

CITY OF BURLINGTON

INTENSIFICATION STUDY:

**VISUALIZING DENSITY AND MARKET
ASSESSMENT OF INTENSIFICATION, A REPORT
FOR THE CITY'S STRATEGIC PLAN**

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TABLE OF CONTENTS

1.0	Introduction.....	1
1.1.	Background.....	1
1.2.	Study Purpose	2
1.3.	Organization	2
2.0	The Context for Intensification.....	3
2.1.	What is Intensification?.....	3
2.2.	Why is intensification Important?	4
2.3.	Policy Context.....	5
2.4.	Market Context for Intensification	10
3.0	Visualizing Intensification	21
3.1.	Approach	21
3.2.	Limitations.....	22
3.3.	Intensificaiton Visualizations	22
4.0	Recommendations.....	47

APPENDICES

Appendix A: City-Wide, Intensification Potential Assessment (prepared by City of Burlington)



1.0 INTRODUCTION

1.1. BACKGROUND

In 2012, the City of Burlington launched its OP Review process to bring the City's Official Plan into alignment with a variety of Provincial and Regional policies and plans. To date, the wide-ranging OP Review has examined a number of the City's main structural elements, including rural areas, employment areas, commercial areas, mobility hubs and several other discrete topics. In 2015, Council also launched its Strategic Plan project. The Strategic Planning process is expected to yield a new set of priorities for growing the City of Burlington. One of the key outcomes of the Strategic Planning process was the need to have a more robust and expansive discussion on intensification. While aspects of the Official Plan Review touched upon intensification, and there exists a policy framework for intensification in the current Official Plan, the City initiated the review of a high-level assessment of intensification opportunities and issues for Burlington. Dillon Consulting, along with Watson and Associates and Brook McIlroy, were retained to prepare a high level intensification study for the City of Burlington. The following report provides a summary of the key findings, recommendations and next steps for the Intensification Study.

1.2. STUDY PURPOSE

The purpose of this study is to address the following key questions:

- What is intensification?
- What could intensification look like in Burlington?
- What are some of the market drivers for intensification?
- How much intensification has occurred in Burlington in past?
- What is the city's current strategy?
- What are the opportunities for improving the strategy?

1.3. ORGANIZATION

The following report is organized into four main sections. The first section provides a brief introduction. The second section provides a discussion of market and policy drivers for intensification. The third section presents a series of visualizations, showing what intensification could look like in various settings throughout the City. The final section provides some recommendations and describes the next steps.

2.0 THE CONTEXT FOR INTENSIFICATION

2.1. WHAT IS INTENSIFICATION?

Ontario's Provincial Policy Statement (PPS) 2014 provides the vision for Ontario's land use planning system and includes direction to municipalities to plan for intensification. The PPS defines general intensification as “the development of a property, site or area at a higher density than currently exists through:

- a) Redevelopment, including the reuse of brownfield sites;
- b) The development of vacant and/or underutilized lots within previously developed areas;
- c) Infill development; or
- d) The expansion or conversion of existing buildings”.

The PPS further provides a more detailed definition for “residential intensification”, which specifically links intensification to a “net increase in residential units or accommodation and includes:

- a) Redevelopment, including the redevelopment of brownfield sites;
- b) The development of vacant or underutilized lots within previously developed areas;
- c) Infill development;
- d) The conversion or expansion of existing industrial, commercial and institutional buildings for residential use; and



- e) The conversion or expansion of existing residential buildings to create new residential units or accommodation, including accessory apartments, second units and rooming houses”.

Finally, the Growth Plan for the Greater Golden Horseshoe provides a geographic metric for understanding intensification and identifies the Built-Up Area as the limit for measuring intensification. All new development which occurs within the Built-Up Area is considered to be intensification.

In summary, any development which occurs within the Built-Up is considered intensification. However, for residential development to be considered as intensification, it must yield a net increase in residential units (i.e. the demolition and replacement of a bungalow with a two storey home would not be considered intensification, unless it included a secondary suite). Also, it is worth noting that the concept of intensification can be applied to both living areas, employment areas and mixed-use areas (which accommodate both living and working functions).

2.2. WHY IS INTENSIFICATION IMPORTANT?

Planning for intensification is of particular importance for the City of Burlington. The City’s supply of greenfield lands is shrinking and, given the limits of the current Provincial Greenbelt Plan, the expectation is that the City of Burlington’s long-term growth prospects will be dependent on the ability to successfully attract intensification investment. Notwithstanding the perceived benefits of growth, there are also a number of other elements which underpin the importance of planning for intensification, including:

- The need to protect rural, agricultural and natural environmental areas from urban expansion;
- The reduction in dependency on the automobile and provision of opportunities for cleaner, greener modes of transportation, such as walking, bicycling and transit; and,
- The desire to make the best use of existing and planned infrastructure, including the leveraging of major Provincial investments in transportation.

2.3. POLICY CONTEXT

2.3.1. Provincial Policy

Land use planning in Ontario is undertaken in a top-down, policy-led system whereby the Province provides direction to municipalities, who in turn are delegated various powers to implement Provincial policies. Within the context of intensification, there are two main Provincial planning documents which are of relevance: the PPS and the Growth Plan for the Greater Golden Horseshoe. The PPS provides a broad policy framework for intensification and includes policies directing municipalities to:

- Make sufficient land available through intensification including at least a 10-year supply of housing through intensification and greenfield lands;
- Maintain a three year supply of serviced residential units through intensification and greenfield lands;
- Provide land use plans which include opportunities for intensification;
- Consider the location of existing and/or planned major public facilities and infrastructure when planning for intensification;
- Establish appropriate development standards and avoid or mitigate potential risks to public health and safety;
- Establish appropriate development standards for intensification which minimize the cost of housing and facilitate compact built form;
- Establish and implement minimum intensification targets, along with supporting phasing policies for intensification;
- Plan for all forms of residential intensification, including secondary suites; and,
- Promote intensification on existing serviced lands.

To implement the PPS, the Province of Ontario adopted Places to Growth: Growth Plan for the Greater Golden Horseshoe (“the Growth Plan”), 2006. This set out a thirty year vision (to 2031) for how growth should occur in the Greater Golden Horseshoe (GGH). The Growth Plan provides a series of population and employment forecasts for upper and single tier municipalities. To plan for and accommodate the projected population and employment growth, the Growth Plan includes a number of policies as well as specific intensification and development density targets which municipalities in the GGH must implement through their respective official plans. This includes policies directing that a minimum of 40% of all annual new residential development in each municipality, including Halton Region, will be in the form of intensification within the built-up area.

The Growth Plan further directs that municipalities will develop and implement, through official plans and supporting documents, a strategy and policies to phase in and achieve intensification, including the 40% intensification target. The Growth Plan states that the strategy and policies will:

- Encourage intensification throughout the urban area;
- Identify intensification areas that will support the 40% intensification target;
- Recognize urban growth centres, intensification corridors and major transit station areas as areas that will accommodate intensification;
- Facilitate and promote intensification;
- Identify the appropriate type and scale of development in intensification areas;
- Include density targets for urban growth centres;
- Identify minimum density targets for other intensification areas with planned transit service levels;
- Implement transit-supportive land use guidelines established by the province.
- Plan for a range and mix of housing that takes into account affordable housing needs;
- Encourage the creation of secondary units in the urban area.

The Province of Ontario has released Amendment 2 to the Growth Plan which takes the planning horizon to 2041. Based on the growth forecasting to 2041, Halton Region has been directed by the Province to receive an additional 180,000 people, taking the population to 1,000,000 by 2041. The Region of Halton has begun its 2041 growth management planning process and the expectation is that the City of Burlington will be working with the Region of Halton over the next several years to finalize the 2031-2041 growth allocations.

2.3.2. Regional Policy

The Places to Grow Act (2005) requires upper and lower-tier municipalities to bring their official plans into conformity with the Growth Plan. To meet this requirement, Halton Region undertook the Sustainable Halton process. The Sustainable Halton process helped develop Halton's growth management strategy to 2031. The process also provided a comprehensive review of The Regional Plan (2006) for the purpose of meeting the statutory requirement under the Planning Act, and providing conformity with the Provincial Policy Statement (2005) and the Greenbelt Plan (2005). The Sustainable Halton process resulted in the Regional Official Plan Amendment No. 38 (ROPA 38).

ROPA 38 contains policies that require area municipalities to develop an intensification strategy. The Regional Plan provides targets for population, housing and employment for each municipality. Policy 55 of ROPA 38 directs Burlington to reach a population of 193,000 and

employment of 106,000 by 2031. Policy 55.1 directs a minimum of 8,300 new housing units to be added to Burlington's built-up area by 2031 and to reach a minimum density target of 45 people and jobs per hectare in the designated greenfield area. Table 2.1 summarizes the breakdown of housing growth allocated to the City.

Table 2.1: City of Burlington Growth Allocation, ROPA 38

Year	2012-2016	2017-2021	2022-2026	2027-2031	2012-2031
Greenfield	428	432	133	221	1214
Intensification	2525	2758	2669	2659	10611
Total	2953	3190	2802	2880	11825
	2012-2016	2017-2021	2022-2026	2027-2031	2012-2031
Greenfield	14.5%	13.5%	4.7%	7.7%	10.3%
Intensification	85.5%	86.5%	95.3%	92.3%	89.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

The Province's revised growth forecasts to 2041 require the Region to revisit the Regional Plan. The Region will need to revise policies to accommodate an additional 180,000 people. The Region's planning process to address 2041 growth will require collaboration and input from the City of Burlington.

2.3.3. City of Burlington Policy

In conjunction with the Sustainable Halton process and to meet the 2031 growth and intensification requirements of the Growth Plan, the City of Burlington prepared a Places to Grow Implementation Strategy (2007) and subsequently undertook an Intensification Study (2008). The results of the Intensification Study were used in the Sustainable Halton Process. The Intensification Study considered intensification potential for:

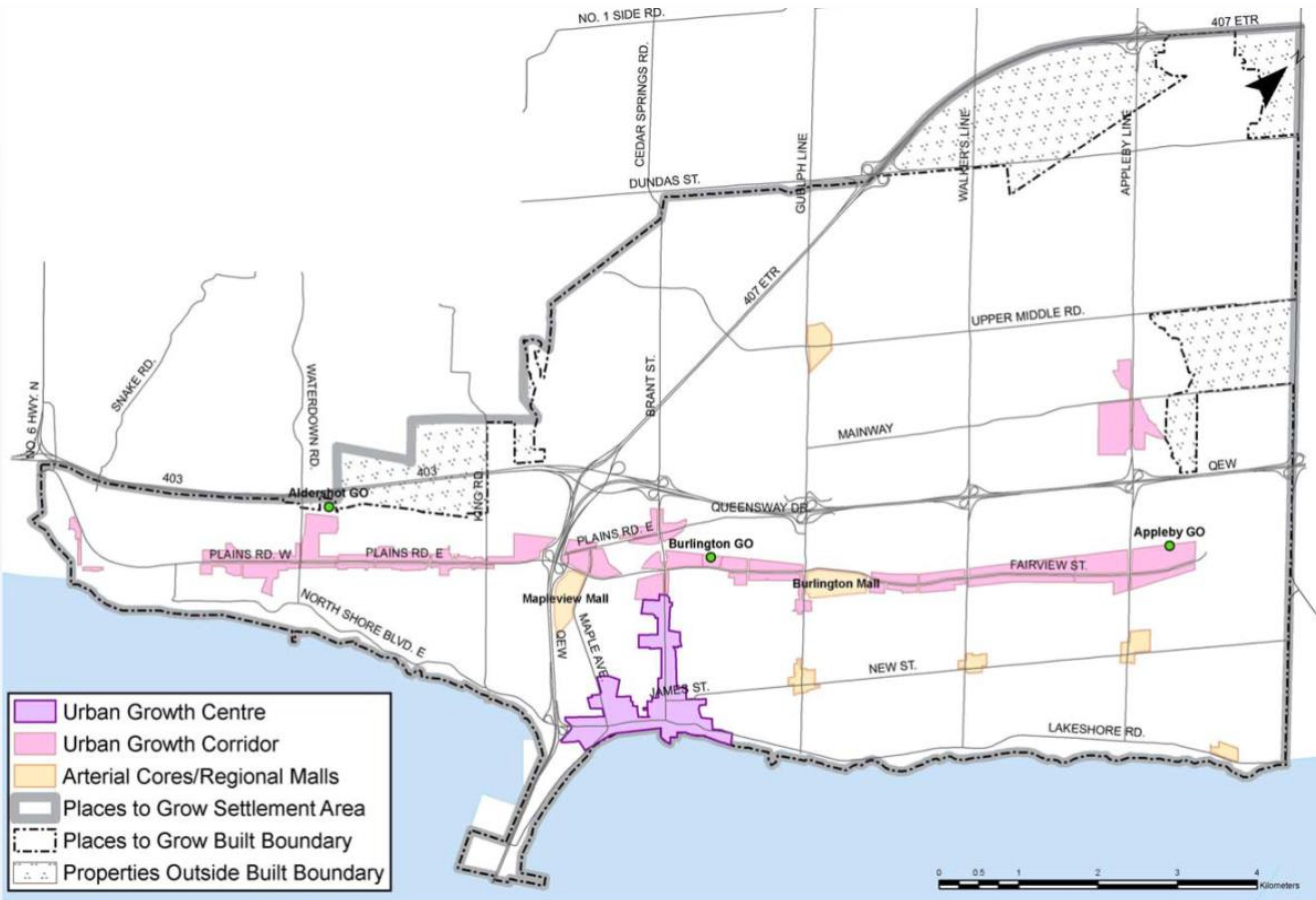
- The Downtown Urban Growth Centre;
- Urban Growth Corridors, which include lands fronting on Plains Road and Fairview Street as well as GO Station Areas;
- Arterial cores and regional malls;
- Low density infill in existing residential areas; and
- Accessory uses (which include new units within dwellings on lots 15 metres or wider).

The study involved an examination of the current urban structure in Burlington which included a review of land uses, lot sizes and densities. The results of the study indicate that approximately 9,700 residential units will be created through intensification between 2006 and 2031. These units will consist of various housing forms within the built-up area. The study also indicates that future employment intensification in Burlington between 2006 and 2031 will result in 4,000 additional jobs. Employment intensification will occur in the Urban Growth Centre (downtown) and Urban Growth Corridors (e.g., Fairview Street, Plains Road, GO Station areas). The findings of the study indicate that it is expected that the City of Burlington will exceed the province's 40% minimum residential intensification target required by the Growth Plan.

Figure 2-1 shows the City's the planned intensification areas based on the 2008 study (Report PL-1/08, City of Burlington).

Through this review, the City has undertaken high level population and employment capacity assessments for strategic intensification areas in the City. These assessments were developed based on the intensification visualizations and density scenarios contained in Section 3.0 of this report. The City's assessments are provided in Appendix A and are subject to further change and refinement through future phases of review regarding intensification.

FIGURE 2-1: 2008 INTENSIFICATION STUDY MAP



2.4. MARKET CONTEXT FOR INTENSIFICATION

The following section provides an overview of real estate market trends regarding residential and non-residential intensification within the City of Burlington. This market assessment is based on a review of recent residential and non-residential building permits and site plan activity within the City's built boundary, as well as a review of broader development trends within the Greater Toronto and Hamilton Area (G.T.H.A.). Consideration is also given to the broad drivers which are anticipated to influence the amount, type and location of intensification development within the City of Burlington over the next several decades.

2.4.1. Market Drivers of Intensification

There are a number of key factors which are anticipated to drive the real estate market for intensification within the City of Burlington. These include:

Diminishing Greenfield Land Supply

- Within the more mature urban areas of the G.T.H.A., including the City of Burlington, the supply of greenfield residential lands is steadily diminishing. As Burlington's remaining greenfield areas approach buildout, an increasing share of housing growth is anticipated to occur within the City's built boundary in the form of high-density development.

Access/Proximity to High-Order Transit

- Access and proximity to high-order transit (i.e., GO Transit) is an increasingly essential component of large-scale residential and non-residential intensification projects, particularly office, residential high-rise and mixed-use development. Across the G.T.H.A., the majority of the major suburban office nodes are, or will be, supported by direct access to GO Transit and/or high-order transit.

Infrastructure Condition/Capacity

- While small-scale infrastructure projects can benefit from existing hard municipal services, large-scale intensification projects require significant regional and local infrastructure investment related to water and sewer infrastructure, transportation, stormwater management, plus a full range of other local and regional services (libraries, parks and recreation, police, fire, etc.). Subject to other local physical attributes (e.g., compatibility with surrounding neighbourhoods), intensification areas within the City of Burlington which currently have infrastructure capacity to accommodate intensification should represent the City's priority development areas.

Development Costs and Financial Feasibility

- Residential and non-residential development location decisions are typically based on a range of both “hard” cost factors (e.g., tax rates, development charges, land costs, construction costs, utilities, etc.) and “soft” factors (e.g., transportation connectivity, access to a growing skilled and unskilled labour force pool, housing choice by type and affordability, access to public and private schools as well as training infrastructure). These factors can impact the feasibility of development forms (i.e., high-density vs. low-density) and the location of development in one area over another (i.e., greenfield vs. built-up area). Increasingly, the importance of the “soft” factors is raised as a key location determinant in residential and non-residential development decision-making.

Labour Force Access

- Access/proximity to a growing and diverse labour force pool is an increasingly critical aspect of business location decisions and is recognized as a key market driver for non-residential development in the retail, industrial and office sector.
- Population does not typically drive employment in export-based sectors (i.e., industrial and office). However, 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.

Location Attributes, Land Suitability and Housing Affordability

- The City of Burlington’s built-up area is particularly attractive to a broad range of demographic groups given the City’s waterfront location, relative affordability and cost competitiveness compared to other G.T.H.A. municipalities, access to amenities (i.e., shopping, dining, entertainment), proximity to employment markets, health care, etc.
- The physical and location attributes of the City’s intensification areas play a key role in the marketability and suitability of lands for intensification.
- To date, the majority of large-scale residential intensification projects within the City of Burlington have occurred along major arterial roads, or at the junction of two arterial roads. As previously discussed, access to GO Transit has also played a key role in influencing location decisions for residential and mixed-use intensification.
- In addition to transportation and transit access, other physical attributes such as proximity to existing or planned shopping/community amenities, proximity to

employment nodes and corridors, and compatibility or fit with neighbouring land uses also strongly influence the demand potential and marketability of intensification.

- For the industrial sector, development tends to be more influenced by broader market conditions (i.e., regional economic competitiveness, transportation access and distance to employment markets), as well as local site characteristics such as servicing, highway access and exposure, site size/configuration, physical conditions and site location.

Demographics

- Demographic trends strongly influence both housing need and form. Across Halton Region, the population is getting older on average due to the aging of the “babyboomers.” The first wave of this demographic group will turn 70 years of age as of 2016¹.
- Between 2001 and 2011, the percentage of persons 55+ years of age increased in the City of Burlington from 24% to 29%. Over the next 20 years, the 55+ population is anticipated to steadily increase in the City of Burlington driven by the aging of the existing population as well as in-migration in this age group.
- Population growth in the 55+ age group will continue to drive demand across a broad range of housing forms within the City’s built-up area, including town homes, apartments, condominiums, seniors’ housing, affordable/assisted housing, given the diversity of this age group with respect to age, income, health, mobility and lifestyle/life stage.
- The “millennial” population also represents a key age group which is anticipated to drive demand for future housing intensification in Burlington. Generally, this demographic group has a strong preference for urban living. As the millennial generation continues to age and form families, their demand for housing is anticipated to steadily increase within G.T.H.A. neighbourhoods which provide urban and civic infrastructure (i.e., multi-modal transportation systems, public open space and recreational opportunities, access to public and private schools), amenities (i.e., shopping, dining and entertainment) and connectivity to local and regional employment markets.

2.4.2. Historical Residential Building Permit Activity within the Built Boundary

Figures 2-2 and 2-3 summarize total residential building permit activity (new units only) with the City of Burlington and within the City’s built boundary between 2006 and 2015 (year-to-date). Between 2006 and 2014:

¹ Defined as population born between 1946 and 1964.

- Residential building permits averaged 782 housing units annually, net of demolitions;
- Annual development activity has declined with the diminishing supply of greenfield land;
- The majority of housing development has occurred within the built boundary, averaging just over 400 residential building permits annually;
- A broad mix of housing types have been accommodated within the built boundary; however, demand has been steadily shifting towards high-density housing forms; and
- Over the 2011-2015 period, the City has accommodated approximately 1,880 housing units within the built boundary, which is close to the amount forecast in the June 2011 Halton Region Best Planning Estimates (B.P.E.) over this period. In other words, the City is tracking well to its O.P. growth targets with respect to residential intensification.

FIGURE 2-2: CITY OF BURLINGTON, NEW RESIDENTIAL BUILDING PERMITS (NEW UNITS) BY LOCATION, 2006-YTD 2015

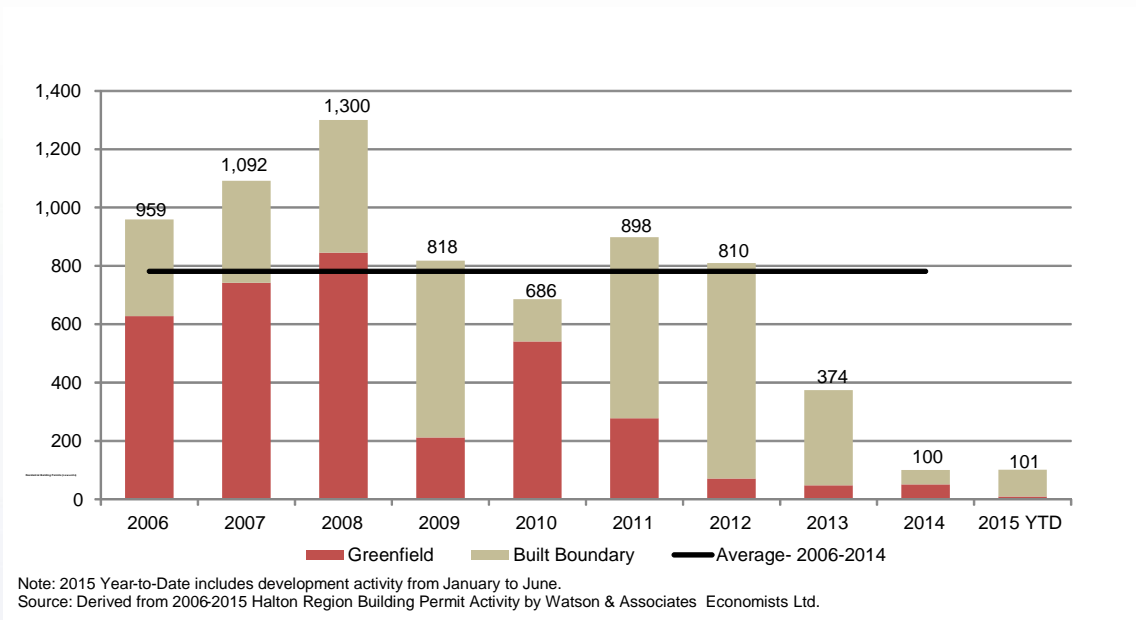


FIGURE 2-3: CITY OF BURLINGTON BUILT BOUNDARY, RESIDENTIAL BUILDING PERMITS (NEW UNITS), 2006-YTD 2015

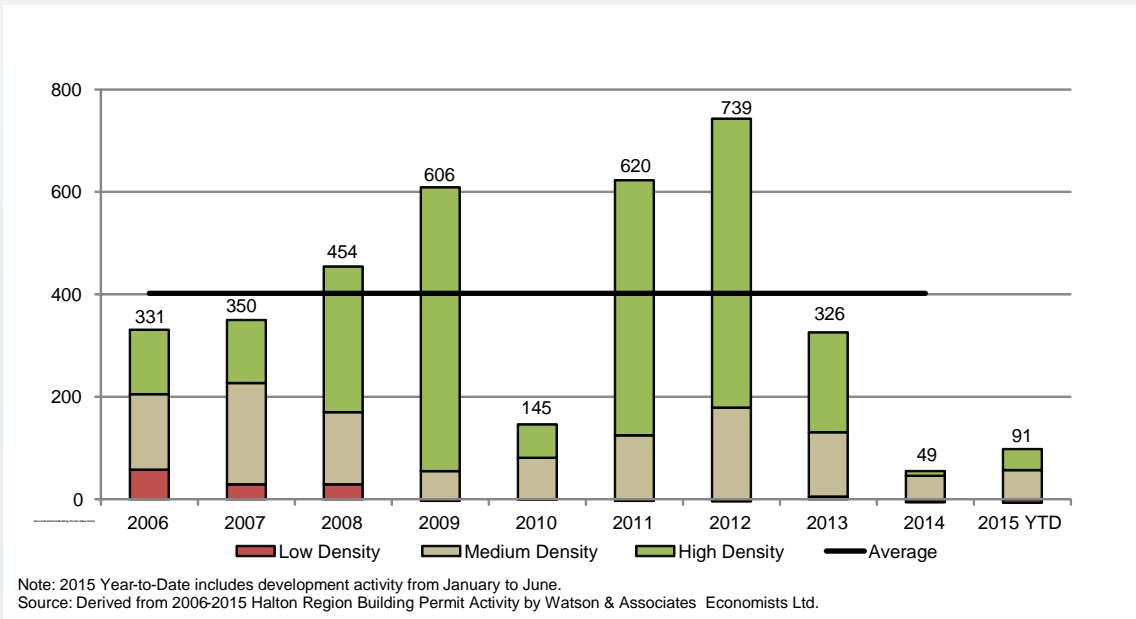
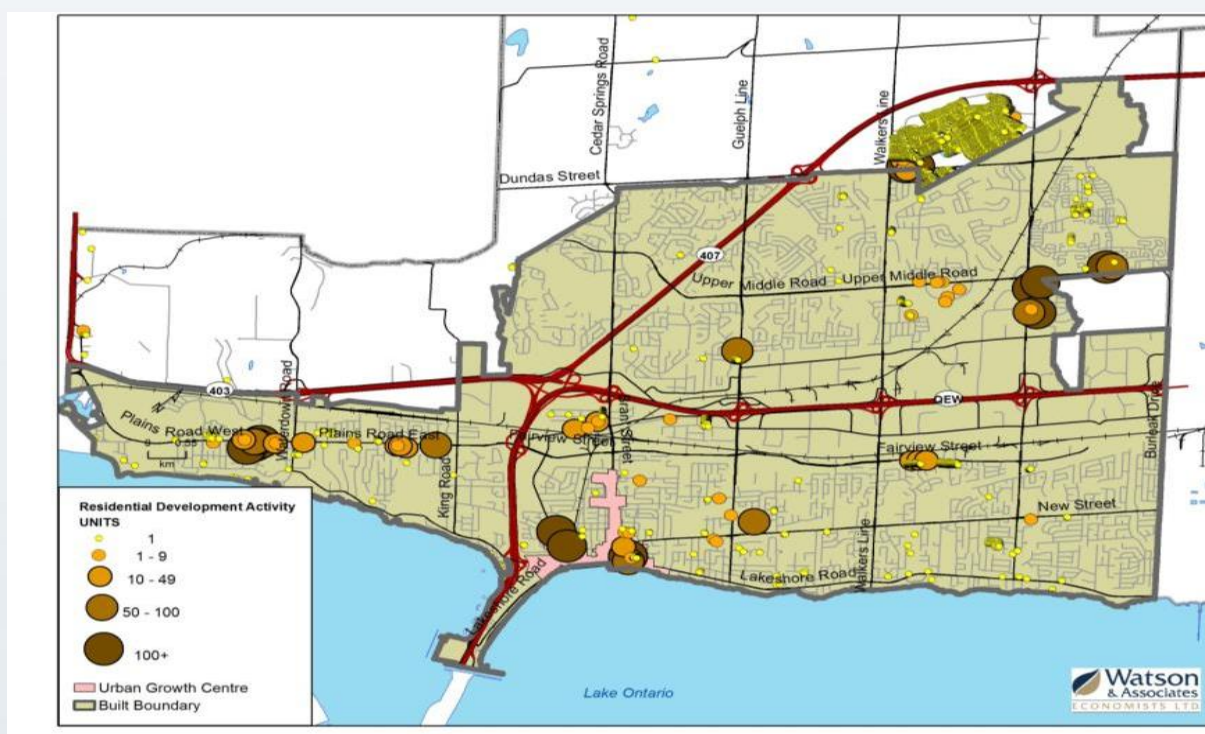


Figure 2-4 geographically summarizes the location of residential building permits issued within the City of Burlington between 2006 and 2015 (year-to-date). During this period, the majority of greenfield residential building permits were issued within the Alton neighbourhood.

Within the built boundary, residential building permits associated with large-scale intensification development activity have been issued largely for lands along arterial roads within the Urban Growth Corridor (U.C.C) along Fairview St. and Plains Rd., the Urban Growth Centre (U.G.C.) and Uptown (Upper Middle Rd. and Appleby Line). Residential building permits for smaller-scale development were also issued for lands along arterial roads outside of the intensification areas outlined above as well as within the City's residential neighbourhoods. It is important to note that most of the ground-oriented residential building permits shown in Figure 2-3 north of the Upper Middle Rd. represent the buildout of existing greenfield areas which were captured within the built boundary as of 2006 onwards. To date, the supply of ground-oriented lots within the City's built boundary is largely built-out. As such, the majority of future residential intensification within the City of Burlington is anticipated to be in the form of high-density housing.

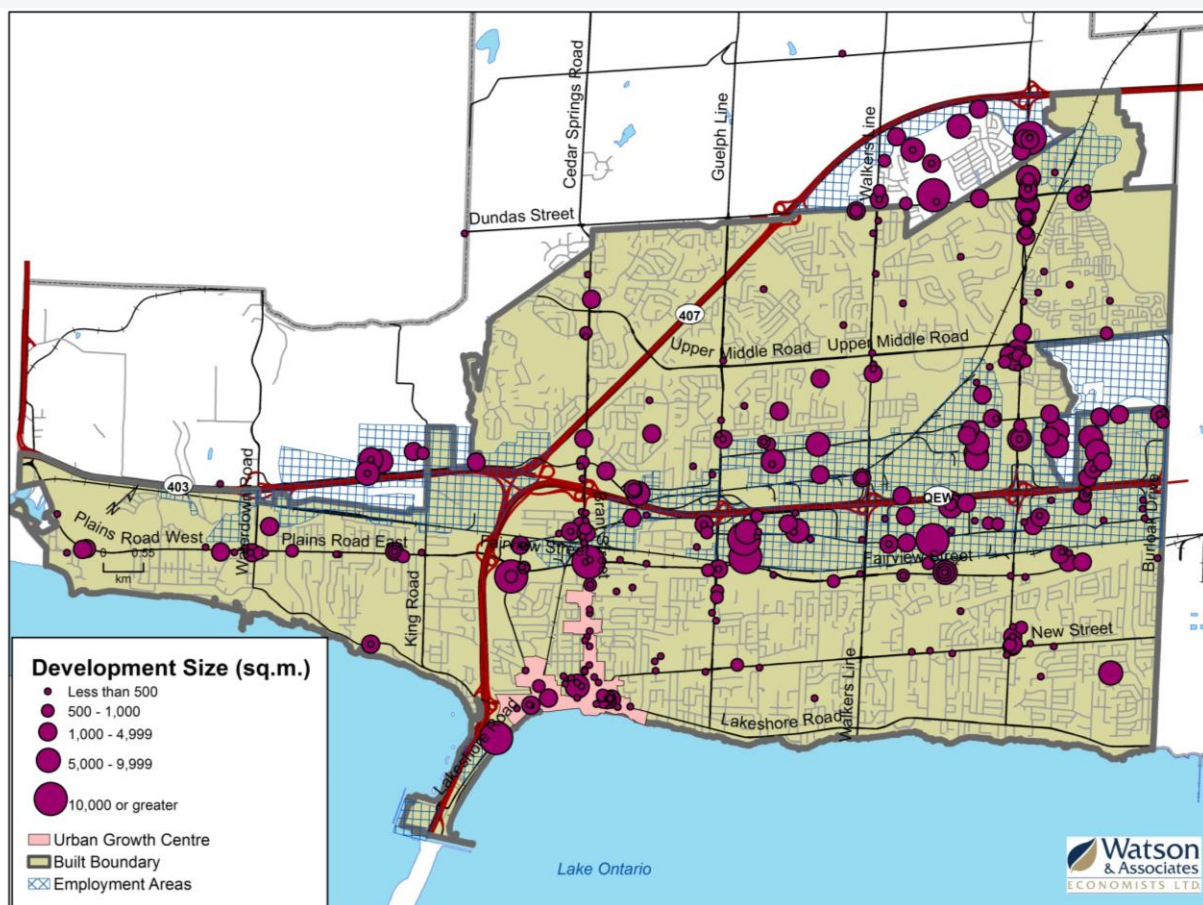
FIGURE 2-4: CITY OF BURLINGTON, RESIDENTIAL BUILDING PERMIT ACTIVITY (NEW UNITS), 2006-MID 2015



2.4.3. Historical Non-residential Building Permit Activity within the Built Boundary

Between 2006 and 2015 (year-to-date), the City reported approximately 569,550 sq.m. (12.3 million sq.ft.) in non-residential building permit activity, expressed in gross floor area (G.F.A.). During this period, approximately 78% of non-residential development in Burlington has been accommodated within the built boundary. A large share (48%) of non-residential development activity has occurred within the built boundary in employment areas, primarily on vacant lots. **Figure 2-5**, geographically summarizes the location of non-residential building permit activity within the City of Burlington between 2005 and 2015 (year-to-date).

FIGURE 2-5: CITY OF BURLINGTON, NON-RESIDENTIAL BUILDING PERMIT ACTIVITY (NEW BUILDINGS AND EXPANSIONS), 2006-MID 2015



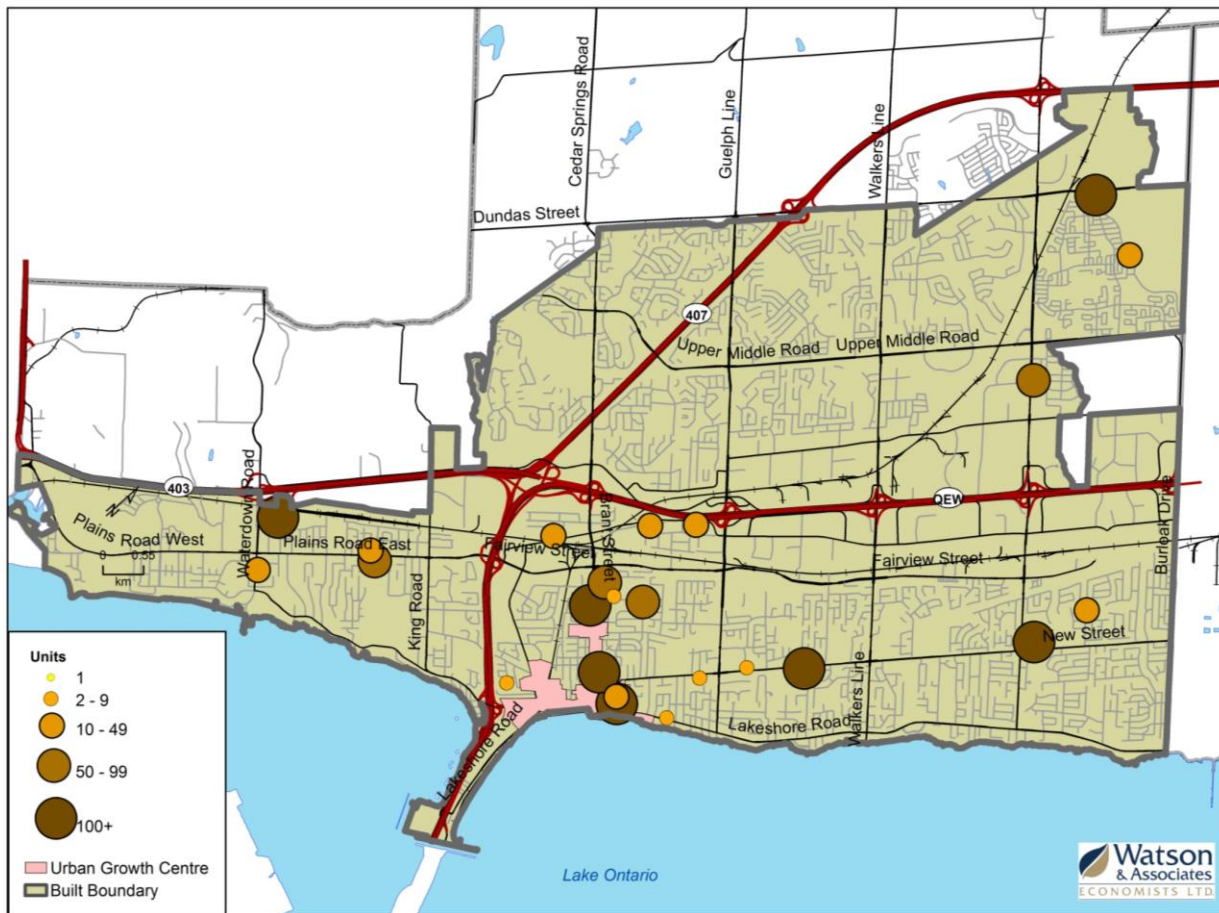
2.4.4. Active Residential Site Plans within the Built Boundary

In accordance with the June, 2011 Halton B.P.E., the City is required to accommodate approximately 8,700 housing units within the built boundary between 2015 and 2031. To gain a better understanding of short-term market demand for residential intensification, a review of active residential site plans within the built boundary was undertaken.

In total, 28 active site plan applications for residential and mixed-use development within the built boundary were identified totalling 2,700 high-density units, located largely in the U.G.C. and along major arterial corridors. This represents just under one-third of the total housing units which need to be accommodated through 2031. In accordance with forecast market demand for residential intensification, the current active residential site plan inventory represents approximately 5 to 6 years of residential supply.

Residential site plan applications range from small-scale development (6 units) to larger-scale developments (450 units). With respect to built-form, the active residential site plans inventoried range in height from 3 to 16 storeys. **Figure 2-6** summarizes the geographic location of residential site plan activity. Similar to recent residential building permit activity, larger-scale proposed residential developments are located along arterial roads. Smaller-scale developments are also located along arterial roads and, to a lesser extent, within mature residential neighbourhoods.

FIGURE 2-6: CITY OF BURLINGTON, RESIDENTIAL ACTIVE SITE PLANS WITHIN BUILT BOUNDARY



2.4.5. Active Non-residential Site Plans within the Built Boundary

Non-residential development currently at the site plan stage within the City of Burlington's built boundary totals 114,600 sq.m. (1.2 million sq.ft.) in G.F.A. Of the total active non-residential site plan activity (i.e., G.F.A.), 58% is comprised of office developments (approximately 65,000 sq.m or 700,000 sq.ft) with the remaining applications mixed between retail, institutional and industrial sectors. The total amount of office development currently within active non-residential site plans represents approximately 40% and 12% of the combined office development identified within the conceptual renderings under the as of right zoning scenario and ultimate scenario, respectively, in Chapter 3.

2.4.6. Office Development Trends

Based on our review of recent office market trends within the City of Burlington and the G.T.H.A., the following observations can be made:

- At the G.T.H.A. level, Downtown Toronto has dominated the major office market in recent years; however, office development patterns are gradually shifting to urban settings across the “905” area;
- For standalone office uses, market demand and development feasibility for office space are anticipated to be strongest within a mixed-use environment that offers proximity/access to amenities and high-order transit;
- On the other hand, demand will 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 17%. The vast majority of office development within Burlington in the past five years has been accommodated on vacant parcels in employment lands; and
- Office development outside employment areas has been limited to small-scale (<5,000 sq.ft.) professional and medical offices.

2.4.7. Retail Development Trends

There are three major retail development trends influencing the retail landscape, which generally support demand for retail in intensification areas. These trends are discussed below.

Available Greenfield Land Supply for Big-Box Development

- Demand for big-box retail development is slowing across the mature markets of the G.T.H.A. 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.

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.

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.



The Small Format Discounter, The Box by No Frills (10,000 sq.ft.) – Windsor, Ontario



Sobey’s Downtown Barrie in the Collier Centre, Mixed-Use Development (10,000 sq.ft.)

2.4.8. Financing Intensification

As a growing share of new development is expected to occur within intensification corridors and redevelopment areas, the City of Burlington and the Region will face new funding challenges such as fragmented land ownership, high project costs for replacement infrastructure and large non-growth component for projects, etc.³. With this, the City and the Region should explore potential new financial models and policies to support growth management in intensification areas. Some approaches may include specialized area rating, special tax levies, third-party financing arrangements, developer negotiations, etc.

³ Fragmented land ownership refers to the notion that intensification of areas can typically involve multiple land owners with different development interests and expectations. For example, some owners may be keen to redevelop their properties immediately while others may not have any interest in pursuing redevelopment for the foreseeable future.

3.0 VISUALIZING INTENSIFICATION

3.1. APPROACH

To illustrate what intensification might look like in Burlington if a series of visualizations were prepared. Five areas were selected to visualize potential intensification opportunities, representing a cross-section of possible intensification typologies, including:

1. A Mobility Hub (Aldershot GO);
2. An Urban Centre (Uptown);
3. An Urban Corridor (Fairview Road & Cumberland);
4. A Neighbourhood Commercial Plaza (New Street at Guelph Line);
5. An Urban Employment Area (Harvester Road east of Appleby Line in the “Prosperity Corridor”).

Note that, at this time, the Downtown was not included in the visualization assessment, as the City’s Downtown has received a considerable level of detailed planning around intensification to date. However, the expectation is that the Downtown will be included in any broader intensification studies/plans.

The visualizations were developed through a conceptual block planning exercise that considered three primary elements:

1. Existing condition: current site size, current uses, range of densities in the surrounding area, current level of connectivity;
2. Land use policy and zoning: current official plan designation and zoning permissions for the site; and,
3. Future potential opportunities: future potential opportunities for pedestrian-supportive heights, densities and streetscapes.

Two visualization scenarios were developed for each of the five areas:

- Scenario 1 shows what intensification might look like based on the current Official Plan and zoning permissions (focusing primarily on height and land use permissions).

- Scenario 2 applies a hypothetical intensification based on increasing the density and height permissions in the areas beyond what is currently permitted in the Official Plan and zoning so as to achieve greater intensification.

3.2. LIMITATIONS

The visualization exercise was not conducted as a detailed master planning process, or technical planning exercise and, therefore, it does not consider factors such as: transportation, utilities, servicing, site-specific constraints or general zoning requirements such as parking. The visualizations are intended to provide a high-level understanding of what intensification could look like, the level of development that can be generated through intensification, and present how well the City's current planning framework supports intensification.

It is important to note that the visualizations are conceptual renderings and do not represent any proposed development application, nor is it necessarily representative of the scale, height, density or design that is permitted or would be supported by the City on any lands now, or in the future, through amendment to the City's Official Plan and/or Zoning By-Law.

3.3. INTENSIFICATION VISUALIZATIONS

The following present the various intensification scenarios for the each of the five areas.

Mobility Hub (Aldershot)

Existing Conditions

Strategic Plan Intensification Workshop | Committee of the Whole - October 16, 2015

DISCLAIMER: This image is a conceptual rendering and is provided for discussion purposes only as part of the current Strategic Plan review. The image does not represent any proposed development application, nor is it necessarily representative of the scale, height, density or design that is permitted or would be supported by the City on any lands now, or in the future, through amendment to the City's Official Plan and/or Zoning By-Law.



Mobility Hub (Aldershot)

Scenario 1 (Existing Zoning) - 300 People + Jobs Per Hectare (38.3 Ha)

Strategic Plan Intensification Workshop | Committee of the Whole - October 16, 2015

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Mobility Hub (Aldershot)

Scenario 1 (Existing Zoning) - 300 People + Jobs Per Hectare (38.3 Ha)

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- New
- 6-storeys
- Office/Retail Mixed-Use

- New
- 6-storeys
- Office/Retail Mixed-Use

- New
- 6-storeys
- Residential

- New
- 3-storeys
- Office/Retail Mixed-Use

- New
- 3-storeys
- Office/Retail Mixed-Use

Mobility Hub (Aldershot)

Scenario 2 (Hypothetical Intensification) - 450 People + Jobs Per Hectare (38.3 Ha)

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- New
- 8-storeys
- Office/Retail Mixed-Use

- New
- 8-storeys
- Office/Retail Mixed-Use

- New
- 15-storeys
- Residential

- New
- 8-storeys
- Office/Retail Mixed-Use

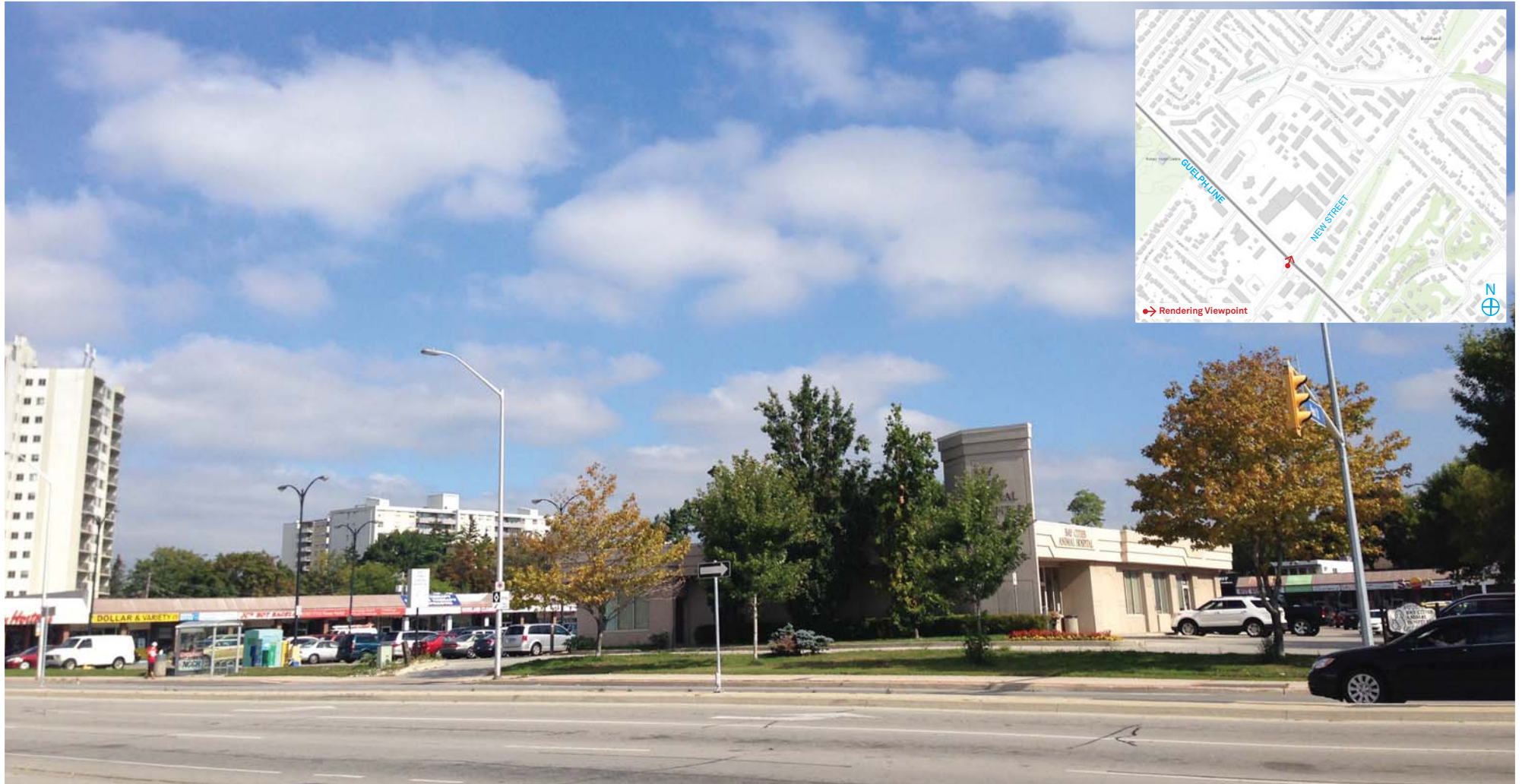
- New
- 8-storeys
- Office/Retail Mixed-Use

Commercial Plaza

Existing Conditions

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Commercial Plaza

Scenario 1a (Existing Zoning) - 155 People + Jobs Per Hectare (2.2 Ha)

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Commercial Plaza

Scenario 1a (Existing Zoning) - 155 People + Jobs Per Hectare (2.2 Ha)

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- Existing
- 14-Storeys
- Residential

- New
- 3-Storeys
- Residential/Retail Mixed-Use

- New
- 3-Storeys
- Residential/Retail Mixed-Use

- New public square

- New
- 3-Storeys
- Residential/Retail Mixed-Use

- Existing
- 2-Storeys
- Commercial

Commercial Plaza

Scenario 1b (Commercial Lands Staff Report) - 210 People + Jobs Per Hectare (2.2 Ha)

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Commercial Plaza

Scenario 1b (Commercial Lands Staff Report) - 210 People + Jobs Per Hectare (2.2 Ha)

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- Existing
- 14-Storeys
- Residential

- New
- 6-Storeys
- Residential/Retail Mixed-Use

- New
- 6-Storeys
- Residential/Retail Mixed-Use

- New public square

- New
- 6-Storeys
- Residential/Retail Mixed-Use

- Existing
- 2-Storeys
- Commercial

Commercial Plaza

Scenario 2 (Hypothetical Intensification) - 285 People + Jobs Per Hectare (2.2 Ha)

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Commercial Plaza

Scenario 2 (Hypothetical Intensification) - 285 People + Jobs Per Hectare (2.2 Ha)

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- Existing
- 14-Storeys
- Residential

- New
- 8-Storeys
- Residential/
Retail Mixed-Use

- New
- 10-Storeys
- Residential/Retail
Mixed-Use

- New public
square

- New
- 8-Storeys
- Residential/
Retail Mixed-Use

- Existing
- 2-Storeys
- Commercial

Urban Employment Area

Existing Conditions

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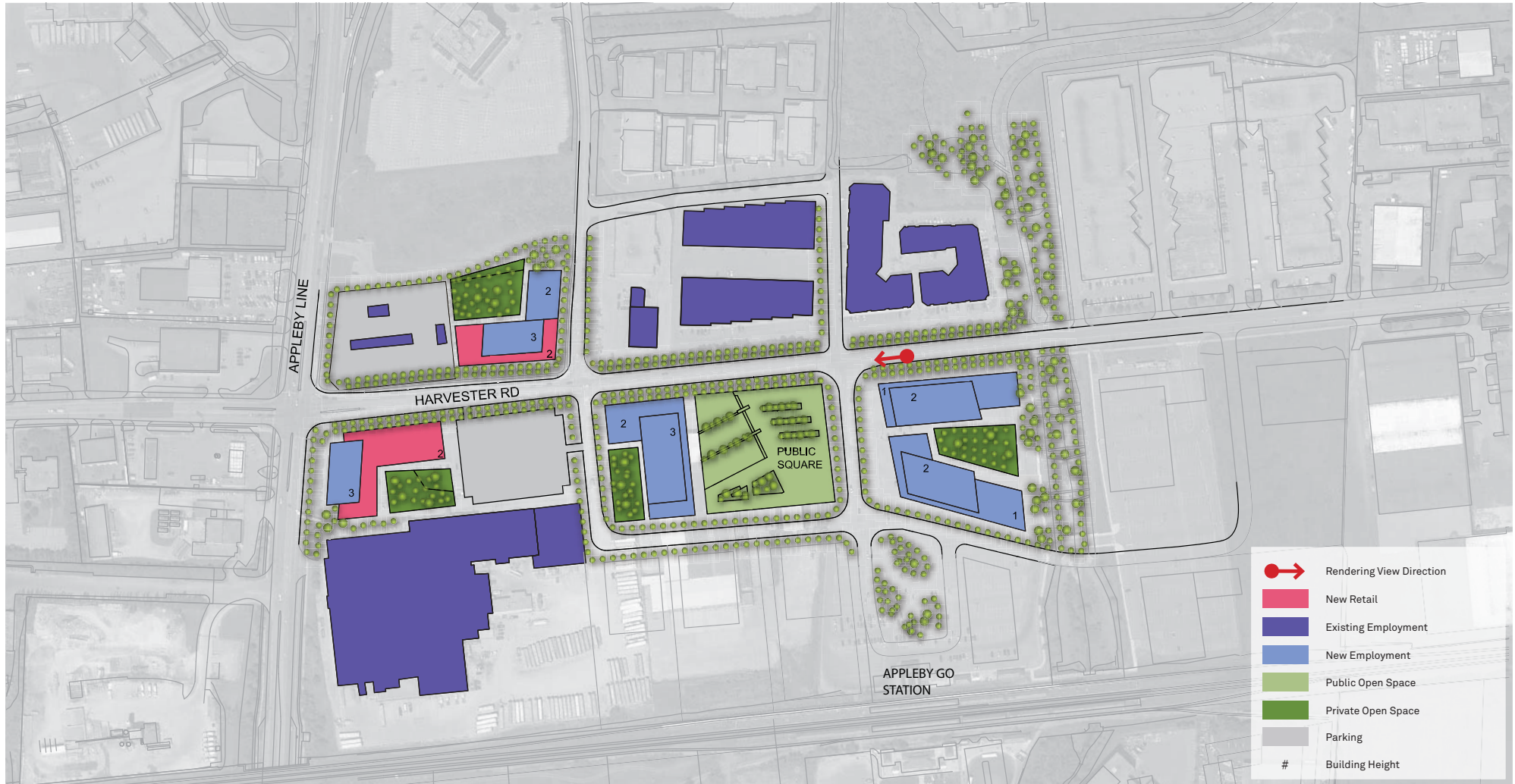


Urban Employment Area

Scenario 1 (Existing Zoning) - 150 People + Jobs Per Hectare (27.4 Ha)

Strategic Plan Intensification Workshop | Committee of the Whole - October 16, 2015

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Urban Employment Area

Scenario 1 (Existing Zoning) - 150 People + Jobs Per Hectare (27.4 Ha)

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- New
- 2-Storeys
- Employment

- New public square

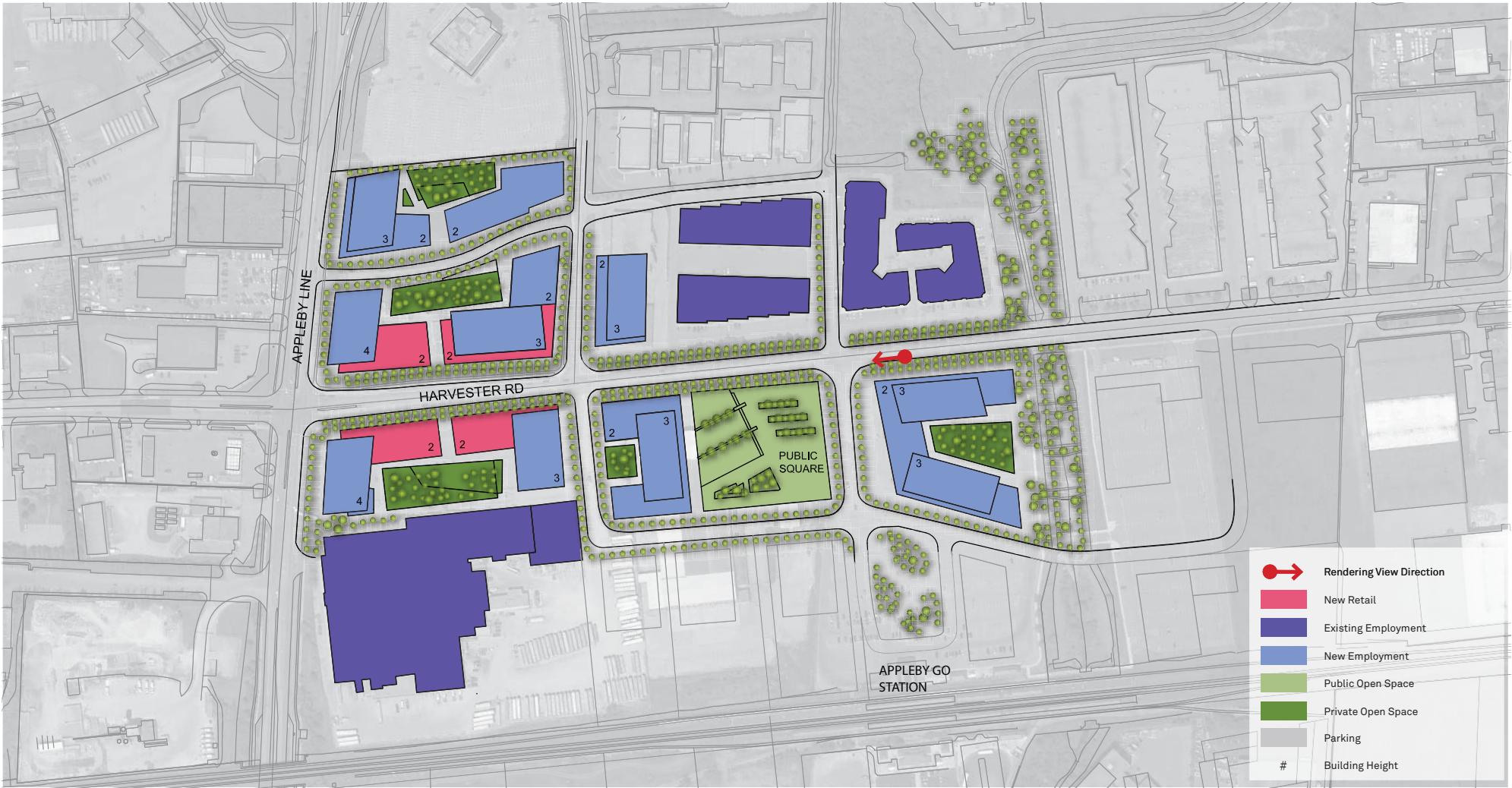
- Existing
- 1-Storey
- Employment

- Existing (Refurbished)
- 1-Storey
- Employment

Urban Employment Area

Scenario 2 (Hypothetical Intensification) - 200 People + Jobs Per Hectare (27.4 Ha)

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Urban Employment Area

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- New
- 2-Storeys
- Employment

- New public square

- New
- 3-Storeys
- Employment

- New
- 3-Storeys
- Employment

- Existing (Refurbished)
- 1-Storey
- Employment

Urban Centre (Uptown)

Existing Conditions

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- Existing
- 17-Storeys
- Condo

Urban Centre (Uptown)

Scenario 1 (Existing Zoning) - 160 People + Jobs Per Hectare (16.9 Ha)

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Urban Centre (Uptown)

Scenario 1 (Existing Zoning) - 160 People + Jobs Per Hectare (16.9 Ha)

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<ul style="list-style-type: none">Existing natural area	<ul style="list-style-type: none">Existing 17-StoreysCondo	<ul style="list-style-type: none">New 11-StoreysResidential/Retail Mixed-Use	<ul style="list-style-type: none">New 8-StoreysResidential/Retail Mixed-Use	<ul style="list-style-type: none">New 8-StoreysResidential/Retail Mixed-Use	<ul style="list-style-type: none">New public square/park	<ul style="list-style-type: none">New 3-StoreysOffice/Retail Mixed-Use
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Urban Centre (Uptown)

Scenario 2 (Hypothetical Intensification) - 340 People + Jobs Per Hectare (16.9 Ha)

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Urban Centre (Uptown)

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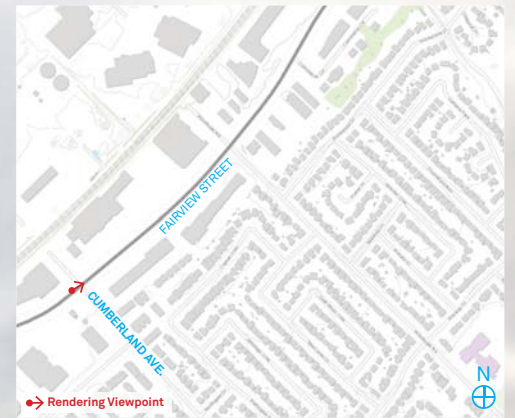
<ul style="list-style-type: none">Existing natural area	<ul style="list-style-type: none">Existing 17-StoreysCondo	<ul style="list-style-type: none">New 15-StoreysResidential/Retail Mixed-Use	<ul style="list-style-type: none">New 8-StoreysResidential/Retail Mixed-Use	<ul style="list-style-type: none">New 10-StoreysResidential/Retail Mixed-Use	<ul style="list-style-type: none">New public square/park	<ul style="list-style-type: none">New 8-StoreysOffice/Retail Mixed-Use
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Urban Corridor

Existing Conditions

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Urban Corridor

Scenario 1 (Existing Zoning) - 250 People + Jobs Per Hectare (6.8 Ha)

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Urban Corridor

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- New
- 6-Storeys
- Office/Retail Mixed-Use

- New
- 6-Storeys
- Office/Retail Mixed-Use

- New
- 5-Storeys
- Office/Retail Mixed-Use

- New
- 6-Storeys
- Residential/Retail Mixed-Use

Urban Corridor

Scenario 2 (Hypothetical Intensification) - 315 People + Jobs Per Hectare (6.8 Ha)

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Urban Corridor

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- New
- 7-Storeys
- Office/Retail Mixed-Use

- New
- 8-Storeys
- Office/Retail Mixed-Use

- New
- 5-Storeys
- Office/Retail Mixed-Use

- New
- 10-Storeys
- Residential/Retail Mixed-Use



4.0 RECOMMENDATIONS & NEXT STEPS

4.1. RECOMMENDATIONS

Over the last decade there has been a dramatic shift in the location and form of development in Burlington. Since 2004, approximately 54% of all residential development has been through intensification. More recently, the amount of units constructed within the Built-Boundary is estimated to be around 80% (between 2011 and 2015). These recent trends are consistent with the growth allocations assigned to the City in the Region's Official Plan and demonstrate that the City has potential to grow through intensification. And while there has been significant uptake of growth within the Built Boundary under the current planning framework, there are a number of opportunities to enhance and improve

the planning and development tools to better position the City. The following briefly summarizes the recommended next steps.

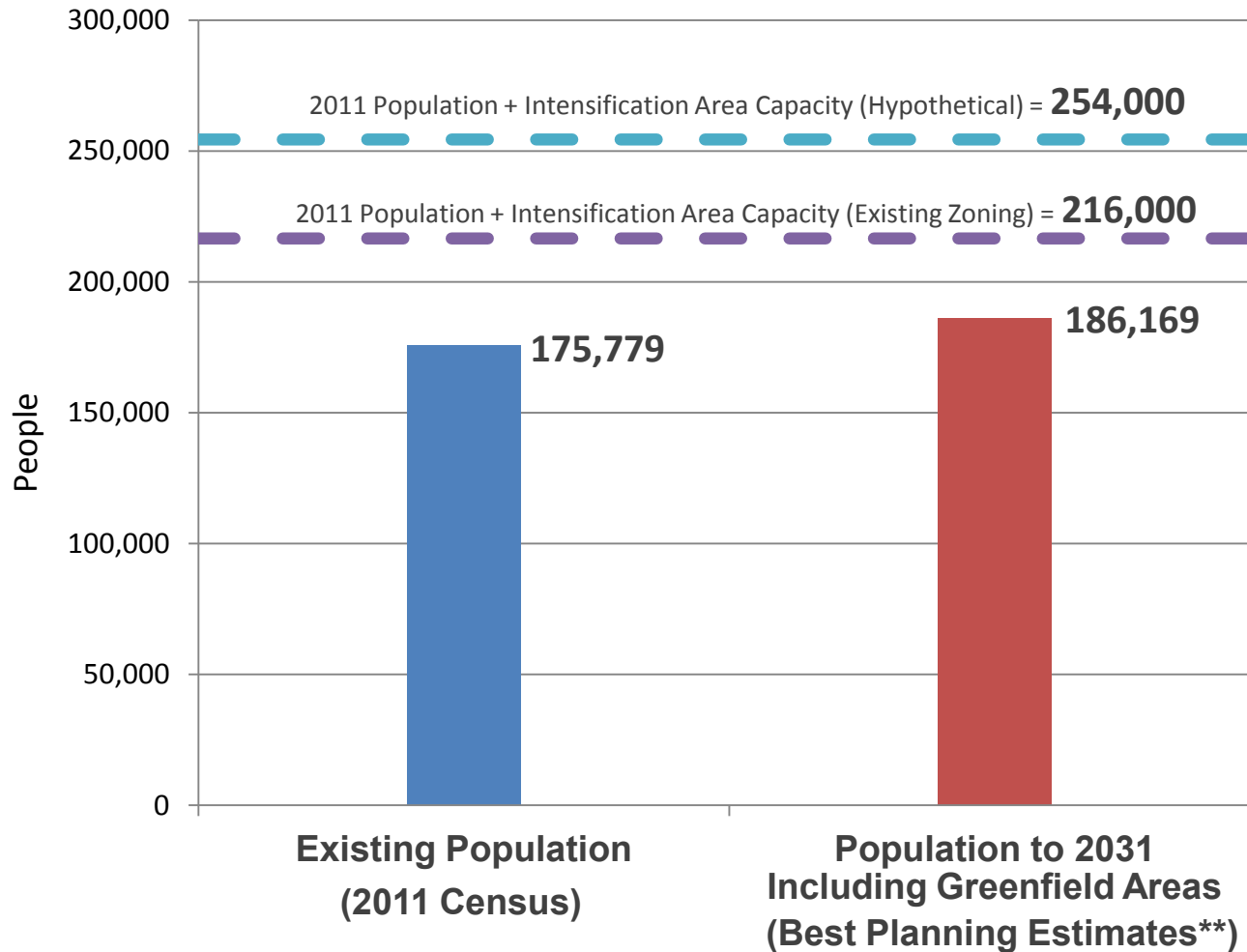
The City of Burlington should update the City-wide intensification strategy to address the following:

1. The City of Burlington should update its City-wide intensification strategy and its Official Plan to include:
 - An urban structure plan to show where intensification is intended to occur including phasing/priority areas (e.g. key nodes/corridors). The urban structure plan should also include a new vision statement which outlines the City's aspirations for growth and intensification.
 - Policies on Burlington's intensification target and how growth will be accommodated up to 2031 and beyond.
 - Policies for employment land intensification.
 - Policies outlining the City's phasing priorities for intensification.
2. In support of the phasing program, the City should also prepare a more detailed action-plan which lays out need for other supporting tools to implement change within key nodes and corridors, including but not limited to the use of:
 - Secondary Plans for priority area;
 - Urban design performance standards to support existing policies in the Official Plan (and if required, modifications to the existing official plan policies) to ensure that new development and redevelopment is compatible and consistent with the City's vision
 - New financial models and policies to support growth management in intensification areas (e.g. specialized area rating, special tax levies, third party financing arrangements, developer negotiations).
 - The action program should lay out a detailed monitoring plan. the

The expectation is that the above-noted items could be further refined through future phases of work, which should include a robust public and stakeholder engagement program.

APPENDIX A: CITY-GENERATED INTENSIFICATION CAPACITY ESTIMATES

ZONING CAPACITY: HIGH LEVEL POPULATION ESTIMATES*

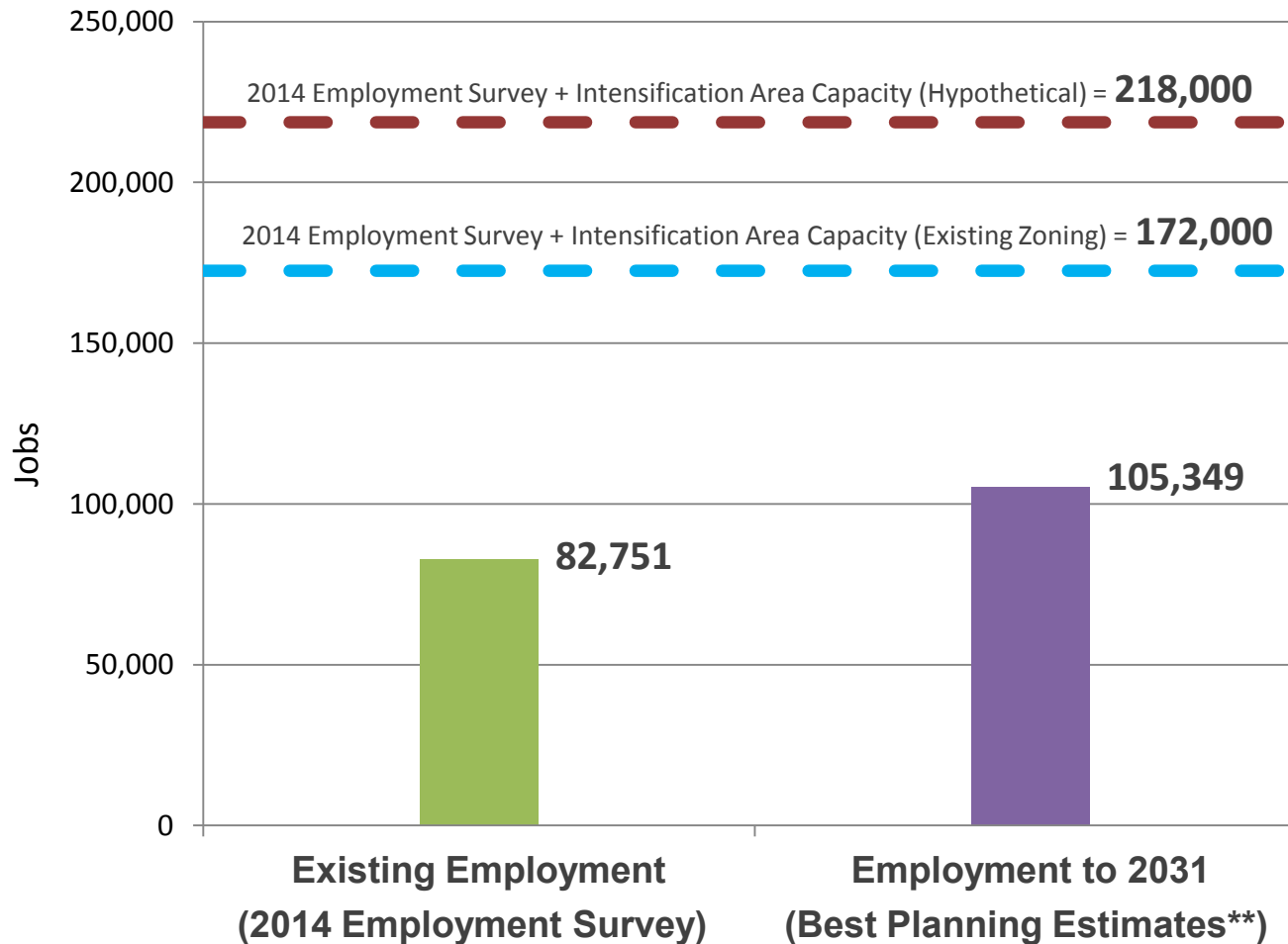


*Assumptions and Considerations

- Figure 1 has been provided for Strategic Plan Review purposes only; estimates have not been prepared as part of a technical planning exercise.
- Population capacity based on:
 - existing land use permissions
 - site/area specific intensification scenarios/renderings and extrapolated to alike intensification areas throughout the City based on people per hectare statistics
 - market and demographic trends and the development potential of individual sites which may be influenced by the presence of existing developments, environmental constraints, heritage buildings, compatibility and urban design considerations among other factors
 - existing 2008 Intensification Study Map areas plus the addition of the Uptown Urban Centre (excluding stable residential and employment areas) and the Burlington, Aldershot and Appleby Mobility Hub Primary Zone areas as established through the Mobility Hubs Opportunities and Constraints Study (2014)
 - intensification area population capacity does not reflect potential growth which may occur in non intensification areas located outside of the above areas

** Region of Halton, Best Planning Estimates Research Paper (2011), estimated 2031 Census Population

ZONING CAPACITY: HIGH LEVEL EMPLOYMENT ESTIMATES*



*Assumptions and Considerations

- Figure 1 has been provided for Strategic Plan Review purposes only; estimates have not been prepared as part of a technical planning exercise.
- Employment capacity based on:
 - existing land use permissions
 - site/area specific intensification scenarios/renderings and extrapolated to alike intensification areas throughout the City based on jobs per hectare statistics
 - market and demographic trends and the development potential of individual sites which may be influenced by the presence of existing developments, environmental constraints, heritage buildings, compatibility and urban design considerations among other factors
 - existing 2008 Intensification Study Map areas, with the exception of the Urban Growth Centre plus the addition of the Uptown Urban Centre (excluding stable residential and employment areas) and the Burlington, Aldershot and Appleby Mobility Hub Primary Zone areas as established through the Mobility Hubs Opportunities and Constraints Study (2014)
 - intensification area employment capacity does not reflect potential employment growth which may occur in non intensification areas located outside of the above areas

** Region of Halton, Best Planning Estimates Research Paper (2011), estimated 2031 Employment Forecast