



PLANNING AND DEVELOPMENT COMMITTEE

TO: *MAYOR AND COUNCILLORS*

**SUBJECT: OCP – ECONOMIC DEVELOPMENT AND INDUSTRIAL LANDS –
EMPLOYMENT LANDS NEEDS ASSESSMENT**

RECOMMENDATION:

THAT the report titled “OCP - Economic Development and Industrial Lands – Employment Lands Needs Assessment” dated June 25, 2024, be received for information.

REPORT

The Planning and Development Committee, at its meeting held on June 25, 2024, received and adopted the *attached* report providing the key findings from the Official Community Plan (OCP) Employment Lands Needs Assessment, including the attached “Burnaby Employment Land Needs Assessment: What We Heard Report”.

On behalf of the Planning and
Development Committee,

Mayor Mike Hurley
Chair

Councillor Pietro Calendino
Vice Chair



Meeting June 25, 2024

File: 70500 01

COMMITTEE REPORT

TO: PLANNING AND DEVELOPMENT COMMITTEE

FROM: GENERAL MANAGER PLANNING AND DEVELOPMENT

SUBJECT: OFFICIAL COMMUNITY PLAN – ECONOMIC DEVELOPMENT AND INDUSTRIAL LANDS – EMPLOYMENT LANDS NEEDS ASSESSMENT

PURPOSE: To convey the key findings from the Official Community Plan (OCP) Employment Lands Needs Assessment, including the attached “Burnaby Employment Land Needs Assessment: What We Heard Report”.

RECOMMENDATION

THAT the report titled “Official Community Plan Economic Development and Industrial Lands – Employment Lands Needs Assessment” dated June 25, 2024, be received for information.

EXECUTIVE SUMMARY

This report highlights the key findings of the Employment Lands Needs Assessment (Needs Assessment) as part of the Official Community Plan (OCP) Economic Development & Industrial Lands Policy Review. The Needs Assessment included targeted interviews, an inventory of existing employment space and the development of employment demand projections. The Needs Assessment found that by 2050 the City is expected to need 26% more employment space (~22 million sq. ft) over the current inventory, of which the highest demand will likely be in industrial, office and commercial uses. This research was utilized by staff to draft strategic Policy Directions which were then brought to the community during Phase 3 of Burnaby 2050 public engagement.

1.0 POLICY SECTION

The Employment Lands Needs Assessment aligns with the following:

- Section 473(1)(b) of the Local Government Act
- Goal 2 and strategies 2.1 and 2.2 of Metro 2050: Regional Growth Strategy

Council-adopted policies:

- *Official Community Plan (1998)*;
- *Economic Development Strategy (2007)*; and
- *Corporate Strategic Plan (2021)*.

2.0 BACKGROUND

On November 20, 2023 Council received a report titled “OCP Policy Development Approach – Policy Reviews And Growth Modelling”, which details the policy development process proposed for the new Official Community Plan to be achieved through 13 “Policy Review” projects.

In Fall of 2023, the City secured Urban Systems to support an Employment Land Needs Assessment as part of the OCP Economic Development and Industrial Lands Policy Review. The Needs Assessment consisted of two research tasks:

- 1) targeted outreach with experts on local employment conditions, and
- 2) projected employment growth and floor area demand.

This report summarizes the key findings of this research.

3.0 EMPLOYMENT LAND NEEDS ASSESSMENT

Employment lands are a crucial component for Burnaby’s economic development and land use framework, as they provide local employment opportunities and accommodate economic activities. For the purposes of the Needs Assessment, the term “employment lands” refers to lands that are dominantly used for employment and economic activities and are designated for agricultural, industrial, office, commercial and institutional uses (Refer to Attachment 1 for definitions).

The objectives of the Needs Assessment were to:

- Create an inventory of the existing built employment space on a parcel and neighbourhood basis, broken out by land use category;
- Estimate the anticipated employment growth by 2050 broken out by land use category and geographic location; and
- Estimate the anticipated amount of built employment area needed by 2050, broken out by land use category and geographic location.

The Needs Assessment was scoped to inform the development of Burnaby 2050. By estimating the amount of additional employment area needed in the City by 2050, the OCP can begin to identify where to direct employment lands moving forward and how to best protect or enhance existing employment space. The findings from the targeted outreach and projected employment growth and floor area demand also helped inform the draft Policy Directions developed for the OCP.

3.1 Methodology

3.1.1 Targeted Outreach

Between December 6, 2023, and January 12, 2024, targeted outreach with major employers, property owners, and development companies operating in Burnaby was conducted. A total of 21 organizations were invited to participate in virtual interviews. The intent of the outreach was for organizations to identify

employment trends and barriers to development and/or redevelopment, and to recommend strategies for Burnaby to remain competitive.

3.1.2 Employment Growth Projections

As a foundation for the Needs Assessment, a floor space inventory was developed to better understand the existing estimated built area, represented in terms of Gross Floor Area (GFA and broken out by employment land use classes (agricultural, office, commercial, institutional, and industrial).

To estimate the existing built area, 19 sub-areas of Burnaby were identified (Refer to Attachment 4). The proposed sub-areas do not cover the entire city, but captured the majority of employers and businesses in Burnaby as employment uses are generally concentrated in a select number of business centres, industrial areas, and mixed-use areas with access to major transportation infrastructure.

The next step in the analysis involved incorporating local employment data to understand the relationship between jobs and employment lands, enabling an estimation of the average amount of floor area currently needed for workers in different employment land use classes. Once these steps were completed, employment growth projections were prepared and an estimate of the anticipated floor area demand to 2051 was established.

It is important to recognize preparing an analysis of employment and space use at a local level presented several challenges associated with data collection and comparability. Data limitations for this project include: the impact of the COVID Pandemic on the 2021 Census, limited responses to the National Household Survey and limitations of data platforms used to calculate floor area estimates. Complementing the quantitative analysis with the qualitative interviews conducted as part of the targeted outreach helped to mitigate the limitations of the data.

3.2 Key Findings

3.2.1 Targeted Outreach – What We Heard Report

The purpose of the interviews was to obtain additional market-specific commentary on employment trends, needs, and challenges, to further inform employment implications for the City of Burnaby. The information collected through the outreach process has been reviewed by staff and was used as an input for the Policy Review process.

A total of 11 organizations were interviewed as part of the targeted outreach and included representatives from the industrial, commercial, healthcare, education, technology, development, and construction sectors. Table 1 provides a high-level summary of what interviewees identified as Burnaby's advantages and challenges in terms of employment and economic development.

Table 1: Burnaby’s Advantages and Challenges from the Targeted Outreach “What We Heard Report”

<p>Burnaby’s Competitive Advantages</p>	<ul style="list-style-type: none"> • Burnaby’s central location and proximity to both Vancouver and the Fraser Valley reduces commute times. • Easily accessible transit system and good highway connectivity. • Quality supply of industrial and employment lands with lower land values than Vancouver. • Burnaby has a large and diverse skilled workforce that stems from the city’s growing population. • Multiple reputable post-secondary institutions are an attractive learning hub and centre for innovation and provide an educated, skilled, and trained labour force. • High concentration of amenities in Burnaby’s Town Centres.
<p>Burnaby’s Existing Challenges</p>	<ul style="list-style-type: none"> • Complex and lengthy development processes. • Rents and lease rates are too high for many small businesses. • Burnaby needs more affordable housing options for their employees to attract and retain skilled labour. This would help Burnaby compete with municipalities further east where housing costs for employees are lower. • Infrastructure related to transit service, walkability and sustainability needs to be improved in some parts of the city.

Participants provided insights into emerging market and development trends in employment land uses they anticipated over the next 25 years. A few of these included:

- Continued demand for industrial lands but a decrease in single use industrial areas. This may lead to demand for smaller parcels and spaces for all industrial and employment land uses.
- Growing demand for on-site amenities (e.g., childcare, restaurants, cafes) in industrial areas and mixed-commercial developments.
- More efficient use of industrial land through the inclusion of office, retail and mixed-commercial uses on upper floors.

3.2.2 Employment Growth Projections

The results of the Needs Assessment 3.1.2 Employment growth projections provided the following insights (Refer to Attachment 2 – Tables 1, 2, 3 and 4, and Graphs 1 and 2, and Attachment 5):

- Currently, Burnaby has approximately 83 million sq. ft. of built employment total gross floor area (GFA) and approximately 103,500 jobs as per the 2021 Census.
- Of the employment land use classes, the majority of Burnaby's employment lands are industrial (49% or ~40,700,000 sq. ft.). Further, industrial uses facilitated the highest number of jobs (almost 37,000) compared to the other employment land use classes as of 2021.
- Overall, the number of jobs located on employment lands is projected to increase by ~72,000 (+70% net employment change) between 2021 and 2051.
- Work From Home employment is projected to decline by ~ 21,000 jobs (-57%) by 2051 from the pandemic peak of ~36,500 jobs.
- The net job growth for the city between 2021 and 2051 is estimated to be ~51,700 (additional jobs over 2021 numbers). This is generally consistent with the employment growth projections in Metro 2050.
- Office and commercial uses combined are projected to have the highest employment demand over the next 25 years (~43,000 additional jobs).
- In total, a demand for ~22 million sq. ft of net additional employment space is projected citywide across all employment land use classes between 2021 and 2051, representing an average 26% increase in demand over the current inventory.
- Industrial uses currently have the highest built gross floor area compared to other land uses and are projected to demand an additional ~8 million sq. ft. (average net growth) of floor area in the next 25 years.
- Agricultural lands are projected to have the lowest total floor area demand compared to other employment land uses, with a projected average net increase of ~230,000 sq. ft in the next 25 years.
- Combined, office and commercial uses are forecasted to demand an additional ~7.5 million sq. ft. of floor area by 2051.
- Required floor area (sq. ft) per worker is anticipated to decrease by 2051 for most employment land classes, which may result in a higher density of employees per sq. ft.

*Numbers presented throughout this document have been rounded and may not add up precisely to the totals and percentages provided.

3.3 Implications for Burnaby 2050 and Next Steps

Results of the Employment Needs Assessment were used to assist with the drafting of Policy Directions for the Economic Development and Industrial Lands Policy Review. The draft Policy Directions were brought forward for public engagement in Spring 2024. Quantitative results related to employment land demand will help inform the draft OCP Land Use Framework, which will be forwarded for Council and Public input later this year.

Preliminary review of the above findings suggests that:

- Demand for employment land is growing across all land use classes, except for working from home where the baseline year of 2021 creates a data anomaly due to the COVID 19 pandemic.
- Existing employment lands in Burnaby should be protected and enhanced.
- Approximately 26% additional employment space will be needed citywide to meet projected demand by 2051.
- In particular, industrial, office, and commercial space should be prioritized to meet forecasted demand.
- Consideration should be given to the City’s identified strategic advantages and challenges to identify actions the City can take to foster job creation and a healthy local economy.

Findings from this study should be considered an early first step towards the City’s broader economic development objectives. Ongoing data gathering and analysis, policy development, strategic planning, and stronger relations with local business experts will help ensure the City remains an attractive place to work, do business, or locate an organization or non-profit.

4.0 COMMUNICATION AND COMMUNITY ENGAGEMENT

Staff engaged with key community partners including Metro Vancouver Regional District and the Burnaby Board of Trade on the scoping of this project. Experts on the local employment and development sector were engaged through the targeted outreach. This report and attachments will be posted on the City’s website.

5.0 FINANCIAL CONSIDERATIONS

The City of Burnaby engaged consultants to assist with the economic development and industrial lands policy review. All costs are covered by the approved OCP Budget.

Respectfully submitted,
 E.W. Kozak, General Manager Planning and Development

ATTACHMENTS

Attachment 1 – Definitions

Attachment 2 – Key Findings, S.3.2.2 Employment growth projections: Tables and Graphs

Attachment 3 - Burnaby Employment Land Needs Assessment: What We Heard Report (January 2024)

Attachment 4 –Employment Land Needs Assessment: Burnaby Key Employment Sub-areas Map

Attachment 5 – Summary tables outlining the net projected average employment growth and floor area demand (sq. ft) by 2051 broken down by sub-area and land use class.

REPORT CONTRIBUTORS

This report was prepared by Danais Ponce, Planner 2 and Chun Nam Law, Planner 2 and reviewed by Erin Rennie, Planner 3, Johannes Schumann, Director Community Planning and Lee-Ann Garnett, Deputy General Manager of Planning and Development.

Attachment 1

Definitions

For the purposes of the Employment Lands Needs Assessment, five primary land use classes were considered to be “employment lands”. Definitions for each land use is included for reference:

Agricultural – Lands that are used primarily for agricultural purposes.

Industrial – Economic activities typically associated with the manufacture, storage, or transportation of goods and materials.

Office – Large format office spaces typically accommodated in significant podium or free-standing office buildings.

Commercial – Retail, restaurant, service, and small office spaces that can include a range of formats, including standalone buildings, strip malls, enclosed malls, and various mixed employment spaces.

Institutional – A mix of civic functions including schools, large healthcare facilities, and municipal halls and works yards.

Attachment 2

Table 1: Citywide employment and existing built employment area broken down by employment land use class.

Employment Land Use Class	Total gross floor area (GFA) (sq.ft)	Percent (%) of GFA per Employment Land Class	2021 Employment
Commercial	14,250,000	17	25,800
Office	11,600,000	14	21,300
Industrial	40,720,000	49	36,700
Institutional	16,050,000	19	19,300
Agricultural	620,000	1	330
Total	83,240,000	100	103,430

Table 2: Citywide 2021 – 2051 employment projections broken down by employment land use class and work from home.

Employment Land Use Class	2021 Employment	Projected 2051 Employment	Estimated Net Employment Change	Change percentage (%)
Commercial	25,800	46,700	20,900	81
Office	21,300	43,800	22,500	106
Industrial	36,700	51,400	14,700	40
Institutional	19,300	33,500	14,200	74
Agricultural	330	450	120	36
Work from Home	36,500	15,800	-20,700	-57
Total	139,930	191,650	51,720	37

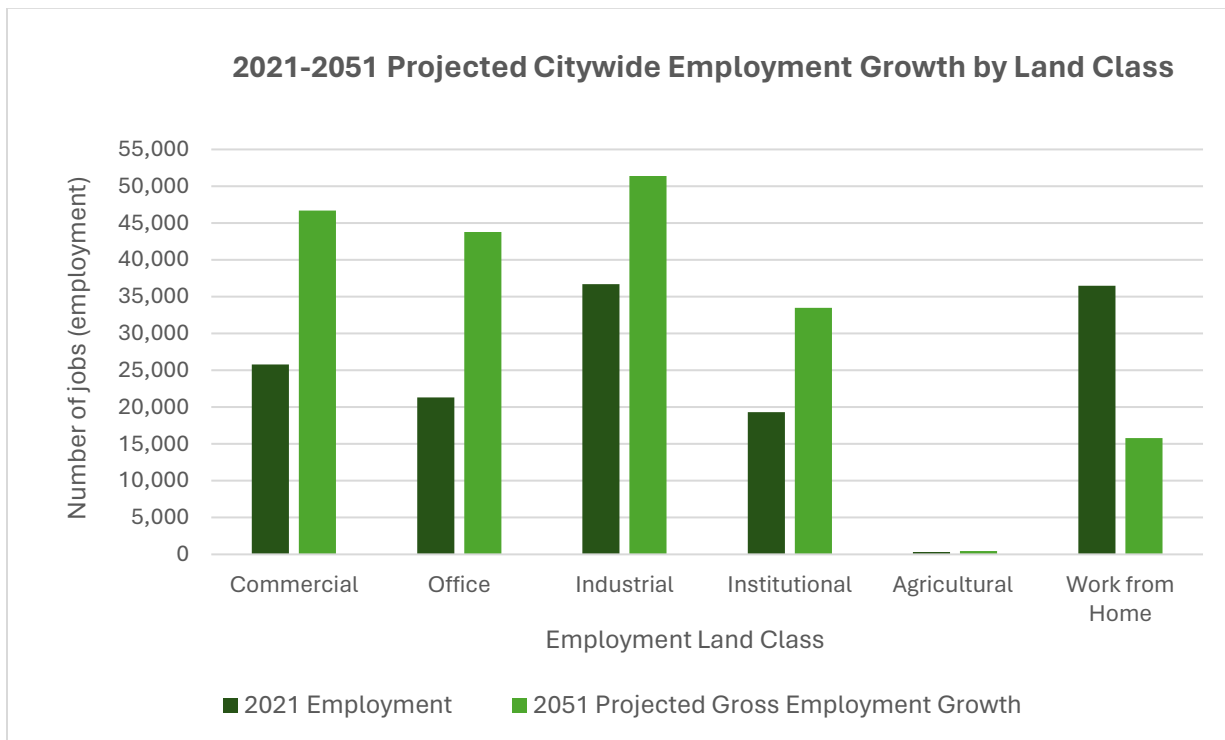
Table 3: Citywide 2021 – 2051 floor area demand projections broken down by employment land use class.

Employment Land Use Class	Floor Area (Sq. ft)			
	2021 Gross Floor Area (GFA)	Projected 2051 GFA demand	Estimated Net Floor Area Demand (sq.ft)	Change percentage (%)
Commercial	14,250,000	18,410,000	4,160,000	29
Office	11,600,000	14,760,000	3,160,000	27
Industrial	40,720,000	48,700,000	7,980,000	20
Institutional	16,050,000	22,470,000	6,420,000	40
Agricultural	620,000	850,000	230,000	37
Total	83,240,000	105,190,000	21,950,000	26

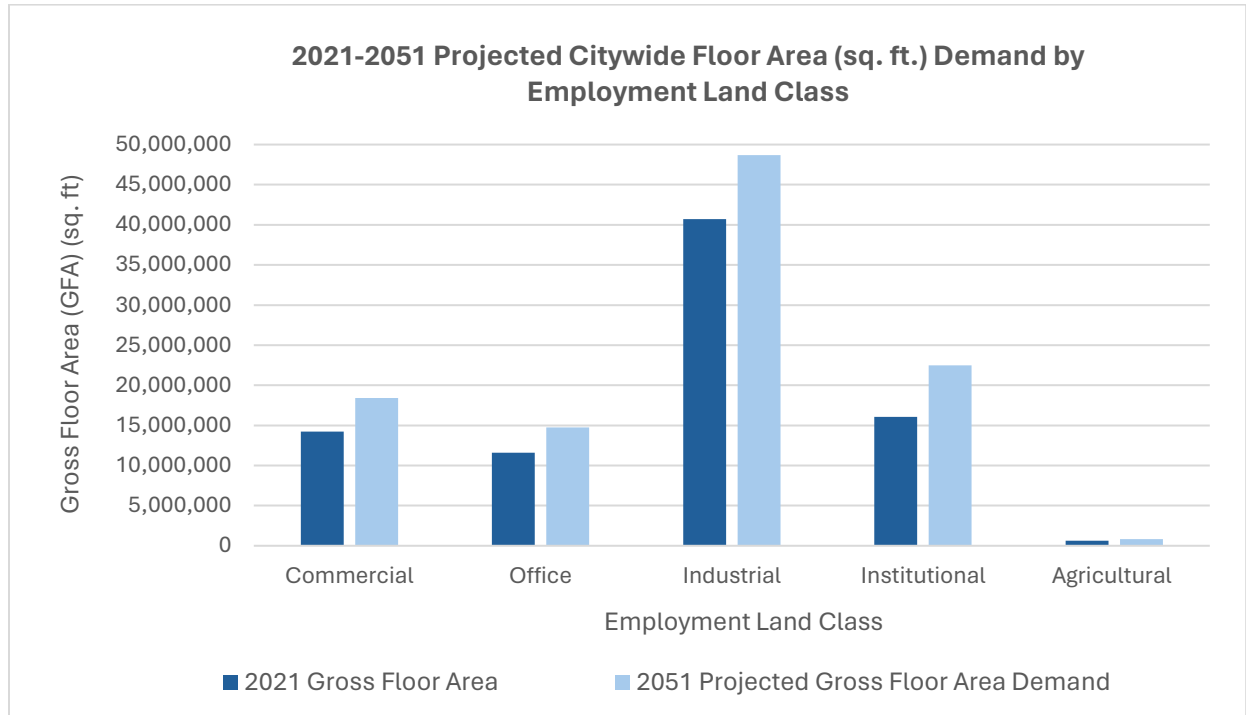
Table 4: Citywide 2021 – 2051 projected floor area (s. ft). per worker broken down by employment land use class.

Employment Land Use Class	2021 Floor Area (sq. ft) Per Worker	Projected 2051 Floor Area (sq. ft) Per Worker
Commercial	550	390
Office	550	330
Industrial	1,100	950
Institutional	830	700
Agricultural	1,900	1,900

Graph 1: Citywide 2021 – 2051 employment projections broken down by employment land use class. Projections show the average of low/high scenarios provided by the consultant.



Graph 2: Citywide 2021 – 2051 floor area demand projections broken down by employment land use class. Projections show the average of low/high scenarios provided by the consultant.





Burnaby Employment Land Needs Assessment

What We Heard Report

JANUARY 2024

Acknowledging the unceded homelands of the hə́ńqəmińə́m and Sḱw̓x̓w̓ú7mesh speaking Peoples

The City of Burnaby recognizes that we are on the ancestral and unceded homelands of the hə́ńqəmińə́m and Sḱw̓x̓w̓ú7mesh speaking Peoples and are grateful to be on this territory.



Table of Contents

Targeted Outreach	1
Engagement Objectives	1
How We Informed – Round One	1
How We Informed – Round Two	2
Engagement by the Numbers	2
Who We Engaged	2
What We Heard: Interview Questions	3
Closing Comments and Next Steps	12



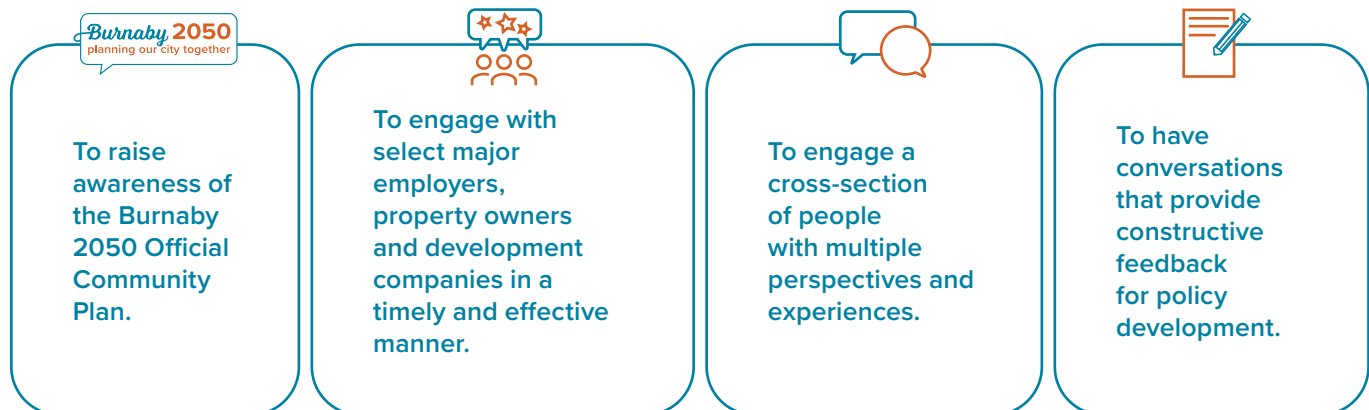
Targeted Outreach



The Employment Lands Needs Assessment includes targeted outreach to Burnaby's major employers, property owners and development companies to supplement desktop research and technical analysis. The outreach was facilitated by Urban Systems (an independent consulting firm) between December 6, 2023, and January 12, 2024.

Engagement Objectives

The objectives for this engagement exercise were:



How We Informed – Round One

On December 6, 2023, the City of Burnaby sent a letter (via email) to 15 organizations inviting them to participate in a brief (25-minute) virtual interview. The interviews were designed to identify employment trends, barriers to development and/or redevelopment and recommend strategies for Burnaby to remain competitive and a preferred location for business. The letter provided a link to the Burnaby 2050 webpage and the list of interview questions so participants could provide informed and meaningful feedback. Participants appreciated the opportunity to consider the questions in advance of the interviews.

On December 8, 2023, Urban Systems sent a Doodle poll (via email) to the 15 organizations inviting them to select a date and time for their interview. A Doodle poll reminder email was sent to the organizations who had not replied by December 15, 2023. Participants reported the Doodle poll to be a helpful and efficient way to schedule the interviews.

How We Informed – Round Two

On December 15, 2023, the City of Burnaby sent a letter (via email) to six (6) organizations inviting them to participate in a brief (25-minute) virtual interview. The second round of letters were sent to individuals recommended to Urban Systems by the initial interviewees.

On December 15, 2023, Urban Systems sent a Doodle poll (via email) to the referrals inviting them to select a date and time for their interviews. A Doodle poll reminder email was sent to the referrals who had not replied by December 21, 2023.

Engagement by the Numbers

- 21 organizations were invited to participate in the targeted outreach
- 11 organizations participated in the virtual interviews
- 25–35 minutes – average interview time

Who We Engaged

Urban Systems interviewed representatives from the industrial, commercial, healthcare, education, technology, development and construction sectors as well as the Burnaby Board of Trade. A total of 11 interviews were conducted as part of the targeted outreach.

Table 1: List of Interview Participants

#	Organization	Interview Date
1	Beedie Industrial	December 13, 2023
2	W P J McCarthy & Co	December 20, 2023
3	Oxford Properties	December 20, 2023
4	Beedie Industrial	January 4, 2024
5	Burnaby Board of Trade	January 5, 2024
6	Carter-Mitchell Auto Group	January 5, 2024
7	Grosvenor	January 9, 2024
8	Fraser Health	January 11, 2024
9	STEMCELL Technologies Canada Inc.	January 11, 2024
10	AHC Construction	January 12, 2024
11	SFU	January 12, 2024

What We Heard: Interview Questions

The interviews consisted of eight (8) questions which the participants were given before the interviews to prepare. The following provides a summary of what we heard through the interview process. The detailed meeting notes have been provided to the City of Burnaby under separate cover.

Q1. What are Burnaby's competitive advantages in terms of economic development and job-creation compared to neighboring municipalities and other similar municipalities?

- **Location – Burnaby's central location is the city's leading competitive advantage**
 - Located in the heart of Metro Vancouver
 - Proximity to the Port of Vancouver, YVR and the US border
 - Proximity to Vancouver where business services are concentrated
 - Proximity to the Fraser Valley where businesses draw employees
- **Accessibility – Burnaby is easily accessible by transit and private vehicles**
 - SkyTrain network is a very attractive feature
 - Transit system enables employees to commute to work easily
 - Highway 1 and Lougheed Highway traverse the city making Burnaby accessible
 - Highways make it easy to transport supplies and goods across Metro Vancouver
 - Customers are plentiful because of transit and the transportation system
- **Land – Burnaby has land available for development and redevelopment**
 - Supply of industrial and employment lands is attractive
 - Value of industrial and employment lands is lower than Vancouver
 - Town Centre land use designation has been an effective development tool
- **Demographics – Burnaby is BC's third largest city with a population of 230,000**
 - Rapid population growth creates opportunities to source talented employees
 - Large and diverse workforce to choose from due to Burnaby's size
 - Burnaby attracts immigrants who diversify the workforce
- **Academic Institutions – Burnaby is a learning hub and centre for innovation**
 - SFU, BCIT and Douglas College provide an educated and skilled labour force
 - SFU provides the talent required to support new technologies and industries
 - Hydrogen, fuel cell technology and health sciences are big opportunities
 - Clean technology companies are attracted because of collaborations with SFU

- **Strong Financials – City Hall has a reputation for being financially strong**
 - City Hall is known for being debt free
 - Burnaby has the financial resources to build more civic infrastructure
 - Burnaby understands businesses need to be profitable to survive
 - Burnaby is known as a great place to do business
- **Pro Growth and Development – City Hall embraces growth and development**
 - There is support for higher density projects at both a staff and Council level
 - Planning department is transparent when it comes to density
 - Building approvals are quick to secure once development approvals are in place
 - Hospital expansion could be a huge opportunity for growth and development

Q2. What specific challenges or barriers has your organization faced in pursuing employment-oriented (i.e. industrial, office, retail, institutional or mixed-commercial) development or redevelopment opportunities within the City of Burnaby?

- **Lengthy planning and development approvals** are the leading barriers participants face
 - The rezoning process is complex and time consuming (approximately one year)
 - Requirement for both site plan and development permit approval can be onerous
 - The need for a Comprehensive Development (CD) Zone for industrial and commercial developments introduces unnecessary time and risk because the applications must be approved by Council – makes doing business in Burnaby less attractive
 - CD Zones limit future redevelopment opportunities
 - Land use designations and zones need to be more specific to provide clarity
 - Simple tenant improvement approvals are lengthy, and provides challenges for small businesses
- **Lack of affordable housing** makes it difficult to attract skilled labour
 - Housing is becoming too expensive for all workers across the city
 - Businesses are having to source employees from the Fraser Valley
 - Cost of housing is making it difficult to attract health care professionals
 - It is difficult to find housing for entry-level employees
 - Problem is compounded by technical programs being at capacity at BCIT so there is a shortage of skilled labour available in Burnaby



- **Employment requirements** are not always realistic
 - Blanket Floor Space Ratio (FSR) does not reflect market conditions
 - Blanket FSR is too high and difficult to achieve in several cases
 - Burnaby has a narrow definition of what a job is – more research and analysis is needed
 - Need to consider occupancy rates at existing locations when thinking about office jobs – there are SkyTrain locations where the office components have not been fully developed
- **Development costs** are high in Burnaby
 - New development leasing costs are too high for small businesses including health care professionals to establish themselves
 - Property taxes are expensive because they are driven by the highest and best use of land rather than the actual use of land
- **Lack of infrastructure** in some parts of the city
 - Transit service levels could be improved
 - Neighbourhoods could be more walkable
 - Development could be more sustainable
 - Burnaby needs more investment in civic infrastructure to attract labour
- **Burnaby's geography** makes it difficult to articulate Burnaby's identity
 - Highways traverse Burnaby making the city feel less cohesive
 - SFU is located at the top of Burnaby Mountain, so it is less connected to the city
 - Burnaby lacks a single downtown core to help define the city



Q3. What emerging market or development trends in employment land uses (industrial, office, retail, institutional or mixed-commercial) do you anticipate in the next 25-years?

- **Industrial**
 - Single use industrial areas are becoming less prevalent – opportunities will emerge to use industrial land more efficiently by allowing office, retail and mixed-commercial uses on upper floors
 - Greater demand for industrial land for logistics and distribution purposes will emerge
 - Greater demand for large warehouses as the movie industry expands in Burnaby
 - More amenities (e.g., childcare, restaurants, cafes) will be offered in industrial areas
 - Developers will seek out quality industrial spaces over large industrial spaces
 - Large industrial tenants will pay more to be in the places they need/want to be
 - An innovation district will be created with land to collaborate with multiple partners, develop ideas, spin-out companies and produce materials
- **Office**
 - Greater demand for office space near amenities and public transit will emerge
 - Burnaby will see a shift toward office and retail mixed developments
- **Retail**
 - Logistics will replace large format retail uses – big box retail is dying
 - Greater demand for smaller format retail space with an experiential component
 - Retail will follow mixed-commercial and office developments for the foot traffic
- **Institutional**
 - Burnaby will continue to be an education hub that businesses collaborate with
 - Staff housing will be required to attract quality talent to institutional uses
 - Land for health care, education and training will continue to be in demand
- **Mixed-Commercial**
 - Industrial uses will be incorporated into mixed-commercial developments like Marine Gateway because the land base and density require it
 - Industrial and mixed-commercial developments will offer more staff amenities e.g., larger lunchrooms, health centres, childcare facilities etc.
- **Other**
 - Electrification of the auto industry will require more specialized skills, more electric charging stations and more BC Hydro grid capacity to keep pace with demand
 - More electrification and automation will reduce the number of cars on the road
 - An expanded rapid transit system will create development opportunities because there will be greater access to labour and inventory
 - Educated and skilled labour will continue to work where housing is most affordable
 - Businesses will continue to demand more amenities
 - Businesses will continue to compare Burnaby to Vancouver



Q3a) How do you think these trends will impact development/redevelopment opportunities within the City of Burnaby?

- Industrial lands will be used more efficiently – this will not necessarily translate to more stacked industrial developments as stacked industrial is expensive to build, but lower parking requirements and higher site coverages
- New land use designations will be created to allow for a greater mix of industrial and commercial developments and further protect these areas from residential development
- Zoning will become more flexible to accommodate new technologies and industries – participants noted the existing zoning regulations make it difficult for non-residential developments to succeed
- Town Centres will evolve to have a greater mix of commercial, office and retail spaces – participants described development opportunities where commercial and retail uses would occupy the first floor of towers and office space would occupy the next three (3) storeys with residential development above.
- New technologies and industries will not succeed unless more industrial land is secured and Official Community Plan (OCP) and Zoning Bylaw (ZB) policies do more to protect industrial land from residential development – clarity is required to prevent speculation
- Small businesses will go extinct if the planning and development approvals process does not improve – it is not economically viable for a small business to wait longer than a year for a development permit when they are tied to a five-year lease. Local businesses cannot afford the holding costs which is why Burnaby is seeing a proliferation of multi-national businesses occupying retail spaces in the four (4) Town Centres.
- New development/redevelopment opportunities require clear OCP policies and ZB regulations. All land use designations should be reviewed and updated for clarity.

Q3b) What kinds of land, space, or facility needs do you foresee in the future because of these emerging trends?

- Smaller parcels and smaller spaces for all industrial and employment land uses
- New areas for industrial and employment land uses throughout the city
- An innovation centre on Burnaby Mountain with access to SFU labs and students – SFU is a magnet for innovation and has land available to support new technologies and industries
- Health care facilities to leverage the new hospital and cancer centre
- New technologies will require more investment inside employment spaces
- Clean energy sector will need large warehouse spaces in good locations
- Dedicated Class AAA office space within 400m of a SkyTrain station

Q4. How could the City help respond to these emerging market or development trends?

- **Reduce Parking Requirements** was the most popular response to this question
 - Relax parking requirements for development in proximity to public transit
 - Relax parking requirements for industrial uses which tend to have surplus parking
 - Maximum site coverage is difficult to achieve (for industrial) due to parking requirements
 - Calculate parking requirements based on number of employees vs. square footage
 - Recognize automation and new technologies require fewer employees than before
- **Reduce Property Taxes** was the second most popular response
 - Restructure industrial property tax based on main floor square footage and use
 - Lower property taxes would make industrial lands regionally more competitive
- **Leverage Post Secondary Institutions** to attract new technologies and industries
 - Burnaby should play a convener role and bring academia and new businesses together
 - Use the Civic Innovation Lab to inform municipal decision-making
 - Collaborate with SFU to develop a clean energy cluster or business park
 - Liaise with academia to stay on top of clean energy trends
- **Create a Health and Wellness Land Use Designation** in the OCP
 - Leverage development of the new hospital to build a thriving health care sector
 - Designate new service hubs with multiple partners and health care professionals
 - Require purpose-built health care space in new developments around SkyTrain Stations
 - Incentivize doctors and healthcare practitioners to establish practices in Town Centres
- **Create a 50-year Business Plan** for how Burnaby will remain competitive moving forward
 - Define what Burnaby wants to be known for from a business perspective
 - Research market trends when creating land use designations and drafting policy
 - Recognize employment targets are aspirational and consider market realities
 - Continue to reach out to developers, property owners and businesses for input
- **Redesignate Municipal Land** for industrial and employment uses
 - Municipal lands could be used to target specific industrial and employment uses
 - Burnaby could adjust rental and lease rates to make targeted businesses more viable
 - Research examples where municipalities are doing this across the US



Q5. Considering your organization's experience in pursuing development or redevelopment of employment land uses in other jurisdictions, what should the City of Burnaby consider in terms of employment land use policies that can better balance demand and supply?

- Provide incentives for parcels of land with lower site coverages to redevelop
- Protect employment lands from residential development
- Consider power requirements when designating employment lands
- Reduce timelines for planning and development approvals
- Set (and adhere to) approval timelines to provide certainty to foreign investors
- Reduce parking requirements to allow for more employment space on land parcels
- Revisit how jobs are defined and calculated especially population-servicing employment – these jobs are in high demand across Burnaby and planners need to better understand their role in the local economy. Burnaby should undertake a market assessment to highlight this.

Q6. Why would an organization choose to locate their offices in one of Burnaby's four Town Centres (Metrotown, Brentwood, Edmonds, or Lougheed)? Why not?

An organization **would choose** to locate their offices in one of Burnaby's four (4) Town Centres for the following reasons:

- **Location – Burnaby's Town Centers are centrally located within Metro Vancouver**
 - Proximity to Vancouver is attractive because of the business services located there
 - Proximity to the Fraser Valley is attractive because of the diverse labour force
 - Proximity to YVR is important to foreign investors
- **Accessibility – Burnaby's Town Centres are well-serviced by roads and public transit**
 - SkyTrain service makes it easy for employees to commute to work
 - Sky Train service attracts and retains high quality employees
 - Proximity to higher order public transit boosts customer traffic volumes
 - Proximity to highways makes it easy to source materials and transport goods
 - Central location draws employees and customers from other municipalities
- **Amenities – Burnaby's Town Centres have the highest concentration of amenities**
 - People from across Metro Vancouver want to work here because of the amenities
 - Employees have access to a broad range of shops and services
 - Services like grocery stores, professional offices and daycares make life easier
 - Prime location and rich amenities align with several corporate brands
 - Metrotown and Brentwood are more attractive because they are newer

- **Vibrancy – Complete communities are being created at the Town Centres**
 - Mixed-use development contributes to activity throughout the day and night
 - Generate energy like Downtown Vancouver without Vancouver’s social challenges
 - Multiple residential rezoning applications are active in the area
 - Several office and retail development opportunities are available
- **Affordable – Burnaby’s Town Centres are an affordable alternative to Vancouver**
 - Cost of leasing space is more affordable than Vancouver
 - Development costs tend to be lower here than Vancouver
 - Built form is attractive and the cost is competitive

An organization **would not choose** to locate their offices in one of Burnaby’s four (4) Town Centres for the following reasons:

- Burnaby’s Town Centres lack the business services Downtown Vancouver offers like lawyers, architects, accountants etc.
- Town Centres offer no industrial development opportunities

Q7. *Thinking about your current workforce...*

a) What have been the impacts of the work from home policies?

- Participants reported the work from home policies have had limited impact
- Employees have been working in the office full-time for quite a while
- Technology companies were some of the first businesses to shift back to in person work
- Suburban office locations have larger floorplates so employees can spread out more
- Development companies need employees to be working in the same location
- Consensus that a hybrid work model has limited benefits

b) What are the greatest perks and challenges to attract/ retain employees in Burnaby?

- **Access to skilled labour is the greatest perk** to attracting/retaining employees
 - Central location enables businesses to draw employees from across Metro Vancouver
 - Academic institutions provide an educated, skilled and trained labour force
 - Transportation network and transit service reduce commuting times
- **Affordability is the greatest challenge** to attracting/retaining employees
 - Burnaby is relatively affordable compared to Vancouver but housing is still expensive
 - Businesses need more affordable housing options for their employees
 - Competition with municipalities further east where housing costs are a little lower



Q8. Is there anything else the City of Burnaby could be doing to prepare itself for the economy of the future and become a top choice location to do business?

- Identify what Burnaby's competitive advantages are in a global (not regional) market
- Partner with post-secondary institutions to realize Burnaby's long-term vision
- Apply a sustainability lens to the municipal decision-making process
- Designate land for a variety of housing typologies and tenures
- Locate employment land uses closer to residential land uses to reduce commuting times
- Expedite planning and development approvals for small businesses
- Set (and adhere to) timelines for planning and development approvals
- Invest in community infrastructure to support a rapidly growing population
- Develop office uses around SkyTrain Stations
- Relocate City Hall to Metrotown
- Integrate employment opportunities in neighbourhoods to create complete communities
- Improve customer service at City Hall
- Research the jobs that are being created in Burnaby to better define what a job is
- Incentivize new technologies and carbon ready development projects
- Maintain Burnaby's strong financial position at City Hall
- Move towards electrification and increase the number of electric charging stations
- Eliminate parking at SkyTrain Stations to allow for alternative commuting options to emerge
- Understand how the provincial TOA guidelines will impact land around SkyTrain Stations
- Take a more flexible approach to planning and development



Closing Comments and Next Steps

Participants appreciated the City of Burnaby reaching out to members of the community for input into the Burnaby 2050 planning process. Participants would welcome continued conversations with planning and development staff as employment land policies are drafted and refined.

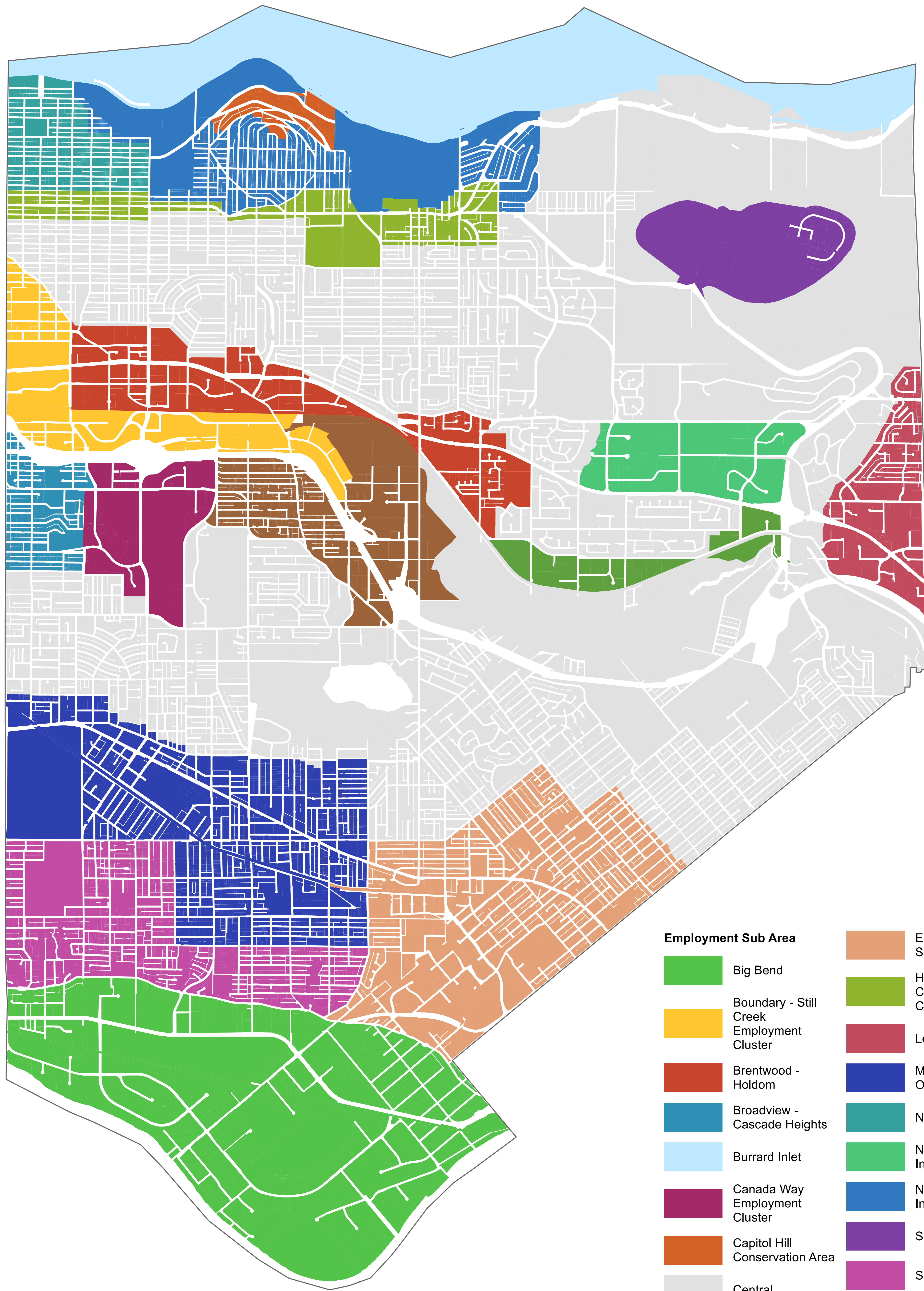
This What We Heard Report (and the detailed interview notes) will be considered by the project team alongside the desktop research and technical analysis. Together, the Burnaby Employment Land Needs Analysis will inform Burnaby 2050 – Burnaby's OCP Review. The OCP Review will also be further informed by a third round of public engagement that will launch in April 2024.



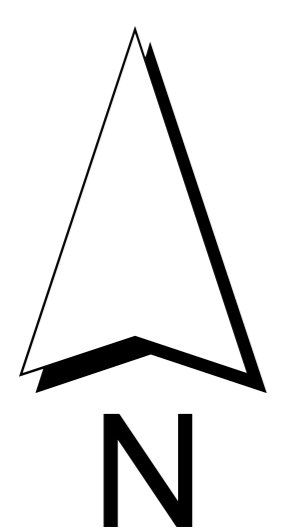


Attachment 4

Employment Land Needs Assessment: Burnaby Key Employment Sub-areas



Employment Sub Area	
	Big Bend
	Boundary - Still Creek Employment Cluster
	Brentwood - Holdom
	Broadview - Cascade Heights
	Burrard Inlet
	Canada Way Employment Cluster
	Capitol Hill Conservation Area
	Central
	Central Burnaby Civic Area
	Edmonds - Sixth Street
	Hasting Commercial Corridor
	Lougheed
	Metrotown - Royal Oak
	North
	North Lougheed Industrial Cluster
	Northern Shore Industrial Cluster
	Simon Fraser
	South
	South Lougheed Industrial Cluster



Attachment 5

Table 1: 2021-2051 Net Projected Average Floor Area (sq. ft) Demand broken down by Employment Land Use Class and Sub-Area

Burnaby Sub-Area	Floor Area (sq. ft) broken down by Employment Land Use Class									
	Agricultural		Office		Commerical		Institutional		Industrial	
	2021	2051 Net Projected Demand	2021	2051 Net Projected Demand	2021	2051 Net Projected Demand	2021	2051 Net Projected Demand	2021	2051 Net Projected Demand
Analysis Areas	630,000	216,500	11,578,000	3,183,500	13,980,000	4,178,000	12,315,000	5,396,500	40,568,000	8,006,500
Big Bend	630,000	216,500	880,000	187,000	916,000	271,000	253,000	48,000	15,491,000	3,403,500
Boundary - Still Creek Employment Centre	-	-	1,693,000	436,000	617,000	208,500	28,000	9,500	6,141,000	1,081,000
Brentwood - Holdom	-	-	1,213,000	358,000	2,017,000	625,000	201,000	121,500	2,668,000	300,000
Broadview - Cascade Heights	-	-	39,000	-	162,000	41,500	963,000	1,202,000	11,000	-
Canada Way Employment Centre	-	-	2,515,000	622,500	1,797,000	458,500	2,029,000	769,000	1,271,000	300,000
Central Burnaby Civic Area	-	-	395,000	124,500	43,000	15,500	1,079,000	433,000	323,000	120,000
Edmonds - Sixth Street	-	-	958,000	280,000	1,175,000	448,000	1,742,000	641,000	1,383,000	200,000
Hasting Commercial Corridor	-	-	13,000	70,000	1,725,000	521,000	1,107,000	280,000	111,000	20,000
Lougheed	-	-	95,000	93,500	1,107,000	375,000	118,000	88,000	56,000	-
Metrotown - Royal Oak	-	-	3,331,000	887,500	4,325,000	1,146,000	1,471,000	657,000	1,690,000	220,000
North Lougheed Industrial Cluster	-	-	446,000	124,500	2,000	31,500	-	9,500	5,094,000	1,201,000
Northern Shore Industrial Cluster	-	-	-	-	1,000	-	118,000	32,000	2,665,000	440,000
Simon Fraser	-	-	-	-	93,000	26,000	3,200,000	1,106,000	-	-
Southern Lougheed Industrial Cluster	-	-	-	-	-	10,500	6,000	-	3,664,000	721,000
Other Sub-Areas	8,000	3,000	64,000	8,000	8,000	93,500	3,744,000	1,099,000	119,000	200,000
Burrard Inlet	-	-	-	-	-	-	-	-	45,000	100,000
Central	8,000	3,000	64,000	8,000	8,000	73,000	3,130,000	913,500	74,000	100,000
North	-	-	-	-	-	5,000	403,000	128,000	-	-
South	-	-	-	-	-	15,500	211,000	57,500	-	-
Citywide	638,000	219,500	11,642,000	3,191,500	13,988,000	4,271,500	16,059,000	6,495,500	40,687,000	8,206,500

*Numbers presented in this document have been rounded and may not add up precisely to the totals provided.

Table 2: 2021-2051 Net Projected Average Employment Growth broken down by Employment Land Use Class and Sub-Area

Burnaby Sub-Area	Employment (number of jobs) broken down by Employment Land Use Class									
	Agricultural		Office		Commerical		Institutional		Industrial	
	2021	2051 Net Projected Employment	2021	2051 Net Projected Employment	2021	2051 Net Projected Employment	2021	2051 Net Projected Employment	2021	2051 Net Projected Employment
Analysis Areas	325	120	21,150	22,628	25,315	20,780	14,830	8,635	36,635	9,458
Big Bend	325	120	1,610	1,558	1,660	1,353	305	198	13,990	3,130
Boundary - Still Creek Employment Centre	-	-	3,090	3,220	1,115	978	35	33	5,545	1,525
Brentwood - Holdom	-	-	2,215	2,443	3,650	3,055	240	213	2,410	568
Broadview - Cascade Heights	-	-	70	45	295	225	1,160	713	10	-
Canada Way Employment Centre	-	-	4,595	4,710	3,255	2,473	2,445	1,388	1,150	358
Central Burnaby Civic Area	-	-	720	818	80	73	1,300	743	290	115
Edmonds - Sixth Street	-	-	1,750	1,923	2,125	1,993	2,095	1,213	1,250	320
Hasting Commercial Corridor	-	-	25	223	3,125	2,578	1,330	753	100	28
Lougheed	-	-	175	388	2,005	1,758	140	120	50	10
Metrotown - Royal Oak	-	-	6,085	6,425	7,830	6,058	1,770	1,088	1,525	378
North Lougheed Industrial Cluster	-	-	815	878	5	80	-	15	4,600	1,430
Northern Shore Industrial Cluster	-	-	-	-	-	-	145	65	2,405	648
Simon Fraser	-	-	-	-	170	133	3,855	2,098	-	-
Southern Lougheed Industrial Cluster	-	-	-	-	-	28	10	-	3,310	950
Other Sub-Areas	5	-	115	98	475	428	4,510	2,315	105	160
Burrard Inlet	-	-	-	-	-	-	-	-	40	95
Central	5	-	115	98	415	353	3,770	1,923	65	65
North	-	-	-	-	-	13	485	255	-	-
South	-	-	-	-	60	63	255	138	-	-
Citywide	330	123	21,270	22,723	25,785	21,213	19,335	10,950	36,740	9,620

*Numbers presented in this document have been rounded and may not add up precisely to the totals provided.