

Consultation Analysis: Online Survey Results

Economic Vision for the City of Burlington

Burlington Economic Development Corporation

DRAFT

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Consultation Analyses

1.1 Online Survey Results

A targeted survey was designed in consultation with the Burlington Economic Development Corporation, with the purpose of soliciting key feedback from stakeholders and the community regarding the establishment of an Economic Vision for the City of Burlington.

It was distributed by the Economic Development Corporation (BEDC) through an established contact list via email. In addition, the survey was also made available on the BEDC's website. In total, 255 individuals participated in the survey, through links to Survey Monkey.

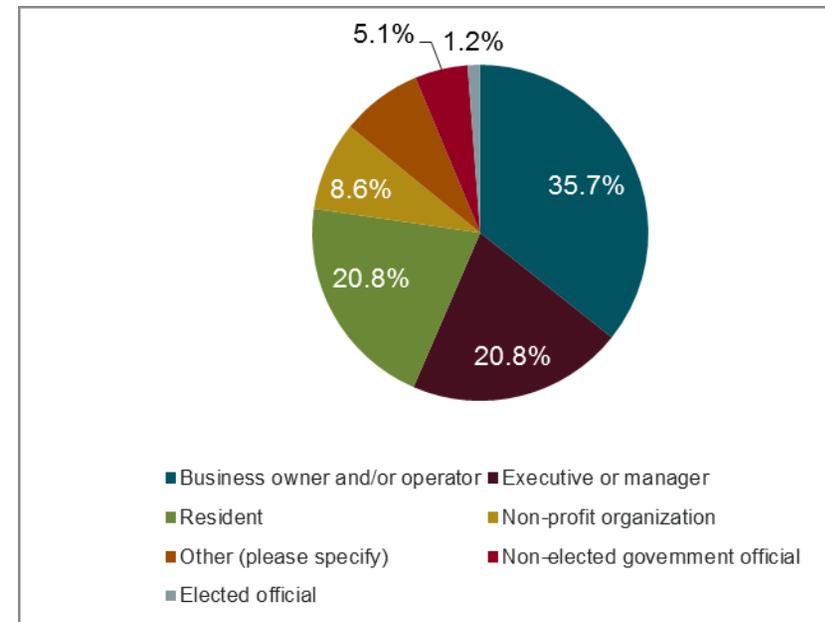
Error! Reference source not found. demonstrates that, of 255 respondents, 35.7% self-identified as business owners or operators. Those who self-identified as Residents and Executives or Managers each represented 20.8% of respondents equally.

Further, 8.6% identified as non-profits, 7.8% identified as 'other,' 5.1% as non-elected government officials, and 1.2% (or three people) identified as elected officials. Therefore, 56.5% of respondents to this survey represent perspectives from the business community.

Taking the elected officials, non-elected government officials, and 'other' respondents together, only 37% (or 13 people) were residents of the community. For those that owned or operated businesses, were executives or managers, or worked in non-profits, 48% were local residents, while the remaining 52% (or 86 people) were non-residents.

Furthermore, of those in the latter list of business owners, executives or managers, or non-profits, 77% (or 127 people) operated their

FIGURE 1: SELF IDENTIFICATION OF RESPONDENTS



Source: Millier Dickinson Blais Inc. 2015.



business or organization in Burlington.



1.1.1 Summary of Online Survey Analysis

- The majority of respondents (88% of 202 responses) either strongly agree or agree that Burlington is a good place to own, operate, or conduct business. This indicates a high level of confidence in the overall potential of the local economy.
- In a survey question designed to identify key words that represent the ability of Burlington to attract investment, the following key words were most commonly referenced by respondents:

- Safe
- Accessible
- Location
- Vibrant
- Growth
- Innovation
- Beauty
- Clean
- Business-friendly
- Livability
- Progressive
- Proximity
- Diverse
- Dynamic
- Educated

- The implication of the key words identified by respondents denotes strong value toward quality of life and quality of place attributes
- A second implication is that respondents view the community as energetic, as manifest through words such as innovation, progressive and dynamic
- The words also reveal traits of the business environment, such as business-friendly, accessible and educated

- Based on a score individuals allocated to various local attributes, the top rated local assets identified by respondents are:
 - Access to a skilled and employable workforce (score 4.52 / 5)
 - Quality of life (i.e. amenities for families, safety, and arts and culture community etc.) (4.48 / 5)
-



- Availability of and high speed telecommunications (4.45 / 5)

Investors searching for ideal business locations are most interested in identifying a skilled labour force and a high quality of life for employees¹. Therefore, the level of confidence offered by respondents in awarding these two characteristic top scores illustrates Burlington may be competitively positioned to meet these investment demands.

The availability of quality telecommunications infrastructure also positions the city strategically for innovative, high-technology, or other infrastructure-intensive investment attraction.

Articulating a Vision for Burlington

- Survey respondents were asked to articulate a vision for economic development in Burlington. The following represent the top five themes under which respondent's visions fit:
 - **Having real estate development opportunities and complimentary planning to allow for development** (49 responses):
 - Availability of developable land
 - Higher density developments
 - Infill or repurposing
 - Development friendly zoning that supports mixed-use and high density development
 - **Having a vibrant or growing economy** (41 respondents)
 - **Having or maintaining a great quality of life** (27 responses):
 - Increased affluence
 - Being a great place to live
 - Having a healthy work-life balance
 - **Having greater investment attraction of industry** (22 responses):
 - Seeking anchor industries to cluster around
 - Attracting more corporate head-quarters or head offices
 - **Having excellent transit and/or transportation infrastructure** (15 responses)

¹ Richard Florida, "What Cities Really Need to Attract Entrepreneurs, According to Entrepreneurs," Citylab, Feb 11, 2014. <http://www.citylab.com/work/2014/02/what-cities-really-need-attract-entrepreneurs-according-entrepreneurs/8349/>



- Improved and more accessible transit
- Increased GO Train services and connections
- Reduced traffic congestion and improved transportation infrastructure

Three of the bullets above represent a broader notion associated with growth; however, they are complimented by a clear desire to maintain a positive quality of life.

Opportunities

Overall, the areas that were identified by survey respondents as containing the greatest potential opportunities were related to technology and related industry growth, enhancing a highly educated and skilled workforce and talent pool. Additional areas of opportunity and potential are highlighted below.

Opportunities identified by respondents for enhancing the economy or improving employment include:

- Sector specific growth in the following identified areas:
 - High tech, IT and related clusters and spin-off industries (23 responses)
 - Health/life sciences (15 responses)
 - Tourism (12 responses)
 - Higher education (10 responses)
 - Professional services (9 responses)
 - Traditional manufacturing (6 responses)
 - Commercial and financial businesses (6 responses)
 - Transport and logistics sector (6 responses)
 - Retail (3 responses)
 - Advanced manufacturing (3 responses)
 - Supporting and/or enhancing the educated workforce, skilled labour development or skill training (23 responses)
 - Advancing redevelopment and intensification opportunities, strategic planning and rezoning (13 responses)
 - Leveraging Burlington's location between Hamilton and Toronto (12 responses)
 - Ensuring stronger municipal support structures for business development:
-



- Stronger municipal government, competitive taxes / development charges and less red-tape (6 responses)
 - Making taxes and development charges more competitive (6 responses)
 - Enhancing business retention and expansion activities help small and medium sized businesses and encouraging start-ups (3 responses)
- Addressing infrastructure problems:
 - Transit and transportation infrastructure enhancements to alleviate congestion (10 responses)
 - City infrastructure improvements to meet growth demands (including broadband) (4 responses)

Challenges

Overwhelmingly, gridlock, traffic congestion, and poor transit offerings were seen as the key challenge to Burlington's future growth. In fact, this was the predominant concerns among respondents related to infrastructure concerns.

Quality of life also ranked prominently among challenges facing Burlington, with specific emphasis on housing affordability and increased cost of living concerns.

Issues associated with land space and availability were identified through responses as the third most prominent challenge faced by the community. A lack of development and employment lands was the most frequently identified issues related to this challenge. Additional challenges are identified in the findings below.

Identified challenges fit within three broad themes:

- Infrastructure:
 - **Poor transit, gridlock and congestion (62 responses)**
 - Poor progress on municipal infrastructure (slow, behind schedule and lacking funding) (7 responses)
 - Parking issues (3 responses)
 - Need for Intensification planning (2 responses)
 - Road and highway quality (2 responses)
 - Quality of life:
 - **Increased cost of living concerns (including housing or rent, utilities and necessities) (40 responses)**
-



- Desire for better wages (6 responses)
 - Loss of the “small town” feel (2 responses)
 - Lack of vibrancy (2 responses)
- Land and space availability:
- **Lack of development / employment lands (26 responses)**
 - Insufficient office space (6 respondents)
 - Concentration of land-owners that drive up costs (5 responses)
 - Lack of land (type not specified) (2 responses)

Synergies exist between components of the above listed opportunities and challenges, indicating respondents are both aware of challenges or barriers as well as mindful of possible opportunities to address them. Furthermore, the linkage implies that strategic actions taken to secure opportunities will resonate well because of clear connections to local concerns.

Stacking up Against the Competition

The survey asked respondents to indicate what nearby communities were viewed as competitors and why. The following list ranks the communities from most competitive to least competitive:

1. Oakville
2. Hamilton
3. Mississauga
4. Toronto
5. Waterloo
6. Markham

Overwhelmingly, Oakville (at 90 responses) and Hamilton (at 86 responses) were identified as the most significant competitors. The following observations on respondent feedback are offered regarding Oakville and Hamilton as competitors to Burlington:



Proximity, accessibility and/or geographic location are viewed as top competitiveness issues, topping the list of identified competitive advantages in Oakville and appearing at second place on Hamilton's list, following costs of rent or property. The following are other key areas of competitive distinction for these two communities over Burlington:

- Proximity is an issue for Burlington because it is situated between Oakville and Hamilton
- Oakville's proximity to Toronto gives it an advantage over Burlington for reasons such as talent attraction, investment attraction from Toronto, commuter accessibility and distance to Lester B. Pearson airport
- Though Hamilton is farther from Toronto, it is directly adjacent to Burlington's southern boundary and has the added value of lower rent and/or property costs, as articulated by 30 respondents in the survey
- Additionally, Hamilton is closer to the United States border, which may make it more appealing for some industries

Another area of important consideration relates to perceptions of a high quality of life, something that Burlington prides itself on, and was identified by respondent feedback that both comparator municipalities have high qualities of life provided to their residents also.

Though value judgements concerning quality of life reflect the personal, subjective tastes of individuals, the fact that all three communities are seen to have good quality of life attributes re-enforces the strategic importance of Burlington finding a means of differentiating itself from the other three on quality of life attributes.

Prioritizing Areas of Importance

The list below ranks areas of strategic importance for resource prioritization over the next 10 years based on respondent preferences:

1. Prosperity Corridor
2. 403 West Corridor
3. Downtown
4. 407 Corridor
5. Bronte Meadows

The majority of respondents to this question (68%) indicated that industrial and office development growth should be accommodated through redevelopment of existing land and office space, while only 17% indicated greenfield developments as a priority focus.



When asked which areas the City should prioritize resources towards in the next ten years, the Prosperity (QEW) Corridor received the highest number of responses. This is not surprising, given the emphasis placed on redevelopment of existing land and office space, and the lower interest in new builds or greenfield developments.

Top 5 Pressing Concerns for Economic Development

Respondents were presented the question, “what are the most pressing economic development issues for the City of Burlington?” From a list of 12 “issues” respondents selected their order of preference. The top five most pressing economic development issues are:

- Increasing high quality jobs and a skilled and talented workforce
- Attracting and retaining businesses
- Addressing demographic challenges and trends
- Reducing traffic congestion
- Investing in road and transportation infrastructure



1.2 Survey Analysis

1.2.1 Key Words Describing Burlington as a Place for Investment

Respondents were asked, “What key words would you use to promote the City of Burlington to a potential investor?” The results that occurred more than one time are ranked below in **Error!**

Reference source not found.. The top words representing Burlington as a place for investment are:

- Safe
- Accessible
- Location
- Vibrant
- Growth
- Innovation
- Beauty
- Clean
- Business-friendly
- Livability
- Progressive
- Proximity

Looking deeper, there are some words that represent similar ideas or themes, such as geographic attributes:

- Accessible
- Central
- Proximity

FIGURE 2: KEY WORDS REPRESENTING BURINGLTON AS A PLACE FOR INVESTMENT

Word	Freq.	Word	Freq.	Word	Freq.
Safe	19	Community	6	Good	3
Accessible	18	Family	6	Labour pool	3
Location	17	Supportive	6	Responsive	3
Vibrant	16	Well-located	6	Skilled	3
Growth	15	Opportunities	6	Upscale	3
Innovation	14	Affordable	5	Water/ waterfront	3
Beauty	12	Central	5	Workforce	3
Clean	11	Close	5	Potential	3
Business-friendly	9	Prosperous	5	Balanced	2
livability	9	Quality	5	Engaging	2
Progressive	9	Sustainable	5	Entrepreneurial	2
Proximity	9	Welcoming	5	Healthy	2
Diverse/ diversity	8	Well-educated	5	High quality	2
Dynamic	8	Convenient	4	Lake	2
Educated/ Education	8	Green	4	Professional	2
Friendly	8	Attractive	3	Quaint	2
Quality of life	8	Best	3	Quiet	2
Excellence	7	Developable	3	Small town feel	2
Great	7	Forward-looking	3	Smart	2
Lifestyle	7	Good	3	Effective	2

Source: Millier Dickinson Blais Inc. 2015.



- Well-located

Similarly, there are some words that collectively imply a positive quality of life or quality of place such as:

- Safe
- Vibrant
- Beauty
- Clean

In fact, of the entire list in Figure 2, there are a minimum of 20 words that relate to quality of life or quality of place attributes. The implication is that quality of life characteristics are highly valued components of Burlington's image.

Figure 2 also implies the community is energetic through words such as:

- innovation
- progressive
- dynamic
- engaging

The list also implies the city is business oriented via words such as:

- Business-friendly
- Entrepreneurial
- Skilled
- Well-educated

In sum, the combination of energetic words and business-oriented words demonstrate a discourse of advancement and mobility in the business environment.



1.2.2 Owning, Operating or Conducting Business in Burlington

The survey asked respondents to indicate to what extent they agreed or disagreed with the statement, “The City of Burlington is a good place to own, operate, or conduct business.” The distribution of responses is shown in Figure 3. Of 202 people that responded to the question, nearly 88% either strongly agreed or agreed, while only approximately 12% disagreed or strongly disagreed. Respondents were also provided the opportunity to explain why they chose a particular response. The results reflect a majority opinion that Burlington has a positive business environment.

In total, 78 people elaborated on their selections for Figure 3, with 21 implying a negative impression, 43 implying a positive impression, and eight indicating that it depends, with a mix of positive and negative observations. The remainder provided answers that did not indicate positive or negative impressions.

The themes most commonly identified as positive attributes include:

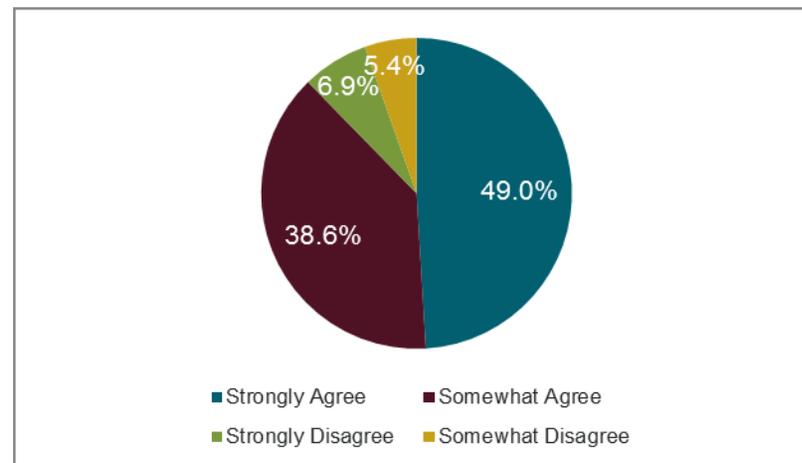
- Quality of life
- Location
- Accessibility
- Market potential for businesses
- Friendly business climate
- Well-run city

Themes that emerged from the negative responses were associated with:

- Bureaucratic process
- Land availability
- Road congestion or transit infrastructure

Of note is the divergence in opinions over the effectiveness of the local municipal government, with opinions expressed in both negative and positive respects.

FIGURE 3: PLEASE INDICATE TO WHAT LEVEL YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT: THE CITY OF BURLINGTON IS A GOOD PLACE TO OWN, OPERATE, OR CONDUCT BUSINESS.



Source: Millier Dickinson Blais Inc. 2015.



1.2.3 Rating Burlington as a Place to do Business

Respondents were asked to rate 11 criteria that make Burlington a good location for conducting business, based on a scale of one to five. Figure 4 provides a ranked summary of the results based on the total average score for each criterion. The highest ranking reasons that make Burlington a good location for business are:

- Access to skilled labour and an employable workforce (average score: 4.52)
- Quality of life (average score: 4.48)
- Availability and quality of high-speed telecommunications (average score: 4.45)

Investors searching for ideal business locations are most interested in identifying a skilled labour force and a high quality of life for employees². Therefore, the level of confidence offered by respondents in awarding these two characteristic top scores illustrate that Burlington may be competitively positioned to meet these investment demands.

Furthermore, the availability of quality telecommunications infrastructure also positions the city strategically for innovative, high-technology, or other infrastructure-intensive investment attraction.

Figure 4 also demonstrates that the least popular criteria are as follow:

- Access to water/waste water services (average score: 3.94)
- Efficient development environment (average score 3.95)
- Access to business services (average score: 4.08)

The fact that access to business services is rated poorly may imply that existing services are undervalued, that services are under-developed or that portions of respondents are unaware of City or Burlington Economic Development Corporation business services. Though the survey results do not allow sufficient insight to ground-truth this connection, it remains a possible interpretation.

² Richard Florida, "What Cities Really Need to Attract Entrepreneurs, According to Entrepreneurs," Citylab, Feb 11, 2014. <http://www.citylab.com/work/2014/02/what-cities-really-need-attract-entrepreneurs-according-entrepreneurs/8349/>



Access to business services may also pertain to dealing with the bureaucratic structure of the City. If this was the perspective of some respondents, the results resonate with other survey sections where expressed frustration with the municipal structure, 'red tape' and regulations was an identified challenge.

Similarly, the second lowest ranked criteria (efficient development environment) may be connected to challenges associated with access to developable land also identified in other sections of the survey. In an environment where investment attraction is understood to be a primary driver of economic growth, these two low rankings identify possible institutional and physical limitations to attaining that goal.



FIGURE 4: TOP ASSETS THAT MAKE BURLINGTON A GOOD PLACE FOR BUSINESS



Source: Millier Dickinson Blais Inc. 2015.



1.2.4 A Vision for City of Burlington's Economy in 10 years

Survey respondents were asked to identify a vision for Burlington's economy in 10 years. In total, 146 respondents provided their visions. While the feedback was varied and diverse, a common threads analysis of responses uncovered many shared themes. Each theme is discussed below.

Vibrant economy and growth:

In total, 41 responses expressed an explicit or implicit desire for a more vibrant economy or economic growth. Nine responses were vague and simply stated "growth", without providing any context.

Some examples of explicit economic growth include:

- "As a mixed manufacturing city, I see progress with low unemployment and steady growth"
- "Continued growth and stability"

In other responses, economic growth was implied more than explicitly stated, such as:

- "Best place for business in southern Ontario"
- "Central to the prosperity of the Golden Horseshoe"

Real estate development opportunities and necessary planning:

In total, 29 responses contained references to the broader theme of real estate development opportunities and planning, including discussions of:

- Availability of developable lands
- Higher densities (particularly in the downtown core)
- More infill
- Better zoning and urban planning for development

The results indicate a desire to see growth in Burlington through development. Urban planning, as noted by three respondents, will allow for a better understanding of ideal location, density and zoning for development.



Quality of life:

In total, 22 responses contained aspirations for the community to either maintain or increase quality of life. Specific aspects articulated include:

- community safety
- Affluence
- “Great place to live” (or similar expressions)
- diverse (culturally)
- work-life balance

Inclusion of quality of life attributes among the other identified vision themes denotes a desire to maintain and/or enhance quality of life while progress is made in other areas more directly associated with an economy. Because the survey question asked respondents about an economic vision, the identification of quality of life attributes demonstrates a broad or holistic approach to viewing the economy of the future.

Investment Attraction of Industry:

In total, the attraction of more industries was illustrated in 22 different responses, including anchor industries that may result in other opportunities for growth. Three respondents also indicated visions associated with attracting corporate head-quarters or head offices.

In addition to investment attraction at a general level, 15 responses contained references to the growing advanced technology sector³. The implication is that respondents have an appetite for growth in the advanced technology sector. Interest in growing advanced technology holds direct connections to values identified by respondents toward key words representing investment in Burlington.

Transit and/or Transportation Infrastructure:

In total, 15 responses also related to transit or transportation infrastructure. The visions expressed by respondents identified better transit or transportation infrastructure as something that would be improved within that timeframe. The following fit within the transit and transportation theme:

- Direct references to transit

³ In coding respondent data, the words “innovative” or “innovation” in conjunction with “industry” or “sector” were included in scoring for advanced technology.



- GO train services and connections
- Congestion and traffic on transport infrastructure

The inclusion of transit within respondents' visions for economic growth indicates a desire to ensure the city enhances accessibility. Reducing congestion and improving transit accessibility also holds implications for maintaining an expected quality of life as well as for labour-force mobility.

Additional Themes related to a Vision for Economic Development:

There were 16 additional themes elaborated, but none garnered greater than 10 shared responses. The remaining themes are summarized in the following list:

- Economic diversification (9 responses)
- Sustainable development (8 responses)
- Entrepreneurial and small business support (8 responses)
- Skilled labour (8 responses)
- Tax competitiveness (8 responses)
- Infrastructure planning (7 responses)
- 'Smart' growth or cautious planning (7 responses)
- Creative economy or knowledge economy (6 responses)
- Investing in youth or the young labour force (6 responses)
- Retaining labour in Burlington (i.e. less of a bedroom community) (5 responses)
- Business retention and expansion (5 responses)
- Less red-tape, greater efficiency of bureaucracy (5 responses)
- More higher education institutions (4 responses)
- The need for a "long-term" plan (4 responses)
- Slow the rate of population growth (3 responses)
- Incubator or accelerator for businesses (2 responses)



1.2.5 Opportunities and Challenges to Business and Employment Growth

Opportunities for Business and Employment Growth

Respondents were asked to identify three opportunities for business and employment growth in Burlington. Aggregated results are summarized in Figure 5.

As the Figure 5 demonstrates, the highest ranking opportunity for business and employment growth relates to supporting or enhancing the educated workforce and/or encouraging skill development and training, which emerged in 23 comments.

Quality of life opportunities were the second most common opportunity, emerging 22 times; however, quality of life attributes can be subcategorized as relating to specific responses:

- Arts and culture
- Work-life balance
- Lifestyle
- Entertainment
- Community spirit and community engagement

Again, quality of life appears to hold strong value to respondents. The result is that notions of

FIGURE 5: OPPORTUNITIES FOR BUSINESS AND EMPLOYMENT GROWTH IN BURLINGTON.

Opportunity	Freq.
Support or enhance educated workforce, skilled labour development or skill training	23
Quality of life enhancements	22
High tech, IT, clusters or spin-offs	19
Health/life sciences, R&D, services (home, aging population)	15
Redevelopment and intensification, strategic planning, re-zoning (downtown, waterfront, corridor specific)	13
Tourism (including sport, leisure, business and hospitality)	12
Leverage location as hub, as being between Toronto and Hamilton, proximity to US	12
Higher education, education sector, industry-education linkages	10
Enhanced Transit/Transportation Infrastructure	10
BR&E, including site selection, incentive programs for expansion or growing markets	10
Professional service industry (including engineering, repair, and other professionals)	9
Traditional manufacturing, including food and light industrial	6
Commercial and financial businesses	6
Network development, inter-business support, collaborative spaces and opportunities	6
Stronger Municipal Government, competitive taxes/DCs	6
Transport & Logistics sector expansion	5
More aggressive marketing and highlight successes	5
Small business, entrepreneurial development and support, start-ups	4
City Infrastructure improvements, including broadband	4
More developable land	4
Retail	3
Advanced manufacturing (including green technologies, robotics)	3
Sustainability	3
Creative industries/ knowledge industries	3
Attract head offices and head-quarters	2
More employment opportunities	2
Fill empty buildings	2
Less bedroom community	2
Increased demand for local products and services	2
Diversify businesses	2

Source: Millier Dickinson Blais Inc. 2015.



economic growth are never far from the broader interaction the economy holds in the city. It is also well recognized that a high quality of life is a precursor to attracting highly skilled talent and innovative businesses.

Based on the content in Figure 5, different sectors emerge as opportunities for enhancement, support and expansion. They are provided below, by order of popularity:

- High technology, IT and related clusters or spin-off industries (19 responses)
- Health/life sciences, including research and development and services (15 responses)
- Tourism, including sport, leisure, business-related and hospitality (12 responses)
- Higher education, including industry-education linkages (10 responses)
- Professional Service Industry, including engineering, repair and other professionals (9 responses)
- Traditional manufacturing, including food and light industrial (6 responses)
- Commercial and financial businesses (6 responses)
- Transport and logistics sector (5 responses)
- Retail (3 responses)
- Advanced manufacturing (3 responses)

Also notable in Figure 5 are sets of opportunities identified that resonate within a strategic perspective, wherein the opportunity positions Burlington to compete with other municipalities. Examples include:

- Redevelopment and intensification, strategic planning and re-zoning (downtown, waterfront, corridor specific) (13 responses)
- Leveraging Burlington's location as a hub between Toronto and Hamilton, and its proximity to the United States (12 responses)
- More aggressive marketing of the City as a place for business, including the celebration of local success stories (5 responses)

There were also comments that are associated with the operation of the city to better help business growth. Most commonly, respondents were interested in BR&E services and incentives (10 responses). Also, respondents wanted improvements to the municipal government itself, including less red tape and competitive adjustments to taxes and development charges (6 responses).

Lastly, there are themes associated with transit infrastructure and congestion alleviation (10 responses) as well as other hard infrastructure, such as roads, access points, and telecommunications (4 responses).



Challenges and Barriers to Business and Employment Growth

The survey invited respondents to supply a list of three challenges to business and employment growth in the City. Aggregated responses are summarized in Figure 6.

As was the case regarding the opportunities for economic development and employment growth discussed above, there are notable themes that emerge from the list of challenges indicated in Figure 6 below.

The themes represent the grouping of otherwise discrete challenges listed by respondents within a broader overarching concept. The themes elaborated are:

- Infrastructure
- Land and space availability
- Quality of life
- Municipal government
- Business and development costs

Infrastructure:

- Poor transit, gridlock and congestion (62 responses)
- Infrastructure, associated with slow progress, scheduling and budgeting (7 responses)
- Poor downtown core infrastructure to suit intensification (2 responses)
- Opposition to further intensification of downtown (2 responses)
- Parking infrastructure (3 responses)

FIGURE 6: CHALLENGES TO BUSINESS AND EMPLOYMENT GROWTH IN BURLINGTON.

Challenges	Freq.	Challenges (continued)	Freq.
Poor transit, gridlock, congestion	62	Unstable economy or dollar	4
Cost of living (housing, rent, expenses, utilities)	40	Sprawl	3
Developable land/ employment lands	26	Poor core infrastructure	3
Bureaucracy/ red tape/ approvals / regulations	22	Parking	3
Taxes/ municipal costs/ development charges etc.	17	No high technology sector	3
Competition from other municipalities (Toronto, Oakville, Hamilton, KW)	17	Land	3
Skilled labour	10	Capital/ finance	3
Aging workforce/ population	8	Space	2
Infrastructure (slow progress, behind, insufficient funding etc.)	7	Poor road/highway infrastructure	2
Office space	6	Loss of "small town feel"	2
Fear of change	6	Lack of vibrancy	2
Higher wages	6	Intensification	2
Strain on small businesses	5	Incentives	2
Lack of vision, leadership, commitment	5	External government pressure	2
Concentration of landowners	5	Employee wages	2
Overpopulated	4	Creative Class	2
land cost/Commercial rent too high	4	Council stagnation	2
Lack of manufacturing	4	Commercial space	2
Investment attraction	4	BR&E	2
Bedroom community	4		

Source: Millier Dickinson Blais Inc. 2015.



- Poor road/ highway infrastructure (2 responses)

Note the divergence of opinions on downtown intensification, with two opposed and two in favour.

Land and space availability:

- Lack of developable land (26 responses)
- Insufficient office space (6 responses)
- Concentration of landowners driving up costs (5 responses)
- Some direct references to “land” without elaboration (3 responses)
- Some direct references to “space” without elaborations (2 responses)
- Some direct references to “commercial space” (2 responses)

Quality of life:

- Cost of living concerns, including rent, housing, goods, and utilities (40 responses)
- Higher wages (6 responses)
- Loss of “small town feel” (2 responses)
- Lack of vibrancy (2 responses)

Municipal government:

- Frustration with the bureaucracy, red-tape, approval processes and/or regulations (22 responses)
- Non-competitive taxes, municipal costs and development charges (17 responses)
- Lack of vision, leadership or commitment to actions (5 responses)
- Council stagnation (2 responses)

Business needs and sector development:

- Skilled labour needs/ shortages (10 responses)
 - Strain on small businesses under current economy (5 responses)
 - Lack of investment attraction (4 responses)
 - Lack of high-technology sector (2 in favour, 1 in favour of high-technology sector)
-

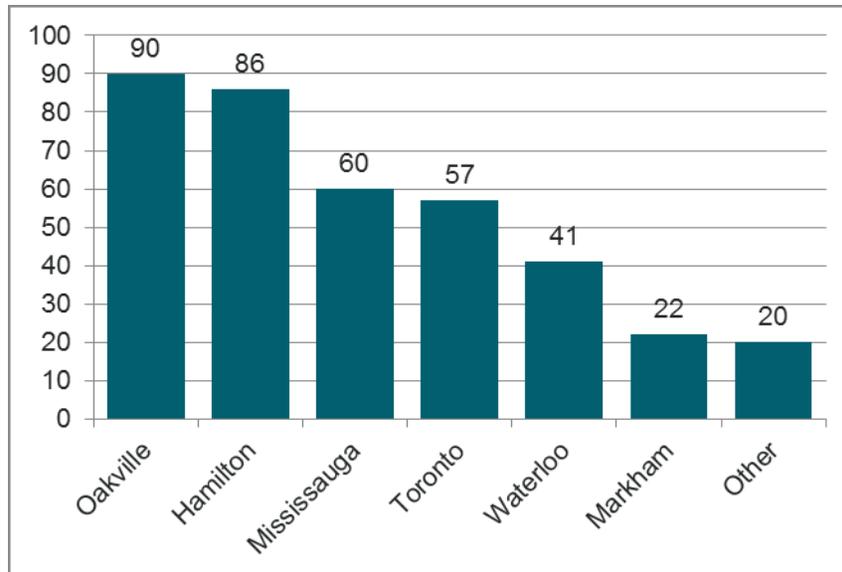


- Lack of capital or finance (3 responses)
- Insufficient “incentives”, not elaborated by respondents (2 responses)
- Need for BR&E attention (2 responses)

1.2.6 Competitor Municipalities

During the survey, respondents were asked to identify the locations understood to be competitors to Burlington. In total, 128 people offered responses, summarized in Figure 7. The figure shows in descending order the number of people that identified specific cities as competitors to Burlington.

FIGURE 7: LOCATIONS IDENTIFIED AS COMPETITORS TO BURLINGTON



Source: Millier Dickinson Blais Inc. 2015.



Oakville was identified as the greatest competitor to Burlington, with 90 responses. Rationales offered by respondents include:

- Proximity (including accessibility and geographic location) (48 responses)
- Availability of developable land (19 responses)
- Quality of life attributes and impression of the city (9 responses)
- Openness to business needs (8 responses)
- Affluence of demographic (8 responses)
- Similarity to Burlington (8 responses)
- Better infrastructure (access to main arteries, transit etc.) (4 responses)
- Skilled labour availability (3 responses)
- Expanding businesses/companies (2 responses)
- Proximity to L.B. Pearson International Airport (2 responses)
- Demographics (growing population and employment base) (2 responses)

Hamilton followed Oakville with 86 respondents selecting it as a competitor, of which the following themes were identified:

- Costs of rent or property (30 responses)
- Proximity (including accessibility and geographic location) (16 responses)
- Openness to business needs, including incentives, attraction program, aggressive economic development department (12 responses)
- Quality of life and image of city (10 responses)
- Lower operating costs or employment costs (7 responses)
 - Two respondents also noted that Hamilton has higher property tax rates, which counter-balances the lower operating or overhead employment costs
- More developable land (6 responses)

Oakville and Hamilton as Competitors

The category of *proximity* is viewed by respondents as a high competitiveness issue for Burlington compared to Oakville and Hamilton. The category tops the list of identified competitive advantages in Oakville and is the second highest on Hamilton's list, following costs of rent or property.

Proximity is an issue for Burlington because it is situated between Oakville and Hamilton, sharing boundaries with both. Oakville's proximity to Toronto gives it an advantage over Burlington for reasons such as talent attraction, investment attraction from Toronto, commuter mobility and distance to Lester B. Pearson airport.

Though Hamilton is farther from Toronto, it is directly adjacent to Burlington's southern boundary and has the added value of lower rent and/or property costs, as articulated by 30 respondents in the survey. Additionally, Hamilton is closer to the United States border, which may make it more appealing for some industries.

Survey results also indicate both comparator municipalities have a higher quality of life and/or city image. Though value judgements concerning quality of life reflect the personal, subjective tastes of individuals, the findings imply a perception that Burlington lags behind the two other municipalities in areas such as:

- Downtown vibrancy or rejuvenation
- Affluence (Oakville)
- Affordability (Hamilton)
- Livability
- Arts, culture and entertainment
- Natural amenities



- Companies are expanding, particularly in health care and knowledge industries (6 responses)
- Post-secondary education institutions (5 responses)
- Demographics (population growth, younger market, employment base) (4 responses)
- Openness to change (within city and residents) (3 responses)
- Skilled labour availability (2 responses)
- Has an airport (2 responses)
- Similar to Burlington (2 responses)

Mississauga was identified as the next largest threat, with 60 respondents providing responses in total. Key themes include:

- Proximity (including accessibility and geographic location) (24 responses)
- Proximity to Lester. B. Pearson International Airport (14 responses)
- Openness to business needs (incentives, investment attraction, BR&E) (13 responses)
- Transit system/ transportation corridor access (13 responses)
- Demographics (diverse population, skilled and unskilled labour availability) (10 responses)
- Availability of development land (5 responses)
- 'Market accessibility' mentioned explicitly (4 responses)
- Quality of life and image of city (4 responses)
- Expanding companies and clustered growth (2 responses)
- Rent and property costs (2 responses)
- Similarities (2 responses)
- Diversified sectors (2 responses)

Toronto was the next largest competitor, identified by 57 respondents. Toronto's six largest advantages are:

- Reputation as a business and economic hub (17 responses)
 - Demographics related to population growth and size and available labour force (13 responses)
 - "Metropolitan" (7 responses)
 - Skilled labour and knowledge base (6 responses)
 - Quality of life (6 responses)
-



- Proximity and accessibility (6 responses)

Waterloo was selected by 41 respondents, and its top five competitive features are:

- Post-secondary institutions (14 responses)
- High tech sector, R&D and innovative clusters (10 responses)
- Transit infrastructure (6 responses)
- Openness to business needs (4 responses)
- “Proximity” (3 responses)
- Knowledge base (3 responses)

Finally, Markham was the least collectively identified competitor with 22 people selecting it. Markham’s five largest competitive advantages are:

- Progressive infrastructure development (5 responses)
- IT cluster and high tech sector (3 responses)
- Proximity to Toronto (3 responses)
- Quality of life attributes (3 responses)
- Demographics (growing population and cultural diversity) (3 responses)



1.2.7 Accommodating Growth

Of 144 respondents, 98 (68%) of respondents believe Burlington should accommodate industrial and office growth by redevelopment of existing land and office space, while 25 (or 17%) would prefer Greenfield developments as priorities. The findings indicate a majority preference among respondents to avoid expanding development outside of already developed areas in Burlington.

A further 21 respondents (15%) indicated 'other' of which eight indicated that both options should be pursued, two more suggested brownfield sites, and two others specified the focus should be on downtown development. There were no other generalizable answers.

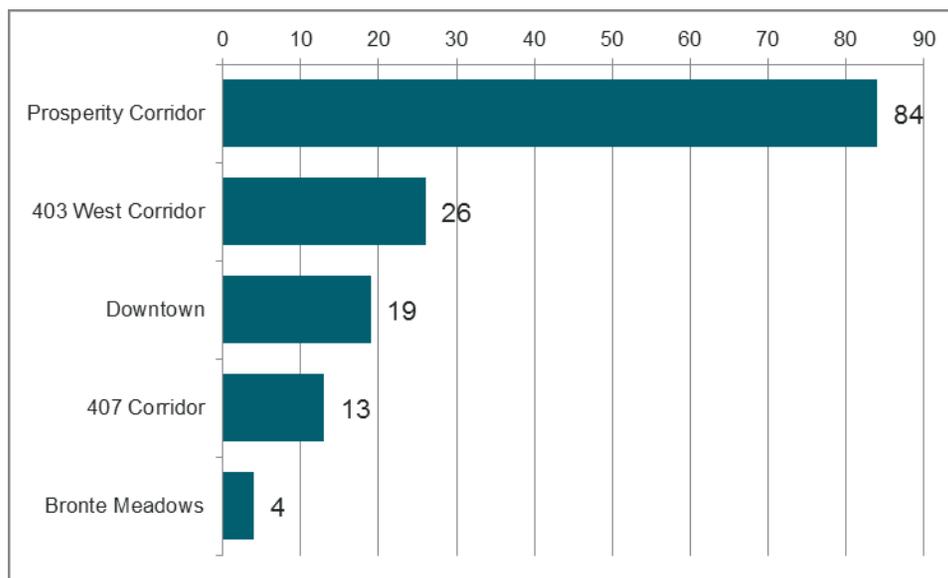
The survey also asked respondents, "Which Burlington Investment Districts do you think the City of Burlington should prioritize resources towards in the next 10 years?" The results are summarized in **Error! Reference source not found..**

According to respondents, the top three investment district priorities are:

- Prosperity Corridor
- 403 West Corridor
- Downtown

From the data above, it is clear that the Prosperity Corridor is by far the area that

FIGURE 8: STRATEGIC RESOURCE PRIORITIZATION



Source: Millier Dickinson Blais Inc. 2015. Note: values represent the average score for each category based on the cumulative total of individual values.



should be leveraged to accommodate industrial and office growth and redevelopment.

1.2.8 Prioritizing Economic Development Issues

The final section of the survey asked respondents, “What are the most pressing economic development issues for the City of Burlington?”

The results are summarized in **Error! Reference source not found.**⁴ Of the 143 respondents that participated, the **most pressing** economic development issues are:

- Increasing high quality jobs and skilled and talented workforce
- Attracting and retaining businesses
- Addressing demographic challenges and trends

The **least pressing** economic development issues identified by respondents were:

- Increasing tourism and visitor spending

FIGURE 9: MOST PRESSING ECONOMIC ISSUES REQUIRING RESOURCES IN BURLINGTON



Source: Millier Dickinson Blais Inc. 2015. Note: values represent the average score for each category.

⁴ NOTE: The total score of all questions is reflected in the graph above. The score contains the aggregate of all ranked responses that were captured for each response and presents this as one figure. Due to the higher level of variables contained within this questions, the score more accurately reflects the priority of the variables chosen by all respondents.



- Investing in water/wastewater infrastructure
- Increasing non-residential tax assessment