PACE OF DEVELOPMENT

Council Workshop
January 14, 2019

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General Manager
Planning, Properties & Permits
Introduction

Defining the issue:
– What is “pace of development” and why is it important?
– Influences
– Current policy (OCP, 2011)
– Historical and projected pace of development
– Options/Discussion
Options for Active Rezoning Applications (i.e. instream):

- Consider proposals on their individual merits
- Focus on key town and village centres
- Focus on rental housing, affordable housing and care facilities
- Focus on proposals with significant transportation improvements
What is “pace of development”?

E.g. Residential units approved, under construction or occupied per year
What is “pace of development”?  

- **Area Planning**: 2+ years  
- **Acquisition and site planning**: months or years  
- **Applications and decision making**: 18 – 30 months  
- **Construction**: 18 – 36 months  
- **Occupation (absorption)**: Days, months or longer
Example: Seylynn Village

- Compass
- Horizon
- Apex
- Beacon

- Occupancy
- Applications, Approvals, Permits
- Construction

Timeline:
- Beacon
- Horizon
- Compass
- Apex

Why is pace of development important?

- Change, uncertainty and risk (e.g. existing tenants)
- Construction impacts (e.g. noise, construction traffic)
- Land use impacts (e.g. traffic, character)
- Costs and service demands (e.g. capacity)
Why is pace of development important?

Changing community needs
(e.g. aging population)

Identified issues
(e.g. housing diversity and affordability)

Renewal and revitalization
(e.g. asset life cycle)
What influences the pace of development?

**Demand:**
- Population change
- Employment change
- Interest rates
- Foreign Buyers Tax
- Property Transfer Tax
- School Tax
- Mortgage “stress-test”

**Supply:**
- Land supply - vacant, partially utilized, underutilized
- Market factors - speculation, holdings & settlements
- Physical limits - environmental sensitivity, hazards
- Policies - federal, provincial, regional, local
- Regulations - Zoning
- Development review process

*Images and design elements not applicable in the text format.*
Census Growth Rate 2006 - 2011

- Port Moody: 19.9%
- Surrey: 18.6%
- Greater Vancouver A: 13.5%
- Pitt Meadows: 12.7%
- New Westminster: 11.2%
- Langley, Township: 10.4%
- Coquitlam: 10.3%
- Maple Ridge: 10.1%
- Burnaby: 9.2%
- Richmond: 6.9%
- Port Coquitlam: 6.7%
- North Vancouver, City: 6.2%
- Langley, City: 6.0%
- Indian Reserves: 4.4%
- Vancouver: 3.3%
- Delta: 3.1%
- White Rock: 2.2%
- North Vancouver, District: 1.3%
- West Vancouver: 1.3%

Census Growth Rate 2011 - 2016

- Greater Vancouver A: 12.6%
- Langley, Township: 11.2%
- Indian Reserves: 10.6%
- Surrey: 10.4%
- North Vancouver, City: 9.8%
- Coquitlam: 9.8%
- Maple Ridge: 8.2%
- New Westminster: 7.6%
- Port Coquitlam: 4.7%
- Pitt Meadows: 4.7%
- Vancouver: 4.6%
- Burnaby: 4.3%
- Richmond: 4.1%
- White Rock: 3.2%
- Langley, City: 3.2%
- Delta: 2.4%
- North Vancouver, District: 1.8%
- Port Moody: 1.6%
- West Vancouver: 1.5%

Metro Vancouver = 9.3%
BC = 7%
Canada = 5.9%

DNV Projection (OCP) = 6% (actual 1.8%)

Metro Vancouver = 6.5%
BC = 5.6%
Canada = 5%

Source: Statistics Canada Census
Current Policy (OCP, 2011)

2011 – 2030
+ 10,000 homes (500/yr.)
+ 20,000 people (1,000/yr.)
+ 10,000 jobs (500/yr.)

Planning Framework
Not targets
## Housing Continuum

<table>
<thead>
<tr>
<th>Category</th>
<th>2011 Units</th>
<th>2030 Units</th>
<th>Net Increase 2011-2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safe Houses*</td>
<td>22</td>
<td>37</td>
<td>15</td>
</tr>
<tr>
<td>Emergency Housing*</td>
<td>0</td>
<td>50</td>
<td>50</td>
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<tr>
<td>Supportive Housing*</td>
<td>17</td>
<td>67</td>
<td>50</td>
</tr>
<tr>
<td>Transition Housing*</td>
<td>21</td>
<td>121</td>
<td>100</td>
</tr>
<tr>
<td>Seniors care and disability care*</td>
<td>279</td>
<td>579</td>
<td>300</td>
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<tr>
<td>Subsidized Rental</td>
<td>644</td>
<td>1,644</td>
<td>1,000</td>
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<tr>
<td>Ownership — Co-op</td>
<td>343</td>
<td>343</td>
<td>0</td>
</tr>
<tr>
<td>Ownership — Co-housing</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Affordable Home Ownership</td>
<td>0</td>
<td>0</td>
<td>0</td>
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</table>
## Housing Continuum

<table>
<thead>
<tr>
<th>MARKET</th>
<th>RENTAL</th>
<th>2011 UNITS</th>
<th>2030 UNITS</th>
<th>NET INCREASE 2011-2030</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Apartments above shops</td>
<td>28</td>
<td>26</td>
<td>-2</td>
</tr>
<tr>
<td></td>
<td>Seniors care and disability care</td>
<td>328</td>
<td>528</td>
<td>200</td>
</tr>
<tr>
<td></td>
<td>Coach Houses*</td>
<td>0</td>
<td>80</td>
<td>80</td>
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<tr>
<td></td>
<td>Secondary Suites*</td>
<td>4,295</td>
<td>6,930</td>
<td>2,635</td>
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<tr>
<td></td>
<td>Purpose Built</td>
<td>1,259</td>
<td>2,859</td>
<td>1,600</td>
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<tr>
<td></td>
<td><strong>TOTAL</strong></td>
<td><strong>28,977</strong></td>
<td><strong>38,895</strong></td>
<td><strong>9,918</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MARKET</th>
<th>OWNERSHIP</th>
<th>2011 UNITS</th>
<th>2030 UNITS</th>
<th>NET INCREASE 2011-2030</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Strata Apartments</td>
<td>3,793</td>
<td>10,143</td>
<td>6,350</td>
</tr>
<tr>
<td></td>
<td>Townhouses</td>
<td>2,565</td>
<td>3,485</td>
<td>920</td>
</tr>
<tr>
<td></td>
<td>Duplexes, Triples, etc.</td>
<td>73</td>
<td>73</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>Row House</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td><strong>TOTAL</strong></td>
<td><strong>19,944</strong></td>
<td><strong>19,794</strong></td>
<td><strong>-150</strong></td>
</tr>
</tbody>
</table>
Census Population and Projection: North Shore Municipalities

Sources: Statistics Canada Census and Metro Vancouver 2040 Shaping Our Future
Census Population Change: North Shore Municipalities

Source: Statistics Canada Census
Historical and Projected Pace of Development

Single Family

Multi-family
Single Family House construction and major renovations (over $150K)

Under construction anytime in 2018

Source: DNV
Single Family Houses: Date of Construction

Source: DNV
Historical Pace of Rezoning Approvals and Multi-Family Occupancies

- Net new multi-family residential units approved (i.e. rezoning) since OCP adoption = 4,456 (Average ~ 595/yr.)

- Net new multi-family residential units occupied since OCP adoption = 1,646 (Average ~ 220/yr.)
Type of Approved Projects

- Non-Market Rental: 238
- Non-Market Care: 181
- Market Rental: 598
- Market Care: 61
- Market Ownership: 4360
Type of Approved Projects

- Non-Market Rental: 238
- Non-Market Care: 181
- Market Rental: 598
- Market Care: 61
- Larco - Market Rental: 341
- Larco - Market Rental: 4019
- Market Ownership:
Type of Approved Projects

- Non-Market Rental: 3215
- Non-Market Care: 238
- Market Rental: 598
- Market Care: 61
- Larco - Market Rental: 181
- Larco - Market Rental, 341: 3215
- Secondary Rental: 61
- Secondary Rental, 804: 3215
- Market Ownership: 238
- Market Ownership: 181
Lions Gate-Marine
Pace of Development
Lions Gate - Marine
Lions Gate - Marine
Lions Gate - Marine
Lynn Valley
Pace of Development
Lynn Creek
Pace of Development
Maplewood
Pace of Development
Maplewood
Outside Centres
Pace of Development
Outside Centres

2020

2021

2022

2023

2024

Under Construction

Completed

○ 0 - 49

○ 50 - 99

○ 100 - 399

○ 400 +
Outside Centres

- Under Construction
- Completed
  - 0 - 49
  - 50 - 99
  - 100 - 399
  - 400 +

2022
Active Rezoning Applications (i.e. instream) Multi-Family Units

- Preliminary Stage: 231 units
- Between Preliminary and Detailed Stage: 994 units
- Detailed Stage: 2,768 units
  - Net Non-Market Rental
  - Market Rental
  - Market Ownership
Options for Active Rezoning Applications (i.e. instream):

– Consider proposals on their individual merits
– Focus on key town and village centres
– Focus on rental housing, affordable housing and care facilities
– Focus on proposals with significant transportation improvements