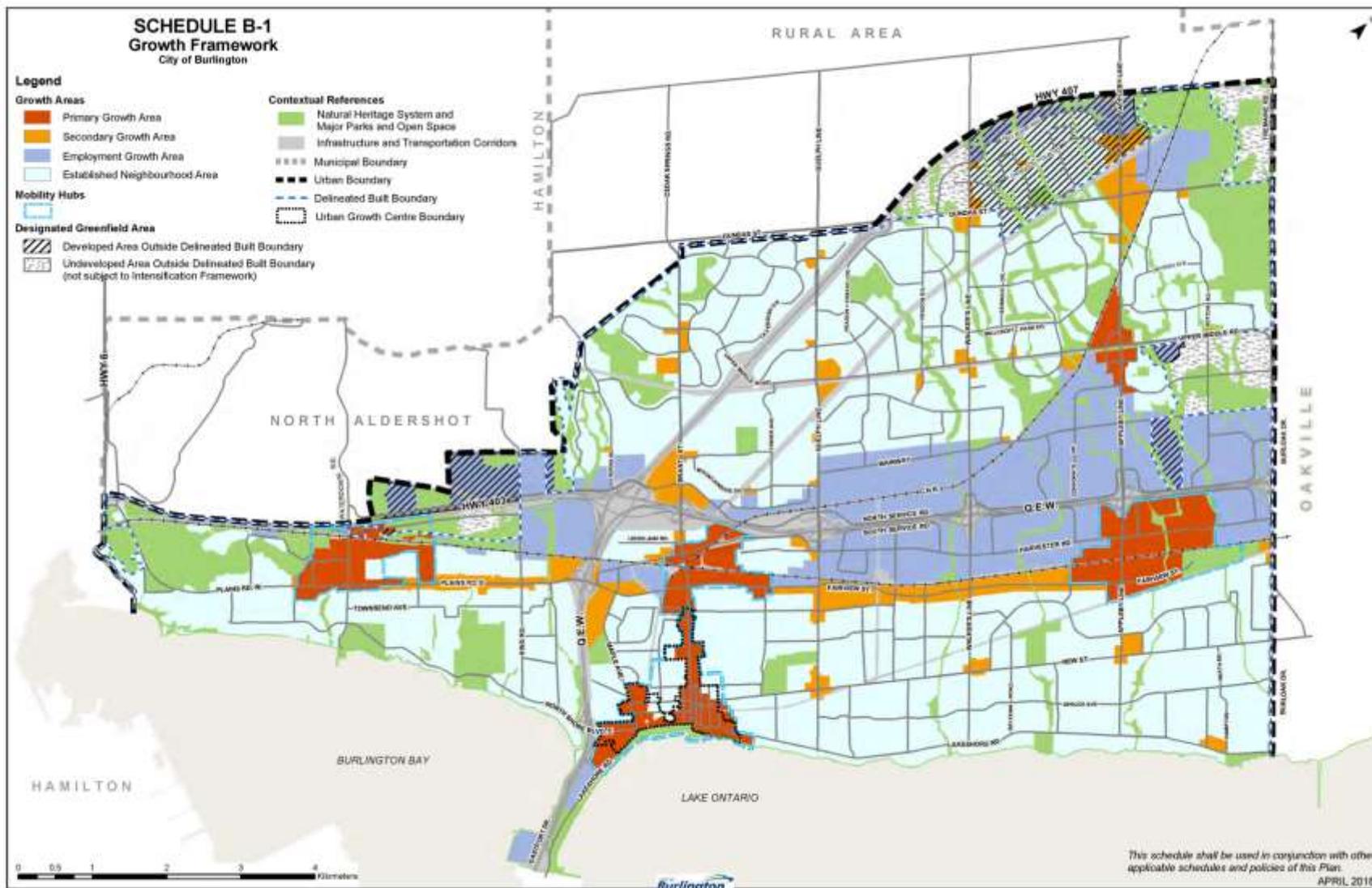
Residential Neighbourhood Areas represent a significant part of the City's Urban Structure and include a number of existing neighbourhoods. The neighbourhoods include a variety of uses (parks, schools, homes, etc.) and include lands designated for Residential – Low Density, Residential – Medium Density and Residential High Density, all of which are not expected to capture a large relative amount of future growth. However, there is an expectation that some limited intensification and change will occur in appropriate locations within Residential Neighbourhood Areas

2.2.3 Growth Framework

The adopted 2018 Official Plan establishes a Growth Framework, which outlines the priority, degree, type and location for growth across the City in order to differentiate areas and establish clear direction on where the City wants to grow. The Growth Framework includes Primary Growth Areas, Secondary Growth Areas, Employment Growth Areas and Established Neighbourhood Areas, as depicted on **Figure 2-2** (Schedule B-1 of the OP):

- **Primary Growth Areas:** Are generally located within the Mixed Use and Intensification Areas of the Urban Structure and include Urban Centres and Mobility Hubs and are intended to accommodate the majority of growth and therefore experience the greatest degree of change. These areas shall be regarded as the most appropriate and predominant location for new tall buildings in accordance with the underlying land use designations or area-specific plans. To support growth, these areas shall be priority for area-specific planning and infrastructure and public service investment (including transit).
- **Secondary Growth Areas:** Are located within the Mixed Use Areas and Intensification Corridors of the Urban Structure, as well as select vacant residential sites and employment designated sites located immediately adjacent to a Major Arterial or Multi-Purpose Arterial Street. These areas are expected to transition over time but are intended to be limited to a maximum of mid-rise built form, unless otherwise noted. Unlike the Primary Growth Areas, which have been identified as a priority for area specific planning, it is anticipated that development on lands within the Secondary Growth Areas will proceed through processes under the Planning Act, including Site Plan or other development applications.
- **Employment Growth Areas:** Include employment oriented designations not captured within the Primary and Secondary Growth Areas and will be an area of focus for intensification of employment. These areas have a potential to accommodate a significant portion of the employment growth of the City.
- **Established Neighbourhood Areas:** Include the Residential Neighbourhood Areas and some lands within the Mixed Use Intensification Areas of the Urban Structure that have otherwise not been included in the Primary or Secondary Growth Areas. In these areas, intensification is generally discouraged and growth is not required to meet the targets of the Plan.

Figure 2-2: Growth Framework (Schedule B-1, City of Burlington Adopted 2018 Official Plan)



2.2.4 Land Use Policies

Section 8 of the adopted 2018 Official Plan outlines the objectives and policies applicable to the Urban Area. Schedule C, D and E outline the land use designations for the Urban Area. The land use designations build upon the City's Urban Structure, as depicted on Schedule B of the adopted 2018 OP and are further informed by the City's Growth Framework, as depicted on Schedule B-1 of the adopted 2018 OP. Lands within the Mixed Use Intensification Area, as identified on the City's Urban Structure, include Urban Centres, Mobility Hubs and Mixed Use Nodes and Intensification Corridors, which are designated as Mixed Use Commercial Centre, Neighbourhood Centre, Local Centre, Employment Commercial Centre, Urban Corridor or Urban Corridor – Employment Lands. Lands within the Employment Areas, as identified on the City's Urban Structure, include lands designated General Employment and Business Corridor. Lands within the Residential Neighbourhood Areas, as identified on the City's Urban Structure, include lands designated Residential – Low Density, Residential – Medium Density or Residential – High Density. There are also lands designated for the City's Natural Heritage System, Major Parks and Open Space, Mineral Resource Extraction Area and Infrastructure and Transportation Corridors.

The land use policies of the adopted 2018 Official Plan provide guidance on intensity and density at the site level, which are detailed in **Appendix A**¹⁰. The majority of the land use designations in the adopted 2018 OP provide guidance for intensity at the site level (e.g. floor area ratio); the only densities that are identified are for the Residential Neighbourhood Area, which are described as number of units per hectare. As these are site-level metrics, several assumptions would need to be made to apply these density and intensity targets at the city-scale.

2.2.5 Rural Area

The adopted 2018 OP policy framework is intended to protect and strengthen the rural community. This includes maintaining the open, rural landscape character, enabling agricultural industry to adapt and grow and ensuring permitted land uses are compatible with surrounding land uses. The City of Burlington has three rural settlement areas: Kilbride, Lowville and Mount Nemo. The policies include that non-farm development in the rural area be directed to one of these rural settlement areas and that new lots outside of the rural settlement areas can only be created through a consent application. The policies permit a secondary dwelling unit in appropriate locations within the Rural Area in order to increase the supply of housing options in the Rural Area.

¹⁰ This information has been included for reference purposes only and has not been used for the supply analysis, as these targets are expected to be applied at the site level as opposed to the Growth Plan area targets.

2.2.6 North Aldershot

North Aldershot is identified on the City System (Schedule A of the OP). This area is a distinct area that contains natural features of high environmental significance, where natural features and human settlement co-exist in a finely integrated fashion. A secondary planning study was completed for North Aldershot in 1994 (the North Aldershot Inter-Agency Review), which concluded that further development potential exists in North Aldershot, provided the unique natural setting is preserved. The land use designations within North Aldershot are identified on Schedule K of the adopted 2018 OP and include Infill Residential, Detached Residential, Cluster Residential, North Aldershot Office, and North Aldershot Commercial.

2.3 Mobility Hub Precinct Plans

The City is preparing Area Specific Plans (precinct plans) for the four Mobility Hubs to guide transit-oriented development to be compact, mixed-use and pedestrian friendly with residential and employment intensities that support the higher order transit investment. The precinct planning process is being undertaken in three phases:

- Phase 1: Review background information and conduct technical analysis for each of the areas identified as mobility hubs. Conduct public consultation and stakeholder engagement. Establish the land-use and design framework. Develop and evaluate draft concepts and select a concept for each mobility hub.
- Phase 2: (currently underway): Prepare area-specific plans for each mobility hub, including directions for policy and implementation. Conduct public consultation and stakeholder engagement about each of the area-specific plans.
- Phase 3: Establish tools and strategies to implement each of the area-specific plans.

The Mobility Hub Precinct Plans are intended to identify the land use, densities and urban form of the four mobility hubs at full build-out. The adopted 2018 OP identifies an overall density target of 300 people and jobs combined per hectare for the GO Station mobility hubs to be considered as part of the area-specific planning process¹¹. It identifies a need for a range of densities with the greatest concentration located in the mobility hubs primary zone, as identified by the Mobility Hubs Opportunities and Constraints Study. The Mobility Hub Precinct Plans have been prepared to identify the detailed land use within each of the four Mobility Hubs. The outcomes of the detailed land use plans for the Downtown were included within the adopted 2018 OP (Schedule D of the adopted 2018 OP). At the time of this study, the Mobility Hub Precinct Plans for the three other Mobility Hubs (Aldershot, Burlington and Appleby GO) were in draft form and did not include population and

¹¹ This is higher than the 2017 Growth Plan minimum target of 150 people and jobs combined per hectare for the GO Station mobility hubs.

employment projections associated with the proposed plan. They have been included as **Figure 2.3, 2.4** and **2.5** below for information purposes only.

Figure 2-3: Aldershot GO Mobility Hub Draft Precinct Plan (Excerpt from Committee of the Whole Presentation, July 12, 2018)

Aldershot GO Mobility Hub

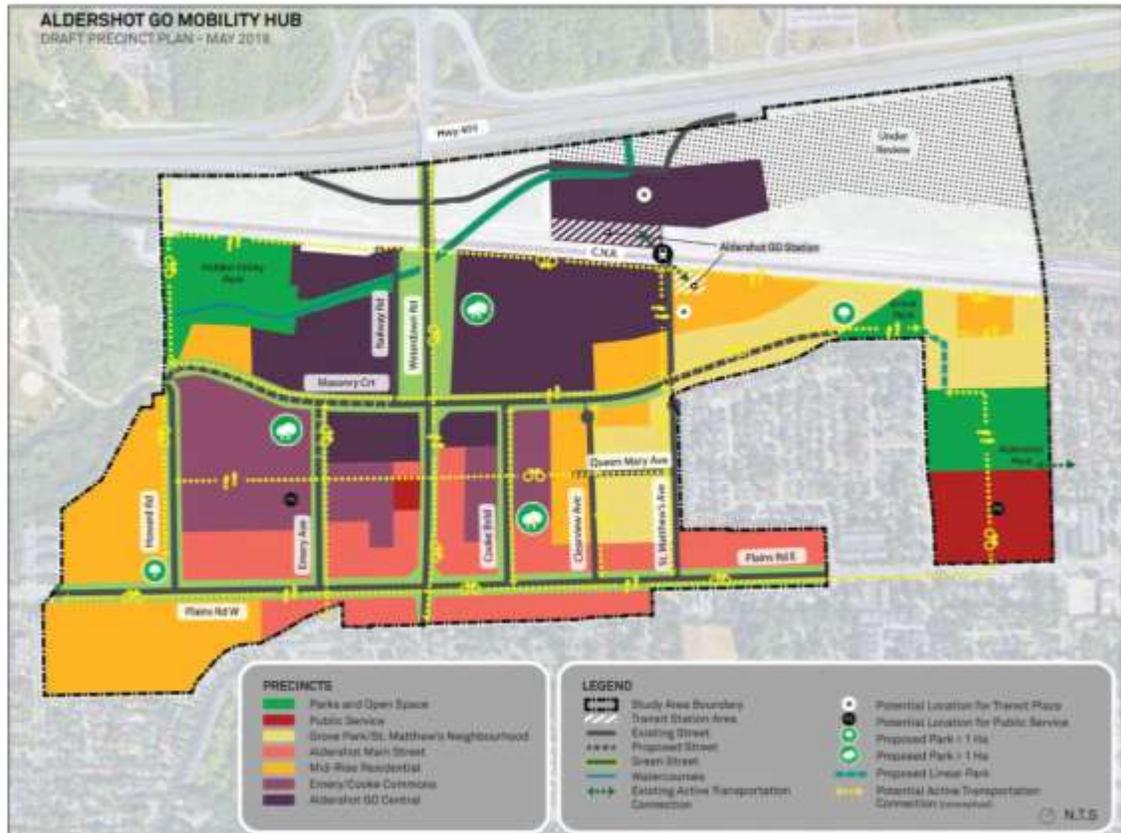


Figure 2-4: Burlington GO Mobility Hub Draft Precinct Plan (Excerpt from Committee of the Whole Presentation, July 12, 2018)

Burlington GO Mobility Hub

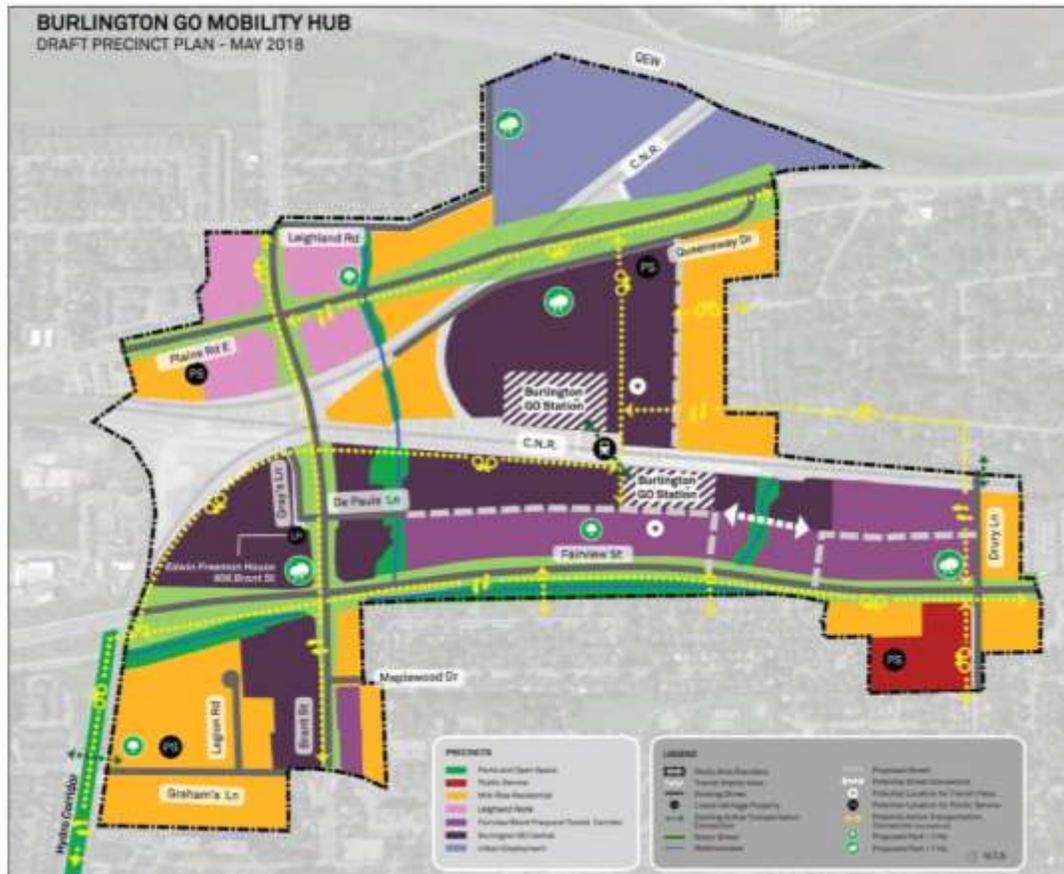
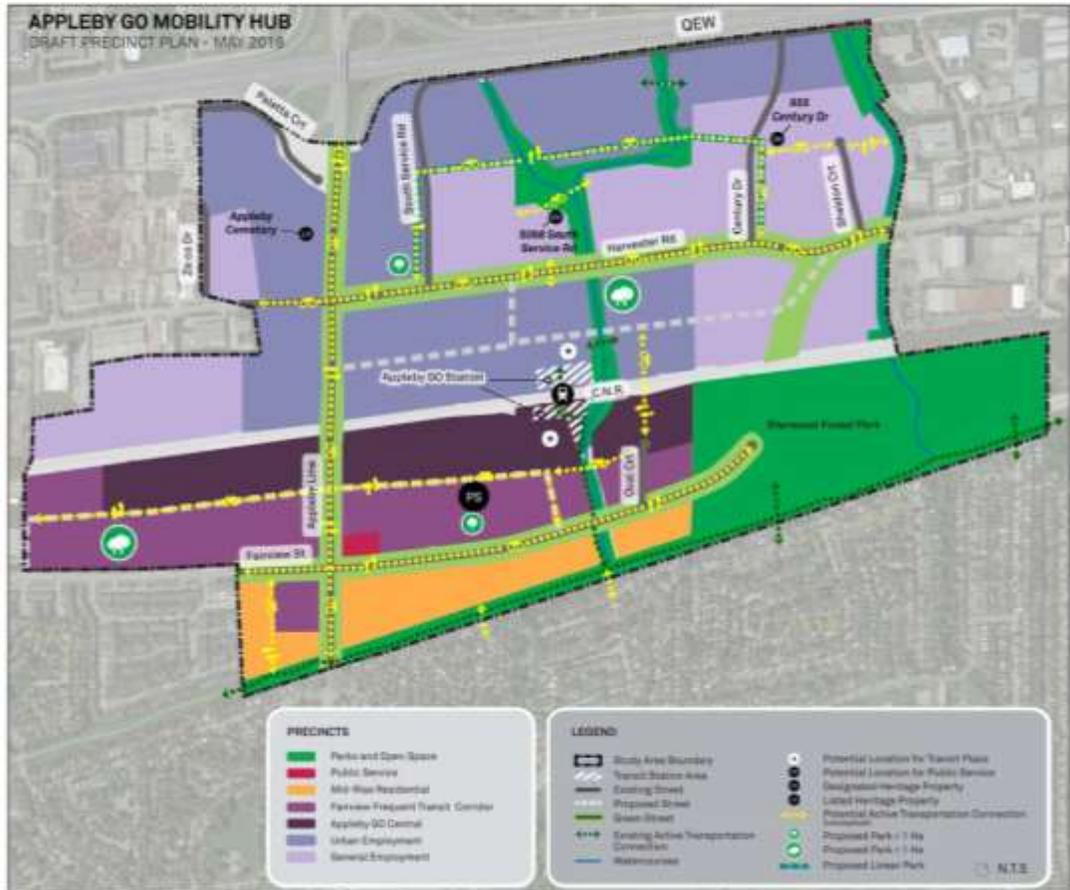


Figure 2-5: Appleby GO Mobility Hub Draft Precinct Plan (Excerpt from Committee of the Whole Presentation, July 12, 2018)

Appleby GO Mobility Hub





2.4 Active Development Applications

In order to inform the land supply analysis for residential and non-residential growth in Burlington, a review of the active development applications was conducted. As the City of Burlington has very limited vacant lands available for development, the active development application data was utilized to determine the number, type and location of residential units and non-residential space being proposed throughout the City. This review is intended to present all active development applications within the City of Burlington, as a snapshot in time. The active development application data includes any proposals, and has not been vetted based on likelihood of approval nor implementation. The active development applications data includes units that are being proposed within and outside of the Delineated Built Boundary and is an important component of the land supply analysis.

The City of Burlington is growing, and has had a lot of development interest. Based on the data provided by the City in October 2018, the City has a total of 10,300 residential units being proposed for development (e.g. active development applications) in the City, as presented in **Figure 2-6** and **Table 2-1**. This includes all development applications with the City of Burlington that are either an Active Development Applications (e.g. application submitted and not yet draft approved/approved including those appealed to the OMB), Draft Approved/Approved, Registered or Under Construction. These proposed units are at various stages of the process and have different levels of likelihood that they will

make it to market. The majority of these residential units are in the active development application phase (5,744 within the build boundary and 1,622 outside), and are therefore still subject to approval (and not guarantee). Furthermore, the development process can take many years and, if approved, many of these projects may take years to materialize. Of the active development applications in Burlington, 11% of the proposed units within the Built Boundary were submitted prior to 2016 (370 units are associated with active applications and 452 units are associated with approved/draft approved applications).

The majority of the proposed residential units are higher density built form. Of the total proposed units, 8.7% are detached, 1.7% are semi-detached, 17.0% are townhouses and the largest portion (72.5%) are apartment units. Of the 25 active development applications that are within the Built Boundary, 4 of the applications represent over 60% of the apartment units being proposed (each of these have over 400 apartment units being proposed).

Based on an average density of 1.9 people per unit¹², the 10,300 proposed residential units would represent approximately 19,570 people being proposed as part of the city's active residential development applications (not adjusted for the disbursement of existing units/people).

¹² PPU of 1.9 was provided by Watson as the Forecast 25 year PPU for new Units Constructed from 2016-2041 based on a medium to high density unit type.

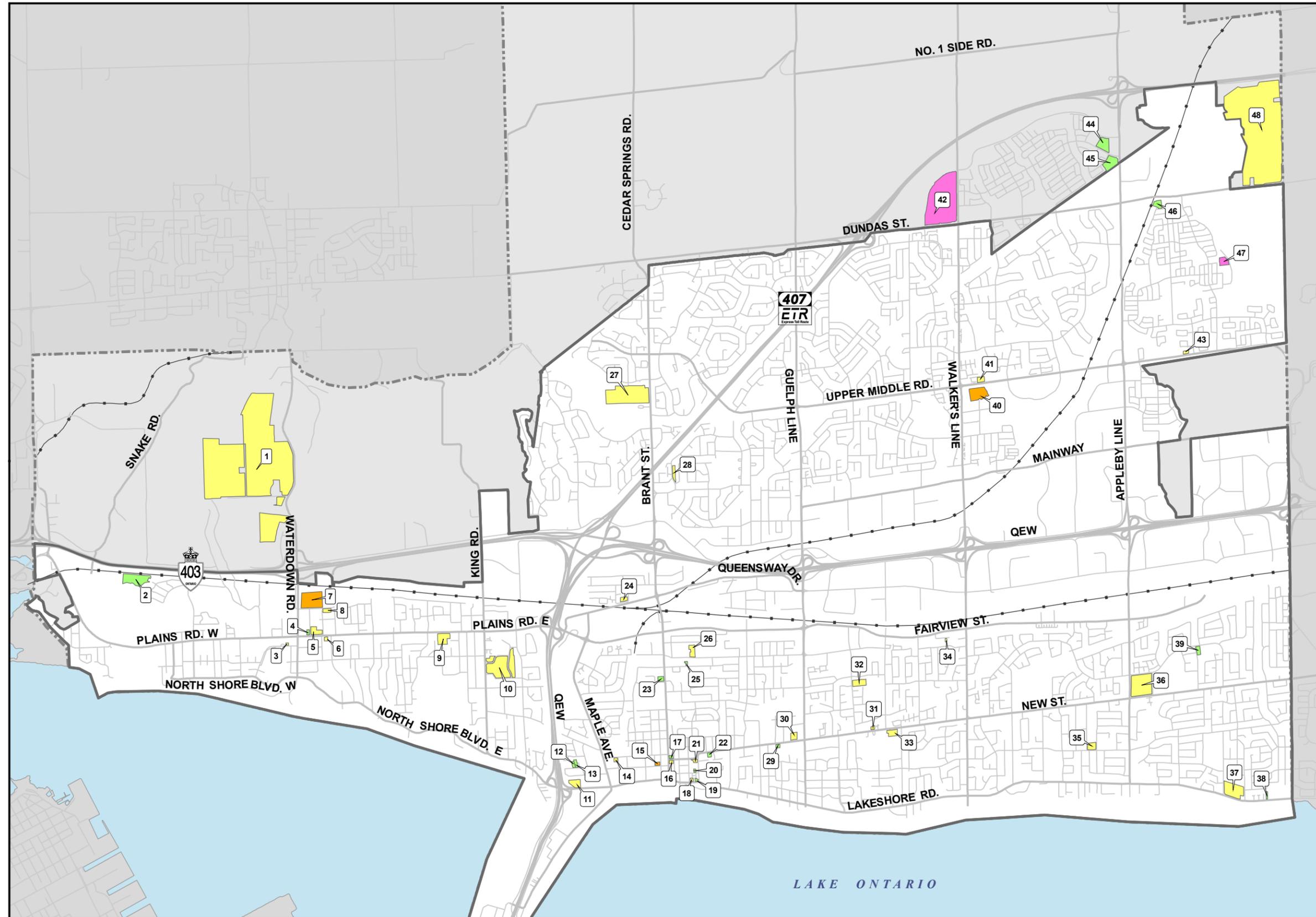
Table 2-1: Active Residential Development Applications in Burlington

City-wide Proposed Residential Units	Detached Units	Semi-Detached Units	Townhouse Units	Apartment Units	Sub-Total
Outside Built Boundary					
Active Development Applications	615	0	680	327	1,622
Approved / Draft Approved	0	0	91	924	1,015
Registered	213	150	35	0	398
Sub-Total	828	150	806	1,251	3,035
Within Built Boundary					
Active Development Applications	10	30	643	5,091	5,774
Approved / Draft Approved	48	0	49	642	739
Registered	15	0	0	0	15
Under Construction	0	0	249	488	737
Sub-Total	73	30	941	6,221	7,265
Grand Total	901	180	1,747	7,472	10,300

BURLINGTON GROWTH STUDY

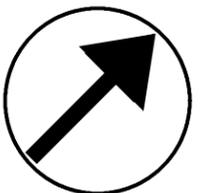
ACTIVE RESIDENTIAL DEVELOPMENT APPLICATIONS IN BURLINGTON

FIGURE 2-6



LEGEND

- Major Roads
- Roads
- Railway
- Delineated Built Boundary
- City Boundary
- Residential Development Applications**
 - Registered
 - Under Construction
 - Approved / Draft Approved
 - Active Development Applications

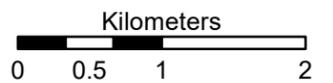


NORTH

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DILLON CONSULTING
CHECKED BY: PJK
DILLON CONSULTING

February 15, 2019

Scale 1:50,000



As of October 2018, the City has a total of 173,625¹³ sq.m of non-residential space proposed for development in Burlington. Of the proposed space, 44,399 sq.m is industrial, 41,351 sq.m is retail, 39,183 sq.m is office, 37,910 sq.m is commercial and the remaining 10,782 sq.m is institutional. Based on an average employee density of 1 employee per 500 sq. ft (46 sq. m)¹⁴, this would equate to approximately 3,738 employees being proposed as part of the city's active non-residential development applications (not adjusted for the disbursement of existing space/jobs, see **Table 2-2, Figure 2.7**).

Table 2-2: Active Non-Residential Development Application in Burlington

City-wide Proposed Non-Residential Units	Retail GFA	Office GFA	Commercial GFA	Industrial GFA	Institutional GFA	Sub-Total GFA
Outside Built Boundary						
Active Development Applications	16,648	10,113	4,689	14,700	2,228	48,378
Approved / Draft Approved	0	1,909	0	0	3,817	5,726
Sub-Total	16,648	12,022	4,689	14,700	6,045	54,104
Within Built Boundary						
Active Development Applications	21,902	26,758	27,617	19,642	1,881	97,800
Approved / Draft Approved	2,801	403	5,604	10,057	2,856	21,721
Sub-Total	24,703	27,161	33,221	29,699	4,737	119,521
Grand Total	41,351	39,183	37,910	44,399	10,782	173,625

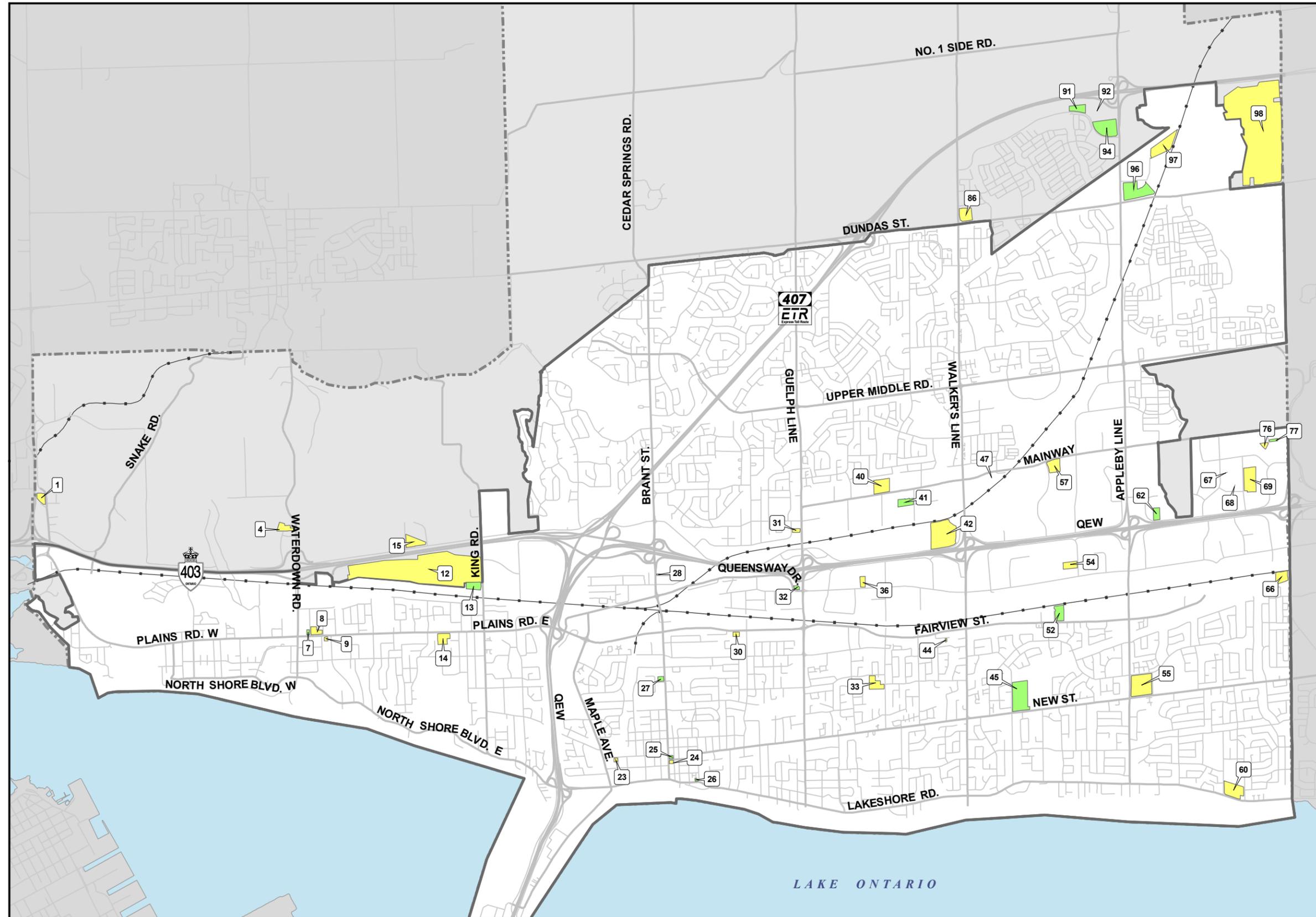
¹³ This does not include two active development applications that did not identify associated GFA, being site number #12 and 94 on Figure 2-7: Active Non-Residential Development Applications in Burlington.

¹⁴ The density target used in this analysis is generally consistent with the city-wide average densities as established in the City of Burlington Development Charges Background Study, undertaken by Watson in 2014. The DC Background Study identified the following densities for non-residential uses: 800 sq.ft per employee for industrial; 550 sq.ft per employee for commercial/population related; 559 sq.ft per employee for retail commercial; 360 sq.ft per employee for non-retail commercial and 400 sq.ft per employee for institutional employment.

BURLINGTON GROWTH STUDY

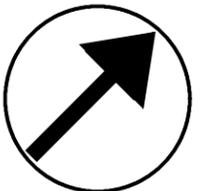
ACTIVE NON-RESIDENTIAL DEVELOPMENT APPLICATIONS IN BURLINGTON

FIGURE 2-7



LEGEND

- Major Roads
- Roads
- Railway
- Delineated Built Boundary
- City Boundary
- Non-Residential Development Applications**
 - Active Development Applications
 - Approved / Draft Approved

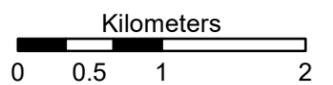


NORTH

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DILLON CONSULTING
CHECKED BY: PJK
DILLON CONSULTING

June 04, 2019

Scale 1:50,000



Of the active development applications, 29% of the residential units and 4% of the employment space are proposed within the City's Primary Growth Areas, including the Downtown, Uptown and Mobility Hubs. Of these, the largest concentration of proposed residential units is within the Downtown Burlington Urban Growth Centre (18%). 32% of the residential units and 22% of the employment space is proposed within the City's Secondary Growth Areas, as depicted on **Table 2-3**. Not surprisingly, the majority of the employment space is proposed within the Employment Growth Areas (67%).

Table 2-3: Portion of Proposed Units in Primary, Secondary and Established Neighbourhoods

Growth Area	Number of Residential Units Proposed	Percent of Residential Units	Amount of Employment GFA (sq.m)	Percent of Employment Space
Primary Growth Area				
<i>Downtown Burlington Urban Growth Centre</i>	1,861	18%	3,693	3%
<i>Uptown Primary Growth Area</i>	0	0%	0	0%
<i>Burlington GO Mobility Hub</i>	0	0%	223	0%
<i>Aldershot GO Mobility Hub</i>	1,153	11%	1,644	1%
<i>Appleby GO Mobility Hub</i>	0	0%	0	0%
Secondary Growth Area	3,255	32%	30,771	22%
Employment Growth Area	0	0%	93,360	67%
Established Neighbourhood Area	2,011	20%	4,304	3%
Undeveloped Area Outside Delineated Built Boundary	1,150	11%	0	0%
North Aldershot	870	8%	5,930	4%
Total	10,300	100%	139,925	100%

2.5 Residential Supply

2.5.1 Methodology

The purpose of the supply analysis is to understand how much additional population the City could expect based on its current policies and plans. The methodology used to estimate supply employs a top-down methodology that identifies the long term full build-out potential based on target densities for each urban structure element. Where a formal target was not available, the analysis relies upon planning documents and guidelines to identify a target density for use. The target densities used are intended to be achieved in the fullness of time and were selected based on applicable City, Regional and Provincial planning documents and guidelines. The top-down, target-based approach also has the advantage of being a fairly nimble methodology, allowing for alternative density scenarios to be tested (should the need arise).

A detailed bottom-up calculation that assesses each developable site based on net densities (similar to the 2008 Intensification Study the City undertook) was considered, however, it was determined not to be a practical methodology for a city-scale study. To apply a bottom-up methodology at the City-scale would involve a parcel by parcel assessment and would also need to translate building heights into population and employment figures, which involves additional assumptions¹⁵.

The residential land supply analysis focuses on the following areas, as depicted on **Figure 2-8**:

- **Primary Growth Areas:** Assumes full build out of all primary growth areas based on density targets established in Provincial, Regional and local plans.
 - Downtown Burlington Urban Growth Centre
 - Uptown Urban Centre Primary Growth Area
 - Burlington GO Mobility Hub
 - Aldershot GO Mobility Hub
 - Appleby GO Mobility Hub
- **Secondary Growth Areas:** Assumes build out to transit supportive densities (based on level of transit currently identified in adopted 2018 Official Plan, Schedule B-2, aligned with MTO's Transit Supportive Guidelines transit categories¹⁶).

¹⁵ Bottom up calculations would need to address site area, building coverage, building efficiency, percent of residential floorspace vs. percent of commercial floorspace, maximum height, average unit sizes and persons per unit, etc.

¹⁶ Secondary Growth Areas along Frequent and Candidate Frequent Transit Corridor (adopted 2018 OP, Schedule B-2) are assumed to be served by Frequent Transit Service (one bus every 10-15 min) based on MTO's Transit Supportive Guidelines, and those along a Transit Supportive Corridor (adopted 2018 OP, Schedule B-2) or any other Secondary Growth Areas are assumed to be serviced by Basic Transit Service (one bus every 20-30 min) based on MTO's Transit Supportive Guidelines.

- **Employment Growth Areas:** Primarily focussed on Vacant Employment Lands with a factor for infill opportunities (refer to Section 2.6 for details).
- **Established Neighbourhood Area:** Identified those lands designated Residential High Density with infill opportunities as well as applying a city-wide secondary suites factor.
- **Undeveloped Areas Outside Delineated Built Boundary:** Those designated employment have been included within the employment land supply (outlined in Section 2.7) and those not designated employment have been included within the residential supply with associated build-out assumptions.

In addition, the analysis includes a factor for the build out potential for North Aldershot and a modest growth assumption for the Rural Areas.

BURLINGTON GROWTH STUDY

RESIDENTIAL SUPPLY ANALYSIS

FIGURE 2-8

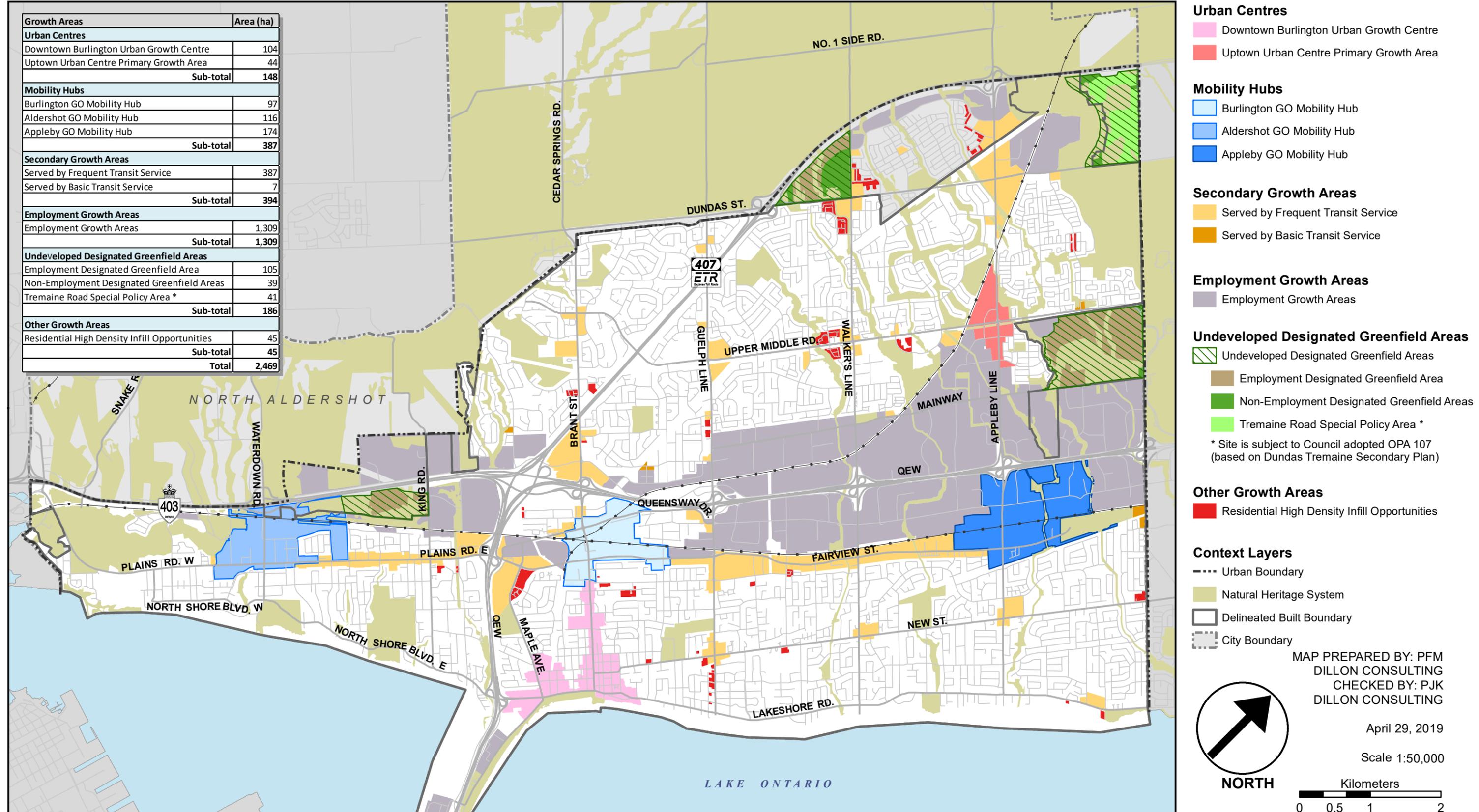


Table 2-4 provides a summary of the density targets used to guide the residential supply analysis, along with the corresponding source. Density targets are multiplied by the estimated gross area for each growth area, net of non-developable environmental features. Density targets are measured over a broad area and are intended to represent the overall density of an area, recognizing that some sites will be developed to a higher density, while others will remain with a lower density.

Table 2-4: Density Targets for Build-Out of Growth Areas

Growth Area	Density Target (ppl +jobs/ha)	Source
Downtown Burlington Urban Growth Centre	200	Growth Plan For the Greater Golden Horseshoe (2017)
Uptown Urban Centre Primary Growth Area	80	MTO's Transit Supportive Guidelines based on frequent transit service (2012)
Burlington GO Mobility Hub	150/300	Growth Plan for the Greater Golden Horseshoe (2017) / Burlington Adopted Official Plan (2018)
Aldershot GO Mobility Hub	150/300	Growth Plan for the Greater Golden Horseshoe (2017) / Burlington Adopted Official Plan (2018) ¹⁷
Appleby GO Mobility Hub	150/300	Growth Plan for the Greater Golden Horseshoe (2017) / Burlington Adopted Official Plan (2018)
Secondary Growth Areas - Served by Frequent Transit Service (assumed to be lands adjacent to Frequent Transit Corridor and Candidate Frequent Transit Corridor in adopted 2018 OP Schedule B-2)	80	MTO's Transit Supportive Guidelines (2012)
Secondary Growth Areas - Served by Basic Transit Service (assumed to be lands adjacent to Transit Supportive Corridor and all other Secondary Growth Areas in adopted 2018 OP Schedule B-2 and those not captured above)	50	MTO's Transit Supportive Guidelines (2012)
Residential High Density Infill Opportunities	195	Based on average permitted density for lands designated Residential High Density in the Burlington Adopted 2018 Official Plan (average of 76-185 units/ha is 130 units per ha) and the average historic people per unit for apartment uses in Burlington (1.5 PPU for high density).

¹⁷ While Aldershot GO is not on a priority transit corridor as identified by the Growth Plan, the Growth Plan density target was applied as a best practice and for consistency with the other GO Station Mobility Hubs in the city.

Growth Area	Density Target (ppl +jobs/ha)	Source
Non-Employment Undeveloped Area Outside of the Delineated Built Boundary (Designated Greenfield Area) (excluding those designated Employment)	45	Sustainable Halton: Regional Official Plan (2009)

As the density targets are a combined people and jobs per hectare, an estimate of the percentage of population versus employment was identified to determine the growth in population and the growth in employment. **Table 2-5** provides an overview of the estimated percent population and employment used for each of the growth areas.

Table 2-5: Population to Employment Ratios

Growth Area	Estimated % Population	Estimated % Employment	Notes
Downtown Burlington Urban Growth Centre	70%	30%	Based on the detailed planned work undertaken as part of the Burlington Adopted 2018 Official Plan to identify a growth forecast for the Downtown.
Uptown Urban Centre Primary Growth Area	70%	30%	Based on the land use policies and permitted uses of the Burlington Adopted 2018 Official Plan for the Uptown Core and Uptown Corridor land use designations.
Burlington GO Mobility Hub	70%	30%	Based on the land use direction in the draft Precinct Plan for Burlington GO Mobility Hub.
Aldershot GO Mobility Hub	70%	30%	Based on the land use direction in the draft Precinct Plan for Burlington GO Mobility Hub.
Appleby GO Mobility Hub	20%	80%	Based on the land use direction in the draft Precinct Plan for Burlington GO Mobility Hub.
Secondary Growth Areas - Served by Frequent Transit Service	50%	50%	Based on the land use policies and permitted uses for Urban Corridor, Urban Corridor - Employment Lands, Mixed Use Commercial Centre and Neighbourhood Centre in the Burlington Adopted 2018 Official Plan.
Secondary Growth Areas - Served by Basic Transit Service	40%	60%	Based on the land use policies and permitted uses for Neighbourhood Centre and Local Centre in the Burlington Adopted 2018 Official Plan.
Residential High Density Infill Opportunities	95%	5%	Based on the land use policies and permitted uses for Residential - High Density in the Burlington Adopted 2018 Official Plan.

Growth Area	Estimated % Population	Estimated % Employment	Notes
Non-Employment Undeveloped Area Outside of the Delineated Built Boundary (Designated Greenfield Area) (excluding those designated Employment)	90%	10%	Based on the policies of the Burlington Adopted 2018 Official Plan and the active development applications.

2.5.2 Supply Analysis

2.5.2.1 Primary and Secondary Growth Areas

Tables 2-6 through **2-8** present the total population and jobs achievable at build out for the Primary and Secondary Growth Areas based on the density targets and estimated population and employment ratios presented above. The analysis shows that the City could expect 60,216 to 87,758 people and 53,470 to 83,938 jobs within the Primary and Secondary Growth Areas at full build out (depending on the density target used for the Mobility Hubs).

Table 2-6: Build-Out Growth Potential - Urban Centres

Growth Area	Gross Area (ha)	Density Target (ppl+jobs/ha)	Estimated % People	Estimated % Jobs	Total People at Build Out	Total Jobs at Build Out
Downtown Burlington Urban Growth Centre	104 ha	200	70%	30%	14,611	6,262
Uptown Urban Centre Primary Growth Area	44 ha	80	70%	30%	2,438	1,045
Sub-Total	148 ha	280	-	-	17,049	7,307

Note: Areas shown in the above tables have been rounded therefore calculations may not be exact if reproduced.

Table 2-7: Build-Out Growth Potential - Mobility Hubs based on Growth Plan targets

Growth Area	Gross Area (ha)	Density Target (ppl+jobs/ha)	Estimated % People	Estimated % Jobs	Total People at Build Out	Total Jobs at Build Out
Burlington GO Mobility Hub	97 ha	150	70%	30%	10,181	4,363
Aldershot GO Mobility Hub	116 ha	150	70%	30%	12,134	5,200
Appleby GO Mobility Hub	174 ha	150	20%	80%	5,226	20,904
Sub-Total	387 ha	-	-	-	27,541	30,467

Note: Areas shown in the above tables have been rounded therefore calculations may not be exact if reproduced.

Table 2-8: Build-Out Growth Potential - Mobility Hubs based on adopted 2018 OP targets

Growth Area	Gross Area (ha)	Density Target (ppl+jobs/ha)	Estimated % People	Estimated % Jobs	Total People at Build Out	Total Jobs at Build Out
Burlington GO Mobility Hub	97 ha	300	70%	30%	20,362	8,727
Aldershot GO Mobility Hub	116 ha	300	70%	30%	24,269	10,401
Appleby GO Mobility Hub	174 ha	300	20%	80%	10,452	41,807
Sub-Total	387 ha	-	-	-	55,083	60,935

Note: Areas shown in the above tables have been rounded therefore calculations may not be exact if reproduced.

Table 2-9: Build-Out Growth Potential - Secondary Growth Areas

Growth Area	Gross Area (ha)	Density Target (ppl+jobs/ha)	Estimated % People	Estimated % Jobs	Total People at Build Out	Total Jobs at Build Out
Secondary Growth Areas - Served by Frequent Transit Service	387	80	50%	50%	15,486	15,486
Secondary Growth Areas - Served by Basic Transit Service	7	50	40%	60%	140	210
Sub-Total	394	-	-	-	15,626	15,696

Note: Areas shown in the above tables have been rounded therefore calculations may not be exact if reproduced.

2.5.2.2

Established Neighbourhood Area

The Established Neighbourhood Area is not intended to accommodate a significant portion of the city-wide growth forecast. In the fullness of time, there are two factors that will primarily effect growth in the Established Neighbourhood Areas: secondary suites being introduced over time and a selection of sites being redeveloped to higher densities through redevelopment. The approach undertaken for secondary suites is outlined in Section 2.5.2.6. To qualify for the latter, a review was undertaken of sites designated Residential - High Density that have infill or redevelopment opportunities over the long term. Infill or redevelopment opportunities have been identified for sites that currently do not have an apartment building on them (assumed to be over 4 storeys), as these sites could perceivably be redeveloped for a higher or better use in the fullness of time. Of the designated Residential – High density sites, a total of 45 hectares has long term infill potential. The timing of this growth potential is very long term, as most of these sites are currently occupied by residential uses and will continue to function as is. **Table 2-10** presents the results of the analysis.

Table 2-10: Build-Out Growth Potential - Residential High Density Infill Opportunities

Growth Area	Gross Area (ha)	Density Target (ppl+jobs/ha)	Estimated % People	Estimated % Jobs	Total People at Build Out	Total Jobs at Build Out
Residential High Density Infill Opportunities	45 ha	195	95%	5%	8,410	443

Note: Areas shown have been rounded therefore calculations may not be exact if reproduced.

2.5.2.3

Greenfield Areas

The City has a total of 186 hectares of Undeveloped Area Outside of the Delineated Built Boundary (Designated Greenfield Area). Of this, 105 hectares are designated employment (and are considered as part of the employment supply analysis in Section 2.7), 39 hectares are designated for residential and 42 hectares are the Tremaine Road Special Policy Area (subject to Council adopted OPA 107 based on the Dundas Tremaine Secondary Plan). A portion of lands designated residential (18 hectares identified as parcel #42 in **Figure 2-6**) and the Tremaine Road Special Policy Area are currently subject to development applications proposing the following:

- Parcel ID #42 on **Figure 2-6**: 3505 Dundas Street has a development application that is registered for 398 residential units.
- Parcel ID #48 on **Figure 2-6** and #98 on **Figure 2-7**: Tremaine Road Special Policy Area is subject to Council adopted OPA 107 (based on the Dundas Tremaine Secondary Plan). The development application for this site includes 752 residential units and 33,700 square metres of non-residential space.

In these areas, the development application has been included within the analysis in Section 2.5.3. The remaining lands that are designated residential have been included in **Table 2-11**. Based on the density target and estimated people to jobs ratio, there is a growth potential for 842 people and 94 jobs at build out on these lands.

Table 2-11: Build Out Growth Potential - Non Employment Greenfield Areas

Growth Area	Gross Area (ha)	Density Target (ppl+jobs/ha)	Estimated % People	Estimated % Jobs	Total People at Build Out	Total Jobs at Build Out
Designated Greenfield Area (Non-Employment Undeveloped Area Outside of the Delineated Built Boundary)*	21	45	90%	10%	842	94

Note: Areas shown have been rounded therefore calculations may not be exact if reproduced.

** Lands not subject to an active development application.*

2.5.2.4

North Aldershot

North Aldershot is a very unique area in Burlington where historic planning approvals exist for residential development outside of the Urban Area¹⁸. Based on the land use designations within the adopted 2018 Official Plan and the active development applications, there is potential for a modest

¹⁸ North Aldershot is being looked at as part of Halton Region's Official Plan Review.

amount of additional residential development. The Region of Halton's Best Planning Estimates included a growth of 319 units and 346 jobs between 2016 and 2031. The Eagle Heights active development application received in 2010 for 1664 Waterdown Road, 66 Horning Road and 48 Flatt Road proposes a total of 870 residential units, broken down into 222 detached, 441 townhouses and 207 apartment units. For the purposes of this analysis, the active development application has been used to determine growth potential for North Aldershot, as outlined in **Table 2-12**¹⁹.

Table 2-12: Growth Potential - North Aldershot

Growth Area	Total Units at Build Out	Total Population Growth*	Total Non-Residential Space (sq.m)	Total Employment Growth**
North Aldershot	870	2,001	5,930	128

* Forecast 25 Year PPU of 2.3 for New Units Constructed from 2016 to 2041 provided by Watson for medium density units, such as townhouses, apartments and duplexes.

** Employment based on employment density of 1 employee per 500 sq.ft (46 sq.m) as provided by Watson.

2.5.2.5

Rural Areas

The Rural Areas of the City of Burlington are not intended to accommodate significant future growth. The rural settlement areas of Kilbride, Lowville and Mount Nemo have very modest growth assumptions to 2031 based on the Region of Halton Best Planning Estimates. For the purpose of this analysis, these modest growth assumptions were maintained going forward. **Table 2-13** presents the growth assumptions for Burlington's Rural Areas.

Table 2-13: Growth Potential - Rural Areas

Growth Area	Total Units	People Per Unit*	Total People	Total Jobs
Rural Area	33	3.3	109	84

* Forecast 25 Year PPU for New Units Constructed from 2016 to 2041 provided by Watson for low density units, such as townhouses, apartments and duplexes.

2.5.2.6

City-wide Secondary Suites Factor

The Province, Region and City promote establishment of secondary suites within the stable residential areas to provide a better range of housing choice and accommodate the aging population. Within the City's adopted 2018 Official Plan, secondary dwelling units are permitted within all land use designations that permit residential uses to increase the supply of affordable housing options in the city. In addition, the Planning Act permits secondary suites in single-detached, semi-detached, row housing as well as accessory structures. In order to assess the growth potential associated with secondary suites city-wide,

¹⁹ The numbers used are for high level assessment purposes only and does not preordain in any way, support of the subject development application.

a 5% growth factor was applied to only the existing inventory of low density (single-detached) units to account for future growth in secondary suites. This factor is a conservative factor for secondary suites, recognising the provincial and municipal direction towards promoting the development of secondary suites, market factors and is similar to the assumptions used for secondary suites in the City of Burlington's 2008 Intensification Strategy. **Table 2-14** presents the results of the City-wide secondary suites factor.

Table 2-14: City-Wide Secondary Suites Factor

	Existing Low Density Units (2016 Census)	Assumption on % of units adding a secondary suite	Secondary Suites (additional unit)	Secondary Suites (additional people based on 1.5 PPU)
Secondary Suites	36,745	5%	1,837	2,791

2.5.3

Supply Results

Table 2-15 shows the results of the City-wide residential supply analysis, showing that the City could accommodate approximately an additional 58,000 people across the City (based on the Growth Plan density targets for the Mobility Hubs) or 86,000 people across the City (based on the adopted 2018 OP density targets for the Mobility Hubs). Based on the current population of approximately 183,000 people, the future “mature state” population for the City could be somewhere in the neighbourhood of 241,000-269,000 people.

The majority of future growth opportunities are associated with the Primary and Secondary Growth Areas. Adjusting for existing people living in these areas, there is an opportunity to add approximately 42,000 to 70,000 people within the Urban Centres, Mobility Hubs and some of the City's Mixed Use Nodes and Intensification Corridors (depending on the density target used for the Mobility Hubs). The largest portion of growth is within the three mobility hub areas. Through redevelopment and intensification over time, there is an opportunity to add approximately 11,000 additional people in the long term to the Established Neighbourhood Areas, primarily through redevelopment of sites designated for high density residential. In addition, there is also some residential growth associated with undeveloped lands outside of the delineated Built Boundary, North Aldershot, and a small amount of growth in the Rural Settlement Areas.

It is important to note that the results of the supply analysis are quite sensitive to the density assumptions and the assumed population to employment ratios. There may be opportunities to plan for additional growth along the City's Secondary Corridors, which represent the largest land area, accounting for 394 hectares (or 42% of the land identified as Primary and Secondary Growth Areas). While the Secondary Growth Areas represent the largest amount of land within the supply, they are assumed to accommodate only 15-21% of the City's future population growth (depending on the density used for the mobility hubs). The lower growth assignment for these areas is based on the level of transit-service currently planned (mainly bus and express bus systems).

Table 2-15: City-Wide Residential Growth Potential

Growth Area	Build Out Population	Existing Population (2016)*	Population Growth between 2016 and Build Out	Population Growth Associated with Active Development Applications **
Primary Growth Area				
Urban Centres	17,049	10,833	6,216	3,536
Mobility Hubs*** (Growth Plan/adopted 2018 OP)	27,541/55,083	4,250	23,291/50,833	2,191
Secondary Growth Areas	15,626	3,150	12,476	6,185
Established Neighbourhood Area (plus secondary suites)	N/A	N/A	11,201	3,821
Non-Employment Undeveloped Area Outside Delineated Built Boundary (Greenfield Area)	842	N/A	842	-
3505 Dundas Street	756	N/A	756	756
Tremaine Road Special Policy Area**	1,429	N/A	1,429	1,429
North Aldershot	N/A	N/A	2,001	2,001****
Rural Areas	N/A	N/A	109	-
TOTAL			58,321/85,863	19,919

* Rough estimate based on Stats Canada 2016 data for dissemination blocks, rounded to nearest 50

** Forecast 25 Year PPU (1.9) for New Units Constructed from 2016 to 2041 provided by Watson average for medium to high density units.

*** Two build out capacity calculations have been provided for the Mobility Hubs to represent the targets in Growth Plan (150 ppl + jobs/ha) and the adopted 2018 Official Plan (300 ppl + jobs/ha).

****Eagle Heights active development application is 870 units. For consistency purposes with the supply analysis above, a low density PPU of 2.3 was used just for North Aldershot.

For employment growth associated with the Primary and Secondary Growth Areas, as well as other areas outside of the Employment Growth Area, **Table 2-16** summarizes the build out employment

growth potential. This information is for summary purposes only and should be reviewed with the Employment Growth Areas which are outlined in Section 2.6.

Table 2- 16: Employment Growth Potential in Residential and Mixed Use Areas

Growth Area	Jobs at Build Out	Job Growth Associated with Active Development Applications (based on 1 employee per 500 sq.ft/46 sq.m)*
Jobs at Build Out for Primary and Secondary Growth Areas		
Primary Growth Area		
Urban Centres	7,307	80
Mobility Hubs** (Growth Plan/adopted 2018 OP)	30,467/60,935	40
Secondary Growth Areas	15,696	662
Sub-Total Jobs at Build Out	53,470/83,938	782
Estimate of existing (2016) employment in Primary and Secondary Growth Areas (BPEs)	47,200	
Job Growth in Primary and Secondary Growth Areas (2016 –build out)	6,270/36,738	782
Established Neighbourhood Area	443	93
Non-Employment Undeveloped Area Outside Delineated Built Boundary (Greenfield Area)	94	-
Tremaine Road Special Policy Area	725	725
North Aldershot	128	128
Rural Areas	84	-
Job Growth in other non-employment areas	1,474	946
Total Job Growth in Residential and Mixed Use Areas	7,744/38,212	1728

* Forecast employment density provided by Watson.

** Two build out capacity calculations have been provided for the Mobility Hubs to represent the targets in Growth Plan (150 ppl + jobs/ha) and the adopted 2018 Official Plan (300 ppl + jobs/ha).



2.6 Employment Supply

2.6.1 Methodology

The city's employment growth forecast covers employment land growth, major office and population related growth potential. Employment growth associated with major office and population related growth is planned to be accommodated within the City's Urban Centres (Downtown and Uptown), Mobility Hubs and Secondary Growth Areas, as well as some other non-employment areas as described above. In these areas there is a growth potential of approximately 7,744 additional employees (based on the Growth Plan density targets for Mobility Hubs) or 38,212 additional employees (based on the adopted 2018 OP density targets for Mobility Hubs). Employment land employment growth will occur through either the development of vacant employment lands (within the Delineated Built Boundary or in the Designated Greenfield Areas) or the intensification of existing occupied employment lands. The non-residential active development application data provides insight into the proposed development opportunities in the Employment Growth Areas and has been factored into the analysis.

For development of vacant employment lands outside of those with active development applications, a similar approach to the residential supply methodology was used where the lands have been assigned a density target associated with full build out. For employment lands, a density target of 45 jobs per hectare has been used based on the Burlington Employment Lands Study Phase 2 (Dillon Consulting, Watson and Associates, 2014). A factor for intensification of occupied employment lands was also included and was based on an analysis of infill opportunities for Employment Growth Areas not subject to active development applications. Employment infill opportunities included portions of a parcel that is vacant on occupied properties with potential for future expansion, large underutilized parcels, and vacant sites that are not subject to a development application and were not within the vacant employment lands supply dataset. Lands which were zoned Open Space were excluded from the infill analysis as well as any areas which were part of the City's Natural Heritage layer.



2.6.2

Supply Analysis

The Employment Growth Area covers a total of 1,309 hectares of land (net of the City's Natural Heritage lands). 67% of the non-residential active development applications are proposed within the Employment Growth Areas, covering 42 ha of employment land. A total of 93,360 sq.m of employment uses, which could accommodate 2,010 employees²⁰ have been proposed within the Employment Growth Area.

Outside of those lands subject to an active development application, there are a total of 77 hectares of the Employment Growth Area that have been identified as vacant. In addition, there is a total of 89 hectares of the Undeveloped Area Outside Delineated Built Boundary that are designated for employment uses (General Employment or Business Employment) and included in this analysis.²¹ Based on a density target of 45 employees per hectare, these lands could accommodate 7,470 employees at build out.

²⁰ Based on an industrial employment density of one employee per 500 square feet (46.4515 sq.m), as provided by Watson

²¹ These lands do not include the Tremaine Road Special Policy Area, as these have been outlined in Section 2.5.2.3 and Table 2-16 above. Associated employment from these lands are carried forward in the analysis on Table 2-19 in the "Job growth in other non-employment areas" row.

Table 2-17: Build-Out Growth Potential - Vacant Employment Lands

Growth Area	Total Gross Area (ha)	Density Target (jobs/ha)	Total Jobs at Build Out
Vacant Employment Lands in Employment Growth Areas*	77	45	3,465
Employment Undeveloped Area Outside of Delineated Built Boundary (portion of Designated Greenfield Area designated for General Employment and Business Employment)*	89	45	4,005
Sub-Total	166	-	7,470

* The areas identified do not include lands that are subject to active non-residential development applications.

Of the remaining occupied Employment Growth Area, 12% of the land has been identified for infill opportunities based on the methodology outlined in Section 2.6.1. These sites have been identified based on their current status and could be redeveloped or accommodate infill employment uses in the long term. Based on a density of 45 employees per hectare, these lands could accommodate approximately 5,445 employees at build out (not adjusted for any reduction of existing employment on these properties). **Table 2-18** presents the results of the Employment Land Infill Opportunities Analysis.

Table 2-18: Employment Land Infill Opportunities

Growth Area	Total Gross Area	Density Target (jobs/ha)	Total Jobs at Build Out
Infill Opportunities	121	45	5,445

2.6.3**Supply Results**

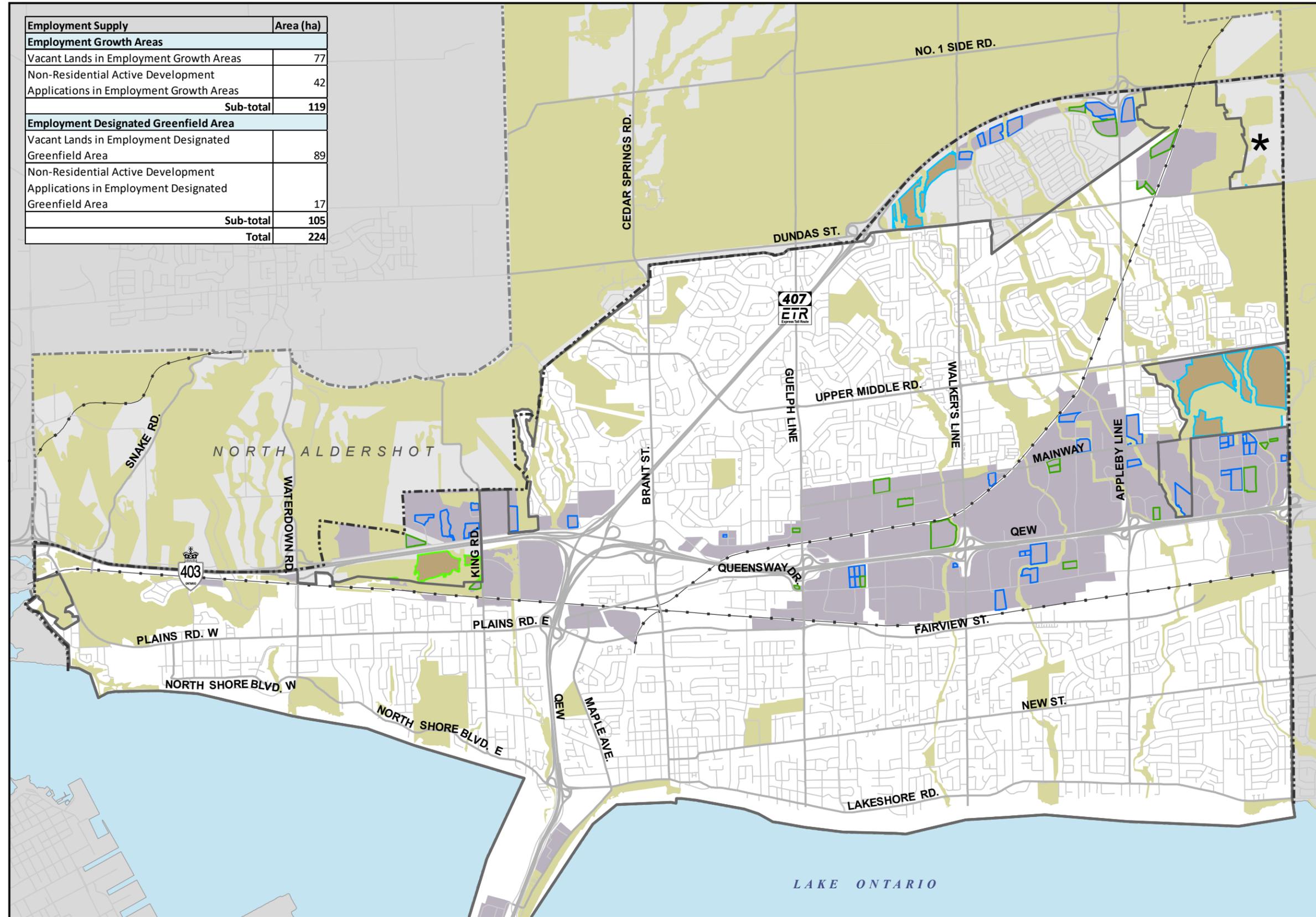
The City's Employment Growth Area can accommodate approximately 10,920 additional jobs at build out (though current active development applications, vacant employment lands and employment infill opportunities). Based on the analysis in Section 2.5, the City's Urban Centres, Mobility Hubs and Secondary Growth Areas can accommodate approximately 6,270 additional jobs at build out (based on the Growth Plan density target for the Mobility Hubs), or 36,738 additional jobs at build out (based on the adopted 2018 OP density target for Mobility Hubs). **Table 2-18** presents the build out potential for employment across the City and the growth potential, given existing city-wide employment (see **Figure 2-9** for additional details).

BURLINGTON GROWTH STUDY

EMPLOYMENT SUPPLY ANALYSIS

FIGURE 2-9

Employment Supply	Area (ha)
Employment Growth Areas	
Vacant Lands in Employment Growth Areas	77
Non-Residential Active Development Applications in Employment Growth Areas	42
Sub-total	119
Employment Designated Greenfield Area	
Vacant Lands in Employment Designated Greenfield Area	89
Non-Residential Active Development Applications in Employment Designated Greenfield Area	17
Sub-total	105
Total	224



Employment Layers

- Employment Growth Areas
- Vacant Lands in Employment Growth Areas
- Non-Residential Active Development Applications in Employment Growth Areas
- Employment Designated Greenfield Area
- Vacant Lands in Employment Designated Greenfield Area
- Non-Residential Active Development Applications in Employment Designated Greenfield Area
- *** Site is subject to Council adopted OPA 107 (based on Dundas Tremain Secondary Plan)

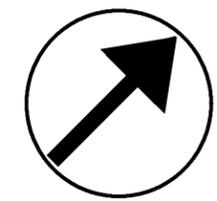
Context Layers

- Urban Boundary
- Natural Heritage System & Parks
- Delineated Built Boundary
- City Boundary

MAP PREPARED BY: PFM
DILLON CONSULTING
CHECKED BY: PJK
DILLON CONSULTING

June 04, 2019

Scale 1:50,000



NORTH

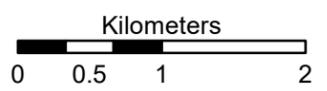


Table 2-19: City-Wide Employment Growth Potential

Growth Area	Job Growth Potential (2016-Build Out)	Percentage
Job Growth in Primary and Secondary Growth Areas* (Growth Plan/adopted 2018 OP for Mobility Hubs)	6,270/36,738	32%/70%
Job growth in other non-employment areas	1,474	6%/3%
Non-Residential Active Development Applications (Employment Growth Areas)	2,010	8%/4%
Vacant Employment Lands (Employment Growth Area)	3,465	14%/6%
Employment Undeveloped Area Outside of Delineated Built Boundary (Greenfield Areas)	4,005	17%/7%
Employment Land Infill Opportunities	5,445	23%/10%
Total Job Growth	22,669/53,137	100%

* Two build out capacity calculations have been provided for the Mobility Hubs to represent the targets in Growth Plan (150 ppl + jobs/ha) and the adopted 2018 Official Plan (300 ppl + jobs/ha).

2.7 Summary

The residential and employment land supply analysis shows that there is potential for the City of Burlington to accommodate an additional 58,321 to 85,863 people and 22,669 to 53,137 jobs 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 built-up area, with a high concentration of future population and jobs planned to be accommodated in its Primary and Secondary Growth Areas. The estimated supply of land is only one of many factors which will shape the amount and pace of development in the City. The next several sections provide commentary on market and demographic factors which also play an important role in understanding the City's growth potential.



3.0

Macro-Economic, Regional and Local Non-Residential Trends

3.1

Provincial and National Economic Outlook

3.1.1

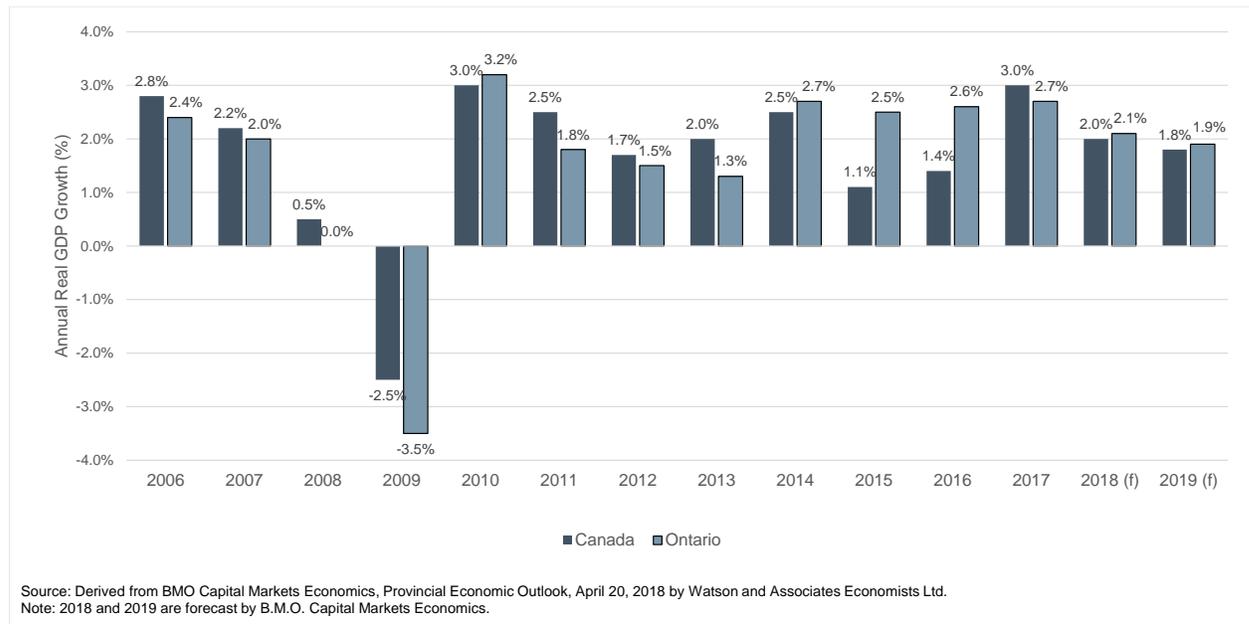
Ontario Economic Outlook with the Canadian Context

The Ontario economy is facing significant structural changes. Over the past several decades, the provincial economic base, as measured by G.D.P. (gross domestic product) output, has shifted from the goods-producing sector (i.e. manufacturing and primary resources) to the services-producing sector. Much of this shift has occurred during the past two decades, driven by G.D.P. declines in the manufacturing sector which were most significant immediately following the 2008/2009 global economic downturn. In contrast, service-based sectors such as financial and business services have seen significant increases over the past several years.

While manufacturing remains vitally important to the provincial economy with respect to jobs and economic output, this sector is not anticipated to generate significant labour-force growth across the Province. In general, globalization has led to increased outsourcing of production processes to overseas manufacturers. While there will continue to be a manufacturing focus in Ontario, industrial processes have become more capital/technology intensive and automated. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive.

Over the past decade, the Ontario economy has experienced a steady rebound in economic activity since the 2008/2009 downturn; however, this recovery has been relatively slow to materialize. That said, provincial G.D.P. levels have sharply rebounded since 2014 and are forecast to remain above the national average in 2018/2019, as illustrated in **Figure 3-1**. This economic rebound has been partially driven by a gradually recovery in the manufacturing sector which has been fueled by a lower-valued Canadian dollar and the gradual strengthening the U.S. economy.²² Looking forward, provincial G.D.P. growth is anticipated to ease from just over 2% in 2018 to approximately 1.3% by 2020, largely as a result of a tightening labour market and slowing global economic growth²³.

Figure 3-1: Annual Real G.D.P. Growth, Ontario and Canada Historical (2008 to 2016), Ontario Estimate (2017) and Forecast (2018 to 2019)



While the performance of the Ontario economy is anticipated to remain positive over the near term, there are potential risks to the national and provincial economies that are important to recognize. This

²² Valued at approximately \$0.73 U.S. as of January, 2019.
²³ Royal Bank of Canada. Provincial Outlook. December 2018.

includes risks with respect to the adoption of protectionist trade measures in the U.S., as well as other proposed changes to U.S. fiscal and industrial policies. Domestically, the housing market continues to pose a risk to the overall economy. The sharp rise in Ontario’s housing prices – particularly in the Greater Toronto Area (GTA.) – has contributed to record consumer debt loads and has eroded housing affordability. Ontario household debt reached record levels in 2016 at 171% of disposable income, and the share of income required to service debt payments is expected to increase as the Bank of Canada hiked the benchmark interest rate three times from July 2017 to January 2018 to reach 1.25%. The resultant increased debt payments may force consumers to scale back on other spending and potentially result in negative implications for the economy.²⁴

3.2 Economic and Non-Residential Trends within GTHA

3.2.1 The Shifting Economic Structure and Influence of Ontario’s Economic Powerhouse

The GTHA represents the economic powerhouse of Ontario and the centre of a large portion of the economic activity in Canada. The GTHA is also economically diverse with most of the top 20 traded industry clusters throughout North America having a strong presence in this region. With a robust economy and diverse mix of export-based employment sectors, the GTHA is highly attractive on an international level to new businesses and investors. The GTHA also has a strong appeal given the area’s regional infrastructure (i.e. Toronto Pearson International Airport (TPIA), other regional airports, provincial highways, inter-modal facilities), access to labour force, post-secondary institutions and proximity to the U.S. border. In turn, this continues to support steady population and housing growth within the City of Toronto and the GTHA “905” municipalities, largely driven by international and inter-provincial net migration to this region.

The diverse and highly competitive GTHA economy has fuelled a steady level of employment growth over the past decade in almost all major sectors of the service-sector economy since 2006. Many of these sectors, including professional, scientific and technical services, financial services, information and cultural industries, education services, health care and social services as well as real estate, represent the knowledge-based and/or creative-class economy.²⁵ Within the service sector, economic growth has been particularly strong for small- to medium-scale knowledge-based businesses that are focused on innovation and entrepreneurship.

The GTHA has also experienced significant employment growth in the Goods Movement sector over the past decade comprised of transportation/warehousing and wholesale trade. This sector is highly concentrated within the Regions of Peel, York and Halton, which are located within proximity to the

²⁴ Economic and Budget Outlook. Financial Accountability Office of Ontario (F.A.O.). Assessing Ontario’s Medium-Term Budget Plan. Spring 2018.

²⁵ Richard Florida, The Rise of the Creative Class. 2002

TPIA. Other regional infrastructure attributes, including access to 400-series highways as well as existing and planned intermodal facilities in Brampton, Vaughan and Milton, have and will continue to, play a key role in driving demand within this sector across the GTHA. Increased outsourcing of manufacturing production to emerging global markets continues to drive the need for new consolidated, land extensive warehousing facilities to store and manage the distribution of goods produced locally as well as goods imported from abroad. This continues to drive demand for increasingly larger, more land-extensive warehousing facilities, generally in greenfield Employment Areas.

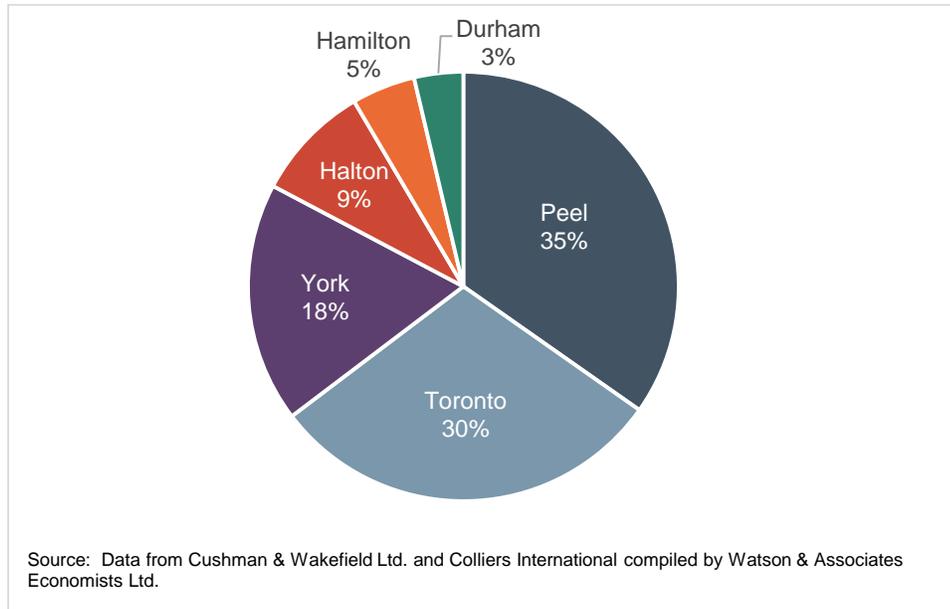
3.2.2 Trends in Industrial/Office Development Activity

The GTHA’s industrial and office commercial development markets are significant, having the third and sixth largest inventories, respectively, in North America.²⁶ The following provides commentary on the characteristics of the market and recent development trends by geographic area.

3.2.2.1 Industrial Market

The industrial market in the GTHA is comprised of 75 million sq.m (812 million sq.ft.) of industrial space, as expressed in gross floor area (GFA), with nearly two-thirds located in Peel Region and the City of Toronto, as illustrated in **Figure 3-2**. Comparatively, Halton Region has an existing industrial base of 7 million sq.m of GFA (71 million sq.ft.), which comprises 9% of the GTHA’s total market.

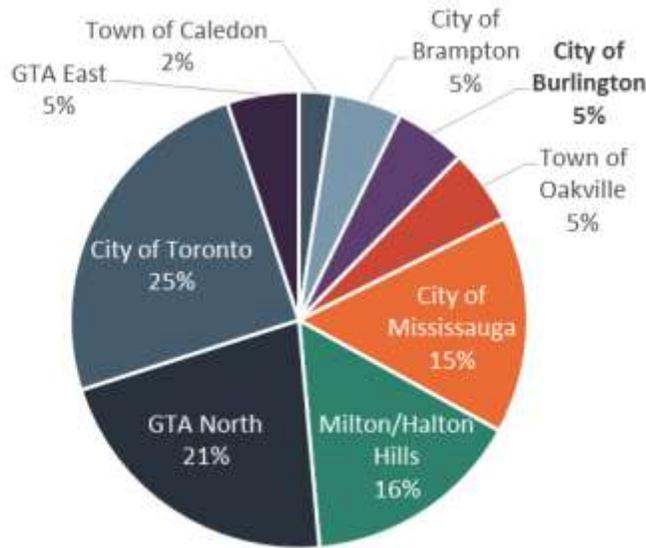
Figure 3-2: Share of GTHA Industrial GFA Inventory by Upper/Single Tier Municipality



²⁶ Source: Derived from Cushman & Wakefield Toronto Industrial Market Beat and U.S. Industrial Market Beat Snapshot, Q3 2017 and Cushman & Wakefield Toronto Office Market Beat and U.S. Office Market Beat Snapshot, Q3 2017 by Watson & Associates Economists Ltd.

In terms of vacant industrial space, Burlington comprises 5% of the GTA share which is comparable to the City of Brampton and the Town of Oakville. The GTA North and City of Toronto markets contain nearly half of the GTA’s inventory due to their large inventories (see **Figure 3-3**).

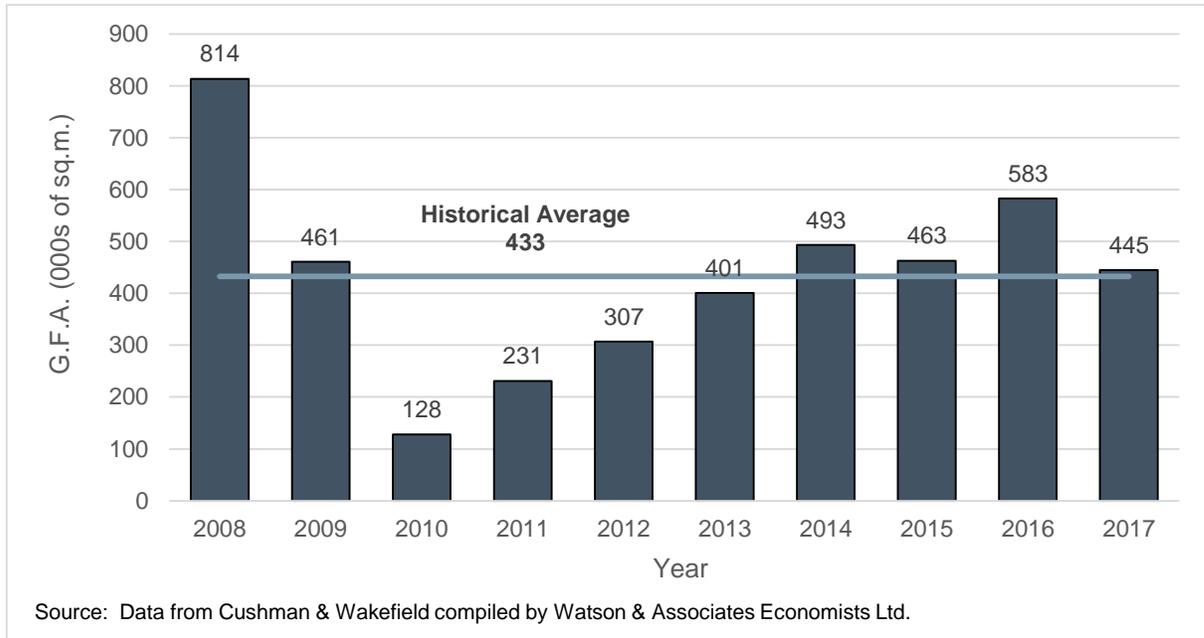
Figure 3-3: City of Burlington and Surrounding GTA Markets, Distribution of Vacant Industrial Space (GFA) in the GTA, 2018



Source: Derived from Cushman & Wakefield Q2 2018 Industrial Report by Watson & Associates Economists Ltd.

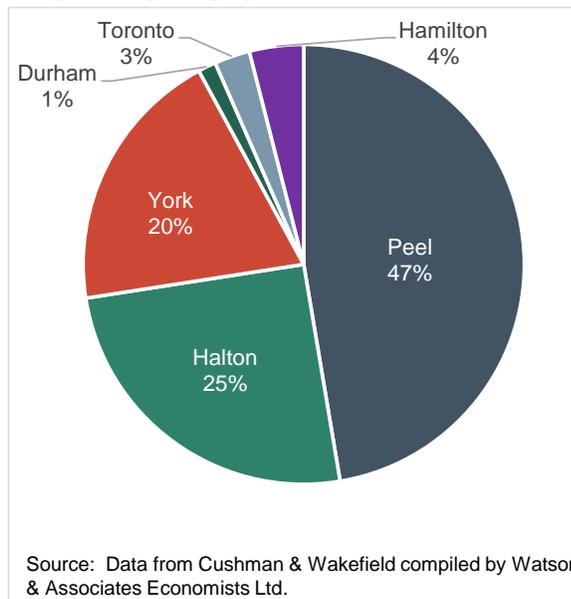
With respect to industrial building development, the GTHA has averaged 433,000 sq.m (4.7 million sq.ft.) of GFA annually over the 2008 to 2017 period (refer to **Figure 3-4**). The GTHA experienced significant growth in industrial development in 2008; however, with the onset of the 2008/2009 global economic recession, development activity dropped sharply in 2009 and 2010. Since bottoming out in 2010, industrial development activity has been steadily rebounding, with 2017 activity totalling 450,000 sq.m (4.8 million sq.ft.). Recent industrial development activity, however, remains below pre-recession levels. Over the past five years, industrial development has been largely oriented to large-scale industrial buildings housing wholesale trade, transportation/warehousing and multi-tenant industrial condominiums, accommodating a range of industrial and non-industrial uses.

Figure 3-4: Industrial Development within the GTHA (000s GFA), 2008 to 2017



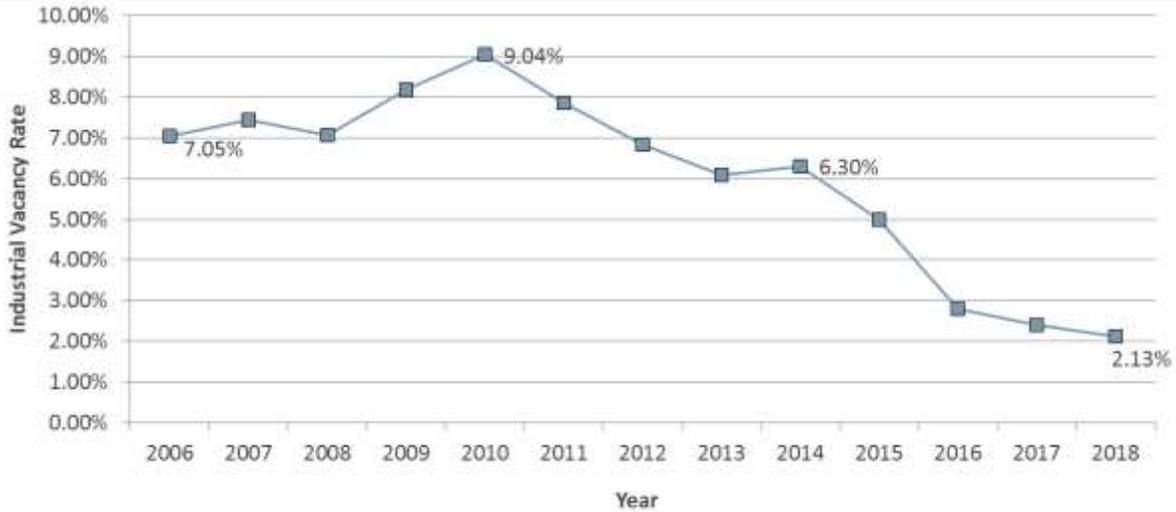
Over the 2011 to 2017 period, Peel Region accommodated nearly half (47%) the GTHA’s industrial development, as illustrated in **Figure 3-5**. In comparison, Halton Region accounted for 25%, York Region 20%, City of Toronto 3%, Durham Region 1% and the City of Hamilton 4%. The majority of recent industrial development has been focused largely along the Highway 401 corridor in Mississauga, Brampton and Milton, and in the Highway 400/407 area of Vaughan.

Figure 3-5: GTHA Industrial Development by Geographic Area, 2011 to 2017



Coinciding with the increase in industrial development activity since 2010, vacancy rates have gradually declined to relatively low levels (refer to **Figure 3-6**). In the GTA West²⁷ market vacancy rates peaked at 9% in 2010, which coincides with the weakest year of development activity due to the global economic recession, to a low of just over 2% in 2018. The industrial vacancy rate for the GTA and City of Burlington markets are currently 1.5% and 2.6%, respectively.²⁸ This is indicative of a relatively strong market with respect to demand vs. supply.

Figure 3-6: GTA West Market Industrial Vacancy Rate, 2006 to 2018



Source: Derived from the DTZ Barnicke/Cushman Wakefield Quarterly Industrial Reports by Watson & Associates Economists Ltd.

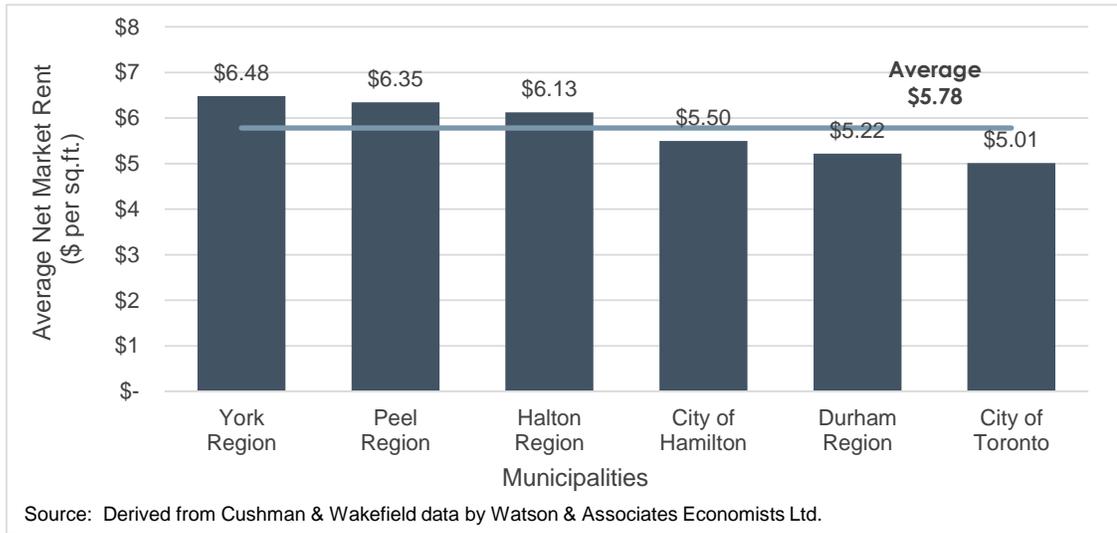
A key variable in understanding the relative strength of the industrial and office markets is the net market rents for industrial and office space, typically expressed on a per sq.ft. of gross lease area on an annual lease basis and referred to as “net market rent.”²⁹ Since the global economic recession, net market rents have risen, albeit at a marginal rate. **Figure 3-7: GTHA Average Industrial Net Market Rents (per sq.ft.)** summarizes the average market rents for industrial space in the GTHA by upper/single-tier municipality. Industrial net market rents in Halton Region average \$6.13 per sq.ft., marginally higher than the GTHA average. Industrial market rents are highest in York Region, followed by Peel Region and Halton Region.

²⁷ The GTA West Industrial Market comprises of Bolton, Caledon, Brampton, Burlington, Milton, Halton Hills, Mississauga and Oakville.

²⁸ Cushman & Wakefield Greater Toronto Area Industrial Market Beat Q4 2018.

²⁹ Net market rent is exclusive of additional charges to the property (e.g. taxes, insurance, utilities and maintenance).

Figure 3-7: GTHA Average Industrial Net Market Rents (per sq.ft.)



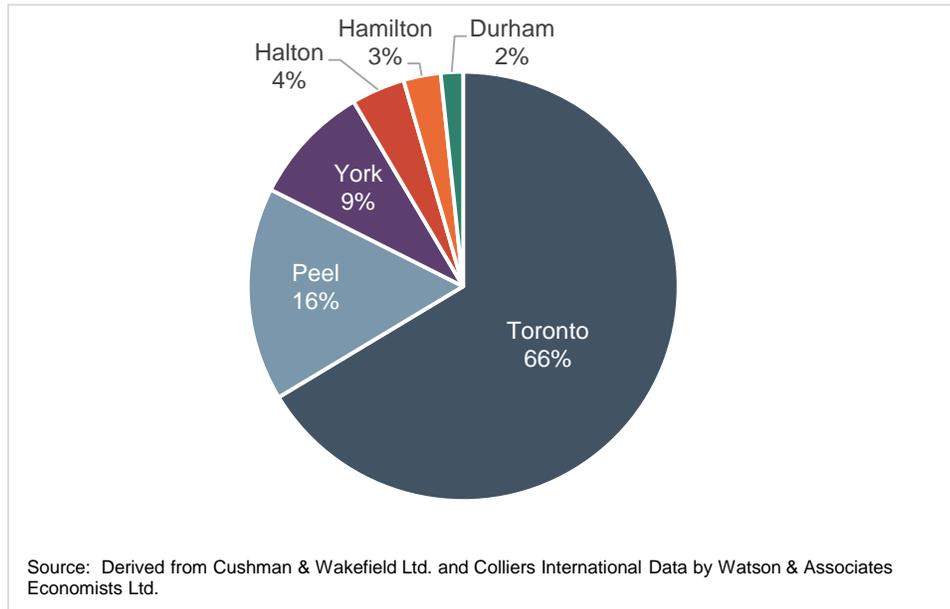
3.2.2.2

Office Market

With respect to the office market, the GTHA contains 17 million sq.m (183 million sq.ft.) of office space.³⁰ Of this total, nearly two-thirds (66%) is located within the City of Toronto, with the majority located in the downtown core, as illustrated in **Figure 3-8**. Outside the City of Toronto, major office clusters are located in the 905 area, including York Region (Highways 404 and 407 in Markham and Richmond Hill, and the Highway 400 Corridor in Vaughan), Peel Region (Mississauga Airport Corporate Centre, City Centre and Meadowvale), and Halton Region (Q.E.W. Corridor in Burlington and Oakville). Halton Region’s share of the GTHA major office market is relatively small, representing 4% of total building GFA

³⁰ Source: Derived from Cushman & Wakefield 2013 to 2017 data, except data for the City of Hamilton which was derived from Colliers International Oakville-Burlington-Hamilton Commercial Real Estate Update Q4 2017.

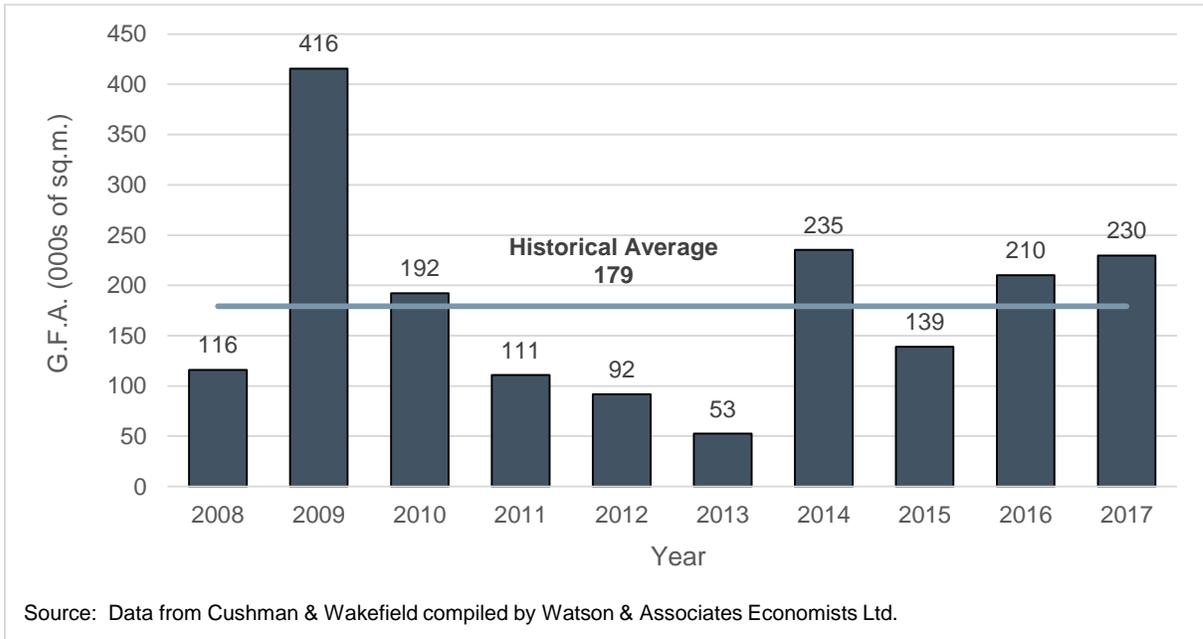
Figure 3-8: Share of G.T.H.S. Major Office GFA Inventory by Upper/Single-Tier Municipality



Over the 2008 to 2017 period, major office development activity in the GTHA has averaged 179,000 sq.m (1.9 million sq.ft.) per year³¹ (refer to **Figure 3-9**). Major office development has exhibited relatively strong growth throughout the past decade. In 2017, office development activity totalled 230,000 sq.m (2.5 million sq.ft.), moderately higher than the historical 10-year annual average.

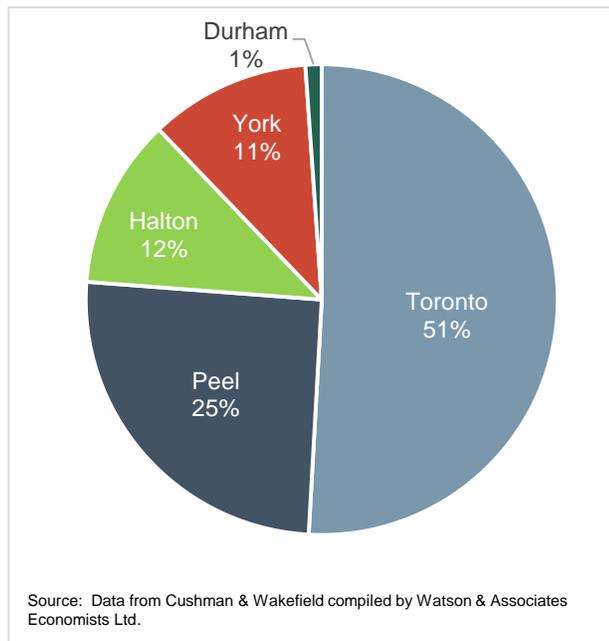
³¹ Based on building completions market data from Cushman & Wakefield. Excludes City of Hamilton for which data was unavailable.

Figure 3-9: Major Office Development within the GTA (GFA), 2008 to 2017



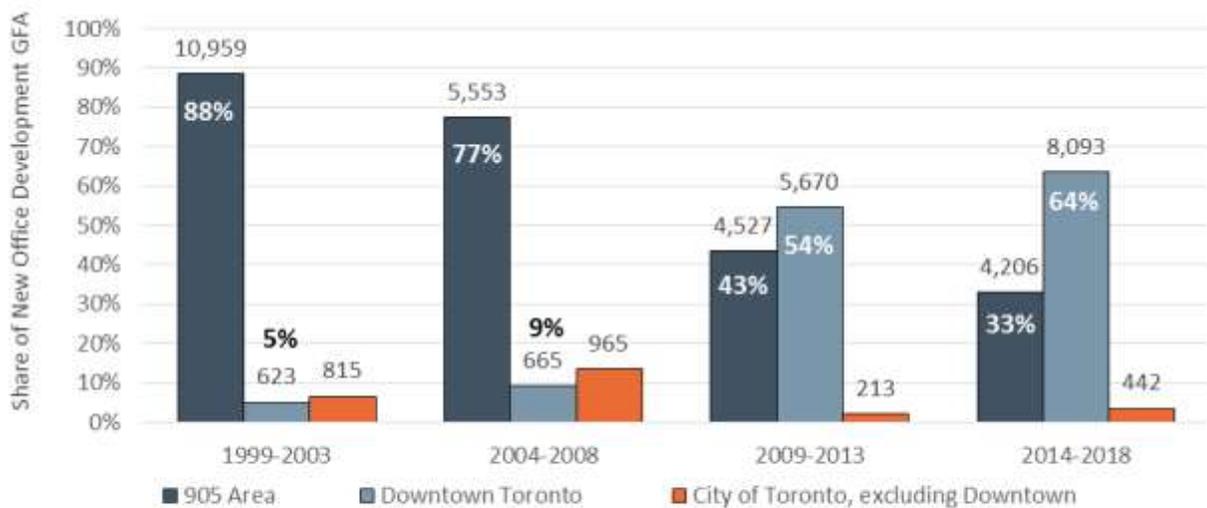
Over the 2011 to 2017 period, over half of new major office development was accommodated within the City of Toronto, as illustrated in **Figure 3-10**. This is compared to 25% within Peel Region, 12% within Halton Region, 11% in York Region and 1% in Durham Region.

Figure 3-10: Greater Toronto Area Major Office Development, 2011 to 2017



Major office development over the past decade has been concentrated within the Toronto downtown core as well as in Vaughan, Markham, Mississauga along the Highway 401 corridor, and the QEW corridor in Burlington (**Figure 3-11**). Over this period, office development activity in the GTHA has shifted increasingly to downtown Toronto at the expense of suburban locations. Historically, the vast majority of suburban office development has been accommodated within Employment Areas; however, market prospects for conventional standalone suburban office development within Employment Areas is gradually diminishing, as demand shifts to more urban environments. Demand for office space within Employment Areas is increasingly single-tenant and integrated with multi-purpose facilities (e.g. R&D, training centres, and wholesale trade) often in campus-type settings. Further, there are growing opportunities for office development within innovation districts located on employment lands which have direct synergies with knowledge-based clusters, as well as health and educational infrastructure.

Figure 3-11: Greater Toronto Area, Share of New Office Space Construction 1999 to 2018 by Area



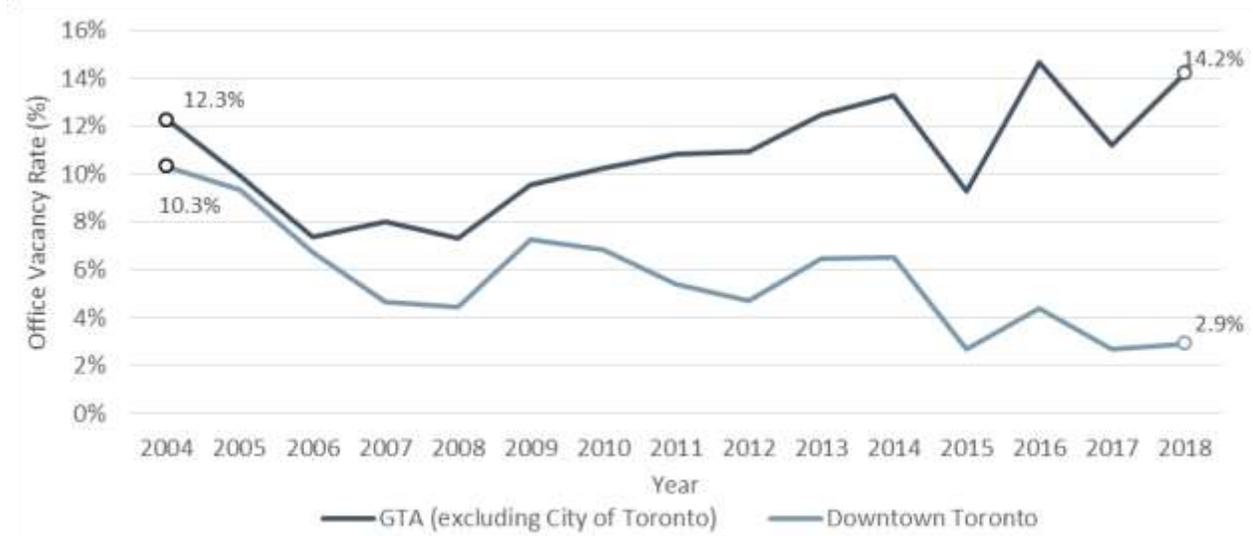
Source: 1999-2013 derived from Office Space Financial/Market Analysis and Marketing Plan Study prepared by Watson & Associates Economists Ltd. 2014-2018 derived from Colliers International Office Market Reports by Watson & Associates Economists Ltd. 2018 excludes development in the fourth quarter of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

The office vacancy rate in the GTA averages 6.8%.³² Vacancy rates for major office space have decreased significantly since the 2008/2009 economic downturn. While vacancy rates for major office space has declined, this has largely been attributed to high demand for downtown Toronto where vacancy rates are at an all-time low, while rates in suburban locations, including the 905 area, remain relatively high in double digit territory (refer to **Figure 3-12**). For the City of Burlington, the office vacancy rate reached an all-time high of 21% in 2016, experiencing negative absorption from 2013 to 2016, but has since

³² Deloitte Mobility Hubs – Office and Retail Market Analysis Study, Preliminary Working Draft, November 2018

shown signs of a recovery with a current vacancy rate of approximately 15% which is indicative of a return to a more balanced market with respect to demand vs. supply.³³

Figure 3-12: GTA. and Downtown Toronto Office Vacancy Rates, 2004 to 2018

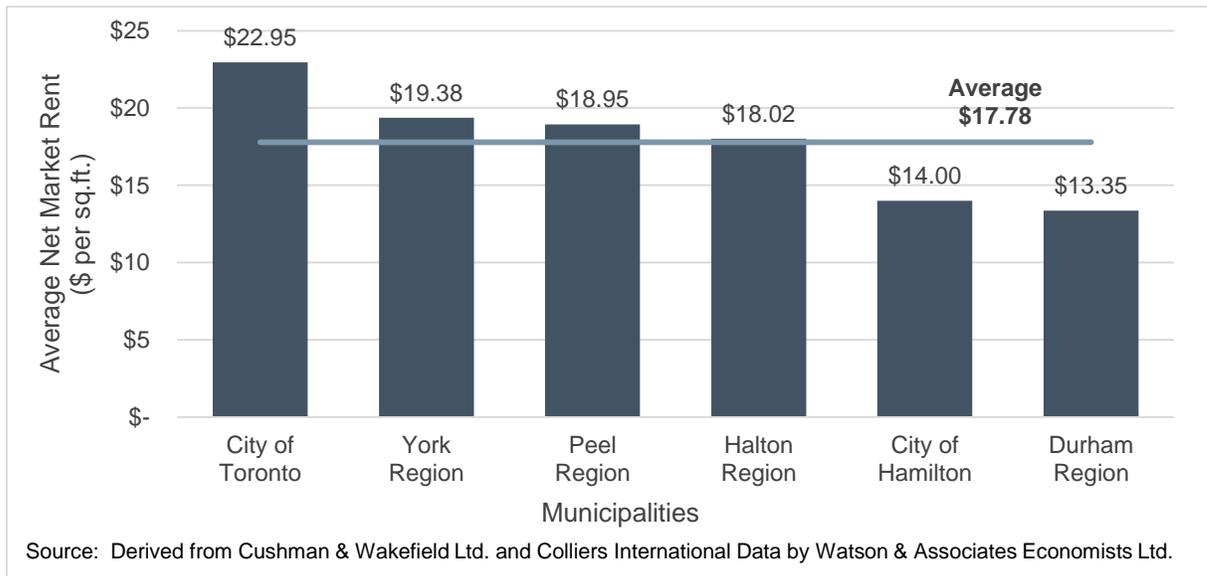


Source: Derived from Altus InSite and Colliers International data by Watson & Associates Economists Ltd, 2019.

Figure 3-13 summarizes the average market rents for major office space in the GTHA by upper/single-tier municipality. As illustrated, office net market rents in Halton Region are marginally above those in the G.T.H.A, averaging \$18 per sq.ft., with only the City of Hamilton and Durham Region having lower rents. This is compared to the City of Toronto, and York and Peel Regions, where rents range between \$19 and \$23 per sq.ft.

³³ibid.

Figure 3-13: GTA Average Office Net Market Rents (per sq.ft.)



3.3 Halton Region’s Evolving Economy

3.3.1 Economic Trends within a Shifting Export-Based Economy

In many respects Halton’s economic growth potential is largely tied to the success of the GTHA as a whole. Many of the largest and fastest growing employment sectors across the GTHA have also experienced strong growth and expansion over the past several decades in Halton Region, as outlined in **Figures 3-14** and **3-15**. Similar to the GTHA as whole, the Region has also experienced steady to strong employment growth in a number of knowledge-based and goods-producing sectors from 2011 to 2016, including manufacturing, which drive the export-based economy in the Region. Strong population growth across Halton Region has also fueled steady growth in population-related employment sectors including retail, and accommodation and food services. Also, a steady rebound in non-residential development activity has supported strong employment growth in the construction sector.

Figure 3-14: Halton Region Change in Employment, 2006 to 2011

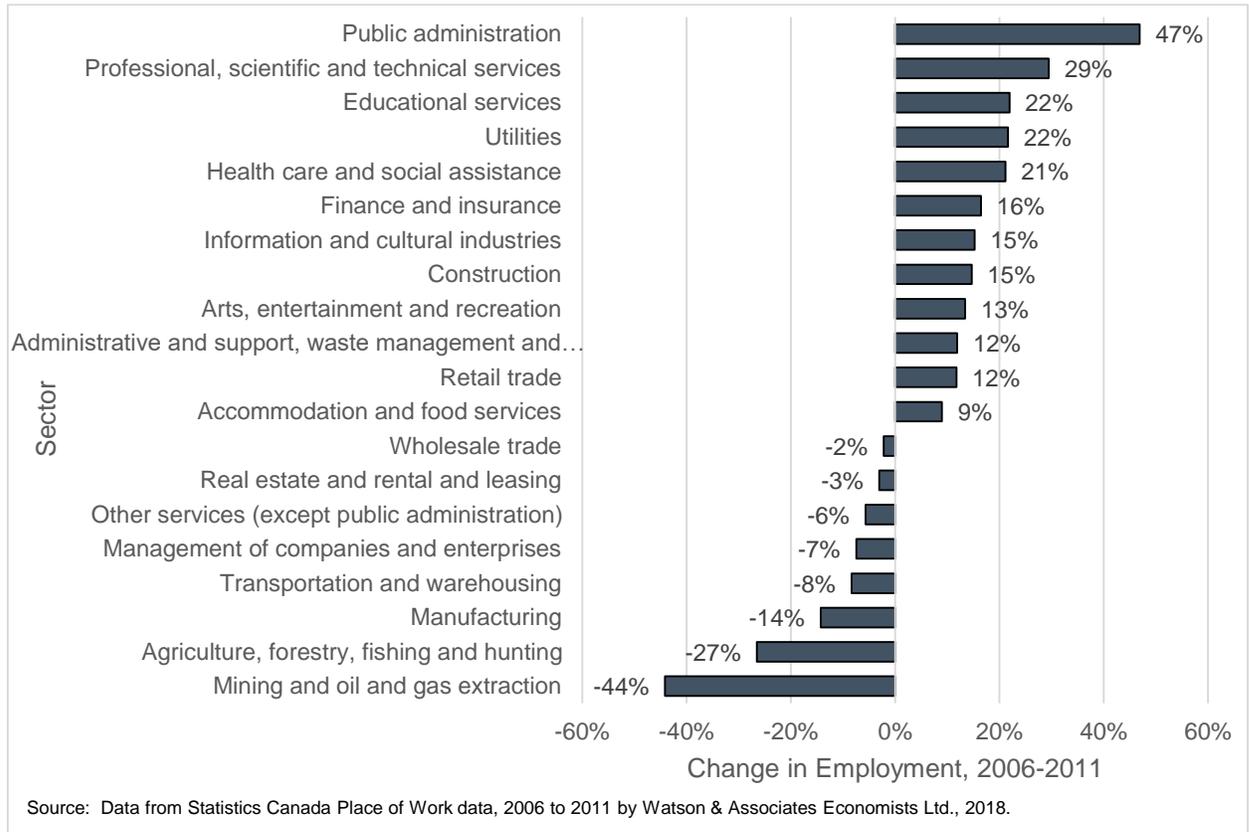
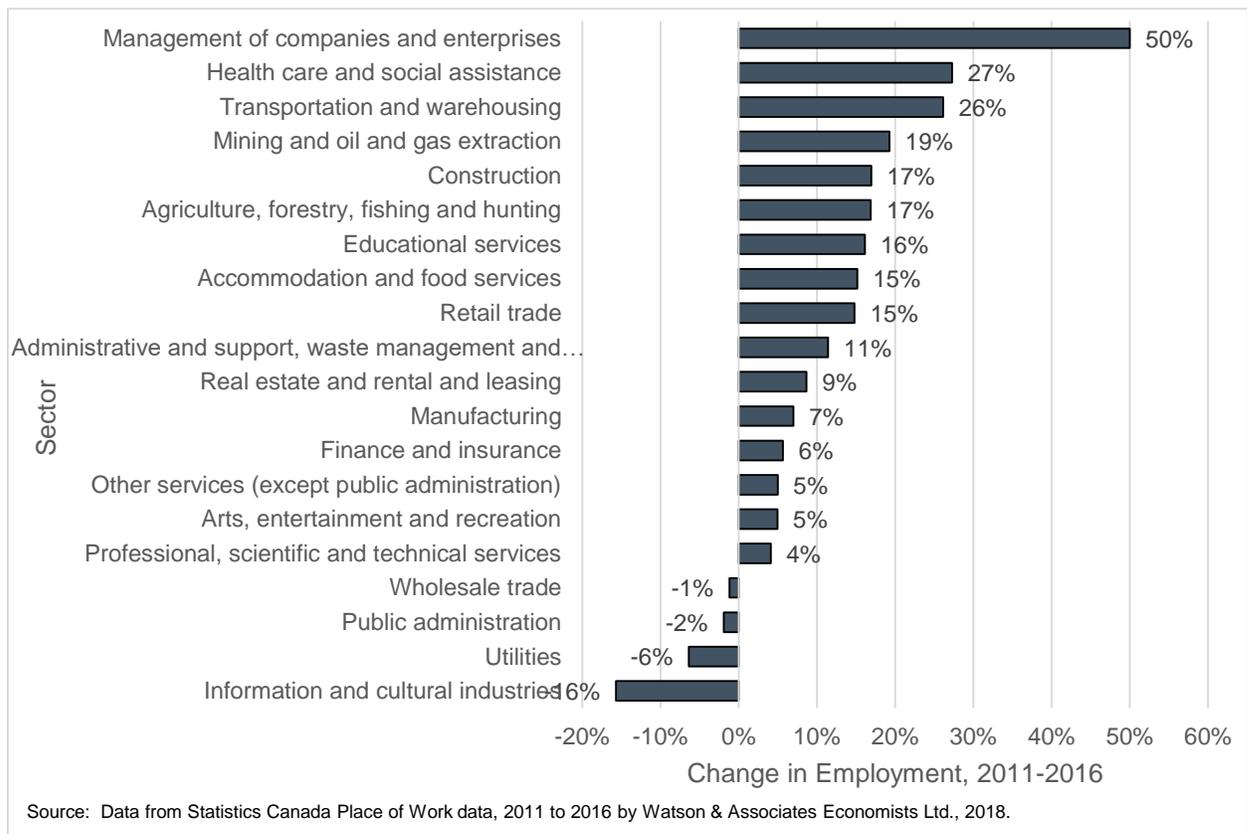


Figure 3-15: Halton Region Change in Employment, 2011 to 2016

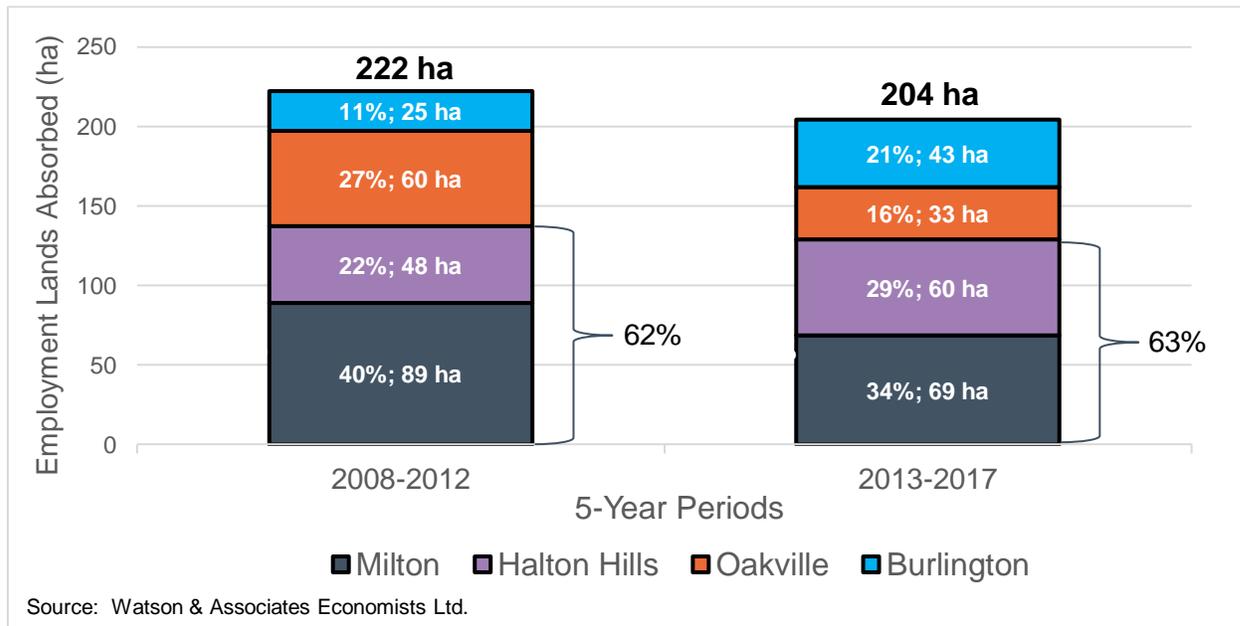


3.3.2 Employment Absorption Trends on Employment Lands in Halton Region, 2008 to 2017

Employment land absorption levels³⁴ in Halton Region have averaged approximately 41 net ha (101 net acres) per year over the past decade. Approximately 62% of employment land absorption in Halton Region has occurred in the Region’s northern municipalities, the Town of Milton and the Town of Halton Hills. Absorption within the Towns of Milton and Halton Hills has been primarily concentrated in Employment Areas with access to Highway 401 and has accommodated large-scale logistics operations. As summarized in **Figure 3-16**, Halton Region’s absorption levels have decreased slightly from an average of 44 ha (109 acres) over the 2008 to 2012 period, to 42 ha (108 acres) per year over the 2013 to 2017 period. While absorption levels have modestly decreased overall for the Region, absorption levels in the City of Burlington have increased over the past five years compared to the previous five-year period in both absolute and percentage terms relative to Halton Region as a whole.

³⁴ Land area associated with new construction based on non-residential building activity permits issued throughout Employment Areas across Halton Region.

Figure 3-16: Halton Region Employment Lands Absorption, 2008 to 2012 and 2013 to 2017

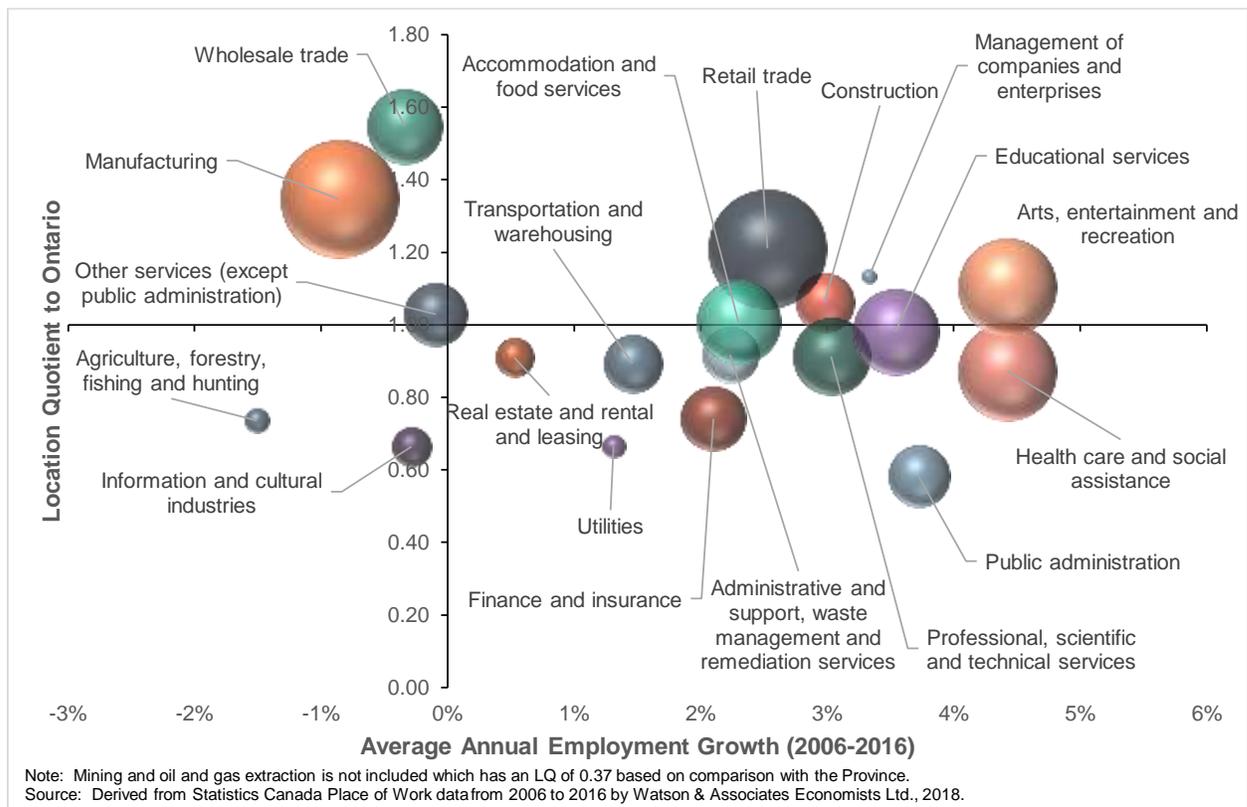


3.3.3 Addressing Regional Economic Opportunities

Figure 3-17 illustrates the strength of employment sectors in Halton Region relative to the Province using Location Quotients³⁵ (L.Q.), size of cluster (based on employment) and recent growth trends. As shown, Halton Region has a relatively high employment concentration in retail trade, arts, entertainment and recreation, and construction. The manufacturing and wholesale trade sectors also have a relatively high concentration in the Region, but have experienced a modest decline in employment over the past decade. Employment in these sectors has shown signs of a rebound in recent years, consistent with trends in the broader economy. In contrast, many emerging “knowledge-based” clusters, including professional, scientific and technical services, finance and insurance, health care and social assistance, educational services, public administration, as well as real estate and rental and leasing have recently been experiencing moderate to strong employment growth.

³⁵ An L.Q. of 1.0 identifies that the concentration of employment by sector is consistent with the broader employment base average. An L.Q. of greater than 1.0 identifies that the concentration of employment in a given employment sector is higher than the broader base average, which suggests a relatively high concentration of a particular employment sector or “cluster.”

Figure 3-17: Halton Region Industry Cluster Size and Growth Matrix, 2006 to 2016

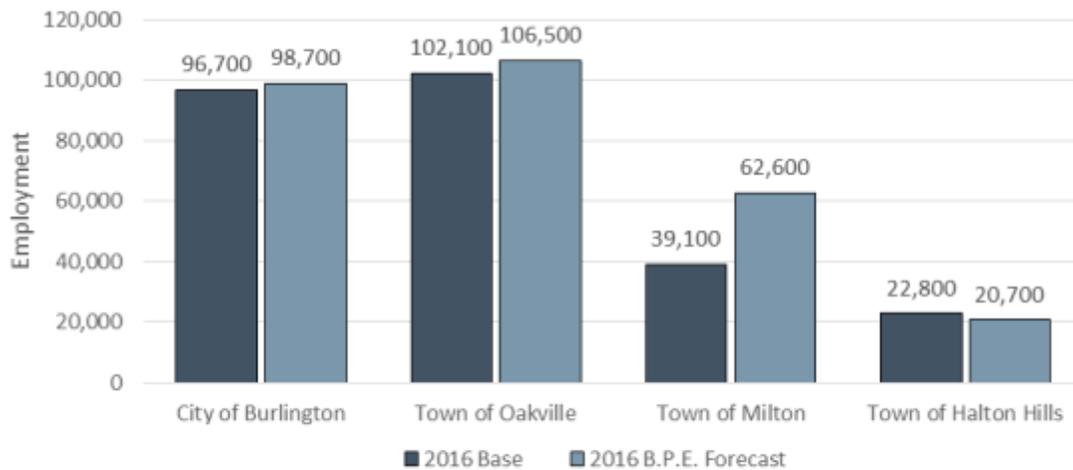


3.4 Historical Employment Relative to the Halton Region 2011 BPE

Figures 3-18 and 3-19 provide a summary of the 2016 Statistics Canada Census employment base for each of the local municipalities within Halton Region in comparison to the 2011 Halton Region Best Planning Estimates (BPE) forecast for 2016. Key highlights include:

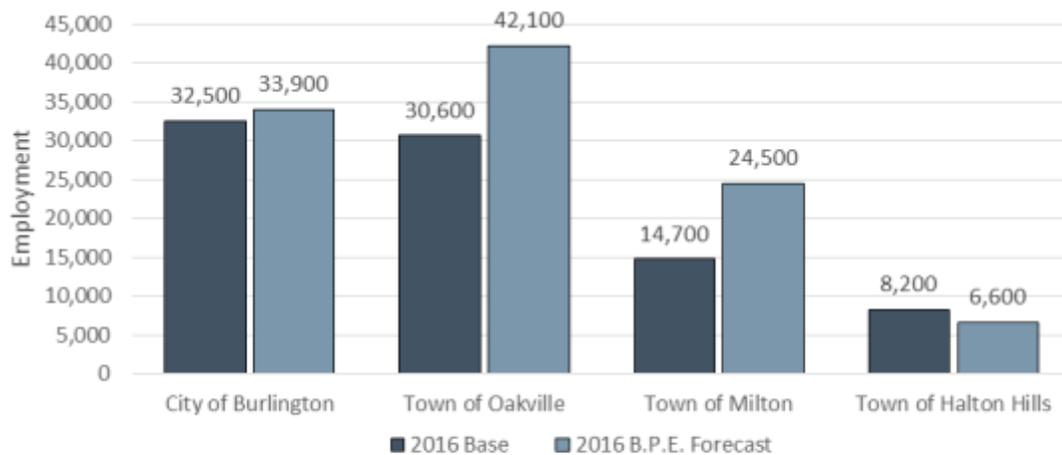
- The Town of Halton Hills exceeded the 2016 BPE employment forecast;
- The City of Burlington, Town of Oakville and Town of Milton have fallen short of the forecast employment for 2016; , however this gap has been larger for the Town of Milton; and
- Estimated 2016 industrial employment levels for the City of Burlington, Town of Oakville and Town of Milton did not reach the 2016 forecast established in the 2011 Halton BPE, although the gap has been more pronounced in Oakville and Milton.

Figure 3-18: Municipalities in Halton Region, 2016 Employment and Best Planning Estimates Forecasts for 2016



Note: No fixed place of work and work at home employment is included in total employment. 2016 Census N.F.P.O.W. employment calculated based on Land Needs Assessment Methodology for the Greater Golden Horseshoe, 2018.
 Source: 2016 derived from Statistics Canada Census place of work and no fixed place of work data. 2016 B.P.E. forecast derived from the Region of Halton Best Planning Estimates, June 2011.

Figure 3-19: Municipalities in Halton Region, 2016 Industrial Employment and Best Planning Estimates Forecasts for 2016



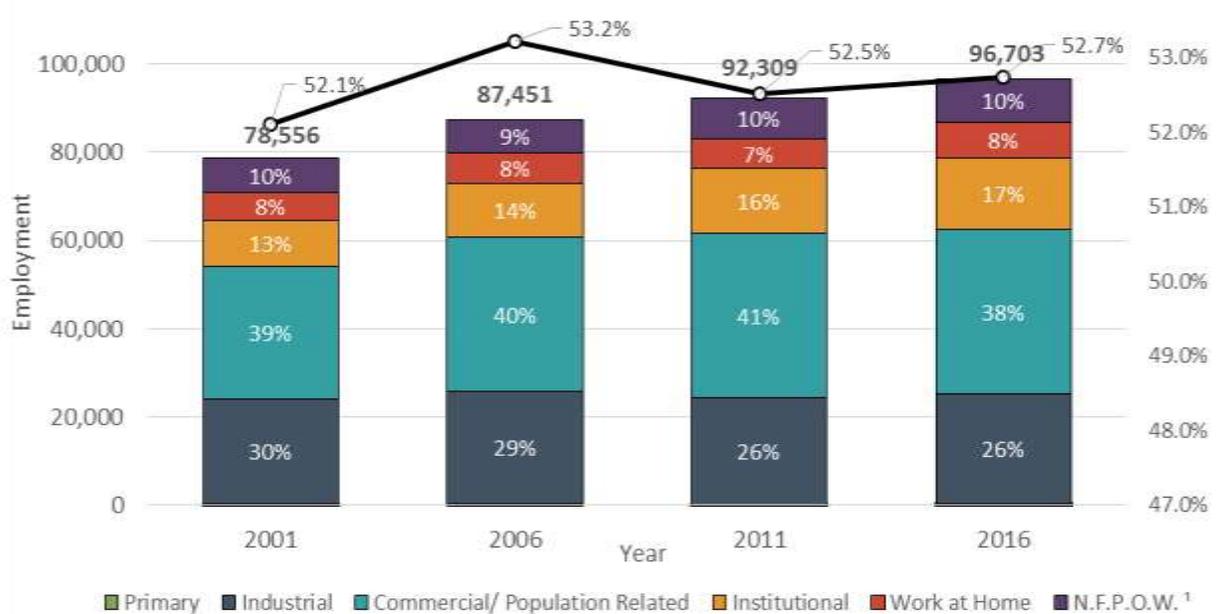
Note: No fixed place of work and work at home employment is included in industrial sector. Primary sector is included within the industrial sector. 2016 Census N.F.P.O.W. employment calculated based on Land Needs Assessment Methodology for the Greater Golden Horseshoe, 2018.
 Source: 2016 derived from Statistics Canada Census place of work and no fixed place of work data. 2016 B.P.E. forecast derived from the Region of Halton Best Planning Estimates, June 2011.

3.5 City of Burlington Employment and Non-Residential Development Profile

3.5.1 Historical Employment Growth by Sector – City of Burlington

Figure 3-20 summarizes historical employment growth within the City of Burlington by major sector over the past 15 years. Over the 2001 to 2016 period, Burlington’s employment base has increased from 78,556 to 96,703, an increase of 23% over the 15 year period which represents a healthy annual growth rate of 1.4%. As of 2016, the commercial/population sector comprises nearly two in five jobs in Burlington, followed by the industrial sector which provides just over one in four jobs. The institutional sector which accommodates 17% of the employment base is the fastest growing sector. Work at home and N.F.P.O.W. (No Fixed Place of Work) employment both contribute a significant amount of jobs to the employment base with 8% and 10%, respectively, of the 2016 total.

Figure 3-20: City of Burlington Total Employment, 2001 to 2016

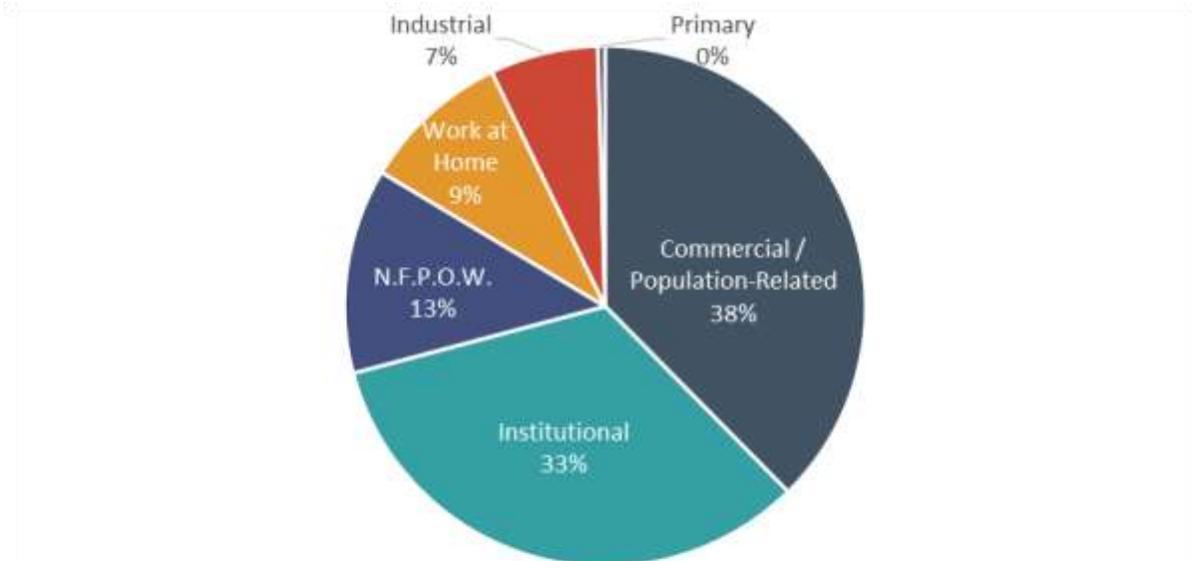


Note: Activity rate is based on population without undercount.

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

- Between 2001 and 2016 the City of Burlington experienced strong employment growth in the commercial/population-related and institutional sectors, contributing to over 70% of new jobs over the 15-year period, as illustrated in **Figure 3-21**. In contrast, the industrial sector experienced the lowest growth rate and added the least amount of new jobs (excluding primary employment) due to the impact of the 2008/2009 global economic recession which hit the sector harder than others, as shown in **Figure 3-21**.

Figure 3-21: City of Burlington Employment Growth Shares by Sector, 2001 to 2016



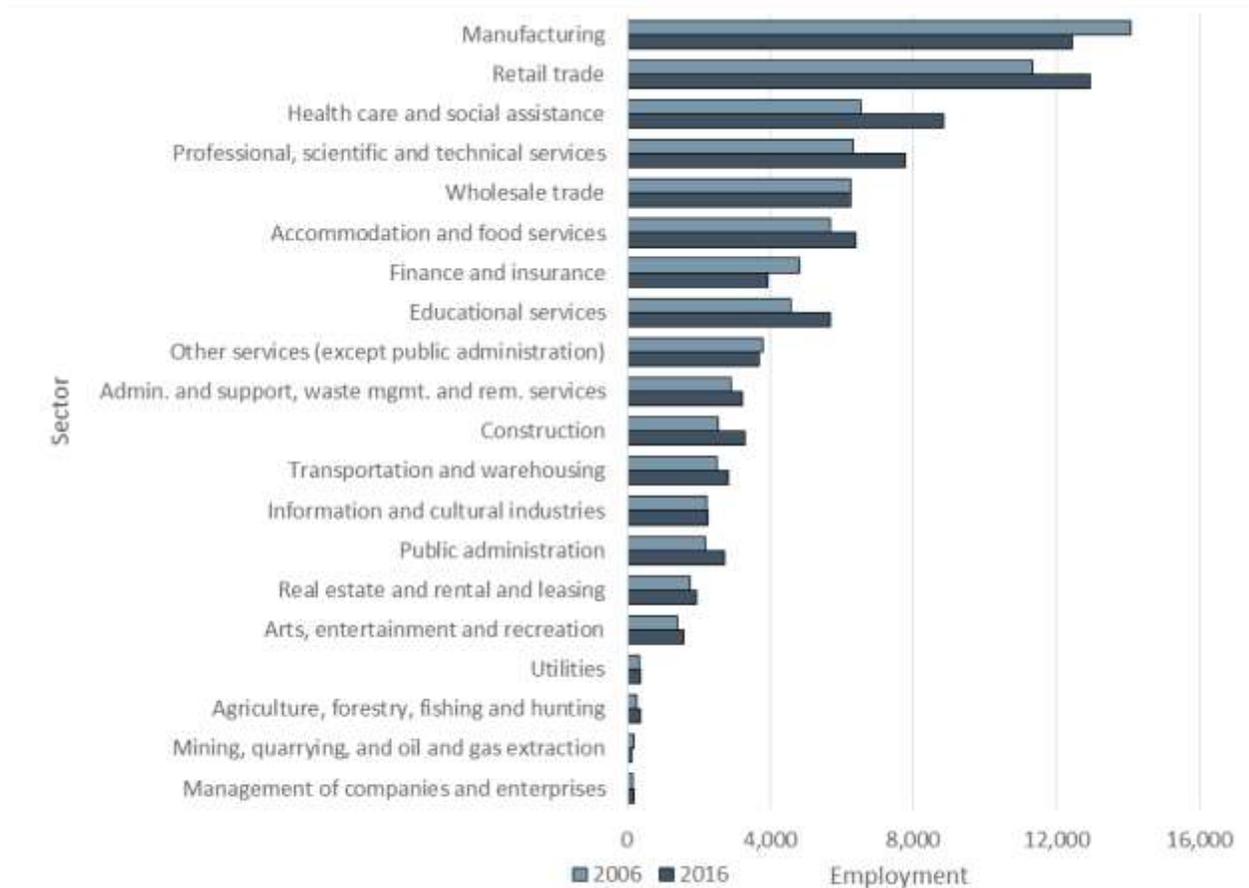
Note: Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

Source: Derived from Statistics Canada Census data, 2001 and 2016, by Watson & Associates Economists Ltd., 2019.

As summarized in **Figure 3-22**, employment growth over the period was driven by a diverse range of sectors, including those in the knowledge-based sectors, retail and industrial sectors. Key observations include:

- Health care and social assistance, retail trade, professional, scientific and technical services, educational services, accommodation and food services, and construction experienced the largest increases in employment in terms of absolute growth; and
- In contrast, manufacturing, finance and insurance, other services (except public administration) and mining, quarrying, and oil and gas extraction experienced declines in absolute employment.

Figure 3-22: City of Burlington Employment Trends by Sector (2-digit NAICS), 2006 to 2016



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.

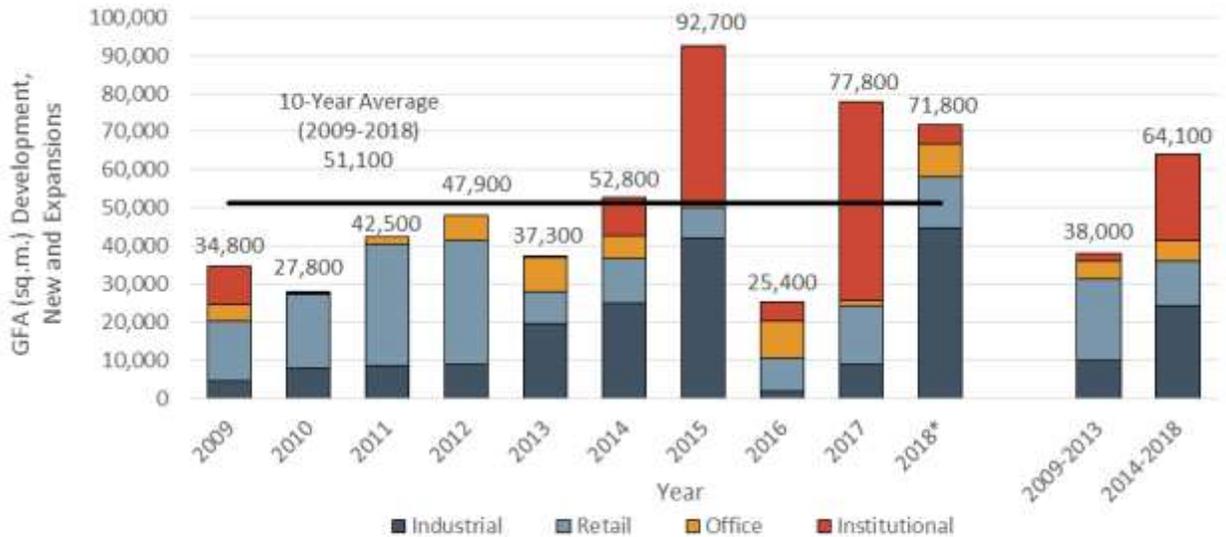
3.5.2 Non-Residential Building Permit Trends, 2009 to 2018

Figure 3-23 summarizes annual non-residential development activity in the City of Burlington between 2009 and 2018 by major sector. Over the past decade, non-residential development activity as measured in gross floor area (GFA) has ranged between 25,400 to 92,700 sq.m (274,000 to 998,000 sq.ft.), averaging approximately 51,100 sq.m (550,000 sq.ft.) per year from 2009 to 2018.

From 2009 to 2018, the City has experienced steady non-residential development activity, with the last three of four years averaging well above the 10-year historical average. Between 2014 and 2018, the average level of non-residential GFA was approximately 68% higher relative to the previous 2009 to 2013 period. Over the past decade, commercial uses (retail and office) have accounted for the largest share of non-residential development activity, accounting for approximately 42% (32% and 10%,

respectively) of the non-residential GFA, followed by the industrial³⁶ sector at 34% and the institutional sector at 24%.

Figure 3-23: City of Burlington, Non-Residential Building Permit Development, GFA (sq.m.) by Sector, 2009 to 2018

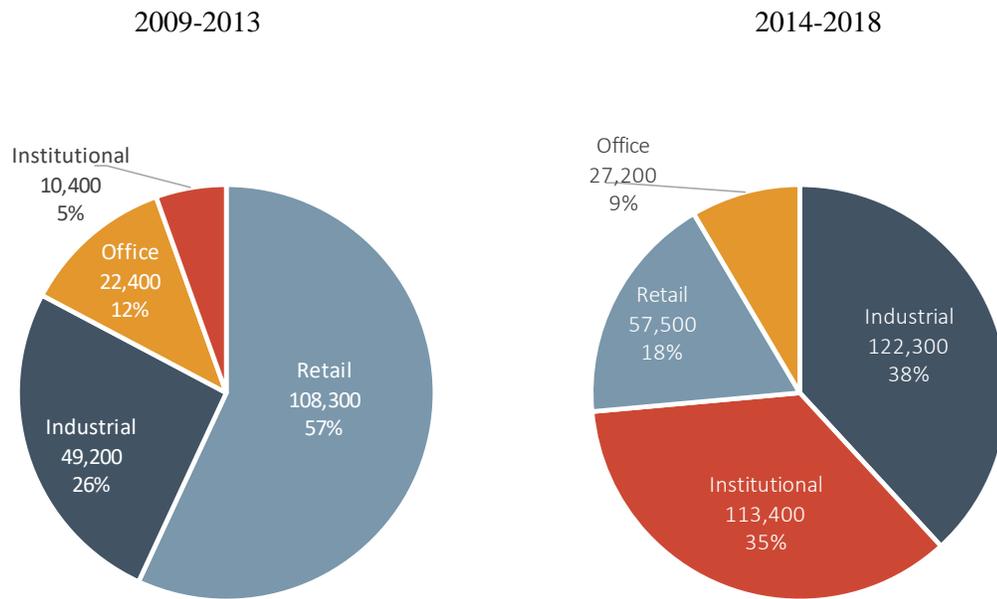


Note: 2018 includes development activity from January to November from City of Burlington building permit data, and December estimated by Watson & Associates Economists Ltd.
 Source: Derived from City of Burlington Non-Residential Building Permit Activity by Watson & Associates Economists Ltd., 2019.

Figure 3-24 summarizes recent trends in non-residential development activity over the past decade in five-year time periods by major sector. During these two periods, the share of industrial development relative to total non-residential development activity increased by 12%. Institutional development activity has also increased significantly from approximately 5% to 35% of total non-residential development activity. In contrast, retail development activity within the City of Burlington has declined relative to the previous five-year period in both absolute and percentage terms, while office development has remained relatively stable.

³⁶ Industrial generally includes developments for manufacturing, transportation and warehousing and wholesale trade.

Figure 3-24: City of Burlington, Non-Residential Building Permit Development Activity, GFA (sq.m.) by Sector

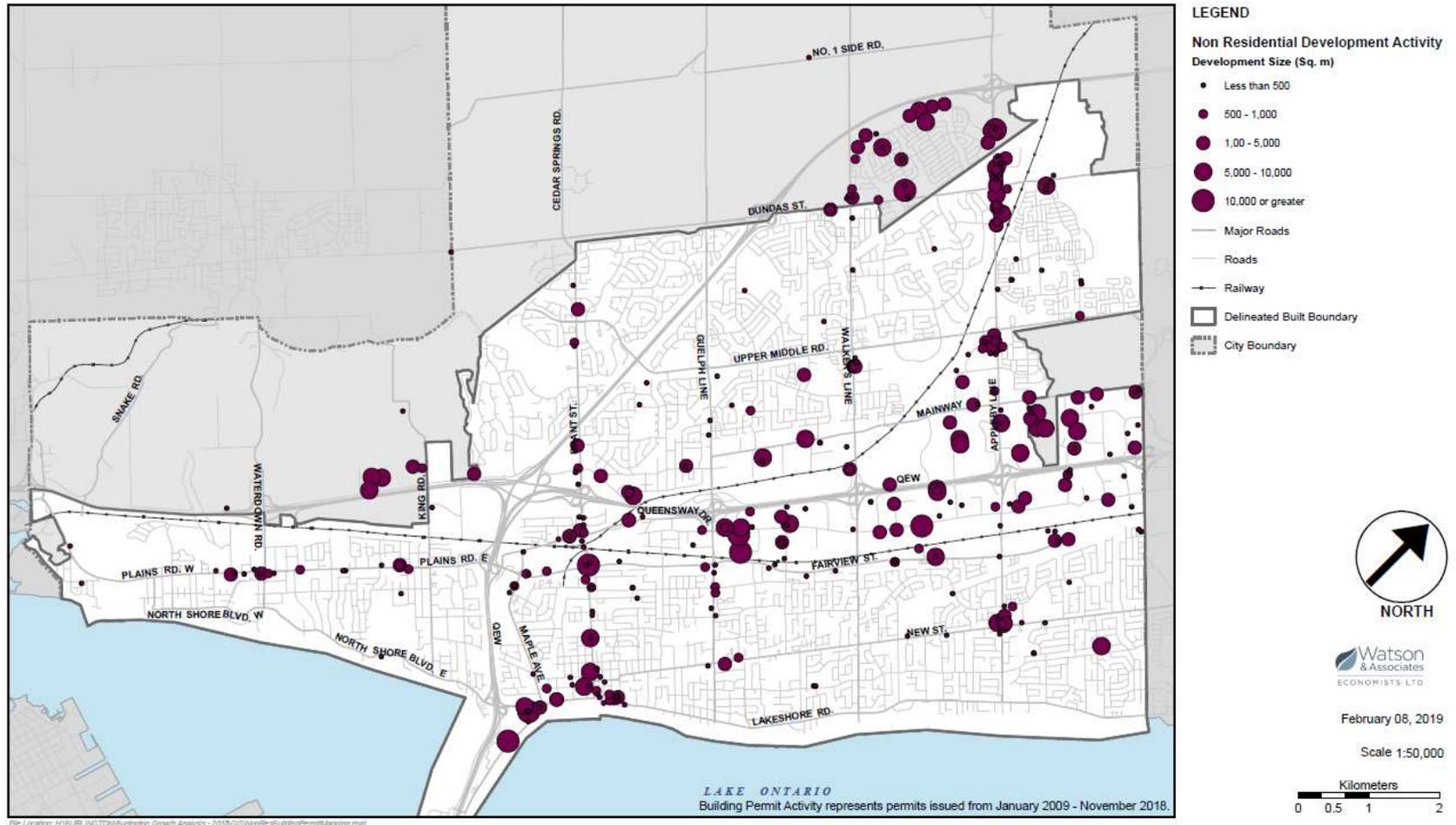


Note: 2018 Includes development activity from January to November from City of Burlington building permit data, and December estimated by Watson & Associates Economists Ltd.

Source: Derived from City of Burlington Non-Residential Building Permit Activity by Watson & Associates Economists Ltd., 2019.

Figure 3-25 illustrates the location and size of non-residential development activity for the City of Burlington between 2009 and 2018 (year-to-date). During this time period, the City reported approximately 143,640 sq.m. (1.5 million sq.ft.) in non-residential building permit activity, with a large share concentrated along major transportation corridors, such as at the 407, QEW and arterial roads in addition to the Downtown Area.

Figure 3-25: City of Burlington, Non-residential Building Permit Activity (New Buildings and Expansions), 2009 to Late 2018

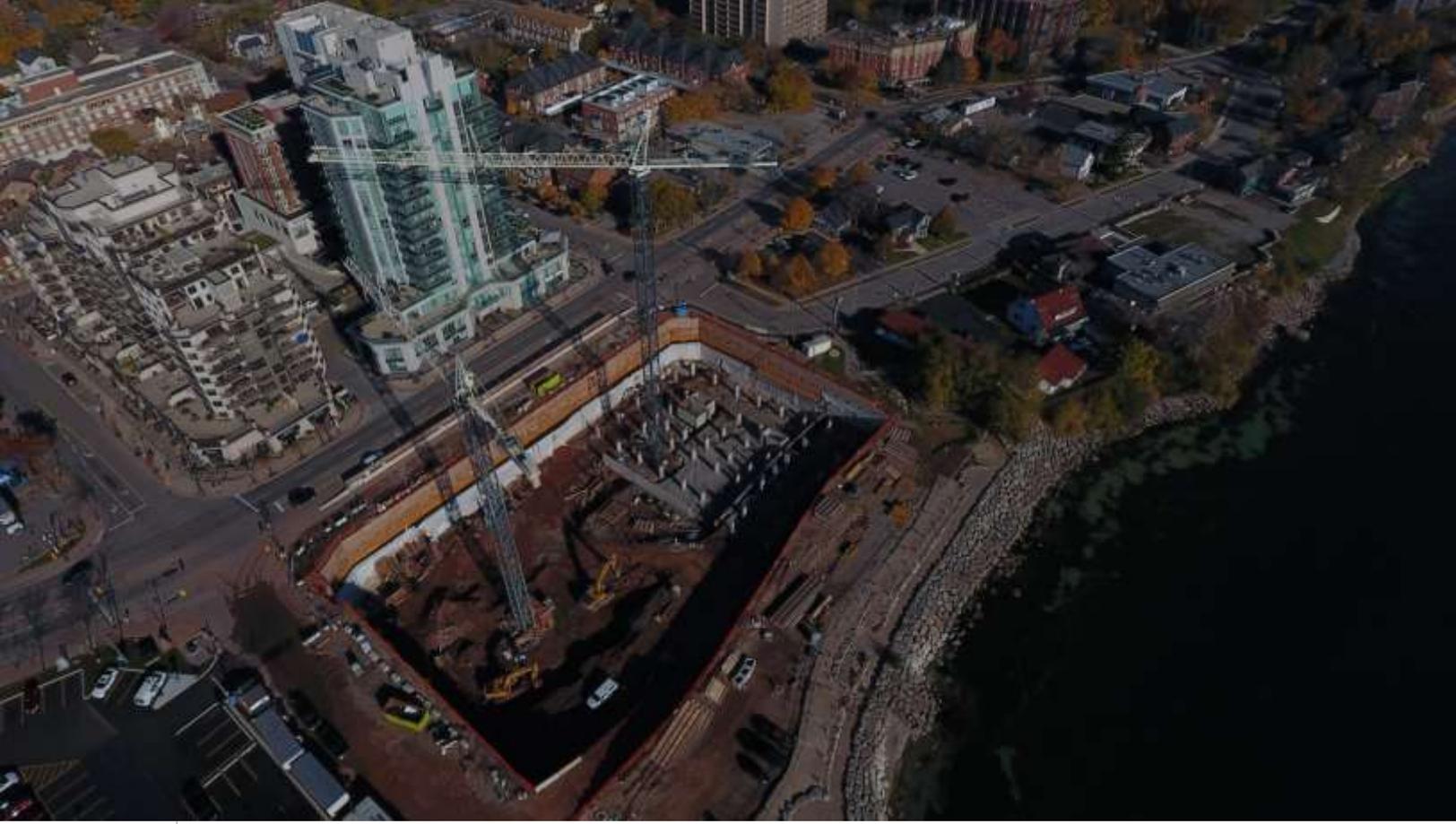


3.6 Summary

The following observations are provided with respect to recent trends regarding current regional economic trends within the City of Burlington.

- Over the past several years, the Ontario economy has experienced steady economic growth partially driven by a gradual recovery in the manufacturing sector which has been fueled by a lower-valued Canadian dollar and gradual strengthening of the U.S. economy. Looking forward, provincial G.D.P. growth is anticipated to ease from over 2% in 2018 to approximately 1.3% by 2020, largely as a result of a tightening labour market, rising household debt and increased global economic uncertainty³⁷.
- Similar to national and provincial trends, the City of Burlington economy is transitioning from goods to services production. Looking forward, existing and emerging knowledge-based sectors such as professional, technical and scientific services, health care and social assistance, and educational services are expected to represent the fastest growing employment sectors for the City.
- The employment base is also highly concentrated in the “creative class” economy. People engaged in arts and culture as artists, actors, performers, writers and designers are a large part of the City’s growing economic base.
- In addition to the growing knowledge-based sector, the industrial sector remains vitally important to the local and regional economy with respect to jobs and economic output. Manufacturing represents the largest employment base of any industry despite job losses from 2006 to 2016, and other industrial related industries such as wholesale trade and construction also contribute a strong share to the employment base, with the later expected to grow as development occurs in Burlington.
- The suburban GTA office market has struggled over the past decade to compete with downtown Toronto. However, the City of Burlington office market is showing signs of strength returning to more balanced market conditions. The industrial real-estate market is very strong with sub 3% vacancy rates signifying high demand for new space in Burlington.
- The majority of employment growth over the last 15 years has largely been attributed to the commercial/population-related and institutional sectors.
- The City’s economic base is also highly oriented to home-based occupations making up 10% of total employment in 2016.

³⁷ Royal Bank of Canada. Provincial Outlook. December 2018.



4.0 Demographic and Socio-Economic Trends - Impacts on the Local Housing Market

4.1 Introduction

The following section explores historical housing, demographic and socio-economic growth trends within Halton Region and the City of Burlington based on Statistics Canada data and other available information sources. Specific attention is given to general housing market trends related to housing form (i.e. density), housing prices and annual construction activity. In certain cases, comparable statistics are provided for adjacent municipalities within the surrounding market area and the Province of Ontario as a whole, to provide greater insight regarding City and Regional growth trends within the context of the broader geographic area. It is noted that the historical time period investigated varies throughout this section, subject to data availability.

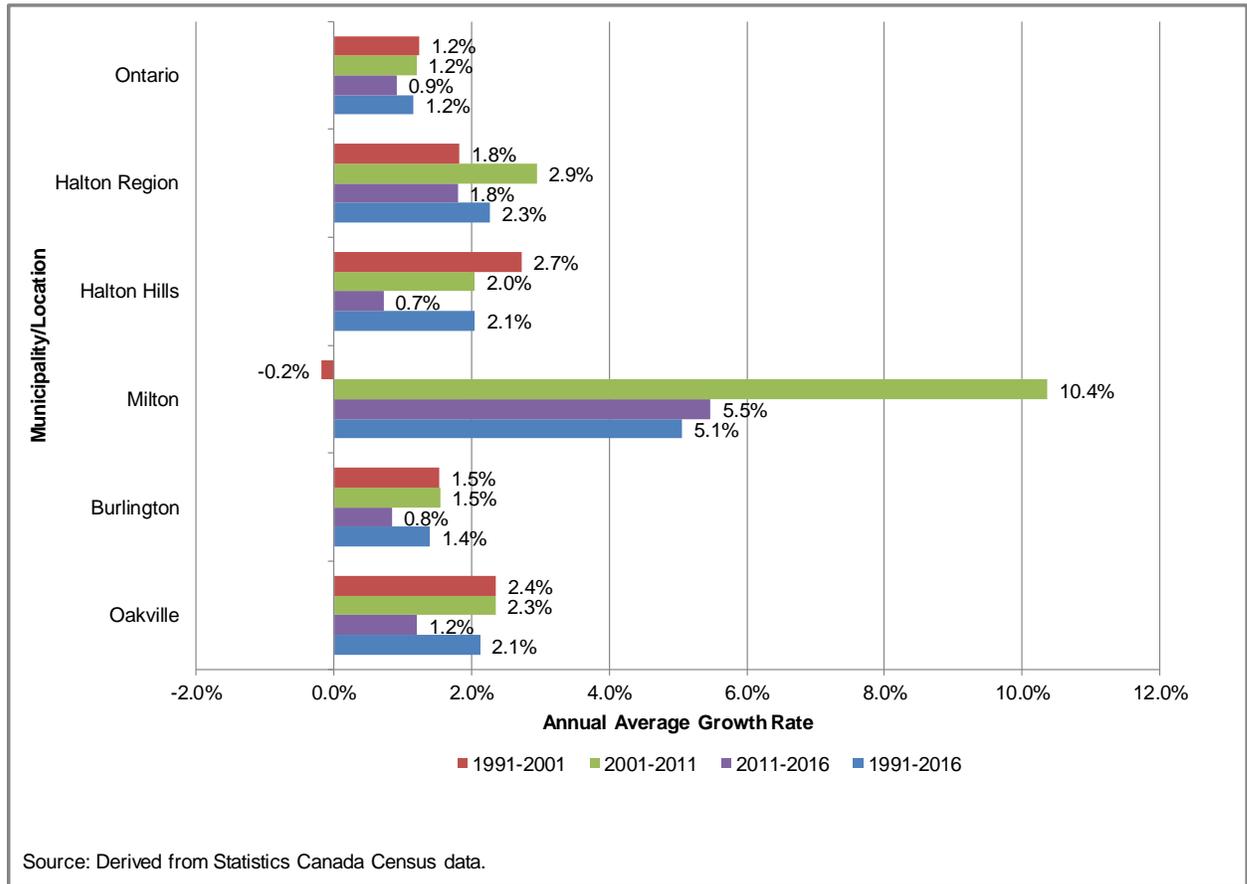
4.2 Historical Demographics and Housing Trends in Halton Region

4.2.1 Historical Population Growth, 1991 to 2016

Figure 4-1 summarizes historical population growth rates for Halton Region and its area municipalities during the 1991 to 2016 period in accordance with Statistics Canada Census data. Key observations include the following:

- Halton Region experienced strong population growth during this period, approximately double the provincial average;
- More specifically, Halton's population grew at an average annual rate of 2.3% compared to 1.2% for the Province as a whole;
- While all of Halton's lower-tier municipalities have experienced population growth, the rate of annual population growth was highest in the Town of Milton at 5.1% annually between 1991 and 2016, driven by strong population growth (10.4% annually) during the 2001 to 2011 period. Strong population growth for the Town of Milton during the 2001 to 2011 period helped to offset a modest loss in population for this municipality during the 1991 to 2001 period;
- The annual rate of population growth in Halton's lower-tier municipalities averaged between 1.4% and 5.1% during the 1991 to 2016 period, with Burlington's growth the lowest at 1.4%.

Figure 4-1: Historical Population Growth Rates, 1991 to 2016



4.2.2 Population and Households, 2016

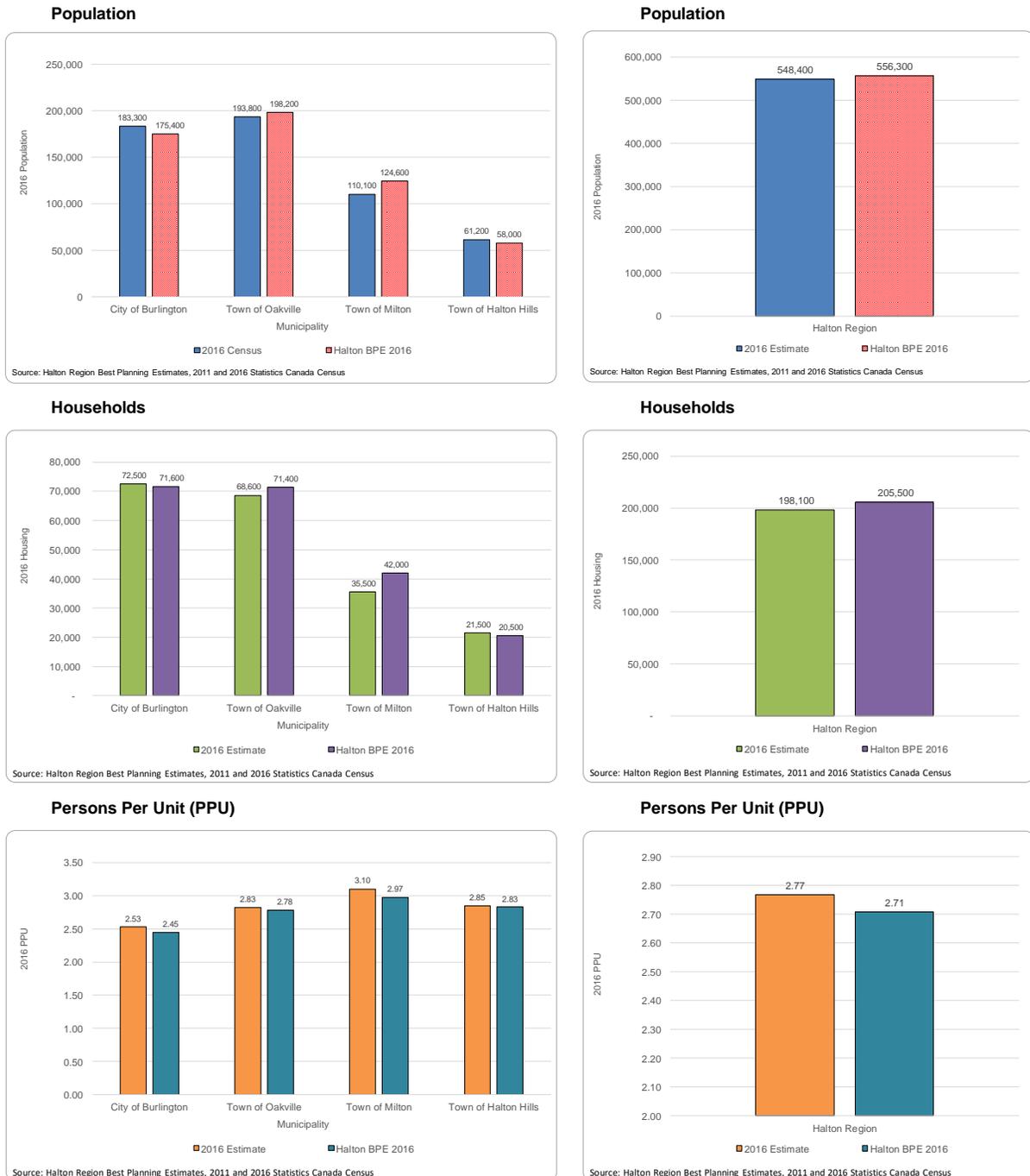
While recent population growth within Halton Region has been strong relative to the provincial average, 2016 population estimates for the Region, specifically the Town of Oakville and Town of Milton, are below the 2016 population forecast as per the 2011 Halton Region BPE. **Figure 4-2** summarizes 2016 population and housing estimates for Halton Region by local municipality in comparison to the 2011 Halton Region BPE forecast as of mid-year-2016. This analysis identifies the following:

- The 2016 Census population in Halton Region is 548,400, approximately 7,900 persons less than the 2011 Halton Region BPE for the year 2016; and ³⁸

³⁸ 2016 population excludes the net Census undercount, which is approximately 4%.

- The 2016 Census populations for the Town of Milton and the Town of Oakville are below the Halton BPE forecast, largely as a result of development delays within North Oakville and the Boyne Secondary Plan Area in Milton.

Figure 4-2: Comparison of 2016 Population Households and PPU to 2016 Best Planning Estimate



- In contrast, the 2016 Census populations for the City of Burlington and the Town of Halton Hills exceed the current Halton BPE population forecast; and
- Housing growth trends by local municipality closely reflect population trends; however, the estimated average number of persons per housing unit (PPU) in Halton Region as of 2016 is higher than the Halton BPE 2016 forecast (2.77 vs. 2.71). This is largely believed to be a result of higher average PPU levels in newer ground-oriented³⁹ households than anticipated in the 2011 Halton BPE. This demographic trend is discussed below further.

4.2.3 Housing Occupancy Trends within the City of Burlington

Figure 4-3 summarizes trends in average housing occupancy for the City of Burlington, Halton Region and the Province of Ontario over the 2001 to 2016 period,⁴⁰ expressed as the average number of persons per unit (PPU).⁴¹ Trends in household occupancy and age structure are a particularly important statistic for planners, as these trends have broad implications for the amount and type of future housing needs associated with population growth as well as demands for public infrastructure, municipal services and schools.

Key observations include the following:

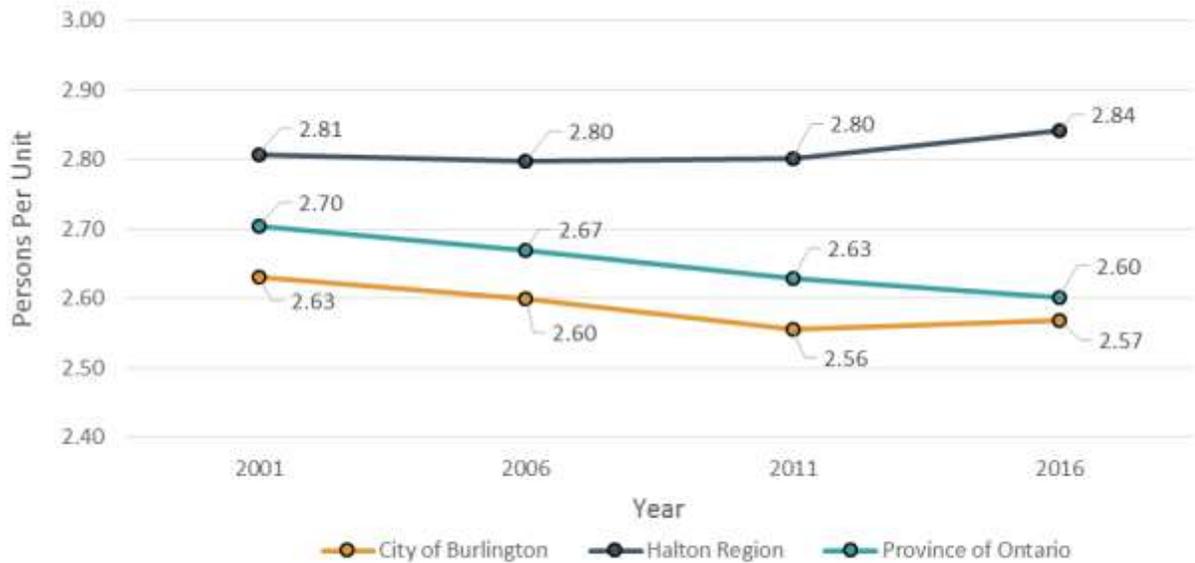
- Average PPU levels for the City of Burlington steadily declined over the 2001 to 2011 period from 2.63 to 2.56; however, in 2016 the City's average PPU increased slightly to 2.57;
- Average housing occupancy levels for the Province as a whole are higher relative to the City of Burlington; however, the overall rate of PPU decline between 2001 and 2016 was higher for the Province. In contrast to the City of Burlington, the average PPU for the Province continued to steadily decline between 2011 and 2016;
- The stabilization in average household occupancy within the City is largely believed to be a result of delays in children leaving home and an increase in multi-family (i.e. multi-generational) dwellings;
- Halton Region as a whole has experienced stable PPU trends from 2001 to 2011 with a modest increase between 2011 and 2016 from 2.80 to 2.84; and
- The average PPU for the City of Burlington is forecast to continue to decline over the long term; however, this decline rate is anticipated to occur at a slower rate than previously anticipated in the 2011 Halton Region BPE. This demographic trend towards higher PPU's is also anticipated in

³⁹ Includes single detached, semi-detached, townhouses, back-to-back townhouses, stacked and back-to-back townhomes, duplexes and low-rise hybrid buildings.

⁴¹ Average number of persons per unit (PPU) defined as the total population divided by the number of occupied dwelling units.

Oakville, Milton and Halton Hills and is one of the primary factors driving the higher 2031 population forecast for Halton Region as identified in Amendment No. 2 to the 2006 Growth Plan.⁴²

Figure 4-3: City of Burlington, Historical Persons Per Unit (PPU) Trends, 2001 to 2016



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

Figure 4-4 summarizes the average PPU for new occupied households occupied over the 2011 to 2016 historical period by built-up area (BUA), designated greenfield area (DGA) and remaining rural area. Average PPU levels have remained stable in the City’s BUA over the past five years, and remain well below average PPU levels experienced in the City’s DGA and rural areas. In contrast to the BUA, PPU levels have significantly increased in the City’s greenfield areas. The importance of this observation is that as the City’s high density development focus continues to increase within the BUA average PPU levels associated with new households within the BUA are anticipated to remain relatively low, reflective of recent PPU trends in high-density dwellings.

⁴² Amendment no. 2 identifies a 2031 population forecast of 820,000 which is approximately 40,000 persons higher than the original 2031 population forecast for Halton Region set out in Schedule 3 of the 2006 Growth Plan.

Figure 4-4: City of Burlington, Historical Persons Per Unit (PPU) Trends by Built-Up Area and Designated Greenfield Area and Rural Area, 2001 and 2016

Geographic Area	2011			2016		
	Population	Households	Average PPU	Population	Households	Average PPU
Built-Up Area	161,129	63,660	2.53	164,865	65,340	2.52
Designated Greenfield Area	10,597	3,630	2.92	13,463	4,305	3.13
Rural Area	4,053	1,489	2.72	4,986	1,730	2.88
Total	175,779	68,779	2.56	183,314	71,375	2.57

Source: Derived from 2011 and 2016 Statistics Canada Census data by Watson & Associates Economists Ltd., 2019.

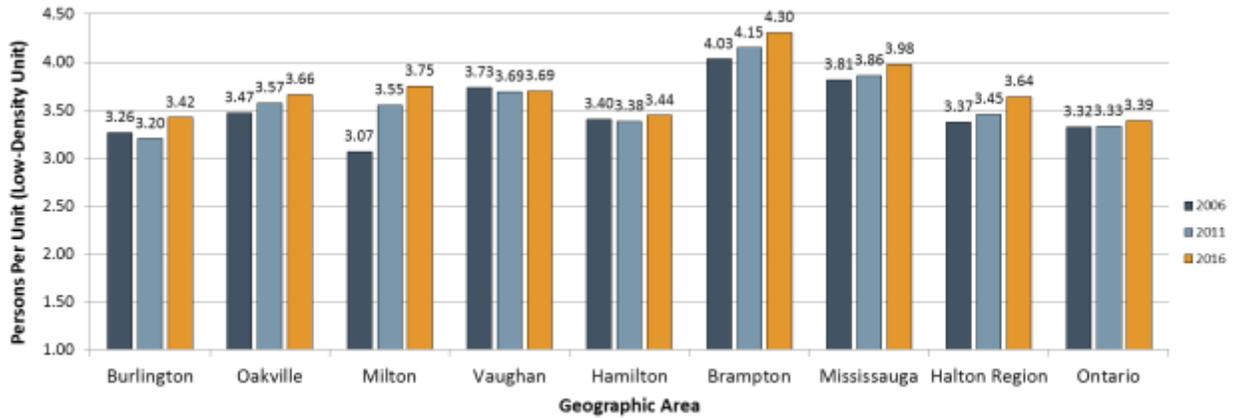
Generally, it is observed that for new housing units, housing occupancy levels tend to increase in the shorter term (1 to 5 years) as new home buyers form families, followed by a decline over the medium term (15 to 30 years) as children leave home. This trend is then followed by a period of stabilization over the long run (30+) as older units are regenerated by new families. The result of this pattern is that more recently constructed housing units typically yield a higher PPU on average in comparison to older units.

Figures 4-5, 4-6 and 4-7 summarizes the average PPU for new dwellings (dwelling units up to 15 years old) occupied between 2001 to 2016 by density type (i.e. low, medium and high density) for the City of Burlington, the remaining municipalities within Halton Region, as well as selected municipalities within the surrounding area based on custom Census data. Key findings include the following:

- As of 2016, the average PPU for new low-density dwellings in Halton Region was 3.64, while the overall average occupancy of all dwellings throughout Halton Region was 2.80;
- For Halton Region municipalities surveyed, the average PPU as of 2016 for new low-density units was highest in the Town of Milton (3.75) and lowest in the City of Burlington (3.42);
- Average new unit PPU levels across Halton are well below the occupancy levels of municipalities located east of Halton Region (Mississauga and Brampton) while slightly higher than the City of Hamilton with Burlington being comparable;
- Over the 2006 to 2016 Census period, average new low-density unit PPU levels increased for all selected Halton Region municipalities in the figures. This increase was most pronounced in the Town of Milton;
- This increasing PPU trend in low-density dwellings is believed to be partially driven by an increase in multi-family (multi-generational) living;
- Relative to low-density units, average PPU levels have not risen as significantly for medium-density dwellings. Halton Region had a moderate increase from 2006 to 2016, but Burlington experienced a decline over the same period; and
- In contrast to low-density dwellings, average PPU levels for new high-density dwellings declined between 2006 and 2016 for all the municipalities surveyed, except for the City of Burlington.

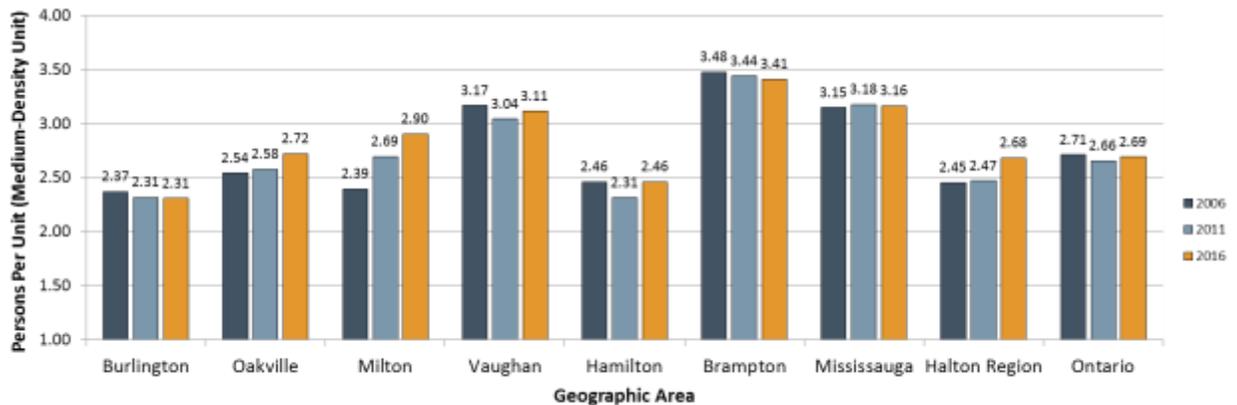
The results of this analysis suggests that housing demand associated with families remains relatively low in high-density dwellings across the west GTA., including the City of Burlington. For the City to achieve a higher level of high-density housing over the next several decades, efforts will need to be made to accommodate more families in high-density dwellings.

Figure 4-5: Comparative Low Density PPU (Housing Units up to 15 Years Old)



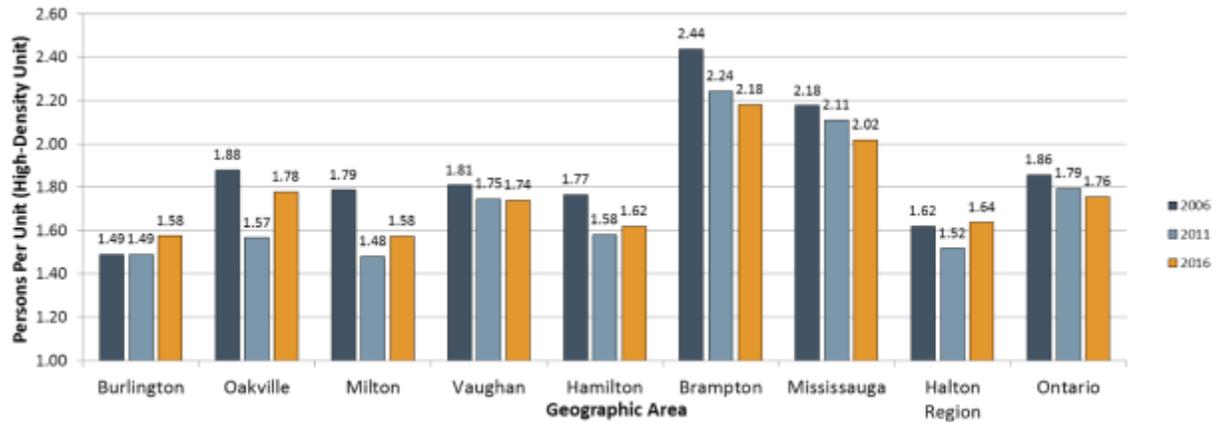
Source: Derived from Census Canada Custom P.P.U. database. Halton Region includes Burlington, Halton Hills, Milton and Oakville. Excludes census undercount. 1. Low-density dwellings represent single and semi-detached housing units

Figure 4-6: Comparative Medium Density PPU (Housing Units 15 Years Old and Newer)



Source: Derived from Census Canada Custom P.P.U. database. Halton Region includes Burlington, Halton Hills, Milton and Oakville. Excludes census undercount. 1. Medium-density dwellings represent rows and apartments in duplex units

Figure 4-7: Comparative High Density PPU (Housing Units 15 Years Old and Newer)



Source: Derived from Census Canada Custom P.P.U. database. Halton Region includes Burlington, Halton Hills, Milton and Oakville. Excludes census undercount. 1. High-density dwellings represent units in apartments >5 storeys.

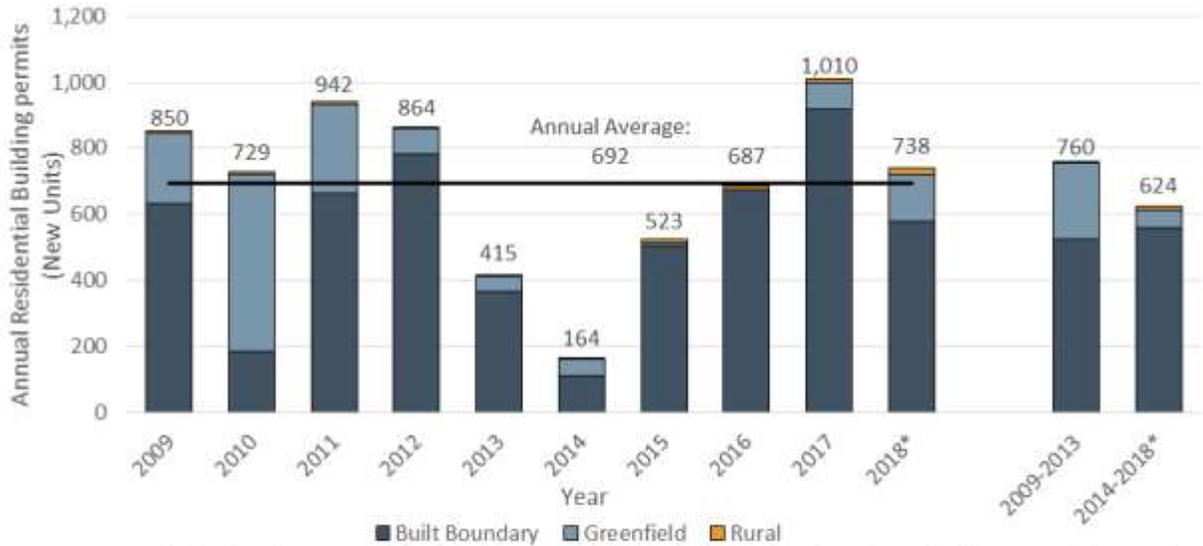
4.2.4 Historical Residential Building Permit Activity by Structure Type and Location

Figures 4-8 and 4-9 summarize total residential building permit activity (new units only) with the City of Burlington and within the City’s built boundary between 2009 and 2018. Between 2009 and 2018:

- Residential building permits averaged 692 housing units annually;
- Recent annual development activity has declined, averaging 624 units annually from 2014 to 2018 which is 18% lower relative to the previous five year period. However, since experiencing a 10-year low in 2014, activity has seen a significant rebound through to 2018;
- The majority of housing development has occurred within the built boundary, averaging just over 540 residential building permits annually or 78% of total building permit activity; and
- A broad mix of housing types have been accommodated within the built boundary, however, demand has been steadily shifting towards high-density housing forms.

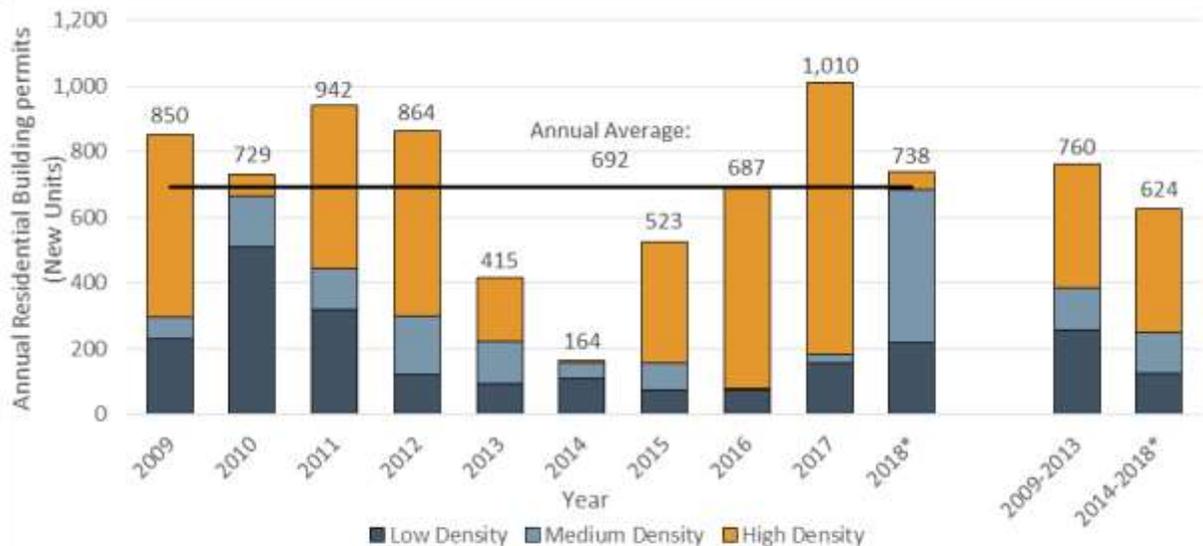
Figure 4-10 illustrates the location and concentration of residential development activity for the City of Burlington between 2009 and 2018 (year-to-date). During this time period, the City reported approximately 6,920 units in new building permit activity which was largely concentrated in South Burlington, the Mobility Hubs, the Downtown, Uptown Burlington and Alton Village.

Figure 4-8: City of Burlington, Residential Building Permits (New Units) by Location, 2009 to 2018 YTD



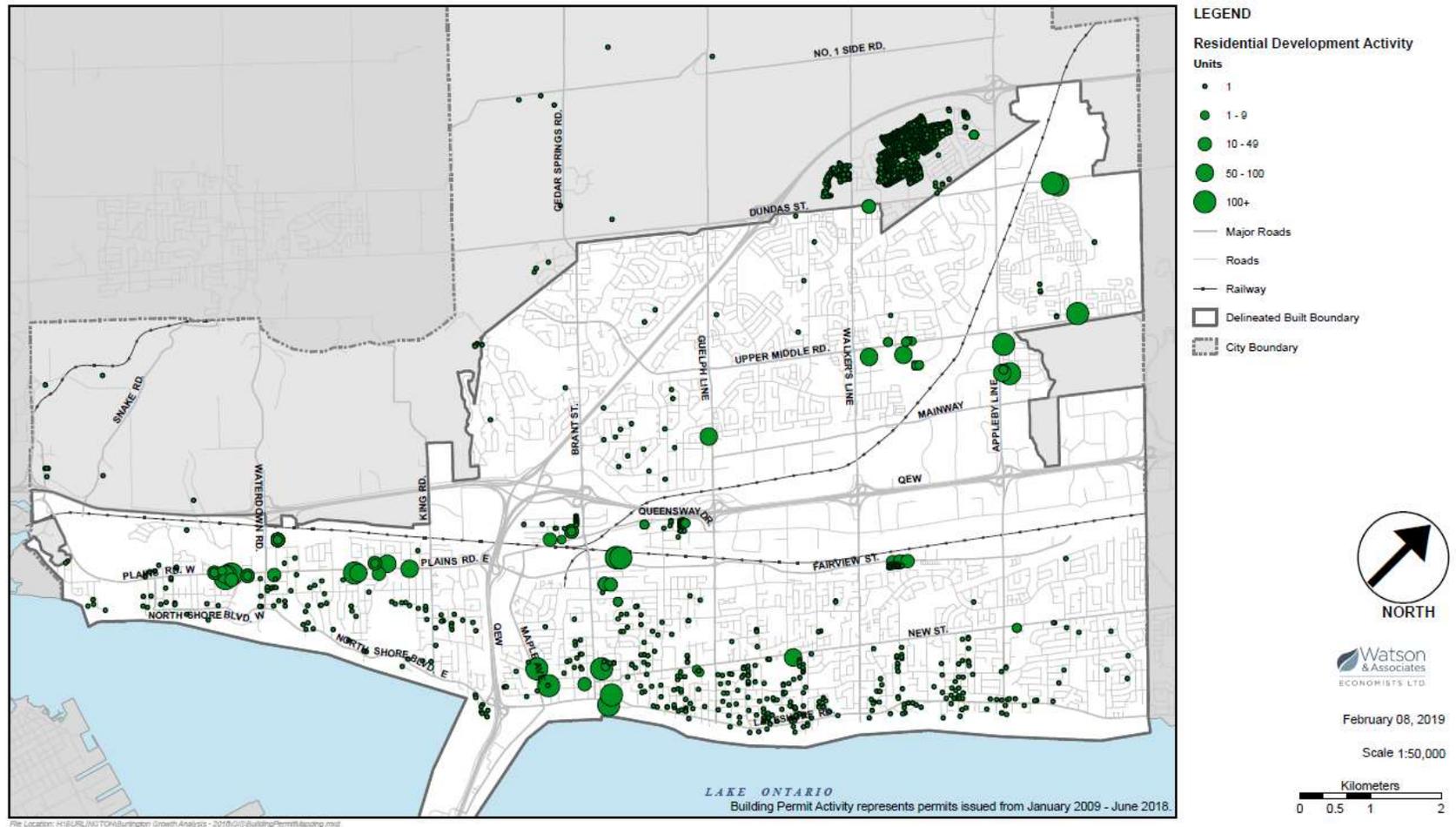
Note: 2018 Includes development activity from January to September from City of Burlington building permit data, and October to December estimated by Watson & Associates Economists Ltd.
 Source: Derived from City of Burlington data by Watson & Associates Economists Ltd., 2019.

Figure 4-9: City of Burlington, 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.

Figure 4-10: City of Burlington, Residential Building Permit Activity (New Units), 2009 to Mid-2018



4.2.5 Housing Propensity Trends by Structure Type, 2016

Figure 4-11 summarizes historical housing propensity (i.e. demand) trends by structure type for permanent households in the City Burlington based on 2016 Statistics Canada Census data. Age-specific propensities measure housing demand by dwelling structure type, by age of household maintainer. Population age structure influences the socio-economic characteristics of the population related to income/affordability, lifestyle, family size, lifestyle decisions, health and mobility. As illustrated in Figure 4-11, propensities for high-density housing (apartments and condominium units) are highest among younger age groups, while propensities for low-density housing (single and semi-detached housing) tend to be highest among population age groups between 35 and 64 years of age.

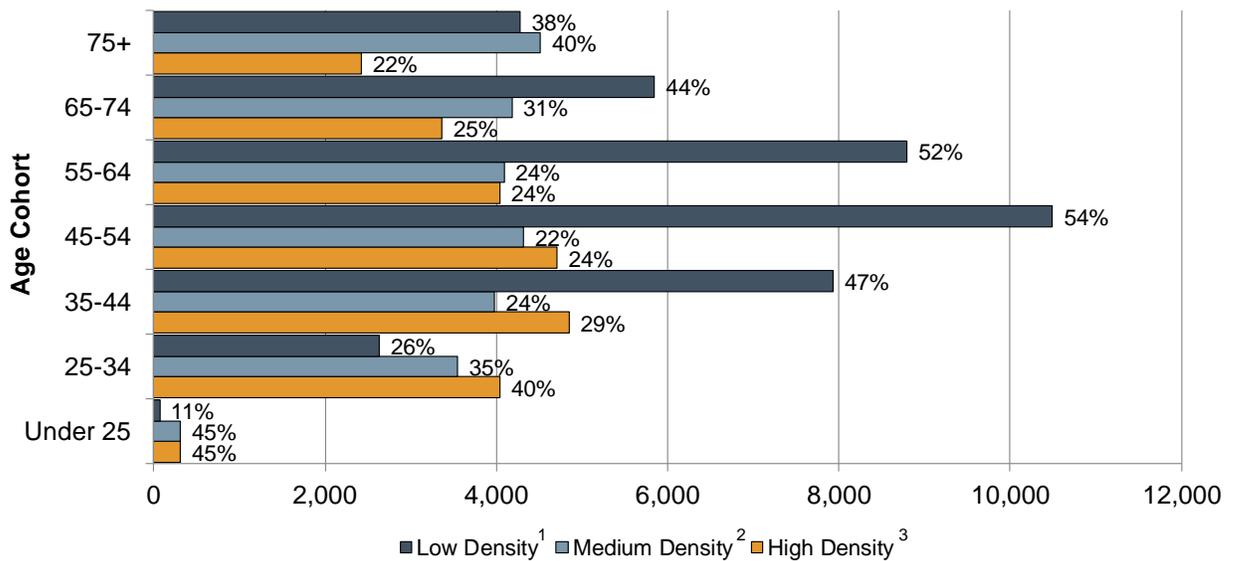
The City of Burlington's population is aging. As mentioned in section 6.2.2, the 55+ age group has grown considerably over the past 15 years and is expected to increase in both percentage and absolute terms over the next several decades. As the average age of the City of Burlington population continues to increase, it is anticipated that the demand for higher density housing forms will also continue to gradually increase.

The aging of the City's population is also anticipated to drive the need for seniors' housing and other housing forms geared to older adults (e.g. assisted living, affordable housing, adult lifestyle housing). Given the diversity of the 55 to 74 and 75+ population age groups, forecast housing demand across the City of Burlington within this broad 55+ demographic group is anticipated to vary considerably.

Within the 55+ age group, housing demand within the 55-74 age group is anticipated to be relatively stronger for ground-oriented housing forms (i.e. single detached, semi-detached and townhomes) which provide proximity to urban amenities, municipal services and community infrastructure. With respect to the 75+ age group, the physical and socio-economic characteristics of this age group (on average) are considerably different than those of younger seniors, empty-nesters and working adults with respect to income, mobility and health. Typically, these characteristics represent a key driver behind their propensity for medium-and high-density housing forms (including seniors' housing) which are in proximity to urban amenities, health care services and other community facilities which are geared toward this age group. As identified in Section 6, the 75+ age group represents the fastest growing population segment within the City of Burlington. It is noted that the increase in propensity for high density housing units within the 75+ age group is not showing an increase within the City of Burlington relative to other housing types based on 2016 Census data.

In addition, the City of Burlington is also anticipated to accommodate a growing share of young adults and new families seeking competitively priced home ownership and rental opportunities. Accordingly, opportunities should be explored to provide a mix of future housing across a range of density types, to accommodate those with varying levels of income (including affordable housing options) within remaining greenfield areas as well as in priority intensification areas across the City's BUA.

Figure 4-11: City of Burlington Permanent Housing Propensity by Structure Type, 2016



¹ Singles and semi-detached.

² Townhouses and apartments in duplexes.

³ Includes bachelor, 1-bedroom and 2+ bedroom apartments.

Source: Data from Statistics Canada Census 2016 by Watson & Associates Economists Ltd., 2019.

4.2.6 City of Burlington Residential Growth and Socio-Economic Trends

4.2.6.1 GTA Trends in Housing Prices, 2008 to 2018

Economic conditions play a key role in shaping urban development trends across the GTA, Halton Region and the City of Burlington. Over the past two decades, the GTA has experienced a steady increase in housing prices driven by rising land prices, strong population growth and a robust employment market. Strong fundamentals associated with the Canadian economy have also attracted a steady stream of local and foreign investment to the GTA real estate market. The low-interest rate environment was one factor which enabled the appreciation of residential real estate values as buyers had access to low rate mortgages, however with policy changes from the provincial and federal governments targeted to cool the market, the growth in housing prices may slowdown in the near term.

Figure 4-12, summarizes historical trends in average housing sale prices for the City of Burlington and several GTA municipalities for single detached dwelling units between 2008 and 2018. Housing price data for townhouses and condominiums is also provided for 2018. Across the GTA, housing prices for new single detached units vary considerably, with average prices highest in the City of Toronto, followed by Mississauga, Vaughan, Oakville and Burlington. Comparatively, the average price of a single detached house is significantly lower in the City of Oshawa and selected municipalities east of the City of Toronto. With respect to housing appreciation for new single detached units, Mississauga, Vaughan and Burlington have experienced the strongest average annual growth rate over the past 10 years.

Figure 4-12: Historical Trends in GTA. Housing Prices

Municipality	2008	2018			Annual Increase in New Single Detached Housing Unit, 2008-2018
	New Single Detached	New Single Detached	Townhouse	Condominium	
City of Mississauga	\$561,000	\$1,821,000	\$703,000	\$430,000	12.5%
City of Vaughan	\$582,000	\$1,771,000	\$833,000	\$527,000	11.8%
City of Burlington	\$471,000	\$1,260,000	\$639,000	\$488,000	10.3%
Town of Whitby	\$360,000	\$857,000	\$530,000	\$424,000	9.1%
City of Oshawa	\$338,000	\$745,000	\$476,000	\$362,000	8.2%
City of Toronto	\$944,000	\$1,991,000	\$915,000	\$602,000	7.7%
Town of Oakville	\$711,000	\$1,393,000	\$798,000	\$586,000	7.0%
Town of Ajax	\$503,000	\$751,000	\$563,000	\$379,000	4.1%
City of Pickering	\$618,000	\$815,000	\$585,000	\$448,000	2.8%

Source: Watson & Associates Economists Ltd. Data for average single detached prices based on the average price of new single detached units derived from Canada Mortgage and Housing Corporation (CMHC), Housing Market Absorption Survey. Data for average prices of townhouse and condominium units derived from 2016 annual market reporting by Toronto Real Estate Board.

4.2.6.2

City of Burlington Household Income Trends, 2000 to 2015⁴³

Figure 4-13 summarizes average household income growth for the City of Burlington, Halton Region and the Province of Ontario between 2000 and 2015. Key observations include the following:

- As of 2015, the estimated average household income in the City of Burlington was \$123,400, which is moderately lower than the average household income for Halton Region and well above the provincial average; and
- The annual rate of household income growth for the City of Burlington has increased over the past five years relative to the previous 10 years. Household income growth over the past five years in the City of Burlington has also been higher relative to Halton Region and the Province of Ontario.

⁴³ Census year income shown is for previous year. E.g. 2001 to 2016 Census is 2000 and 2015 reported income.

Figure 4-13: City of Burlington, Halton Region and Province of Ontario, Average Household Income, 2001 to 2016 Census Years

Census Year	City of Burlington	Halton Region	Province of Ontario
Average Household Income			
2001	\$83,700	\$92,500	\$66,800
2006	\$95,900	\$108,100	\$78,000
2011	\$105,500	\$119,400	\$85,800
2016	\$123,400	\$139,300	\$97,900
Average Annual Growth			
2001-2006	\$2,440	\$3,120	\$2,240
2006-2011	\$1,920	\$2,260	\$1,560
2011-2016	\$3,580	\$3,980	\$2,420
Average Annual Growth Rate			
2001-2006	2.8%	3.2%	3.1%
2006-2011	1.9%	2.0%	1.9%
2011-2016	3.2%	3.1%	2.7%

Note: Census year income shown is for previous year. E.g. 2001 to 2016 is 2000 to 2015 income.

Source: 2001-2016 data derived from Statistics Canada Census and NHS by Watson & Associates Economists Ltd., 2019.

While average household income levels in Burlington are well above the provincial average, average household incomes have not kept pace with rising resale and new housing prices. As a result, housing affordability has steadily eroded over the past decade across the G.G.H., most notably within the larger urban centres of the GTA., including the City of Burlington. As a result of this upward pressure on housing prices and steady reduction in housing affordability, there is a need to ensure that sufficient opportunities exist within the City of Burlington (and across the G.G.H. in general) to accommodate a range of housing types (i.e. ground-oriented and high density) for all income levels, including market, affordable, assisted and emergency housing.^{44, 45, 46}

4.2.7 Visible Minorities, 2001 to 2016

The changing ethnic makeup within the City of Burlington is also anticipated to influence future housing needs associated with population growth. **Figure 4-14** identifies the percentage total of population categorized as “visible minority” according to the 2001 and 2016 Census, within the City of Burlington,

⁴⁴ Affordable housing is defined as housing with a market price or rent that is affordable to households of low to moderate income, spending no more than 30 percent of their gross income without government subsidies, with sufficient income remaining to meet other daily living needs. As of 2013, the affordable housing income threshold in Halton was \$98,410.

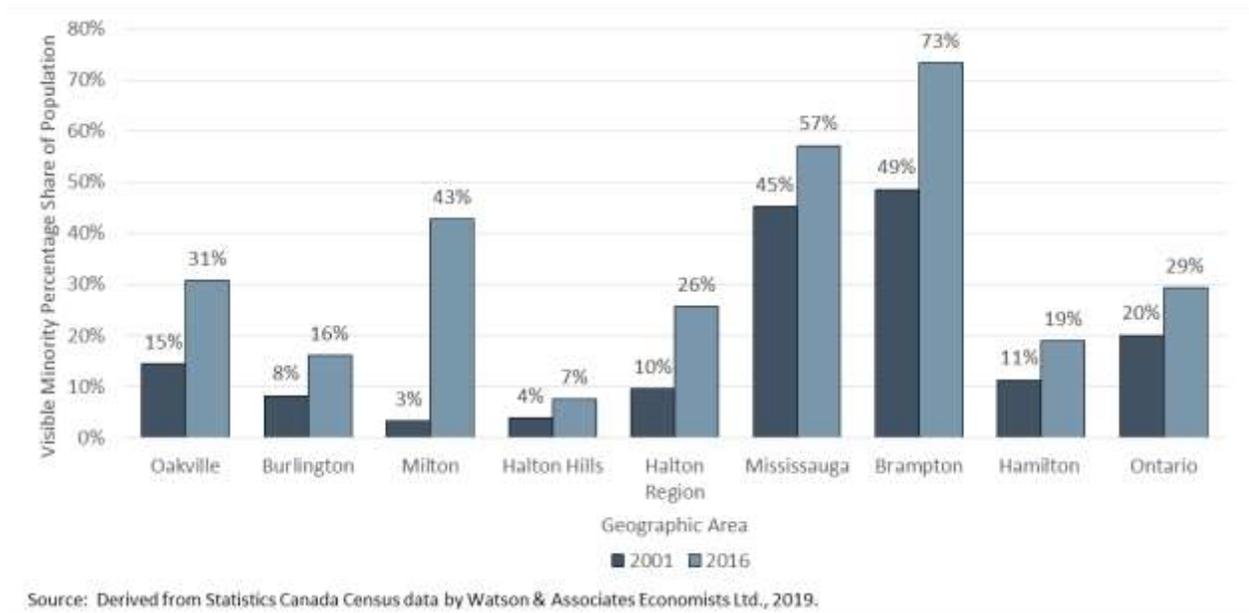
⁴⁵ Assisted housing is defined as housing that is available to low and moderate income households for rent or purchase where part of the housing cost is subsidized through a government program.

⁴⁶ Emergency housing refers to shelters, supportive housing, transitional housing, etc.

the remaining municipalities within Halton Region as well as selected municipalities within the surrounding area.

During the 2001 to 2016 period, the percentage share of visible minorities in Halton Region more than doubled. This increase was predominantly driven by the Town of Milton and, to a lesser extent, the Town of Oakville and City of Burlington which doubled their percentage share.

Figure 4-14: Percentage Share of Population that is Visible Minority, 2001 and 2016



4.3 Summary

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 O.P. policy. 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 analysis explored within this Section suggests that residential market conditions in South Halton and the City of Burlington are generally moving in the same direction as provincial, regional and local planning policy. This emphasizes the need to plan towards more compact residential development forms and an increasing share of high-density housing. While this represents good planning policy, it is important to recognize that historical residential development has been largely driven by demand from ground-oriented housing forms. To facilitate this shift towards more compact high-density urban development, the City will need to consider the use of planning and/or financial tools as well as other policies which address the implementation of the City's and Region's long-term vision.

It is also important to recognize that the demographic and socio-economic characteristics within the City are not homogenous. Understanding trends in household occupancy, age structure and income at the sub-municipal level is particularly important for the City of Burlington. These trends have broad implications on the amount, type and density of future housing needs associated with population growth, as well as demands for public infrastructure, municipal services and schools.



5.0

Growth Drivers and Economic Disruptors Influencing Real Estate Trends

5.1

Introduction

As discussed in Sections 3 and 4, a broad range of considerations related to demographics, economics and socio-economics are anticipated to impact future population and employment growth trends throughout the City of Burlington over the 2016 to 2041 planning horizon. These factors will not only affect the rate and magnitude of growth but will also influence the form, density and location of residential and non-residential development. This section explores the primary factors which are anticipated to drive population, housing and employment growth for the City of Burlington over the next 25 years.

As a starting point, it is important to recognize that future population and employment growth within the City of Burlington is strongly correlated with the growth outlook and competitiveness of the export-based sectors with the regional economy – which in this case is largely represented by the GTHA. The

GTHA represents the economic powerhouse of Ontario and the centre of much of the economic activity in Canada. It also represents much of the commuter-shed for the City of Burlington. Potential employment opportunities within the City of Burlington and surrounding commuter-shed represent the primary driver of net migration to the City of Burlington. In turn, net migration drives population growth within the City’s working-age population and their dependents (i.e. children, spouses not in the labour force and other family members).

The employment base within the City of Burlington and surrounding commuter-shed can be grouped into two broad categories - export based sectors and community-based sectors. The latter primarily refers to local population serving employment. Export-based sectors are comprised of industries (i.e. economic clusters) which produce goods that reach markets outside the community (agriculture and primary resources, manufacturing, research and development as well as other knowledge-based industries). Export-based industries also provide services to temporary and/or other residents of the municipality not captured by Census data as part of the permanent population base (hotels, restaurants, tourism-related sectors, colleges and universities) or to businesses outside the community/municipality (specialized financial, professional, scientific and technical services).

Economic growth in the regional export-based economy generates wealth and economic opportunities which, in turn, stimulates community-based or population-related employment sectors, including retail trade, accommodation and food and other service sectors. As such, economic growth represents the key driver of net migration and, ultimately, the growth of the working age population and their dependents (i.e. children, spouses not in the labour force, others). On the other hand, long-term population growth of the City’s 65+ population will be largely driven by the aging of the City’s existing population and, to a lesser extent, the attractiveness and affordability of the City to new seniors.

5.2 Growth Drivers and Disruptors

The following section briefly summarizes the key regional and local factors and disruptors which are anticipated to drive population and employment growth within the City of Burlington.

5.2.1 Regional Infrastructure Assets

Strategically located within the southwest of the GTHA, the City of Burlington continues to have a strong appeal to new businesses and residents. This appeal is largely attributed to the City’s geographic location within the GTHA and its proximity to key regional infrastructure such as the Toronto Pearson International Airport (TPIA), a myriad of provincial highways, regional transit (GO Transit) and a number of post-secondary institutions within a 1- to 2-hour radius. The City’s western GTHA location also offers access to a number of major employment markets within southern Ontario and the U.S. These attributes make the City of Burlington an attractive destination to people and businesses.

5.2.2 Quality of Life

In addition to the above “hard” regional infrastructure attributes, “soft” or “quality” factors are becoming increasingly important regarding the attraction of new families and business development. The City of Burlington, and more generally Halton Region, has a world class reputation as a vibrant, growing, low-crime location in which to live. The City offers a wide range of top-rated schools, a high standard of local infrastructure (i.e. roads, indoor/outdoor recreation facilities and social services, etc.), a vibrant downtown, access to shopping, arts and culture and other recreational opportunities. Looking forward, these “soft” factors represent a key reason why Burlington’s competitive position is likely to strengthen, relative to other municipalities within the regional market area, in attracting new families and business development over the long term.

5.2.3 The City of Burlington is Located in a Competitive Regional Economy

As previously discussed, Burlington’s long-term population growth potential is largely tied to the success of the GTHA as a whole. With a robust economy and diverse mix of export-based employment sectors, the GTHA is highly attractive on an international and national level to new businesses and investors.

Notwithstanding the past and potential success of the regional employment market, international competition for business development and investment is becoming increasingly competitive in today’s “new economy.” The City of Burlington is located within proximity to a number of large urban/suburban municipalities with which it competes directly for business attraction and investment. All of these municipalities generally offer regional attributes which largely appeal to prospective international and local firms as well as new residents. As such, the City of Burlington will need to continue to position itself as a hub for innovation to capitalize on the human capital that currently exists within the broader regional economy while encouraging ongoing entrepreneurship, small business development and investment retention.

5.2.4 Technological Change as a Growth Driver

Long-term labour force growth potential across the national, provincial, regional and local level will be directly influenced by continued structural changes and disruptions driven by technology and automation. According to the Brookfield Institute for Innovation + entrepreneurship, over the next 10 to 20 years, 42% of the Canadian labour force is at high risk of being affected by automation, either through significant task restructuring or elimination. Jobs that are anticipated to be most highly impacted by automation are primarily within occupations that are administrative, routine, or oriented towards sales and service. The Brookfield Institute report also notes that highly-skilled occupations are expected to grow much more quickly than the rest of the labour force and are at a lower risk of being

negatively affected by automation. This suggests that more highly-skilled labour will be a significant driver of Canada’s future economic growth.⁴⁷

Considerable research has recently been undertaken by institutions and consulting agencies to assess the potential impacts of artificial intelligence (A.I.) to businesses as well as its broader impacts to the global economy. A report prepared by PWC in 2017 identifies that the net impacts to global G.D.P. resulting from A.I. are anticipated to contribute up to \$15.7 trillion to the global economy in 2030, more than the current output of China and India combined.⁴⁸ The report also identifies that over the next decade, A.I. will generate massive disruption as both established businesses and new entrants drive innovation and develop new business models.

To prevent an undesirable lose-lose scenario associated with anticipated technological change in the economy – talent shortages, unemployment and growing inequality – a number of critical actions are needed. This includes businesses assuming an active role in supporting their existing workforce through reskilling and upskilling, individuals taking a proactive approach to their own lifelong learning, and governments creating an enabling environment to assist in these efforts.⁴⁹

While the long-term net economic impacts of automation and/or A.I. appear to be positive, global competition from both established and emerging markets looking to capitalize on potential opportunities related to this technology will be increasingly fierce. Building on their strong institutional and community foundations, both Halton Region and the City of Burlington have the ability to influence their readiness towards an ever-evolving knowledge-based economy through on-going leadership and investment. Ultimately, these efforts are important to enhance youth in-migration, talent attraction and regional employment opportunities geared towards an increasingly skilled labour force.

5.2.5 Attracting Millennials and Future Generations

Future housing needs in the City of Burlington will be increasingly impacted by the Millennial generation. While there is no standard age group associated with the Millennial generation, persons born between 1980 and 1992 best fit the definition of this age group. This cohort represents a large and growing percentage share of the GTHA population. Millennials are a large age cohort, rivaling the Babyboomer generation in terms of size, and their preferences and life choices are proving to have a significant impact.

Within the GTHA context, currently, a high percentage of Millennials are choosing to live in urban locations, within the City of Toronto core over suburban City of Toronto and “905” locations given the

⁴⁷ The Talented Mr. Robot. The impacts of automation on the Canadian workforce. Brookfield Institute for Innovation + Entrepreneurship. June 2016.
⁴⁸ Sizing the Prize. What’s the real value of AI for your business and how can you capitalise? PWC. 2017.
⁴⁹ World Economic Forum. Insight Report. The Future of Jobs Report. Centre for the New Economy and Society. 2018.

proximity of downtown Toronto to amenities, entertainment and employment. Based on recent survey data, 62% of Millennials prefer to live in the mixed-use environment that urban centres offer which includes proximity to amenities and employment.⁵⁰ They tend to have a much higher preference for a compact environment which offers a short distance to work and place a higher preference on walkability and access to public transit.⁵¹ A recent survey of Millennials planning to purchase their next residence found that 47% of respondents indicated that proximity to work and amenities was an important feature/attribute of their next home.⁵² Given the age and size of this cohort, Millennials will play a key role with respect to labour force supply, which, as previously mentioned, is critical to the steady growth of Burlington's population.

Over the 2011-2014 period, the average annual population growth in the Millennial generation in the GTHA averaged 40,000 per year.⁵³ Of this, nearly two-thirds of the population growth in the Millennial cohort was accommodated in the City of Toronto.⁵⁴ Of the population growth in the City of Toronto over the period, Millennials accounted for 76%.⁵⁵ In comparison, population growth of Millennials in Halton Region was 24% over this same period.⁵⁶ The extent to which the City of Burlington can capitalize on this shift is subject to a number of economic and socio-economic variables (e.g. relative housing costs/affordability, fuel costs, lifestyle preferences and perceived quality of life between urban and suburban neighbourhoods).

Various polls and surveys have identified that home ownership is considered important by the majority of Millennials.⁵⁷ A recent Canadian survey found that more than half the Millennials planning to purchase their next residence intend to purchase in the suburbs (56%) compared to the downtown core of a city (22% per cent).⁵⁸ The same survey found that 70% of respondents have a preference for a low-density home for their next home compared to 16% wanting a condominium/apartment.⁵⁹ Much of this demand for a future home appears to be the desire for additional floor space and a yard, in many cases to accommodate a growing family. This anticipated shift in housing preferences by the Millennial population is anticipated to drive future housing demand in suburban municipalities such as the City of Burlington. As previously mentioned, eroding housing affordability is anticipated to steadily shift housing demand within this generation towards medium and high-density housing forms which offer a more competitive and wider product offering relative to Downtown Toronto.

⁵⁰ Millennials – Breaking the Myths, Nielsen, 2014

⁵¹ Emerging Trends in Real Estate, Canadian Edition, PwC and ULI, 2014.

⁵² Royal LePage National Survey, 2013.

⁵³ Population Dynamics in the Greater Golden Horseshoe – Millennials vs. Baby Boomers, Centre for Urban Research and Land Development, Ryerson University, November 19, 2015.

⁵⁴ Ibid.

⁵⁵ Ibid.

⁵⁶ Ibid.

⁵⁷ CIBC online poll, March 2016;

⁵⁸ Royal LePage National Survey, 2013.

⁵⁹ Ibid.

To attract a share of the Millennial population, there is a need for more competitively priced housing forms which can ultimately accommodate their growing families. Housing opportunities are expected to be primarily in the form of medium-density development – such as mid-rise condos, row townhouses and stacked/back-to-back townhouses. Within the City of Burlington and other GTHA municipalities of similar demographic and socio-economic make-up, housing demand from Millennials is expected to be strongest in established neighbourhoods, around mobility hubs, on under-developed avenues and along new transit lines.⁶⁰

Generation Z, the cohort which directly follows the Millennial Generation, is also anticipated to have a significant impact on long-term population growth and housing needs within the City of Burlington. Demographers and researchers typically use the mid-1990s to mid-2000s as starting birth years for this cohort. For the purposes of this study, we have assumed that those born between 1993 and 2005 comprise Generation Z. As of 2019 the Generation Z population comprises approximately 15% of the City of Burlington population base. Between 2019 and 2041 this Generation is forecast to comprise 25% of total population growth within the City of Burlington.

It is also important to recognize the impact of Millennials and Generation Z on the nature of future employment growth, which will be increasingly driven by the knowledge-based economy. From a planning and economic development perspective, both Millennials and Generation Z will continue to serve as a catalyst for both growth and change related to future office, retail, institutional and industrial developments across the City of Burlington⁶¹.

5.3 Long-Term Housing Residential Real Estate Outlook for the City of Burlington

5.3.1 Future Market Demand for Ground-Oriented and High-Density Housing Forms

The residential market for the City of Burlington has been transitioning towards high density development as the supply of green-field land diminishes. There are approximately 10,300 units in the City’s development pipeline of which 10% are low-density, 17% medium-density and the remaining 73% high-density, as shown in **Figure 5-1**. The majority of proposed development is within the built boundary, consisting of 86% high density 13% medium density and 1% low density. Of the total supply, 2,900 units are either under construction, registered or approved/draft approved of which an estimated 1,800+ units are expected to be ready for occupancy by 2022⁶². High-density development projects appear to be targeted towards a broad range of demographic groups, including young urban professionals, families, empty nesters and seniors. The potential unit yield associated with the

⁶⁰ Location-Efficient Choices for GTA Homebuyers. A policy supplement to Priced Out, Pembina Institute, 2012.

⁶¹ City of Burlington Mobility HUBs - Office and Retail Market Analysis Study, Deloitte, January 2019.

⁶² Based on a site-specific review of development applications currently under construction, registered and approved/draft approved.

development applications currently active within the City’s development pipeline and pace of approvals suggests that demand will continue to remain strong over the next decade, particularly for high density development.

Figure 5-1: City of Burlington Future Housing Supply in the Development Pipeline (as of 2019)

Stage of Development	Density			Total
	Low ¹	Medium ²	High ³	
Within Built Boundary				
Under Construction	0	249	488	737
Registered	15	0	0	15
Approved / Draft Approved	48	49	642	739
Active Development Applications	40	643	5,091	5,774
Sub-total	103	941	6,221	7,265
Outside Built Boundary				
Registered	363	35	0	398
Approved / Draft Approved	0	91	924	1,015
Active Development Applications	615	680	327	1,622
Sub-total	978	806	1,251	3,035
Total	1,081	1,747	7,472	10,300

¹ Includes single and semi-detached units.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Source: Data as of February 2019 from the City of Burlington compiled by Dillon Consulting and derived by Watson & Associates Economists Ltd., 2019.

As previously identified, relative to the province as a whole, the City of Burlington has a higher percentage of middle and upper- income households and families. Burlington’s existing housing base largely reflects this demographic base, comprised of a large share of ground-oriented dwellings and relatively higher levels of home ownership relative to the provincial average. Notwithstanding these existing conditions, the share of residential development activity within the City of Burlington geared towards ground-oriented homes has steadily declined over the past decade. This trend has been mirrored across many of the larger, maturing urban municipalities within the GTHA in recent years.

As the City of Burlington continues to mature and exhaust its remaining greenfield housing supply, the share of future residential development anticipated through more high-density housing forms in the form of intensification is anticipated to significantly increase. Alternatively, new ground-oriented housing development (i.e. single, semi-detached and townhouses) within the City of Burlington will represent an increasingly smaller percentage of City-wide development activity. Looking forward, it is anticipated that a greater share of Burlington families will seek townhome and apartment units to accommodate their housing needs given pressures related to eroding housing affordability summarized

in Section 4. It is further anticipated that the City will continue to experience an increase in multi-family low-density dwellings, which will continue to upwardly impact average PPU levels in newer low-density households as well as established low-density neighbourhoods. Lastly, it is anticipated that demand will steadily increase for secondary suites, largely in low-density dwellings.

5.4 Long-Term Non-Residential Real Estate Outlook for the City of Burlington

5.4.1 The Importance of Employment Lands in Accommodating Employment Growth in Burlington

Employment lands form a vital component of the City’s land-use structure and are an integral part of the local economic development potential of Burlington and Halton Region. They are also home to many of the Region’s largest private-sector employers. Employment lands provide opportunities to accommodate a wide-range of businesses and employment sectors, including:

- Traditional industrial sectors, including manufacturing, construction, logistics and distribution facilities requiring large sites with strong 400-series highway connectivity and opportunities for future expansion;
- Businesses requiring integrated operations on larger sites in a “campus-style” setting. These integrated facilities often accommodate a combination of office, research and development, warehousing and logistics and on-site manufacturing (e.g. Mazda Canada and BMW Canada in Richmond Hill, Honda Headquarters Training Centre and Distribution Centre in Markham and L3 WesCam in Burlington);
- Flex office space, which has become a major trend across the GTHA and beyond. Flex office space allows occupants flexibility in the use and allocation of space according to operation needs. Tenants of flex office space may include businesses that require a blend of office and industrial site characteristics;
- Research and development facilities requiring large 1-storey facilities to operate equipment; and
- Employment land supportive commercial uses typically include accommodation and food services and commercial services. These uses are key amenities in attracting businesses and employment in industrial and office sectors.
- Place making is increasingly becoming recognized as an important concept in creating diverse and vibrant communities, which in turn can help attract local population and job growth providing that other necessary infrastructure requirements are met. This is particularly relevant in mixed-used environments which integrate office commercial, residential and other community uses with public open spaces.

5.4.2 Planning for Office Development within the City of Burlington

As previously identified, downtown Toronto has dominated the major office market in recent years. Within the “905” area market demand and development feasibility for stand-alone office space are

anticipated to be strongest within mixed-use environments that offers proximity/access to amenities and higher-order transit. Demand will also continue to exist for industrial and certain commercial uses in sub-urban greenfield settings within the City of Burlington which offer ample land supply for building development and surface parking requirements. Generally, demand for office development has been relatively limited within the City of Burlington over the past five years, as indicated by recent building permit trends and current office vacancy rates which are estimated at approximately 15%.⁶³ The vast majority of office development within Burlington in the past five years has been accommodated on vacant parcels in employment lands. Office development outside employment areas has been limited to small-scale (<5,000 sq.ft.) professional and medical offices.

Section 5.1.2 (d) of the City's adopted 2018 Official Plan directs Major Office and appropriate major institutional development to Urban Growth Centres (UGC) or major transit station areas, with existing or planned higher order transit services.⁶⁴ While the majority of stand-alone office development has been concentrated on the City's employment lands in recent years, this trend is anticipated to evolve in the coming decades. Looking forward, market demand for stand-alone office space is anticipated to strengthen within the City's mixed-use areas which are transit supportive, pedestrian oriented and offer proximity/access to amenities, entertainment, cultural activities and public spaces.

Based on a review of recent trends within Halton Region and the GTHA as a whole, employment density levels associated with new major office development within the City of Burlington are anticipated to average above 150 employees per net ha. Other remaining new office development not captured as Major Office development is also anticipated to generate relatively high average employment densities. As such, urban land needs associated with office employment growth is anticipated to be minimal.

5.4.3 Planning for Employment in Burlington's Mobility Hubs

In August 2017, N. Barry Lyon Consultants in association with Brook McIlroy prepared a report titled, Burlington Mobility Hub Market Analysis,⁶⁵ as part of a broader planning initiative by the City to prepare Area Specific Plans for four Mobility Hub areas in the City of Burlington. The Market Analysis Study provides an outlook for the four mobility hubs with respect future population, housing and employment growth to 2031.

The subject report notes that major stand-alone office is not anticipated to occur within the mobility hubs over the 2031 planning horizon. The report identifies that mobility hubs will be comprised of mix-use development forms with a non-residential component that will be driven by the local population

⁶³ Source: Deloitte Mobility Hubs – Office and Retail Market Analysis Study, Preliminary Working Draft, November 2018.

⁶⁴ In accordance with the Growth Plan for the Greater Golden Horseshoe (2017). Major Office is defined as free-standing office buildings, of approximately 4,000 sq.m. (43,000 sq.ft.) of floor space or greater, or with approximately 200 jobs or more.

⁶⁵ Prepared by Brook McIlroy and N. Barry Lyon Consultants Ltd., August 2017.

surrounding the mobility hub.⁶⁶ Based on the conclusions of the Market Analysis Study, shorter-term demand for non-residential within in the mobility hubs is likely to be comprised of retail and service commercial uses. Beyond 2031, office growth within the City’s mobility hubs is anticipated to steadily increase.

5.4.4 Retail Development Opportunities and Disruptors

The City’s retail base is concentrated primarily in ten commercial nodes that are located throughout the City. It was noted in the City of Burlington Official Plan Review Commercial Strategy Study, that the City’s retail structure provides a balanced distribution of commercial space in relation to residential communities. This bodes well for the City in regards to building ‘complete communities’. The City’s central location within the GGH highway network, access to a variety of recreational areas, and its relatively high-income characteristics, offer an ability to attract retailers that are very selective with regards to store locations.⁶⁷ It is important to note that due to the City’s location in proximity to other large municipalities (Town of Oakville and City of Hamilton), there are competitive influences that intercept regional retail trade.

Over the past few years, retail development in the City has been very active with both local and regional tenants opening new locations or expanding existing operations. The retail areas near the 400-series highways (QEW and Highway 407) have been particularly active given their access to surrounding communities across the GGH. Further, it was noted in the City’s 2013 City of Burlington Official Plan Review Commercial Strategy Study that the City is undergoing a shift in its retail base with a greater emphasis on service-related commercial space, primarily due to the changing role of the downtown area.⁶⁸ This is a national trend that is anticipated to continue due to the growth of e-commerce and other commercial disruptors.

With respect to the geographic concentration of new construction, there are several major development trends influencing the retail landscape, which generally support demand for retail in intensification areas. These trends are discussed below.

5.4.4.1 Impacts of E-Commerce

The rise of e-commerce has influenced the demand for retail square footage, in particular the demand for retail goods. While e-commerce has been capturing market share from goods-based retailers, growth in service-based retailers continues as they provide social experiences and other services that

⁶⁶ Burlington Mobility Hub Market Analysis Market Analysis prepared by Brook McIlroy and N. Barry Lyon Consultants Ltd., August 2017.

⁶⁷ City of Burlington Official Plan Review – Commercial Strategy, Part 1: Commercial Market Supply and Demand Analysis, prepared by urbanMetrics Inc., June 10, 2013.

⁶⁸ Ibid.

cannot be purchased remotely. Service-based retailers⁶⁹ typically have smaller footprints than goods-based retailers and, therefore, have greater flexibility for intensification areas. These service-based retailers are driving the intensification of power centre and shopping centre sites across Canada by adding retail space to parking lots and occupying vacant retail space previously inhabited by goods-based retailers. Burlington Centre (formerly Burlington Mall) was recently renovated in 2018. The renovations included repurposing of the former Target Department Store space to include service-based retailers and local servicing retail tenants, including a grocery store (R. Denninger Ltd.).

5.4.4.2 Available Greenfield Land Supply for Big-Box Development

Demand for big-box retail development is slowing across the mature markets of the GTHA as a result of the limited supply of greenfield land in these areas. As a result, traditional power centre developers are pursuing a wider-range of development sites to broaden their real estate portfolio, including a wider-range of location/size options.

5.4.4.3 Increasing Productivity of Retail Stores

Retailers are embracing the concept of “just-in-time retail” which involves using the latest technologies in controlling product inventory and applying scheduling techniques to provide the same product assortment with less real estate square footage.

5.4.4.4 Small Store/Customized Store Prototypes

The majority of Canada’s top retail players (e.g. Canadian Tire, IKEA, Sobeys and Loblaws) that have traditionally been “big-box” retailers have small store prototypes which range in size from 5,000 to 20,000 sq.ft. The smaller store prototype focuses on serving a more defined targeted demographic from a smaller local trading area. The small store footprint provides developers with greater flexibility in incorporating retail in an intensification area, as well as the opportunity to accommodate major national companies.

5.5 Summary

Future population and employment growth potential within the City of Burlington is strongly correlated with the growth outlook and competitiveness of the export-based sectors with the regional economy – which in this case is largely represented by the GTHA. The GTHA represents the economic powerhouse of Ontario and the centre of much of the economic activity in Canada. It also represents much of the commuter-shed for the City of Burlington. Potential employment opportunities within the City of

⁶⁹ Service-based retailer refers to retail establishments that primarily provide an on-site service or where goods are consumed on-site, including food services (e.g. restaurants and bars), personal care services (e.g. hair salon), commercial recreational uses (e.g. fitness centres and movie theatres) and automotive services. Goods-based retailer refers to retail facilities that sell goods to be used or consumed at home, including food-oriented retail (supermarkets and convenience stores), beer, wine and liquor stores, pharmacies and personal care stores and G.A.F.O.

Burlington and surrounding commuter-shed represent the primary driver of net migration to the City of Burlington. In turn, net migration drives population growth within the City's working-age population and their dependents (i.e. children, spouses not in the labour force and other family members).

Between 2016 and 2041, the GTHA population and employment base is forecast to grow by approximately 2.9 million people and 1.3 jobs. Comparatively, the GTHA economy is growing, and projected to continue to grow, at a faster rate than remaining regions of the province. The GTHA also represents the fastest growing large metropolitan area in the great lakes / eastern U.S. region of North America.

This section identifies a number of key drivers which suggest that the City of Burlington is well positioned to accommodate a portion of the regional economic and population growth that is anticipated within the GTHA. It is also recognized that technological change and automation will continue to create economic opportunities and disruptions within an increasingly competitive regional labour market. While the City of Burlington has limited control over these evolving macro-economic trends, it does have control over local land use planning policy, programs and initiatives aimed at retaining/attracting investment, accommodating existing and new residents across all demographic groups and expanding its local labour force base.



6.0

City of Burlington Forecast Population and Housing Growth Scenarios, 2016 to 2041

6.1

Introduction

This Section provides an assessment of the population and housing growth potential for the City of Burlington to the year 2041. As previously discussed, a broad range of considerations related to demographics, economics, socio-economics and infrastructure are anticipated to drive future growth throughout the City over the long-term planning horizon. These factors will not only impact the rate and magnitude of growth but will also influence the form, density and location of residential development throughout the City.

A total of three 2041 population and housing forecasts have been prepared for the City of Burlington, including a Low Growth Scenario, Reference Growth Scenario and High Growth Scenario. A range of population and housing growth forecasts have been generated for each of these respective scenarios largely based on varying assumptions regarding annual demand for new housing construction and

corresponding annual net migration. Each of these growth scenarios is discussed in greater detail in section 6.4 within the context of current provincial, regional and local planning policy requirements, recent residential development trends and anticipated demographic and housing market growth drivers.

6.2 City of Burlington Population Growth Forecast, 2016 to 2041

6.2.1 Population Growth Forecast, 2016 to 2041 (Reference Scenario)

Figure 6-1 summarizes the City’s Revised Reference Growth Scenario in five-year increments over the 2016 to 2041 forecast period relative to historical population between 1991 and 2016. For comparative purposes, the 2011 Halton BPE population forecast for the City of Burlington is also provided. The Reference Growth Scenario forecasts that the City of Burlington will reach a population of approximately 214,300 by 2031.⁷⁰ By 2036, the City’s population is forecast to grow to 225,100 and ultimately 234,000 by 2041.⁷¹ Under the Reference Growth Scenario, the City’s annual population growth rate between 2016 and 2031 is forecast to average 0.9% annually and 0.9% during the 2031 to 2041 period. Relative to historical population growth levels achieved in the City of Burlington over the past 25, the Reference Growth Scenario represents a lower rate of annual population growth (i.e. 1.4% between 1991 and 2016 vs. 0.9% between 2016 and 2041).

Reflective of recent population growth trends, it is recognized that the City of Burlington will exceed the previous 2031 population forecasts established for the City under the June 2011, Halton Best Planning Estimates (B.P.E). In fact, as of 2019, the City’s population is estimated to have almost reached the 2031 population forecast for the City of Burlington as per the 2011 Halton BPE of 186,200.

In accordance with Provincial, Region and local planning policy direction, residential intensification will be a key focus of long-term housing development in Halton Region. It is recognized that resident regional market potential for residential intensification is strongest in south Halton Region. The City of Burlington has been particularly successful in completing a number of new high-density development projects within its Downtown Area. As previously mentioned, the City has a total of 10,300 new housing units (7,472 high-density units), which are currently in various stages of planning approval and, should they be approved, are anticipated to be completed well before 2031.

In accordance with Amendment # 1 to the 2006 Growth Plan (i.e. 2031B), an additional 40,000 persons have been allocated to Halton Region by 2031 (i.e. 2031B). This upwardly adjusted population forecast represents the Region’s 2031 population allocation as per Schedule 3 of the 2017 Growth Plan. Reflective of recent development trends and anticipated demand, the Reference Scenario assumes that just over 50% of the additional 40,000 persons allocated to Halton Region by 2031, as per the 2017

⁷⁰ Population forecast includes the net Census undercount, which is estimated at 3.0%.

⁷¹ Population figures exclude the net Census undercount which is estimated at approximately 3.0%.

Growth Plan, is accommodated in the City of Burlington. During the post-2031 period, the City’s population is forecast to steadily grow driven by significant residential and non-residential development potential which has been identified within the City’s primary and secondary intensification areas, particularly its three mobility hubs and Downtown Area.⁷²

Figure 6-1: City of Burlington, Historical and Forecast Population (Reference Growth Scenario), 1991 to 2041

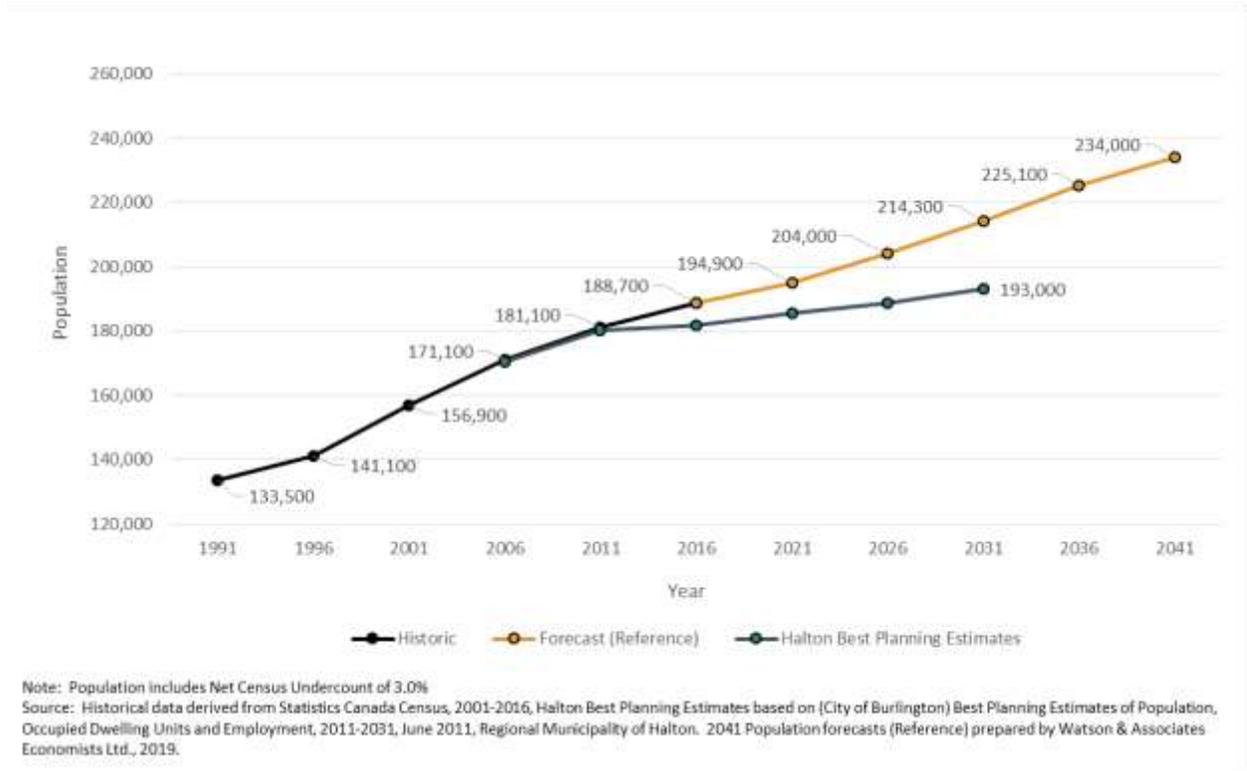
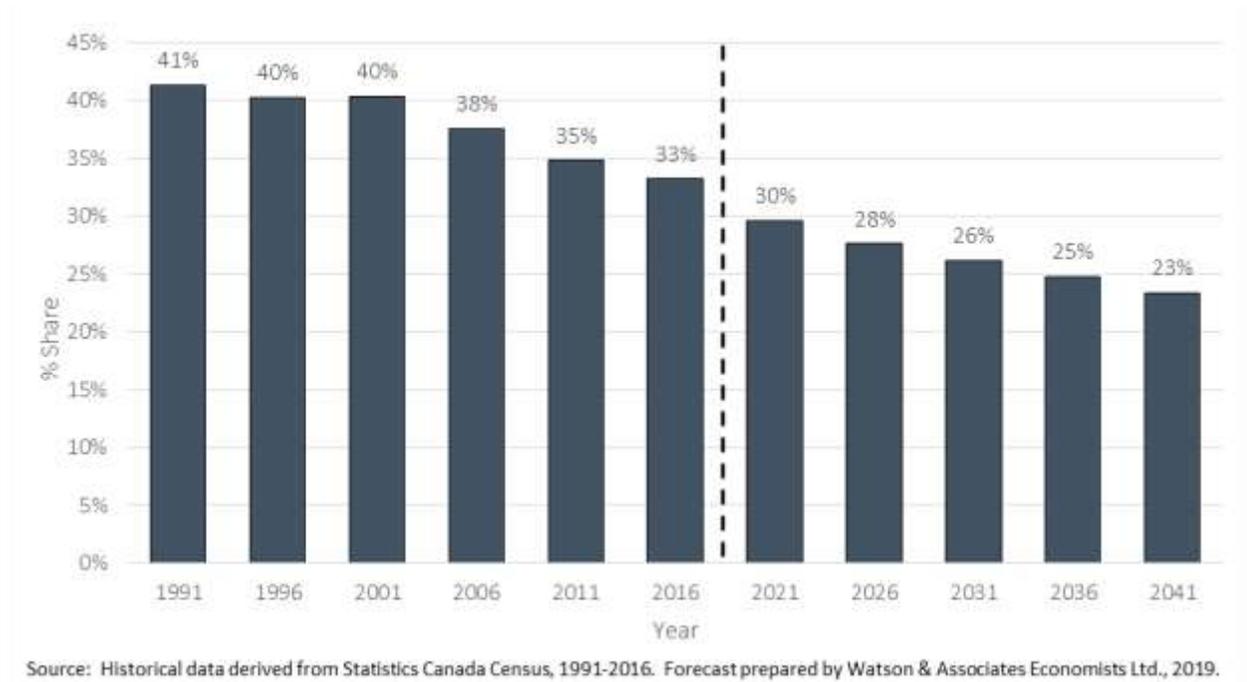


Figure 6-2 summarizes the forecast share of Regional population under the Reference Growth Scenario to the year 2041 in comparison to historical trends. Over the 2016 to 2041 forecast period, the City’s share of Regional population is forecast to decline from 33% to 23%. This future decline in Regional population growth share is anticipated as population growth in north Halton Region, largely driven by ground-oriented housing forms, continues to outpace south Halton Region.

⁷² City of Burlington Mobility Hub Market Analysis, Burlington Ontario. August, 2017. N. Barry Lyon Consultants Ltd.

Figure 6-2: City of Burlington, Historical and Forecast Population Share of Halton Region (Reference Growth Scenario), 1991 to 2041

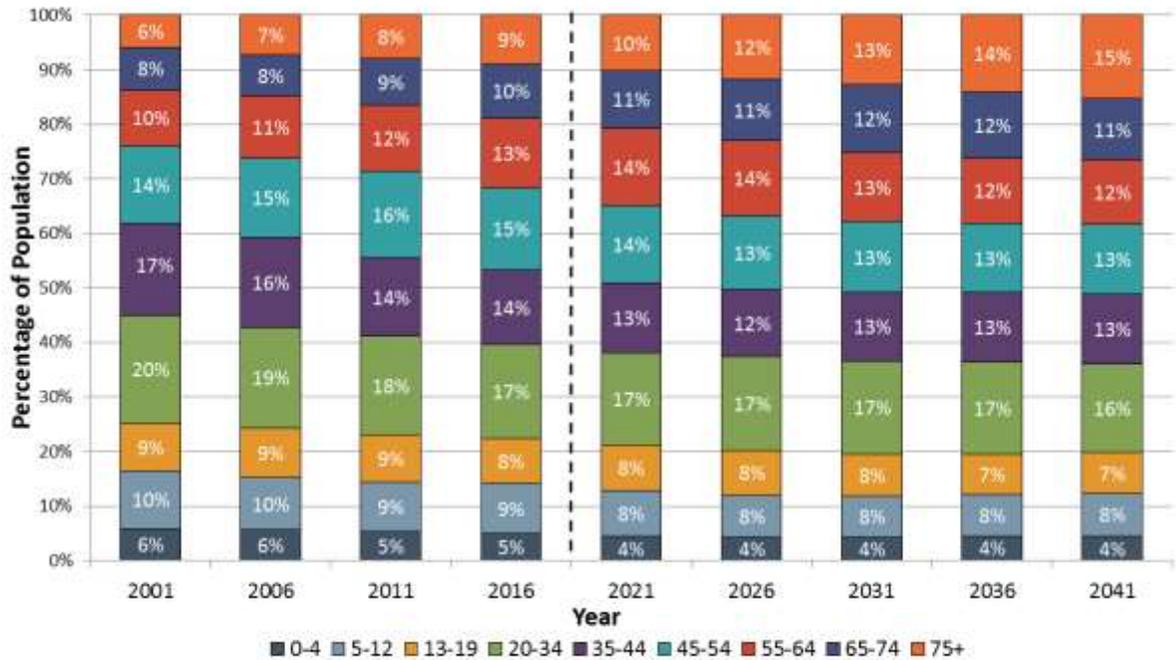


6.2.2 Forecast Population Growth by Age (Reference Scenario)

Figure 6-3 summarizes reference forecast population growth by major age group (cohort) over the 2016 to 2041 period for the City of Burlington (additional details are provided in Appendix B). Key observations are as follows:

- The percentage of population in the 0-19 age cohort (youth population) is forecast to steadily decline from 22% to 19%;
- Burlington’s young adult/adult population (20-54 years of age) is also forecast to steadily decline, from 46% of the population in 2016 to 42% in 2041:
- The 55-74 age group (empty-nesters/younger seniors) is forecast to remain steady at 23% from 2016 to 2041; and
- The percentage of the population in the 75+ age group (seniors) is forecast to rapidly increase from 12% in 2016 to 15% in 2041.

Figure 6-3: City of Burlington, Population Forecast by Major Age Group (Reference Growth Scenario), 2001 to 2041



Source: Data derived from a custom order Statistics Canada Demography Division (Catalogue no.91C005). 2001 to 2041 prepared by Watson & Associates Economists Ltd., 2019.
 Note: Population includes a net Census undercount estimated at approximately 3.0%.

6.3 Components of Population Growth

6.3.1 City of Burlington Net Migration and Natural Increase Forecast, 2016 to 2041

Due to the aging of the City’s existing population base, population growth from natural increase (births less deaths) is anticipated to continue to diminish and eventually turn negative by approximately 2026. As such, net migration will represent the primary driver of long-term population growth for the City of Burlington. It is important to note that this trend is consistent with most GTHA municipalities.

Over the next several decades, the City is anticipated to experience relatively strong net migration across all major age groups. As previously discussed, net migration in the City of Burlington is anticipated to be largely driven by the long-term economic growth prospects in the GTHA and local economy, local housing supply opportunities to accommodate a range of demographic groups (i.e. first-time homebuyers, families, empty-nesters and seniors), and the City’s attractiveness as a place to live.

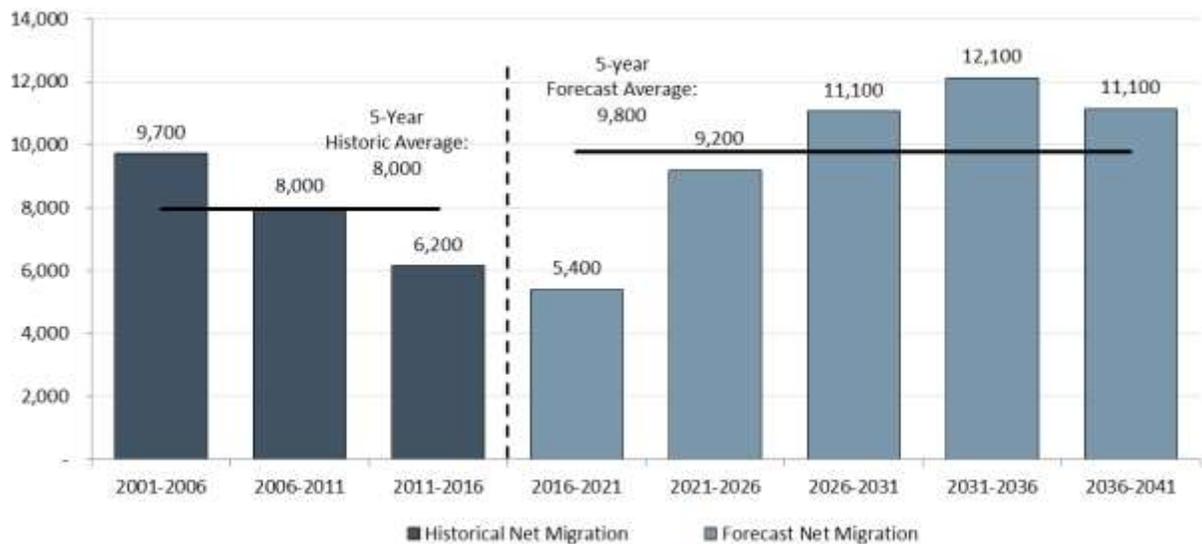
Figures 6-4 and Figure 6-5 summarizes population growth associated with forecast net migration and natural increase for the City of Burlington over the 2016 to 2041 forecast period relative to historical levels during the 2001 to 2016 period. In comparison to historical trends, average net migration over

the next 25 years is forecast to be moderately higher than historical levels experienced between 2001 and 2016. The City of Burlington is forecast to add approximately 1,955 net migrants annually (or an average of 9,780 every five years). In total, net migration is anticipated to comprise the majority of total population growth for the City of Burlington during the 2016 to 2041 period.

Forecast net migration levels during the 2016 to 2031 period represent the level of net migration required for the City to achieve its current 2031 population allocation of 193,000⁷³ as set out in the City of Burlington adopted 2018 Official Plan and Halton Region Official Plan., plus approximately 53% of the additional 40,000 population assigned to Halton Region as per 2006 Growth Plan Amendment No. 2. Achieving the forecast rate of net migration during the forecast period will require stronger local and regional economic growth (i.e. employment) relative to recent trends, as well as the timely approval of residential development plans across the City.

At present, the City’s remaining low-density housing supply is approaching built-out. Post-2021, the vast majority of the City’s remaining ground-oriented housing supply is anticipated to be exhausted. Accordingly, the City’s future development focus will increasingly need to shift from low and medium-density greenfield development to high-density housing across a range of low-rise, medium-rise and high-rise development forms.

Figure 6-4: City of Burlington, Net Migration Forecast (Reference Growth Scenario), 2002-2041



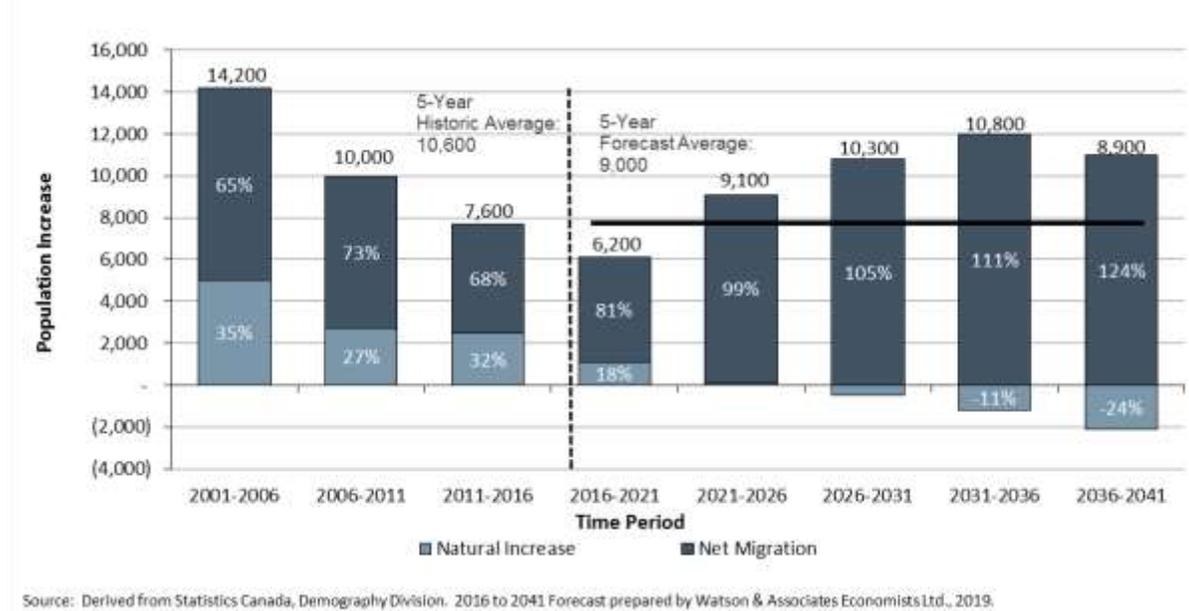
Source: Historical data from Statistics Canada, Demography Division. 2016 to 2041 Forecast prepared by Watson & Associates Economists Ltd., 2019.

⁷³ Population target includes the net Census undercount.

6.3.2 Forecast Trends in Natural Increase (Births Less Deaths), 2011 to 2041

As previously discussed, population associated with natural increase steadily diminished between 2001 and 2016 for the City of Burlington as a result of the City’s aging population combined with declining fertility rates. Over the forecast period, the population growth from natural increase is forecast to remain low due to the aging of the City’s population, but to rebound modestly from current levels. The implication of this trend is that the City will become increasingly dependent on net migration as a source of population growth.

Figure 6-5: City of Burlington, Historical and Forecast Net Migration and Natural Increase (Reference Growth Scenario), 2001 to 2041



6.3.3 Alternative Population Forecast Scenarios, 2011 to 2041

Figure 6-6 graphically summarizes two additional alternative long-term population growth forecasts for the City, including a Low Growth Scenario and High Growth Scenario. The Halton 2011 BPE forecast is also provided for context. A more detailed tabular summary of the three growth scenarios is provided in five-year increments from 2016 to 2041 in Figure 6-7.

Low Growth Scenario: The Low Growth Scenario projects that forecast housing construction levels during the 2016 to 2041 period will be considerably lower than what has recently been achieved over the past decade. This scenario assumes that future demand for high-density within the City of Burlington is relatively modest relative to the historical trends and anticipated regional market demand. Under the Low Growth Scenario, the City’s population is forecast to reach 208,100 by 2031 and 214,600 by 2041. This represents an annual population growth rate of 0.5% over the 2016 to 2041 forecast period.

High Growth Scenario: This scenario assumes that the City’s current share of Halton Region’s population remains relatively constant throughout the 2016 to 2041 forecast period at 35%. Based on this assumption, the City’s population would reach 220,500 by 2031 and 254,400 by 2041. Under the High Growth Scenario, the City’s population is forecast to increase at an annual growth rate of 1.2% between 2016 and 2041.

Each of these alternative growth scenarios has been evaluated in terms of macro-economic and regional demographic trends, percentage growth share to Halton Region and local growth assimilation. These factors are discussed further below.

- **Macro-Economic Growth Trends** – In accordance with the Growth Plan, the annual rate of population growth across G.G.H. is forecast to decline towards the 2041 planning horizon as a result of the aging of both the regional labour force and population. Similar to the G.G.H. as a whole, it is anticipated that incremental population growth rates within Halton Region and each of the area municipalities will slow over the long term rather than accelerate. Accordingly, the higher growth trajectory of the High Growth Scenario during the post-2031 period appears to be unlikely. In comparison, the trajectory of the Low and Reference Growth Scenario represents a significantly lower annual rate of population growth during the 2031 to 2041 period, relative to the 2016 to 2031 period. While this scenario is reflective of the constraints to future population growth associated with the City’s aging population, it does not strongly embrace the residential market potential and supply opportunities which have been identified within the City’s primary and secondary intensification areas.
- **Regional Growth Share** – As previously identified, the City of Burlington’s share of Halton Region population has steadily declined over the past 25 years from 41% in 1991 to 33% in 2016 and is anticipated to continue to decline to 23% of the Region’s population by 2041. Given the level of net migration required to achieve higher population growth, the higher Growth Scenario appears aggressive, in light of competition from neighbouring municipalities which offer a choice of housing supply opportunities across low and medium density types. Conversely, the Low Growth Scenario potentially understates the City’s population, similar to the previous forecast prepared for the City under the Halton BPE.
- **Growth Assimilation** – Section 6.4 summarizes the housing forecast associated with the Reference forecast. Under the Reference scenario, the City is forecast to average approximately 870 new housing units per year over the 2016 to 2041 period. In accordance with the short to medium-term housing opportunities identified within the development pipeline as well as long-term housing intensification opportunities identified within the City’s primary and secondary intensification areas, the Reference Growth Scenario reflects an achievable level of future housing development. Comparably, the City averaged approximately 940 new housing units per year between 2001 and 2016. As such, the Reference Growth Scenario represents a comparable

level of development activity that the City has been experienced in the past. In contrast, the High Growth Scenario would require an average of 1,130 new units per year, while the Low Growth Scenario would see the City’s annual housing activity fall to just over 600 units per year.

In accordance with the above, the Reference Growth Scenario is recommended as it most adequately recognizes the City’s long term population growth potential and role in accommodating new residential development within the Halton Region context.

Figure 6-6: City of Burlington, Population Forecast (Reference, Low and High Growth Scenarios), 1991 to 2041

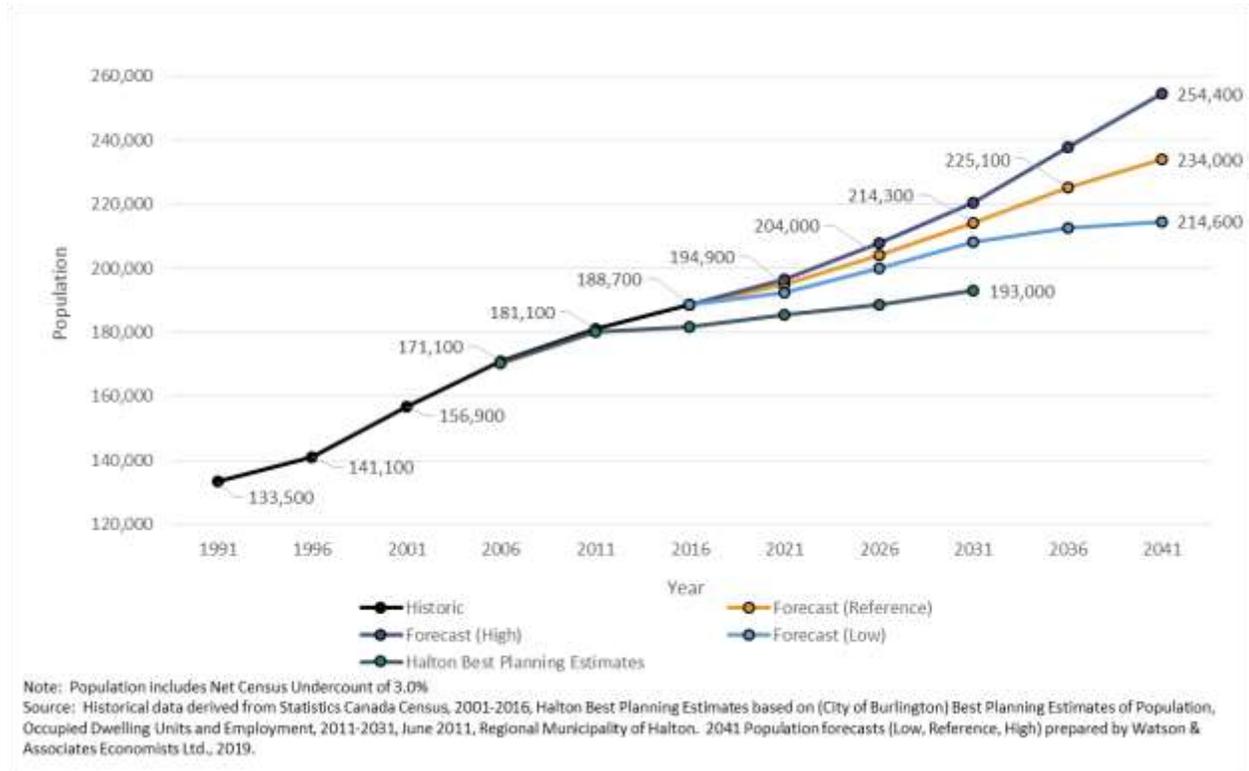


Figure 6-7: City of Burlington, Population Forecast Tables (Reference, Low and High Growth Scenarios), 2011 to 2041

City of Burlington Population Forecast Scenarios (Excluding Undercount)

Year	Halton BPE	Low Forecast	Reference Forecast	High Forecast
2011	173,800	175,800	175,800	175,800
2016	175,400	183,400	183,400	183,400
2021	178,800	186,700	189,200	190,700
2026	182,000	194,300	198,000	201,800
2031	186,200	202,000	208,000	214,100
2036	-	206,300	218,500	230,800
2041	-	208,300	227,200	247,000

City of Burlington Population Forecast Scenarios (Including Undercount)

Year	Halton BPE	Low Forecast	Reference Forecast	High Forecast
2011	180,100	181,100	181,100	181,100
2016	181,800	188,700	188,700	188,700
2021	185,400	192,300	194,900	196,400
2026	188,700	200,100	204,000	207,900
2031	193,000	208,100	214,300	220,500
2036	-	212,500	225,100	237,700
2041	-	214,600	234,000	254,400

Note: Population with undercount includes a 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.

6.4 City of Burlington Housing Forecast, 2016 to 2041

6.4.1 Forecast Persons Per Unit (P.P.U)

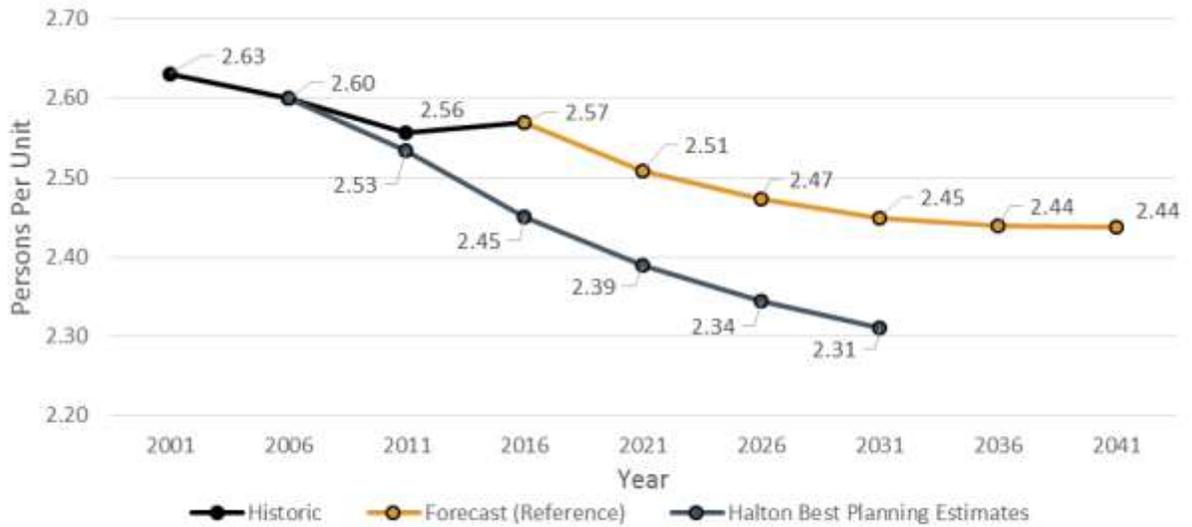
Figure 6-8 summarizes the PPU forecast for the City of Burlington from 2016 to 2041 based on a headship rate analysis. A headship rate is defined as the number of primary household maintainers or heads of households by major population age group. The headship forecast forms the basis for determining the demand for new households generated from population growth. Dividing total units over population generates the resulting long-term PPU for the City from 2016 to 2041.

For comparative purposes, the 2011 to 2031 PPU forecast for the City of Burlington generated through the 2011 Halton BPE is also provided. To provide historical context, actual PPU trends between 2001 and 2016 are also provided in accordance with the Statistics Canada Census. Over the forecast period, the City's average PPU is anticipated to steadily decline from 2.57 in 2016 to 2.44, largely as a result of the aging of the City's population.⁷⁴ The City's housing occupancy levels are anticipated to decline at a slower rate by 2031, in comparison to the 2011 Halton BPE forecast. As a result, City of Burlington will require fewer households over the 2011 to 2031 period than indicated in the 2011 Halton BPE to accommodate the 2031 population forecast of currently set out in the Halton Region 2018 Official Plan.

This is an important observation as it identifies that the relatively higher population levels achieved by the City relative to the 2011 Halton BPE have been largely driven by the recent rebound in the City's average PPU levels as opposed to an increase in recent housing development activity relative to the Halton Region 2011 BPE forecast.

⁷⁴ For comparative purposes with the 2011 Halton Region B.P.E., all PPU references in Figure 6-7 exclude the net Census population undercount.

Figure 6-8: City of Burlington, Historical and Forecast Average Persons Per Unit

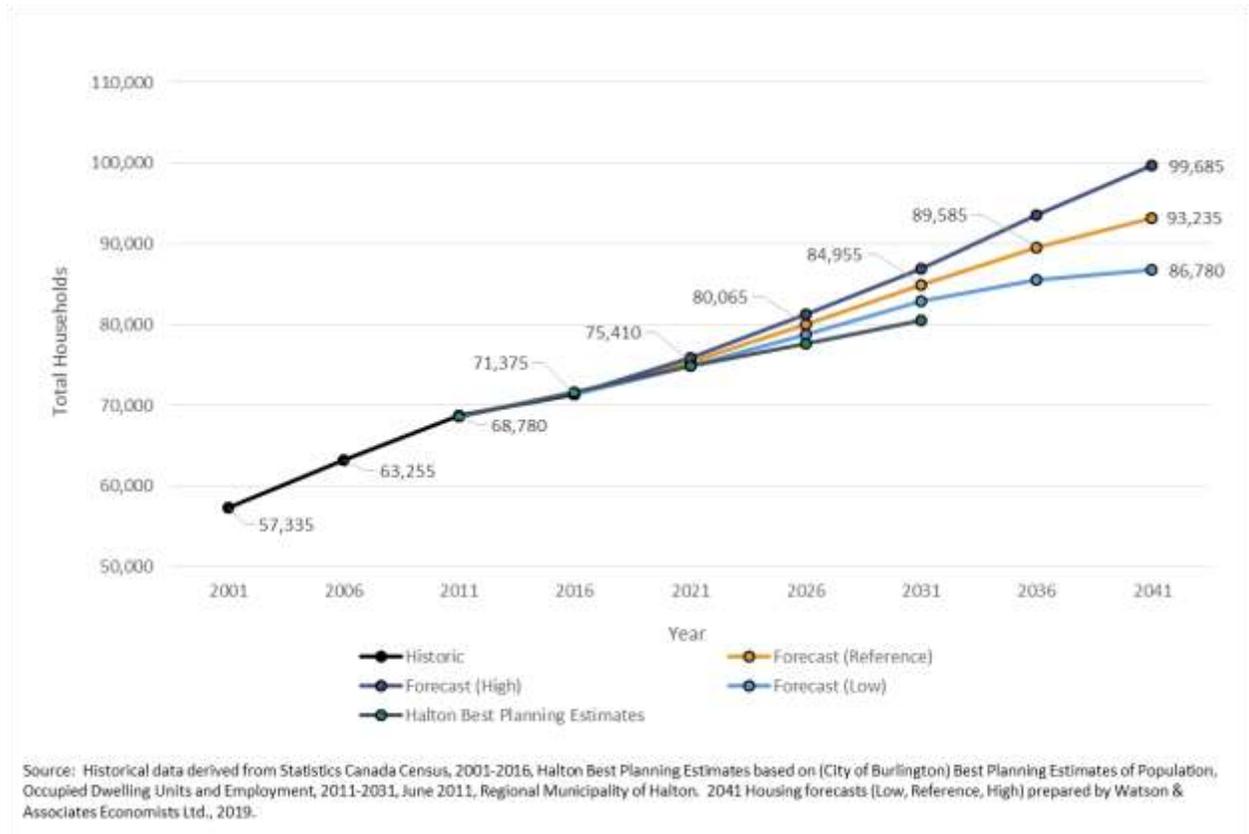


Source: Historical data derived from Statistics Canada Census, 2001-2016, Halton Best Planning Estimates based on (City of Burlington) Best Planning Estimates of Population, Occupied Dwelling Units and Employment, 2011-2031, June 2011, Regional Municipality of Halton. 2041 Persons Per Unit forecast (Reference)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

6.4.2 Housing Forecast Scenarios

In accordance with the population growth scenarios identified in Section 6.3, **Figure 6-9** summarizes three City-wide housing growth scenarios in five-year increments from 2016 to 2041. For comparative purposes, the 2011 Halton BPE housing forecast for the City of Burlington is also provided. By 2031 the City’s housing base is forecast to reach approximately 85,000 total occupied units. Comparatively, this represents 4,400 additional households than previously forecast by the 2011 Halton BPE. Under the Reference Growth Scenario, the rate of housing growth is forecast to remain relatively steady during the post-2031 period in accordance with forecast population growth trends during this time period. By 2036 and 2041, the City’s housing base is forecast to increase to approximately 89,600 and 93,200 respectively.

Figure 6-9: City of Burlington, Housing Forecast (Reference, Low and High Growth Scenarios), 2001 to 2041



6.4.3 Housing Forecast by Structure Type (Reference Scenario)

Figure 6-10 summarizes the City of Burlington’s total population and housing forecast by structure type from 2016 to 2041. As previously discussed, housing preferences by structure type (i.e. low, medium and high density) are anticipated to continue to steadily shift from ground-oriented to high-density housing forms over the next 25 years. This shift is anticipated to be driven by the aging of the population, declining housing affordability and diminishing ground-oriented housing supply. Over the 2016 to 2031 period, anticipated housing demand is comprised of 21% ground-oriented and 79% high-density household, respectively. Post-2031, approximately 93% of forecast housing demand in the City of Burlington is anticipated to be derived from high-density housing forms.

Figure 6-10: City of Burlington, Residential Growth Forecast Summary, 2016 to 2041

Year	Population (Including Census undercount) ¹	Population (Excluding Census Undercount)	Housing Units					Persons Per Unit (P.P.U.) with undercount	Person Per Unit (P.P.U.): without undercount	
			Singles & Semi-Detached	Multiple Dwellings ²	Apartments ³	Other	Total Households			
Historical	Mid-2006	171,100	164,400	36,680	12,430	14,065	80	63,255	2.705	2.599
	Mid-2011	181,100	175,800	39,185	13,710	15,820	65	68,780	2.633	2.556
	Mid-2016	188,700	183,400	39,925	14,030	17,240	180	71,375	2.644	2.570
Forecast	Mid-2021	194,900	189,200	40,610	14,710	19,910	180	75,410	2.585	2.509
	Mid-2026	204,000	198,000	41,060	15,160	23,660	180	80,060	2.548	2.473
	Mid-2031	214,300	208,000	41,355	15,395	28,025	180	84,955	2.523	2.448
	Mid-2036	225,100	218,500	41,430	15,630	32,345	180	89,585	2.513	2.439
	Mid-2041	234,000	227,200	41,505	15,865	35,685	180	93,235	2.510	2.437
Incremental Growth										
Incremental Growth	Mid-2006 to Mid-2011	10,000	24,964	2,505	1,280	1,755	-15	5,525		
	Mid-2011 to Mid-2016	7,600	7,600	740	320	1,420	115	2,595		
	Mid-2016 to Mid-2021	6,200	5,800	685	680	2,670	0	4,035		
	Mid-2016 to Mid-2031	25,600	24,600	1,430	1,365	10,785	0	13,580		
	Mid-2016 to Mid-2041	45,300	43,800	1,580	1,835	18,445	0	21,860		
Incremental Unit Mix Growth										
Incremental Unit Mix Growth	Mid-2006 to Mid-2011			45%	23%	32%	0%	100%		
	Mid-2011 to Mid-2016			29%	12%	55%	4%	100%		
	Mid-2016 to Mid-2021			17%	17%	66%	0%	100%		
	Mid-2016 to Mid-2031			11%	10%	79%	0%	100%		
	Mid-2016 to Mid-2041			7%	8%	84%	0%	100%		

Source: Watson & Associates Economists Ltd., 2019.

¹ Census undercount estimated at approximately 3.0% for 2016 and forecast period 2016 to 2041. Note: Population including the undercount has been rounded.

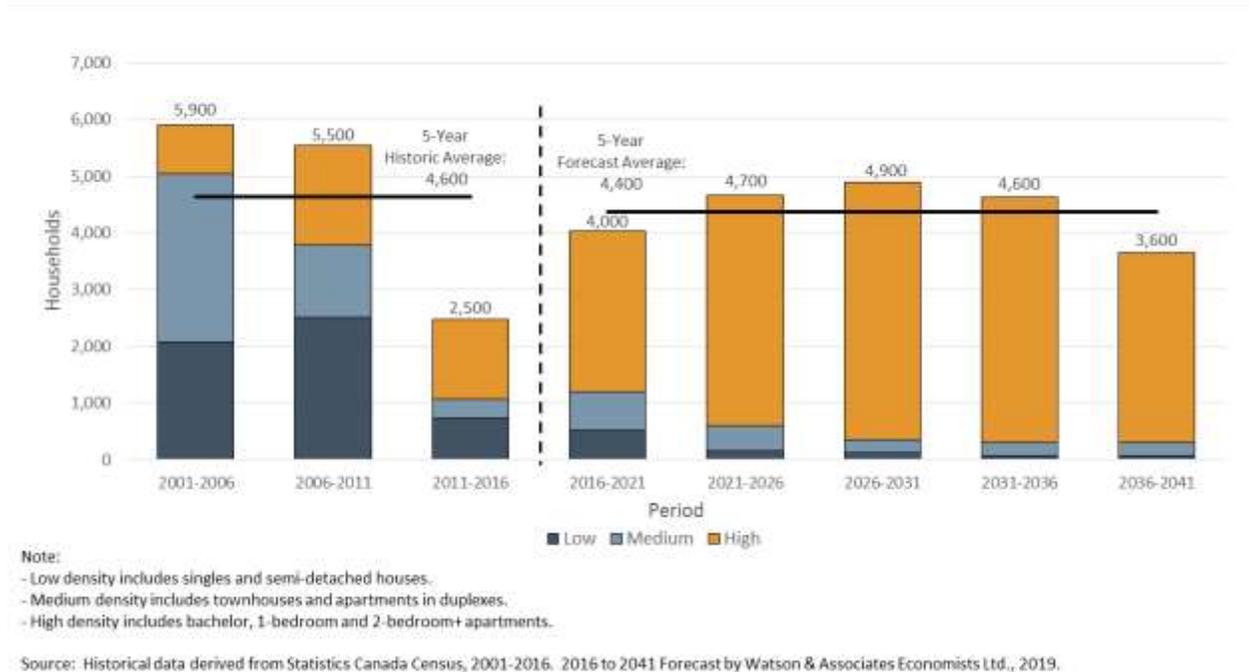
² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

Figure 6-11 conceptually summarizes the annual level of housing anticipated for the City of Burlington from 2016 to 2041 relative to historical residential building permit activity between 2001 and 2016.⁷⁵ As previously discussed, recent housing growth has steadily shifted away from ground-oriented housing forms, with high-density housing comprising 57% of total housing growth between 2011 and 2016. Over the next 25 years, it is anticipated that housing development within the City will be increasingly focused on high-density forms as the City’s remaining greenfield lands are developed. As previously addressed this shift in housing will also be driven by declining housing affordability and the aging of the City’s population base.

⁷⁵ Historical building permit activity provided by the City of Burlington. Year 2015 building permit data has been estimated based on January to June, 2015 actuals.

Figure 6-11: City of Burlington, Annual Housing Forecast



6.5 Allocation of Population and Housing Forecast by Planning Policy Area

As illustrated in **Figure 6-12**, the majority of the 2016 housing stock and population in the City of Burlington is located in the BUA. The BUA is anticipated to accommodate the majority of planned population and housing growth. In summary, the BUA is forecast to accommodate approximately 18,500, or 85%, of all new residential units from 2016 to 2041, including 93% of all high-density forms and 39% of ground-oriented forms. This housing forecast reflects 2015 to 2018 building permit activity plus the housing supply identified within the BUA as summarized in Figure 2-1 herein. Development in the greenfield area, including the rural area is forecast to accommodate approximately 15% of new housing units between 2016 and 2041, including the majority of ground-oriented forms, specifically single and semi-detached households.

Figure 6-12: City of Burlington, Population and Housing Growth by Density and Geographic Area

Geographic Area	Population	Housing Units				P.P.U.
		Low ¹	Medium ²	High ³	Total	
2016 Total						
Built Boundary	169,827	35,468	13,283	16,590	65,340	2.60
Greenfield and Rural	19,004	4,553	803	680	6,035	3.15
Total	188,832	40,020	14,085	17,270	71,375	2.65
2016-2041 Growth						
Built Boundary	36,300	285	1,030	17,195	18,510	1.96
Greenfield and Rural	8,800	1,290	805	1,250	3,345	2.63
Total	45,100	1,575	1,835	18,445	21,855	2.06
2041 Total						
Built Boundary	206,200	35,755	14,310	33,785	83,850	2.46
Greenfield and Rural	27,800	5,845	1,610	1,930	9,385	2.96
Total	234,000	41,600	15,920	35,715	93,235	2.51

¹ Includes singles and semi-detached houses.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Notes: Population includes Net Census Undercount of 3%. Numbers may not add to totals due to rounding.

Source: Derived from 2016 Statistics Canada Census data, building permit and development supply data from the City of Burlington by Watson & Associates Economists Ltd., 2019.

6.6 Phasing Considerations for Residential Growth

Based on the existing and emerging planning policy framework at the Province, Region and City, the active development applications, as well as the market analysis, existing conditions and characterization of the demand, the following identifies the potential priority short, medium and long term areas for residential growth within the City of Burlington. As these lands are in private ownership, there is limited ability to control the phasing of development. Municipal infrastructure capacity is a main component that impacts the phasing of growth. This will be reviewed by the Region as part of the Municipal Comprehensive Review, and has not been considered in this analysis. The following section is intended to highlight some phasing considerations regarding the alignment of the demand with the full build out potential of the city.

6.6.1 Short Term (0-10 years)

- Downtown Burlington Urban Growth Centre:** Downtown Burlington UGC has been identified as a priority for growth by the Province, Region and City. It has also been a focus of development activity in recent years. The City's adopted 2018 Official Plan designates several sites as Downtown Tall Buildings Precinct, Downtown Mid-Rise Residential Precinct, Downtown Core Precinct, The Cannery Precinct and Upper Brant Precinct, which permit new development within a range of maximum heights. The Downtown is expected to be able to accommodate around 14,500 people and 6,000 jobs, based on a build out density of 200 people and jobs per hectare. Although some aspects of the adopted 2018 Official Plan's density and height policies are

currently under review, the expectation is that the Downtown will continue to play a significant role in accommodating future residential and employment development opportunities.

- Burlington GO Mobility Hub:** The Burlington GO Mobility Hub has been identified as a priority area by the Province, Region and City and has direct connection to the Downtown, the QEW and GO Rail. Sites south of the rail corridor and along Fairview Street are currently designated Regional Commercial, Mixed Use Corridor – General and Mixed Use Corridor – Commercial Corridor (2017 In-effect Burlington Official Plan), and are not within the City’s nor the Region’s Employment Lands. Many of these sites have been identified as Burlington GO Central and Fairview/Brant Frequent Transit Corridor in the draft Burlington GO Mobility Hub Precinct Plan. These areas are intended to be developed in the short term to transit oriented densities to support the regional transit infrastructure. The Burlington Mobility Hub is expected to be able to accommodate approximately 10,200 to 20,400 people and 4,400 to 8,700 jobs at build out (based on 150 people and jobs/ha density target from the Growth Plan or the 300 people and jobs per hectare target from the adopted 2018 Official Plan).
- Aldershot GO Mobility Hub:** The Aldershot GO Mobility Hub has been identified by the City as a priority area, has direct access to Highway 403 and the GO Rail and has been a focus of recent development activity. There are a few sites along Plains Road and Waterdown Road that are designated Mixed Use Corridor – General and Mixed Use Corridor – Commercial Corridor in the 2017 Burlington Official Plan and Urban Corridor in the adopted 2018 Official Plan, and these are not within the City nor Region’s Employment Lands. These sites have been identified as Aldershot Main Street, Emery/Cooke Commons and Aldershot GO Central in the draft Aldershot GO Mobility Hub Precinct Plan. These areas are intended to be developed in the short term to transit oriented densities to support the regional transit infrastructure. Aldershot GO Mobility Hub is expected to be able to accommodate approximately 12,100 to 24,300 people and 5,200 to 10,400 jobs at build out (based on 150 people and jobs/ha density target from the Growth Plan or the 300 people and jobs per hectare target from the adopted 2018 Official Plan).

Other areas that are likely to see development over the short term include the Non-Employment Designated Greenfield Areas.

6.6.2 Medium Term (10-20 years)

- Uptown Urban Centre Primary Growth Area:** Uptown has been identified by the City as a primary area and is along the Appleby frequent transit corridor. The policies of the adopted 2018 Official Plan designate several sites as Uptown Core and Uptown Corridor, which both permit mixed use growth in higher density built forms. However, these lands are largely occupied by land extensive retail uses currently. In the medium term, there will be opportunities for these sites to be redeveloped with higher density build forms. The Uptown Urban Centre is expected to be able to accommodate approximately 2,400 people and 1,000 jobs at build out (based on a density target of 80 people and jobs per hectare).

- **Secondary Growth Areas along Plains Road and Fairview Street:** The lands to the north and south of Plains Road and Fairway Street are close to the Mobility Hubs/GO Rail corridor and the QEW and located along an existing frequent transit corridor. These lands are largely occupied by ground oriented residential and commercial uses and designated Urban Corridor and Mixed Use Commercial Centre in the adopted 2018 Official Plan. A few of these sites have been the subject of development applications in recent years. In the future, many of these sites may be redeveloped or new buildings added through infill to intensify the corridor with densities that will be supported by the transit service investment.
- **Secondary Growth Areas along Appleby Line:** The lands to the east and west of Appleby Line north of Uptown have direct access from Highway 407 and are along an existing frequent transit corridor. They are designated Mixed Use Commercial Centre in the adopted 2018 Official Plan, which permits a range of uses in mid-rise built form. These lands are largely occupied by ground oriented retail uses and may be redeveloped with new buildings added through infill to intensify the area with densities that support the transit investment.

6.6.3 Long Term (>20 years)

- **Appleby GO Mobility Hub:** The Appleby Mobility Hub area is identified as a priority for growth by the City. It is largely designated General Employment, Business Corridor and Urban Corridor – Employment in the adopted 2018 Official Plan and the land north of the rail corridor is within the Region of Halton’s Employment Lands. The draft Appleby GO Mobility Hub Precinct Plan identifies the lands north of the rail corridor as Urban Employment and General Employment, while the lands south of the rail corridor are identified as Appleby GO Central, Fairview Frequent Transit Corridor and Mid-Rise Residential providing for some medium and tall mixed use development opportunities. The lands are currently mostly occupied by industrial uses and redevelopment to accommodate residential uses is expected to be in the long term. The Appleby GO Mobility Hub is expected to be able to accommodate approximately 5,200 to 10,500 people and 20,900 to 41,800 jobs at build out (based on 150 people and jobs/ha density target from the Growth Plan or the 300 people and jobs per hectare target from the adopted 2018 Official Plan).
- **Secondary Growth Areas within neighbourhoods:** Those Secondary Growth Areas that are not along Fairview Street, Plains Road and Appleby Line are largely clustered at major intersections at the edge of residential neighbourhoods. These lands are largely designated Neighbourhood Centre in the adopted 2018 Official Plan, which permits a range of uses in low-rise built form. These areas are largely occupied with ground oriented commercial uses and may transition to higher density built forms in the long term.

Other areas that are likely to develop in the long term include the redevelopment of the sites identified as Residential High Density Infill Opportunities.

6.7 Summary

The recommended population scenario for the City of Burlington envisions the City reaching a population of 234,000 people by 2041 (Reference Scenario). The Reference Scenario represents an increase over the share of population growth previously assumed through the last Regional Official Plan review exercise; however, it is also important to note that there has been a considerable amount of change since the last Regional MCR (adopted 2018 City Official Plan, market shifts, etc.). The Reference Scenario presented in this Section takes into account the wide range of emerging demographic and socio-economic trends, as well as the availability of land. The population forecast aligns well with the City's planned urban structure, as the expectation is that the majority of future population growth will occur within the Primary and Secondary Growth Areas.



7.0

City of Burlington Employment Growth Scenarios, 2016 to 2041

7.1

Introduction

Building on the results of supply and demand analysis provided in Sections 2 through 7 of this report, a long-range employment forecast for the City of Burlington has been provided by major employment sector. Details have also been generated regarding the location and nature of employment growth by Employment Area and Community Area at the City-wide level. Lastly, a commentary has been provided with respect to key industry sub-sectors which are anticipated to drive market demand for non-residential development over the 2016 to 2041 planning horizon.

7.2 City of Burlington Employment Growth Forecast, 2016 to 2041

7.2.1 City of Burlington Total Employment Growth Scenarios, 2016 to 2041 (Reference Scenario)

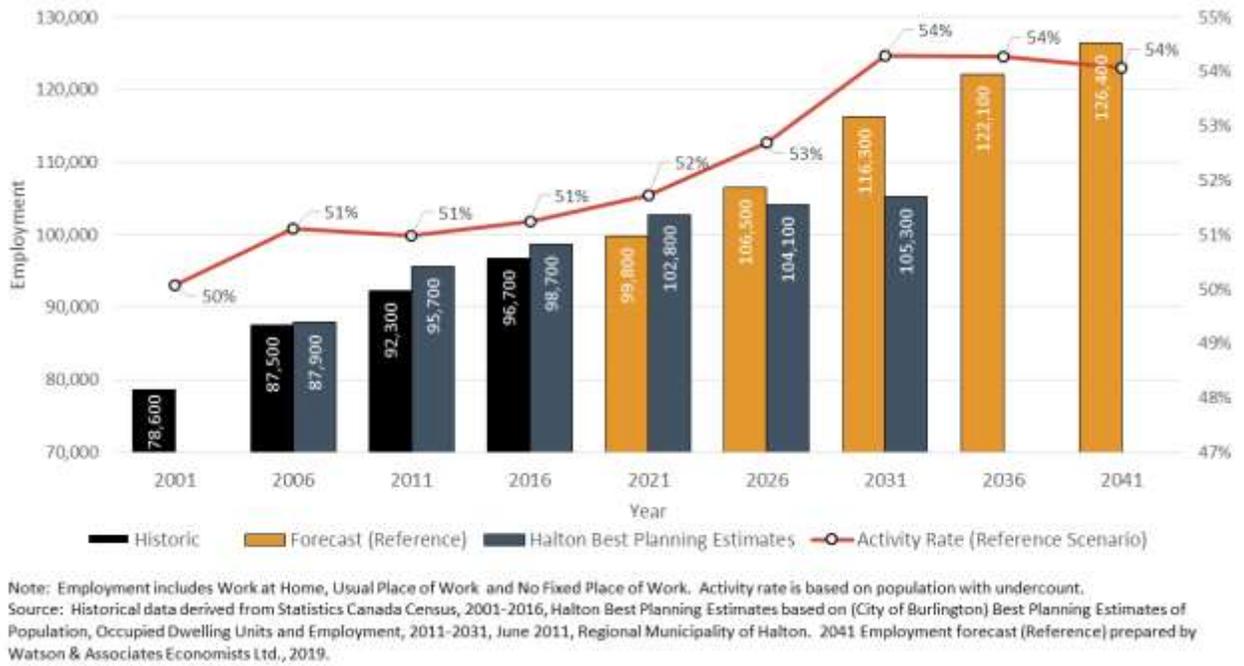
Figure 7-1 summarizes the long-term employment forecast for the City of Burlington by total employment and employment activity rate⁷⁶ in comparison to recent historical trends. Key observations are provided below:

- By 2041, the City's employment base is forecast to reach approximately 126,400. This represents an increase of approximately 29,700 jobs from 2016 to 2041 (approx. 1,190 jobs annually), or an annual employment growth rate of 1.1%. Relative to historical employment trends, this represents a moderate increase in the rate of employment growth across the City.
- The City is currently relatively well balanced between population and employment. Since 2001, the City of Burlington's employment activity rate (ratio of local employees to population) has increased moderately from 50% to 51%. By 2031, the City's employment activity rate is forecast to increase to 54%, driven by continued growth in the local export-based economy and steady employment growth in population serving sectors. During the post-2031 period, the City's employment activity rate is forecast to stabilize largely due to the aging of the population and labour force base.

While the City of Burlington has achieved a strong rate of employment growth over the past 15 years, its share of employment to the Region of Halton has declined, similar to that of its population base. This is primarily due to relatively higher employment growth rates which have been achieved in north Halton Region over the past 15 years, particularly the Town of Milton. Between 2001 and 2016 the City's share of total employment relative to Halton Region has declined from 41% to 37%. Under the reference scenario, the City's share of total employment relative to Halton Region is anticipated to further decline to 27% by 2041.

⁷⁶ Ratio of jobs to population.

Figure 7-1: City of Burlington, Historical and Forecast Employment (Reference Growth Scenarios), 2001 to 2041



7.3 City of Burlington Total Employment Growth Scenarios, 2016 to 2041

Similar to the population growth analysis, two additional long-term employment growth scenarios have been developed for the City of Burlington employment forecast including a Low Scenario and High Scenario.

Low Scenario

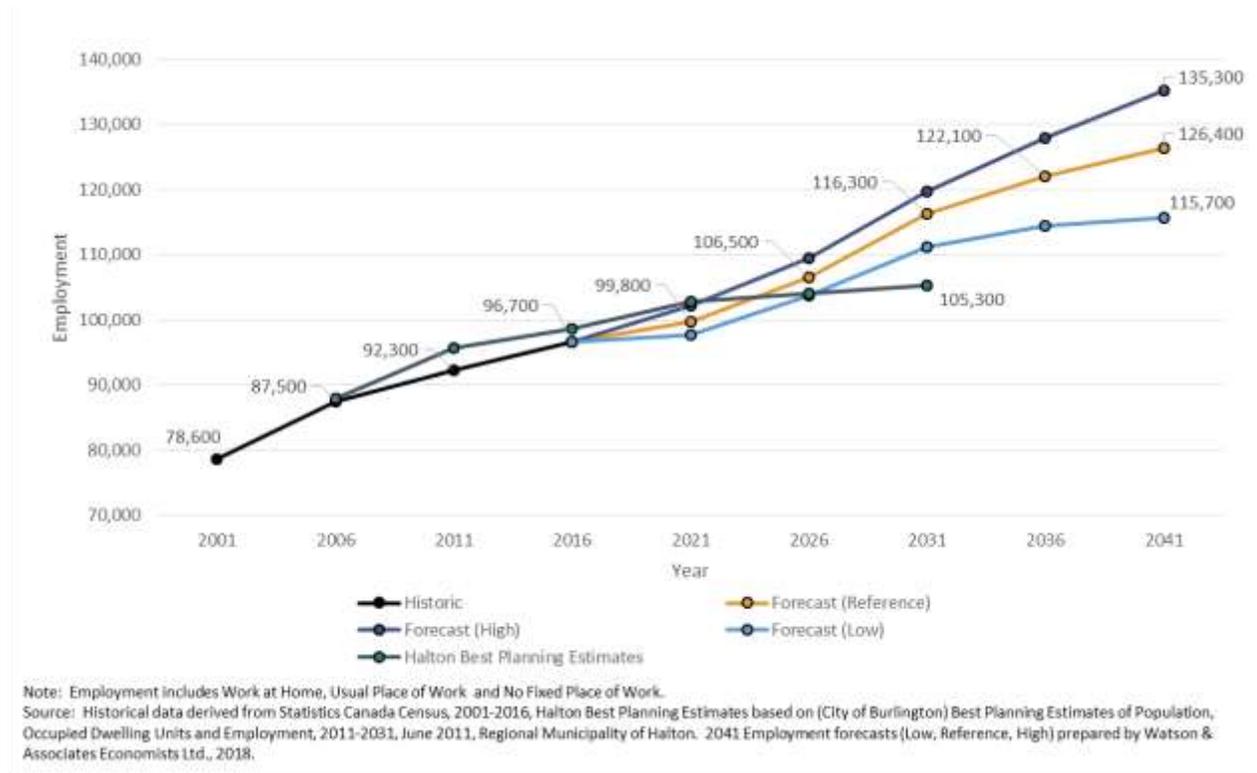
The Low Employment Growth Scenario assumes that the City will grow at an average annual growth rate of 0.7% per year and add 760 jobs annually.

High Scenario

Under the High Scenario, the City’s employment base is forecast to grow at an average annual rate of 1.4% per year or 1,540 jobs annually. This represents an average annual growth rate which is comparable to what the City has achieved over the past 15-years (2001 to 2016 period).

Figure 7-2 graphically summarizes the two alternative scenarios for the City, as well as the Reference Scenario and 2011 Halton Region B.P.E employment forecast to 2031. In accordance with forecast employment growth potential across the GTHA to the year 2041 as well as our review of the local non-residential real estate market conditions and potential long-term population growth, the Reference Scenario is recommended as the preferred long-range employment forecast for the City of Burlington. Section 7.4 provides a more detailed discussion of growth opportunities by employment sub-sector.

Figure 7-2: City of Burlington, Employment Forecast (Reference, Low and High Scenarios), 2001 to 2041



7.4 City of Burlington Employment Growth by Sector, 2016 to 2041 (Reference Forecast)

The following observations are provided with respect to employment growth within the City of Burlington by sub-sector.

7.4.1 Planning for Employment in Industrial Sectors

7.4.1.1 Manufacturing

As previously mentioned, the manufacturing sector remains vitally important to the provincial and regional economies with respect to job growth and economic output. While growth in traditional manufacturing sectors has declined in recent years, there is still demand for these activities throughout the broader Ontario economy. Canada and the United States have experienced some reshoring⁷⁷ of manufacturing employment over the past couple of years due to rising shipping and labour costs in China and advanced manufacturing processes requiring skilled labour.⁷⁸ This trend, however, has been

⁷⁷ Reshoring is reintroducing domestic manufacturing to a country. It is the reverse process of offshoring.

⁷⁸ The Economist, A growing number of American companies are moving their manufacturing back to the United States, January 19, 2013.

more pronounced in the United States with lower energy costs and access to a larger consumer market.⁷⁹

Looking forward, there will continue to be a manufacturing focus in Ontario and the City of Burlington; however, industrial processes have become more specialized, capital/technology intensive and automated. This means that as the regional manufacturing sector continues to recover, economic output will gradually increase; but associated employment growth is likely to be modest.

Reflective of recent development trends and broader employment growth trends in Employment Areas within Halton Region and GTHA, the City's Employment Areas are anticipated to be particularly attractive over the long-term towards small to mid-size manufacturing developments (i.e. 1 to 5 ha) in the form of multi-tenant industrial space. Provided that serviced employment land supply opportunities are available, larger industrial development (greater than 5 ha) is also anticipated across the City's Employment Areas within the manufacturing sector.

7.4.1.2 Goods Movement (Transportation, Warehousing and Logistics)

The Goods Movement sector (i.e. transportation/warehousing and wholesale trade) is an integral part of the southern Ontario and regional economy. The Goods Movement sector represents approximately 11% of the current employment base in the City of Burlington. Employment lands within the City of Burlington offer strong access and connectivity via the Queen Elizabeth Highway (Q.E.W) to facilitate trade and the regional movement of goods. As previously noted, the City's western GTHA location offers good access within Canada's largest employment market as well as proximity to the U.S. market.

The Goods Movement sector is accommodated in a range of industrial building typologies reflecting the diverse sub-sectors that comprise the sector. This includes distribution centres, warehouses, fulfillment centres, delivery depots, logistics hubs, corporate office buildings of major logistics companies, trucking terminals, multi-tenant warehouses and terminals, cold storage buildings and transportation yards.

Increased outsourcing of manufacturing production to emerging global markets continues to drive the need for new consolidated, land-extensive warehousing facilities to store and manage the distribution of goods produced locally as well as goods imported from abroad. Demand in the Goods Movement sector is anticipated to continue across the City of Burlington, particularly in locations with available employment lands with strong connectivity to regional transportation infrastructure.

Several factors have been changing the nature of the Goods Movement industry over recent years, including just-in-time manufacturing, e-commerce and globalization. It is expected that the industry will continue to evolve and, in the near-term, the following trends are expected in Canada:

⁷⁹ KPMG, KPMG's Canadian Manufacturing Outlook Report, 2014.

- Just-in-time manufacturing will continue to be the industry norm, placing increasing emphasis on more frequent and smaller deliveries by truck transport;
- Automation of distribution centres allows for more vertical storage; however, the need for numerous loading bays will dictate land requirements and the industry trend is for more and more bays at facilities;
- Larger facilities are a continuing trend versus smaller properties; typically, the larger the property the lower the average employment density. However, it is noted that rising industrial land values and diminishing land supply will likely limit the City’s market potential for large-scale logistics facilities, which have more recently been experienced in north Halton Region.
- Increasing growth in e-commerce is anticipated to have a significant impact on employment growth and land demand related to the logistics sector. E-commerce sales in Canada have grown at a rate that is five times the pace of overall growth in retail trade. Online sales account for 6% of total Canadian retail spending. By comparison, U.S. online sales account for 9% of total spending.⁸⁰ Delivery expectations within this sector are increasing on an annual basis. As delivery times decrease, it is anticipated that demand for regional fulfilment centres will increase; and
- Reverse logistics – approximately 25-30% of online merchandise is returned, which is generating increasing need for dedicated return centres.

7.4.1.3 Construction

The City has a relatively high concentration of employees in the construction sector. Over the forecast period, a portion of industrial employment growth is anticipated to be generated from construction employment, driven by both residential and non-residential development activity within the City and the surrounding area. This includes employment associated with construction of buildings, heavy and civil engineering construction and speciality trade contractors.

A large component of the construction sector is associated with employees that have no fixed place of work (N.F.P.O.W.). Construction sub-sectors involved in large-scale construction projects typically require land to store equipment and machinery in proximity to major roads and highways. As such, employment densities within this sector tend to be low. More specialized construction firms may require offices and facilities. Employment in this sector includes a wide-range of job types, including laborers, trades persons and engineers.

7.4.2 Planning for the Knowledge-Based Economy

7.4.2.1 Office Sector

Looking forward over the next several decades, employment growth within the City’s Employment Areas and Commercial Areas will ultimately be driven by demand from a broad range of export-based and

⁸⁰ Purolator Logistics. Adapting your Canadian Supply Chain for E-commerce Efficiency. 2015.

knowledge-based employment sectors. Reflective of employment growth trends in the broader regional economy, the City of Burlington is anticipated to be particularly attractive, over the long term, to knowledge-intensive and creative forms of economic activity such as professional, technical and scientific services, information and cultural services, and real estate and insurance as well as arts, entertainment and recreation. Many of these sectors are typically accommodated in standalone low-rise office, flex office and multi-tenant commercial/industrial space.

Major office buildings in the City of Burlington are forecast to accommodate approximately 2,700 employees over the 2016 to 2041 period. This represents approximately 9% of the City’s total employment growth over the 25-year forecast period.

7.4.3 Population-Related Employment

7.4.3.1 Retail Sector

The retail sector represents approximately 22% of the City’s 2016 employment base. As previously mentioned, the City of Burlington has been very active with both local and regional tenants opening new retail locations or expanding existing operations. Strong forecast population growth is anticipated to drive demand for additional retail, accommodation and food services largely within the City’s community areas as well as in the form of employment supportive uses throughout the City’s established and planned employment areas.

7.4.3.2 Institutional Sector

Employment in the institutional sector comprises a large share (17%) of the City’s employment base. It is anticipated that the City’s share of institutional employment will remain relatively steady to total employment over the next 25 years, driven by the City’s growing population base. The City has large and rapidly growing employment clusters within both the health care and education sector. Looking forward, the City is expected to experience an increase in seniors’ health facilities/services, including retirement homes and assisted living facilities due to its growing population base in the 65+ category, which is anticipated to drive increased demand for a number of occupations in the health sector.

7.4.4 Work at Home and No Fixed Place of Work Employment

Employment growth within the work at home category will be facilitated by opportunities related to telecommuting and increased technology. Demographics also play a role in the employment outlook for work at home employment. As the City’s population and labour force continues to age, it is likely that an increased number of working and semi-retired residents will be seeking lifestyles which will allow them to work from home on a full-time or part-time basis.

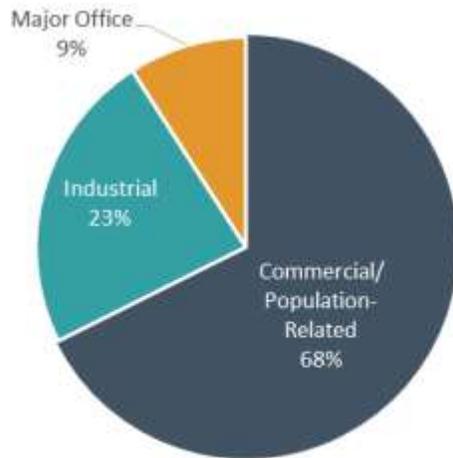
N.F.P.O.W. employment is forecast to steadily increase within the City over the long term, largely driven by steady employment growth in the construction, goods movement and knowledge-based sectors.

Over the forecast period, N.F.P.O.W. employment is expected to expand by approximately 2,800 jobs, 9% of the total employment growth.

7.5 City of Burlington Employment Growth by Land Use Category, 2016 to 2041 (Reference Forecast)

In accordance with the sub-sector employment trends analysis provided in Section 7.4, the following provides a summary of the City’s long-range employment forecast by land use category. **Figure 7-3** summarizes the City of Burlington employment forecast by land use category, employment land employment, commercial/population-related employment and major office employment. The commercial/population-related sector represents the largest share of growth in Burlington comprising just over two-thirds of the total forecast employment growth from 2016 to 2041. The industrial sector represents just under one quarter of total employment growth, and the major office category is anticipated to accommodate approximately 9% new jobs within the City.

Figure 7-3: City of Burlington, Employment Growth Share by Sector (Reference Scenario), 2016 to 2041



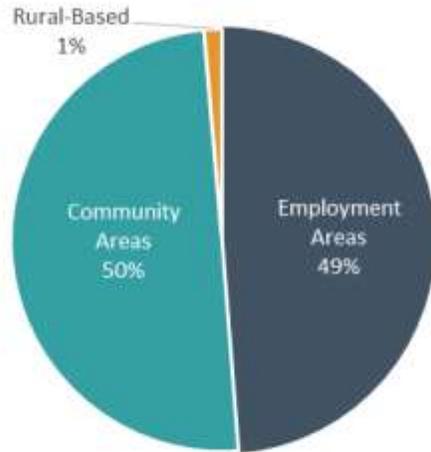
Source: Watson & Associates Economists Ltd., 2019.
 Note: No Fixed Place of Work and Work at Home Employment is included in the categories. The Commercial/Population-Related category includes mixed-use/office space in the Mobility Hubs.

Figure 7-4 illustrates the distribution of employment growth by geographic area. Employment Areas in the City of Burlington are forecast to accommodate approximately 14,480 employees over the 2016 to 2041 period.⁸¹ This represents approximately 49% of the City’s total employment growth over that period. It is assumed that 91% of City-wide industrial employment growth will occur on employment

⁸¹ Including major office employment located on employment lands. Excluding major office, employment lands are forecast to accommodate 13,130 employees, representing 44% of employment growth to 2041.

lands, while 36% of the City’s commercial/population-related and major office employment will be accommodated in Employment Areas.⁸² The City’s Community Areas⁸³ are forecast to accommodate the other 50% of new employment, while the remaining Rural Area is anticipated to accommodate limited employment growth.

Figure 7-4: City of Burlington, Employment Growth Distribution by Location (Reference Scenario), 2016 to 2041



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

Figure 7-5 summarizes the City’s employment forecast by broad geographic area by major sector from 2016 to 2041. **Figures 7-6** and **7-7** further summarize the share of forecast employment by major sector by Employment Area and Community Area within the City Burlington between 2016 and 2041. Key observations include:

- The vast majority of the City’s industrial employment growth will be accommodated in Employment Areas, however, a small portion of industrial employment growth related to N.F.P.O.W. has been identified within the City’s Community Areas;
- Burlington’s Employment Areas currently accommodate and will continue to attract about one third of forecast City-wide commercial/population-related employment growth; and
- As of 2016, approximately 92% of the City’s Major Office employment base is accommodated within the City’s Employment Areas. Over the next several decades, a greater share of the City’s Major Office employment is anticipated to be accommodated within the City’s Commercial Areas, including its Mobility Hubs and Downtown Area.

⁸² It is assumed that 50% all of the major office employment will occur on employment lands.

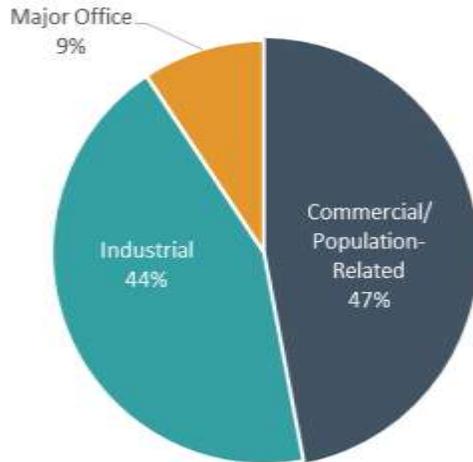
⁸³ Represents all urban employment growth outside of Employment Areas.

Figure 7-5: City of Burlington, Forecasted Employment Growth by Sector and Location (Reference Scenarios), 2016 to 2041

Employment Sector	City-Wide	Employment Areas	Community Areas	Rural-Based	Percentage of City Employment on Employment Lands
2016 Employment					
Primary	476	39	88	350	8%
Industrial	30,023	27,441	2,372	210	91%
Commercial/Population-Related	57,686	19,555	37,092	1,038	34%
Major Office	8,519	7,863	656	0	92%
Total Employment	96,703	54,898	40,207	1,598	57%
<i>Employment Areas Excluding Major Office</i>		47,035			49%
2016-2041 Employment Growth					
Primary	0	0	0	0	0%
Industrial	6,920	6,320	550	50	91%
Commercial/Population-Related	20,080	6,810	12,910	360	34%
Major Office	2,700	1,350	1,350	0	50%
Total Employment	29,700	14,480	14,810	410	49%
<i>Employment Areas Excluding Major Office</i>		13,130			44%
2041 Employment					
Primary	480	40	90	350	8%
Industrial	36,940	33,760	2,920	260	91%
Commercial/Population-Related	77,770	26,360	50,000	1,400	34%
Major Office	11,220	9,220	2,010	0	82%
Total Employment	126,410	69,380	55,020	2,010	55%
<i>Employment Areas Excluding Major Office</i>		60,160			48%

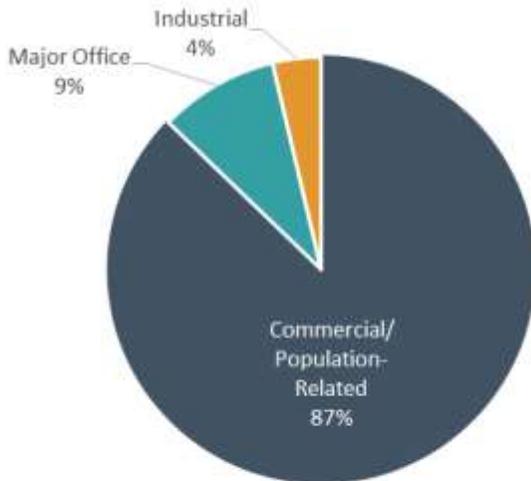
Source: 2016 Employment derived from 2016 Census data and 2016-2041 forecast by Watson & Associates Economists Ltd., 2019.
 Note: Work at Home and No Fixed Places of Work is included in the Primary, Industrial, Commercial/Population-Related and Major Office categories. Numbers may not add to totals due to rounding.

Figure 7- 6: City of Burlington, Forecasted Employment Growth in Employment Areas by Sector, 2016 to 2041



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

Figure 7-7: City of Burlington, Forecasted Employment Growth in Community Areas by Sector, 2016 to 2041



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

7.6 Phasing Considerations for Employment Land Employment Growth

Based on the existing and emerging planning policy framework at the Province, Region and City and the active development applications, as well as the market analysis and characterization of the demand, the following identifies the priority short, medium and long term areas for employment growth within the City of Burlington. This represents the priority areas for the portion of employment growth that is intended to be accommodated on employment lands, and does not account for the significant portion of

employment growth that is anticipated to be accommodated through mixed use development in the Downtown, Uptown, Mobility Hubs or Secondary Growth Areas which is described in Section 6.6.

Short Term:

- **Vacant employment lands and lands subject to an active development application:** Those lands that are currently vacant represent a top priority for employment growth across the City. In addition, those lands that are subject to an active development application are likely to be developed in the short term. Most of these lands are designated General Employment and Business Corridor in the adopted 2018 Official Plan and some are within the Delineated Built Boundary while others are outside of it. Although not all sites are being actively marketed for development, this represents the land most likely to accommodate short term employment land employment growth. Since the development of any privately-owned lands requires an interested owner, all vacant employment lands may not necessarily be developed within the short term.

Medium and Long Term:

- **Intensification of existing occupied employment lands:** The lands within the City's Employment Growth Areas are intended to accommodate intensification as the city matures. Many of the occupied lands have portions of undeveloped or underutilized land. In the medium and long term as technology changes the way we work, and as land becomes less available, there will be opportunities to redevelop and accommodate infill developments within the occupied employment lands.

7.7 Summary

The recommended employment scenario for the City of Burlington envisions the City reaching an employment level of 126,400 by 2041. The growth in employment over the forecast period is expected to be fairly balanced, with approximately 49% of future growth being accommodated in Employment Areas and 51% being accommodated elsewhere in the City. The commercial/population-related sector is anticipated to represent the largest share of non-residential development in Burlington comprising just over two-thirds of the total forecast employment growth from 2016 to 2041. The industrial sector is anticipated to represent just under one quarter of total employment growth, and the major office category is forecast to accommodate approximately 9% new jobs within the City over the same period.

8.0 Conclusions

This report set out to answer several important questions surrounding the City's future growth prospects, namely:

- How much land supply is there to accommodate future long term (i.e. beyond 2041) population and employment growth in the City?
- What are some of the recent broader macro-economic and regional growth trends which will influence growth in Burlington?
- What do the City's recent economic, demographic and real estate market trends tell us about future growth potential?
- 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?
- Given the range of potential growth and the multiple opportunities for development, what are the phasing considerations for residential and employment growth?

The following provides some concluding commentary on each of the above-noted questions.

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

The City has a large supply of land to accommodate future growth. The residential land supply analysis shows that there is potential for the City of Burlington to accommodate an additional 58,321 to 85,863 people and 22,669 to 53,137 jobs 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. However, it is important to note that the available supply of land is only one of many factors that will shape the amount and pace of development in the City.

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

In recent years the Ontario economy has experienced steady economic growth partially driven by a gradual recovery in the manufacturing sector which has been fueled by a lower-valued Canadian dollar and gradual strengthening of the U.S. economy. Looking forward, provincial GDP growth is anticipated to ease from over 2% in 2018 to approximately 1.3% by 2020, largely as a result of a tightening labour

market, rising household debt and increased global economic uncertainty⁸⁴. Similar to national and provincial trends, the City of Burlington economy is transitioning from goods to services production. Looking forward, existing and emerging knowledge-based sectors such as professional, technical and scientific services, health care and social assistance, and educational services expected to represent the fastest growing employment sectors for the City. The employment base is also highly concentrated in the “creative class” economy. People engaged in arts and culture as artists, actors, performers, writers and designers are a large part of the City’s growing economic base. In addition to growing knowledge-based sector, the industrial sector which remains vitally important to the local and regional economy with respect to jobs and economic output. In terms of economic output, manufacturing represents the largest employment base of any industry despite job losses from 2006 to 2016. Other industrial related industries such as wholesale trade and construction also contribute a strong share to the employment base, with the latter expected to grow as development occurs in Burlington.

The suburban GTA office market has struggled over the past decade to compete with downtown Toronto. However, the City of Burlington office market is showing signs of strength returning to more balanced market conditions. The industrial real-estate market is very strong with sub 3% vacancy rates signifying high demand for new space in Burlington. The majority of employment growth over the last 15 years has largely been attributed to the commercial/population-related and institutional sectors and the City’s economic base is also highly oriented to home-based occupations making up 10% of total employment in 2016.

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

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).

⁸⁴ Royal Bank of Canada. Provincial Outlook. December 2018.

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 analysis explored within this report suggests that residential market conditions in South Halton and the City of Burlington are generally moving in the same direction as provincial, regional and local planning policy. This emphasizes the need to build housing supply attractive to families in more compact residential development forms and an increasing share of high-density housing. While this represents good planning policy, it is important to recognize that historical residential development has been largely driven by demand from ground-oriented housing forms. To facilitate this shift towards more compact high-density urban development, the City will need to consider the use of planning and/or financial tools as well as other policies to attract development which implements the City's and Region's long-term vision (e.g. Secondary Plans, Zoning By-laws, Development Charges, CIPs, etc.).

It is also important to recognize that the demographic and socio-economic characteristics within the City are not homogenous. Understanding trends in household occupancy, age structure and income at the sub-municipal level is particularly important for the City of Burlington. These trends have broad implications on the amount, type and density of future housing needs associated with population growth, as well as demands for public infrastructure, municipal services and schools.

This report identifies a number of key drivers which suggest that the City of Burlington is well positioned to accommodate a portion of the regional economic and population growth that is anticipated within the GTHA. It is also recognized that technological change and automation will continue to create economic opportunities and disruptions within an increasingly competitive regional labour market. While the City of Burlington has limited control over these evolving macro-economic trends, it does have control over local land use planning policy, programs and initiatives aimed at retaining/attracting investment, accommodating existing and new residents across all demographic groups and expanding its local labour force base.

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

There are a number of potential population growth scenarios for the City. On the lower end of the spectrum, the City could achieve a population of 214,600 by 2041 and the upper limits suggest the

potential to achieve a population of 254,400 by 2041. The recommended population scenario for the City of Burlington envisions the City reaching a population of 234,000 people by 2041 (Reference Scenario). The Reference Scenario represents an increase over the share of population growth previously contemplated for the City; however, it is also important to note that there has been a considerable amount of change since the last Regional MCR (adopted 2018 City Official Plan, market shifts, etc.). The Reference Scenario takes into account the wide range of emerging demographic and socio-economic trends, as well as the availability of land. The population forecast aligns well with the City's planned urban structure, as the expectation is that the majority of future population growth will occur within the Primary and Secondary Growth Areas.

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

From an employment growth perspective, the City's future employment by 2041 could range between 115,700 (low scenario) to 135,300 (high scenario). For the purposes of long range planning, the recommended employment scenario for the City of Burlington is 126,400 by 2041. The growth in employment over the forecast period is expected to be fairly balanced, with approximately 49% of future growth being accommodated in Employment Areas and 51% being accommodated elsewhere in the City. The commercial/population-related sector represents the largest share of non-residential development in Burlington comprising just over two-thirds of the total forecast employment growth from 2016 to 2041. The industrial sector is anticipated to represent just under one quarter of total employment growth, and the major office category is forecast to accommodate approximately 9% of new jobs within the City over the same period.

Given the range of potential growth and the multiple opportunities for development, what are the phasing considerations for residential and employment growth?

There are several potential priority short, medium and long term areas for residential growth within the City of Burlington. In the short term, the City should prioritize development opportunities in the Downtown Urban Growth Centre, the Burlington and Aldershot GO Mobility Hubs and the remaining designated greenfield areas (which constitute a very small portion of the City's overall supply). As these areas mature, the City should begin to see increased interest in other areas, including the Uptown Urban Centre and a number of higher profile Secondary Growth Areas (e.g. Fairview, Plains Road, Appleby Line). The Uptown Urban Centre and the higher profile Secondary Areas represent medium term priorities for the City. Over the longer term, the City can expect to see residential development interest in the Appleby GO Mobility Hub and the remaining Secondary Growth Areas (mainly those areas designated as Neighbourhood Centres in the City's adopted 2018 Official Plan). However, as these lands are in private ownership, there is limited ability to control the phasing of development.

From an employment growth perspective, population-related employment associated with the residential priorities is expected to occur in alignment with the general phasing outlined above. Over the short term, the focus of employment land employment growth is expected to occur on the City's

remaining vacant employment lands. Vacant employment lands represent a top priority for employment growth across the City. In addition, lands subject to an active non-residential development application are likely to be developed in the short term. Most of these lands are designated General Employment and Business Corridor in the adopted 2018 Official Plan and some are within the Delineated Built Boundary while others are outside of it. Although not all sites are being actively marketed for development, this represents the land most likely to accommodate short term employment land employment growth. Since the development of any privately-owned lands require an interested owner, all vacant employment lands may not necessarily be developed within the short term. Over the medium and longer term, as the vacant land supply shrinks, the expectation is that the focus of growth will transition to employment land infilling and intensification.

Appendix A

Official Plan Densities

Table A 1: Density Targets for Land Use Designations Within the Adopted New Official Plan (2018)

Land Use Designations	Policies on People and Jobs/ha	Policies on Units/ha	Policies on Floor Area Ratio	Policies on Building Heights
Downtown Urban Centre*	200 residents and jobs combined per hectare by 2031 (8.1.1(3.2b))	-		-
Uptown Urban Centre*				
Mixed Use Nodes and Intensification Corridors				
Mixed Use Commercial Centre				Min. 2 storeys – Max. 12 storeys (8.1.3(3.2d))
Neighbourhood Centre			2.5:1 (8.1.3(4.2d))	Min. 2 storeys – Max. 6 storeys; up to 11 storeys may be permitted through amendment (8.1.3(4.2e))
Local Centre			1.0:1 (8.1.3(5.2d))	Min. 2 storeys – Max. 4 storeys (8.1.3(5.2e))
Employment Commercial Centre				Min. 2 storeys (8.1.3(6.2c))
Urban Corridor			Max. 2.0:1 (8.1.3(7.2f))	Min. 2 storeys – Max. 6 storeys; Max 11 storeys through amendment (8.1.3(7.2g))
Urban Corridor – Employment Lands			Max. 2.0:1 (8.1.3(8.2g))	Min. 2 storeys (except for industrial) – Max. 6 storeys (8.1.3(8.2h)); Max. 11 storeys may be permitted through amendment (8.1.3(8.2i))
Residential Neighbourhood Areas				
Residential – Low Density		Max. 25 units/ha (8.3.3(1c)); Max 30 units/ ha in Alton and Orchard communities (8.3.3(2a,b))		

Land Use Designations	Policies on People and Jobs/ha	Policies on Units/ha	Policies on Floor Area Ratio	Policies on Building Heights
Residential – Medium Density		Min 26 units/ha – Max 75 units/ha (8.3.4(2b))		Max. 3 storeys for ground oriented dwellings, Max. 4 storeys for non-ground oriented dwellings (8.3.4(1c))
Residential – High Density		Min 76 units/ha – Max 185 units/ha (8.3.5(1b))		Max. 10 storeys in Alton community (8.3.5(2a))
Employment Lands				
General Employment				
Business Corridor	Min. 45 jobs/ha (8.2.4(2e))		Min. 0.25:1 (8.2.4(2c))	

*Specific density policies exist for many of the land use designations within the Downtown Urban Centre and Uptown Urban Centre, which have been included in **Table A-2** and **A-3** respectively.

Table A 2: Density Targets for the Downtown Urban Centre Land Use Designations - Adopted 2018 Official Plan

Downtown Urban Centre Land Use Designations	Policies on People and Jobs/ha	Policies on Units/ha	Policies on Building Heights
St. Lukes/Emerald Neighbourhood Precinct	-	Max. 25 units (8.1.1(3.5.1c))	Max. 2.5 storeys (8.1.1(3.5.1b))
Bates Precinct	-	-	Max. 3 storeys (8.1.1(3.6.1b)) For the Bates Precinct Special Planning Area, As approved by council (8.1.1(3.6.2b))
Brant Main Street Precinct	-	-	Max. 3 storeys adjacent to Brant Street; and Max. 11 storeys adjacent to John or Locust Streets (8.1.1(3.7.1c)) Brant Main Street Special Planning Area may be permitted up to 17 storeys (8.1.1(3.7.2b))
Downtown Mid-Rise Residential Precinct	-	-	Min. 5 storeys – Max. 11 storeys. (8.1.1(3.8.1c). Downtown Midrise Special Planning Area: Max. 6 storeys; with a podium max 2.5 storeys (8.1.1(3.8.2b)))
Downtown Tall Residential Precinct	-	-	Min. 12 storeys – Max. 21 storeys (8.1.1(3.9.1c))
Old Lakeshore Road Precinct	-	-	In the West Sector Min. 2 storeys – Max. 10 storeys (31.5m). Max. 15 storeys (47m) if conditions are met. (8.1.1(3.10.1c)) In the East Sector Min. 2 storeys – Max. 6 storeys (19.5m). Max 8 storeys (29m) if conditions are met. In the South Sector, no new development.
Downtown Core Precinct	-	-	Max 12 storeys; Max 17 storeys if conditions are met. (8.1.1(3.11.1c))

Downtown Urban Centre Land Use Designations	Policies on People and Jobs/ha	Policies on Units/ha	Policies on Building Heights
The Cannery Precinct	-	-	Max. 22 storeys (8.1.1(3.12.1c))
Upper Brant Precinct	-	-	Max 25 storeys except for the following where maximum height is limited to 1 storey per 4.5m of depth: <ul style="list-style-type: none"> • Max. 11 storeys within Sector One • Max. 7 storeys within Sector Two • Max. 17 Storeys within Sector Three

Table A 3: Density Targets for the Uptown Urban Centre Land Use Designations – Adopted 2018 Official Plan

Uptown Urban Centre Land Use Designations	Policies on Floor Area Ratio	Policies on Units/ha	Policies on Building Heights
Uptown Core	Max. 3.5:1 (8.1.1(4.4.2d))	-	Min. 2 storeys – Max. 20 storeys (8.1.1(4.4.2e))
Uptown Corridor	Max. 2.5:1 (8.1.1(4.5.2c))	-	Min. 2 storeys – Max. 11 storeys (8.1.1(4.5.2d))
Uptown Local Corridor	Max. 1.0:1 (8.1.1(4.6.2c))	-	Min. 2 storeys – Max. 4 storeys (8.1.1(4.6.2d))
Uptown Residential – Medium Density	-	-	-
Uptown Business Corridor – Employment Lands	Max. 2.0:1 (8.1.1(4.8.2f))	-	Min. 2 storeys – Max. 8 storeys (8.1.1(4.8.2f))
Uptown Business -Employment Lands	Max. 1.0:1 for industrial use; Max. 1.5:1 for office use. (8.1.1(4.9.2e))	-	Max. 4 storeys except for office us, Max. 6 storeys (8.1.1(4.9.2f))

Appendix B

Population Forecast By Age Cohort

Table B-1: City of Burlington, Population by Selected Age-Cohort, 2001 to 2041.

Population (Including Census undercount) ¹

Cohort	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-19	39,400	41,400	41,900	42,200	41,200	41,200	41,900	44,000	46,300
20-34	31,200	31,700	32,500	32,600	33,000	35,000	36,600	37,800	38,200
35-44	26,500	28,100	26,200	25,700	25,100	25,300	26,800	28,900	29,700
45-54	22,200	25,000	28,700	28,600	27,600	27,400	27,800	28,400	30,000
55-64	16,000	19,400	22,000	24,100	27,600	28,000	27,200	27,200	27,600
64-74	12,200	13,000	15,400	18,600	20,600	23,100	26,500	27,000	26,200
75+	9,300	12,400	14,500	16,900	19,800	23,900	27,400	31,900	36,000
Total	156,900	171,100	181,100	188,700	194,900	204,000	214,300	225,100	234,000

Percentage of Population

Cohort	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-19	25.1%	24.2%	23.1%	22.3%	21.1%	20.2%	19.6%	19.5%	19.8%
20-34	19.9%	18.6%	17.9%	17.3%	16.9%	17.2%	17.1%	16.8%	16.3%
35-44	16.9%	16.4%	14.5%	13.6%	12.9%	12.4%	12.5%	12.8%	12.7%
45-54	14.1%	14.6%	15.8%	15.1%	14.2%	13.4%	13.0%	12.6%	12.8%
55-64	10.2%	11.4%	12.1%	12.8%	14.2%	13.7%	12.7%	12.1%	11.8%
64-74	7.8%	7.6%	8.5%	9.9%	10.5%	11.3%	12.4%	12.0%	11.2%
75+	5.9%	7.3%	8.0%	8.9%	10.2%	11.7%	12.8%	14.2%	15.4%
Total	100.0%								

Source: Watson & Associates Economists Ltd., 2019.

¹ Net population undercount estimated at approximately 3.0%

Note: Figures may not add precisely due to rounding.