

Appendix D: Understanding and Defining Burlington's Housing Need

Burlington's Housing Strategy

Burlington's [Housing Strategy](#) sets out a roadmap for addressing local housing need and increasing housing options that meet the needs of current and future residents at all stages of life and at all income levels. It identifies the City's role in housing, housing need in the City as well as housing objectives. The Housing Strategy was underpinned by extensive technical work that can be found in the [Housing Needs and Opportunities Report](#). The Housing Needs and Opportunities Report articulated the current state of housing in Burlington as well as current and future housing needs and established a toolbox of best practices in housing, focusing on innovative practices and new ideas.

Local Context: Defining Housing Needs

Over the past year, the City has advanced its Growth Management role and understanding of growth and housing need through a comprehensive [Growth Analysis Review \(2025\)](#) and Housing Market Assessment, supported by a [Housing Needs Assessment \(2025\)](#) completed for federal funding eligibility. These studies, grounded in Council-approved policy documents, informed the development of the Affordable Rental Housing Community Improvement Plan (CIP) and related City initiatives.

The Growth Analysis identified Burlington as a maturing municipality with an increasingly diverse demand for high-density housing, driven by declining affordability and by an aging population. It emphasized the need to significantly increase a diverse set of housing options. While mid and high-rise condominium projects are expected to account for a large share of high-density housing development, purpose-built rentals and "missing middle" housing such as low-rise apartments and ARUs are expected to increase in their relative share to meet long-term population and housing targets.

Although the condominium market was expected to strengthen by 2025, recent Zonda Urban data shows a substantial decline in new multi-family condominium sales, contrary to earlier forecasts. Even before this downturn, the City faced structural deficits in rental and affordable housing. As the population ages and homeownership becomes less affordable, the demand for rental housing is expected to rise. Rental housing in the City is expected to increase by approximately 5,290 units over the 2024 to 2034 period, accounting for nearly 39% of total housing growth over the forecast period. Rental dwelling growth in the City between 2024 and 2034 is forecast to comprise 3% low-density (singles and semi-detached), 9% medium-density (townhouses and duplexes), and 87% high-density households (apartments and secondary units).

Despite the forecasted steady and continued housing unit growth to 2051, the city's housing stock is expected to continue to experience structural deficits related to housing options, these deficits include affordable housing units and rental housing units. (Growth Analysis Review, 2025.Watson & Associates, pgs 6-20)

Continued shortages in affordable rental accommodations further underscore the need for diversified, attainable housing options across all income and demographic groups. With the City's recent Growth Analysis finding that the City will require over 500 rental units per year over the next 10 years to keep pace with the demand for rental housing. Similar to the rental housing forecast, most of the ownership housing growth in the City is expected to occur in the form of higher-density developments. Of the total forecasted 8,130 ownership dwellings, low-density housing forms are projected to account for 11%, while high-density units are expected to make up 79%. The remaining 10% of housing growth is anticipated to occur in medium-density dwellings. (Growth Analysis Review, 2025.Watson & Associates, pgs 6-20-6-21)

The City is experiencing a shortage of affordable housing accommodations. This emphasizes the continued need for a greater supply of non-market and market rental housing options (including both primary and secondary rental high-density accommodations and secondary units) and ownership condominiums, to address future high-density housing demand across all ages and income groups. (Growth Analysis Review, 2025.Watson & Associates, pg 7-10)