

OFFICIAL COMMUNITY PLAN 5-Year Review



OCP Monitoring Program



Annual Review

- Snapshot of progress
- 17 annual indicators

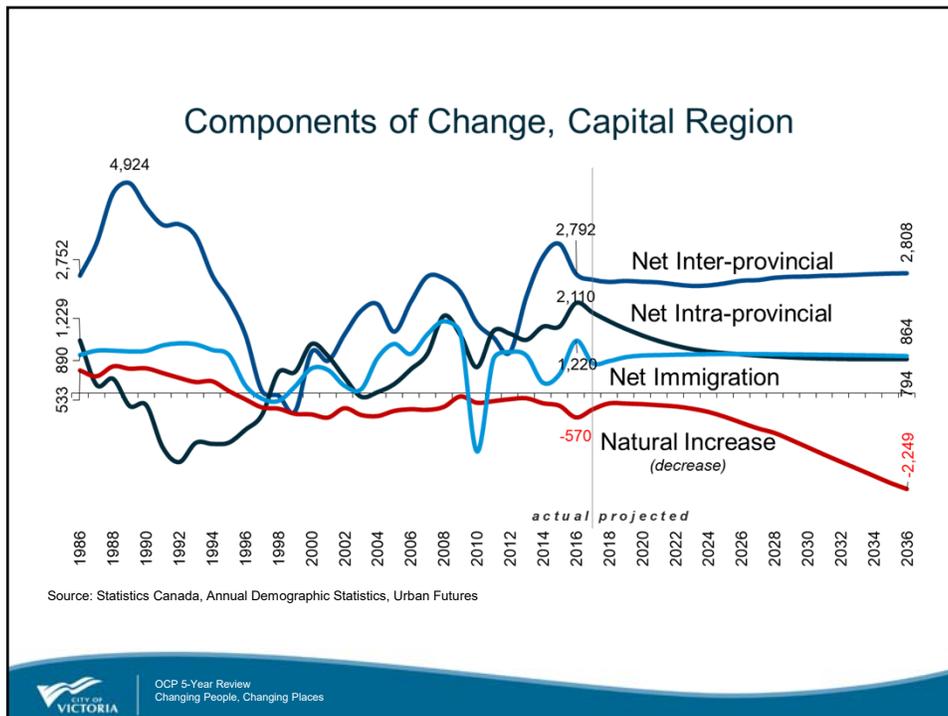


Five Year Review

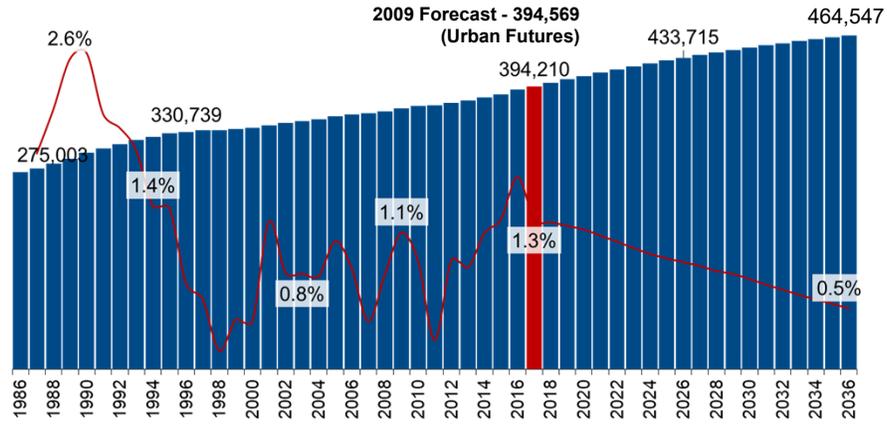
- Trends and forecasts
- Identification of policy implications for inclusion in future work plans



Population and Demographics



2018 Population Forecast, Capital Regional District

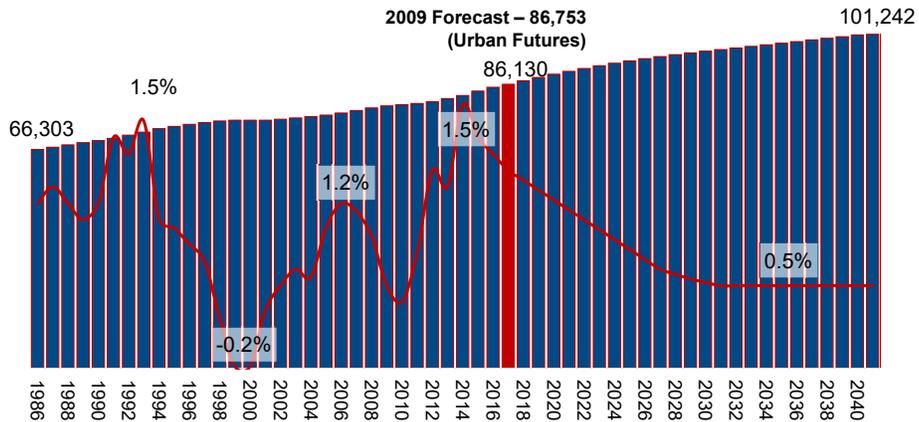


Source: Statistics Canada, Annual Demographic Statistics, Urban Futures



OCP 5-Year Review
Changing People, Changing Places

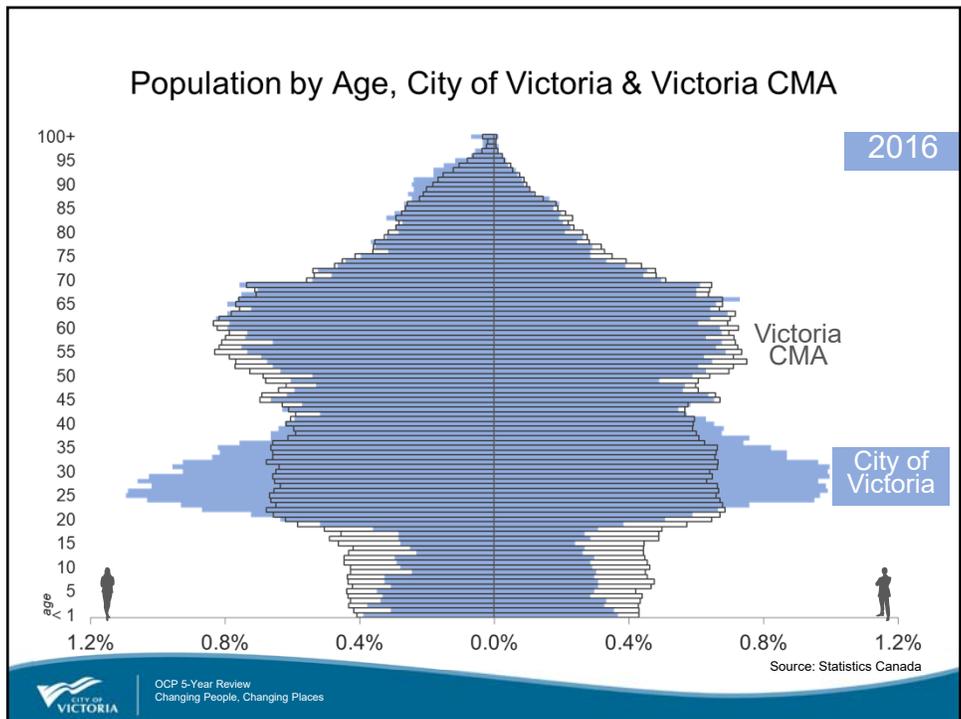
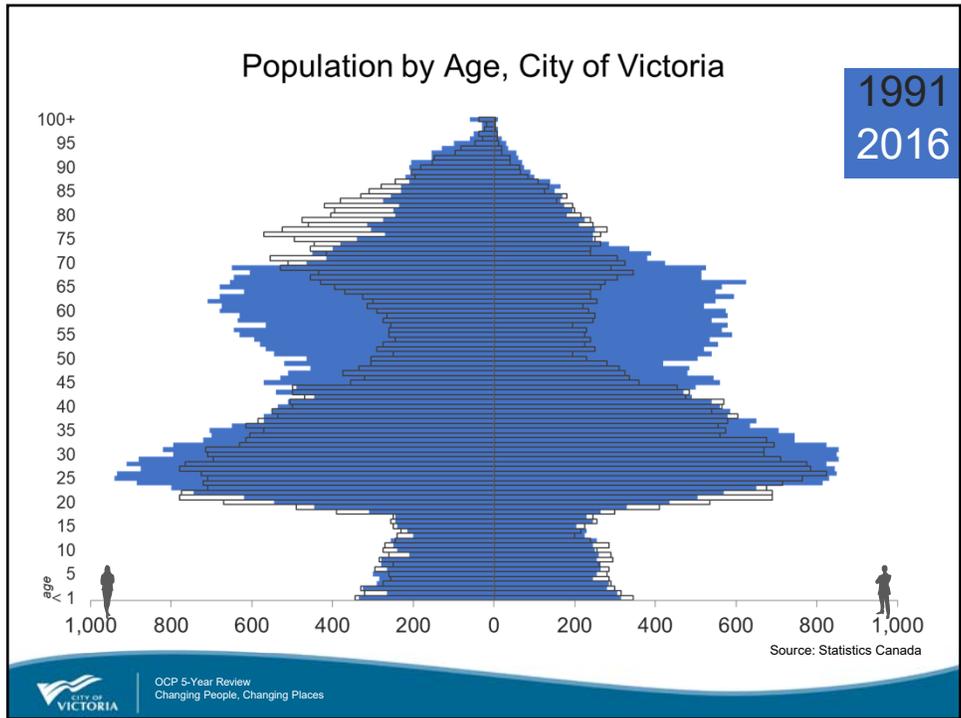
2018 Population Forecast, City of Victoria

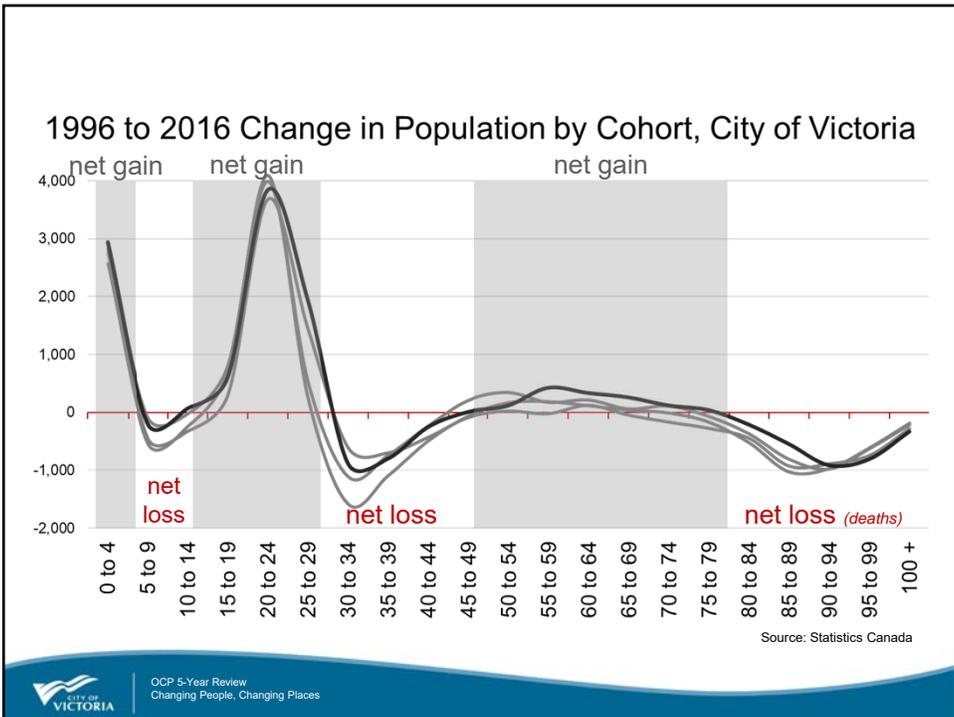
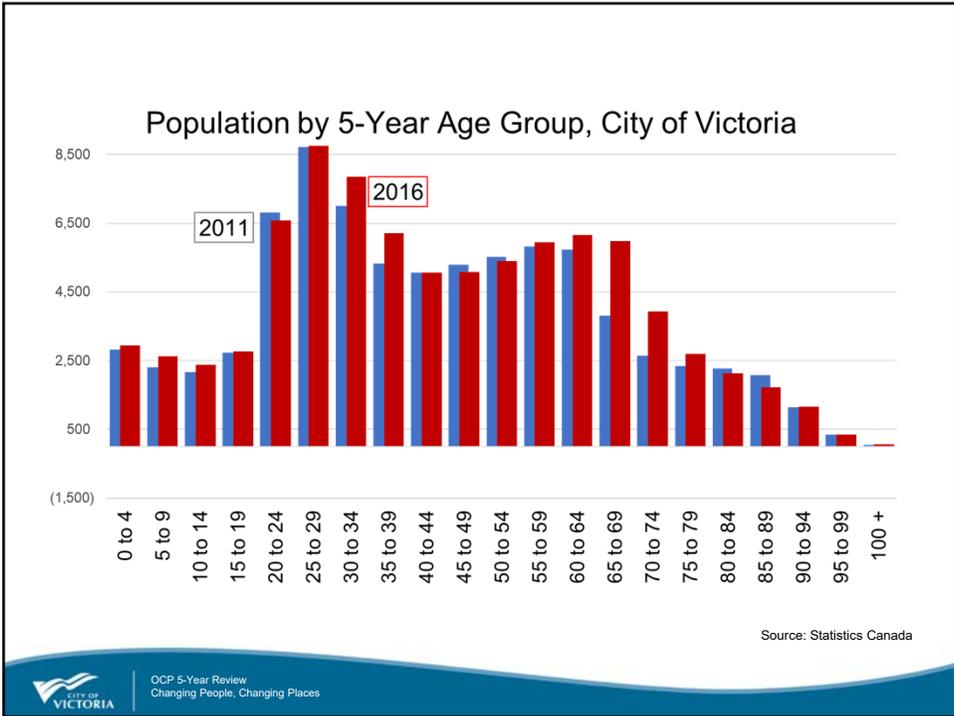


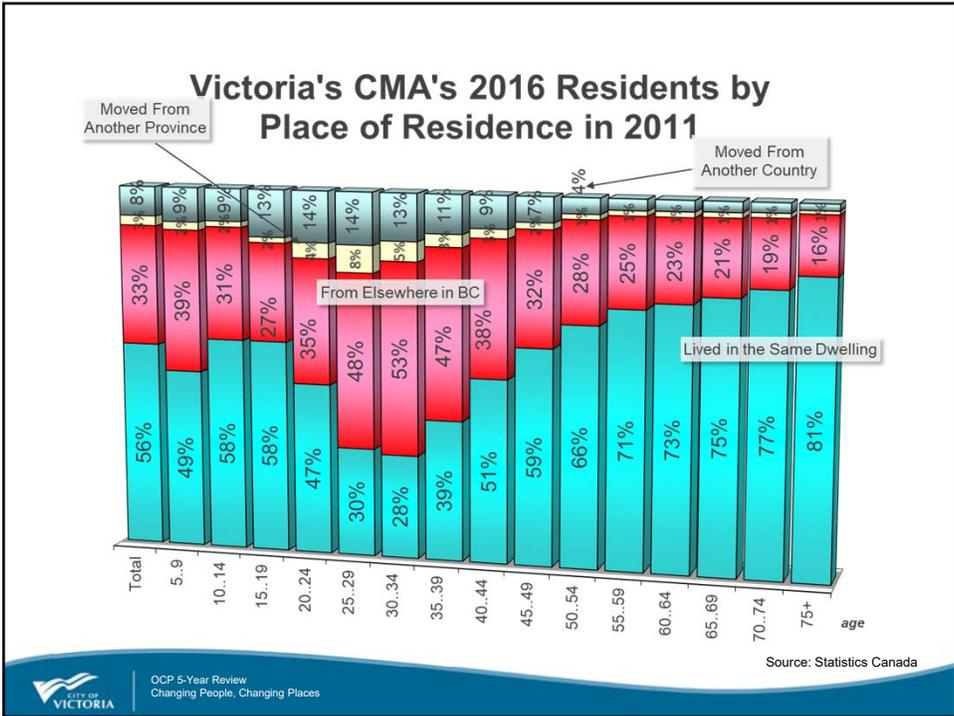
Source: Statistics Canada, City of Victoria, Urban Futures



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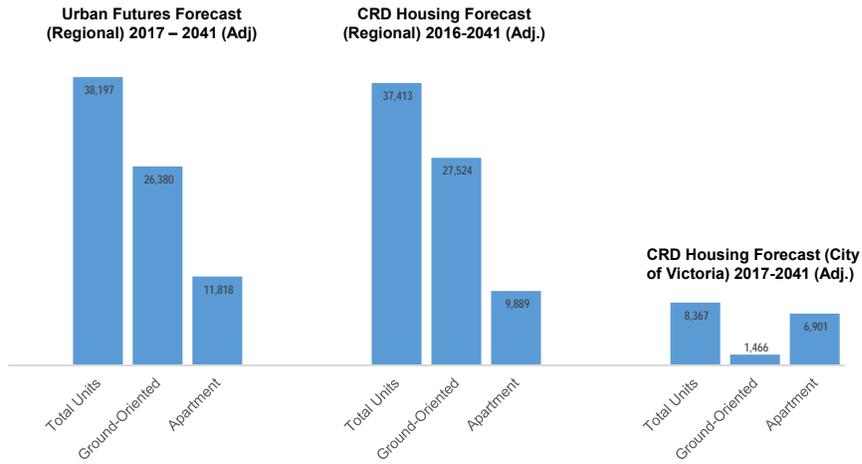






Housing

Housing Unit Demand Forecast 2017-2041

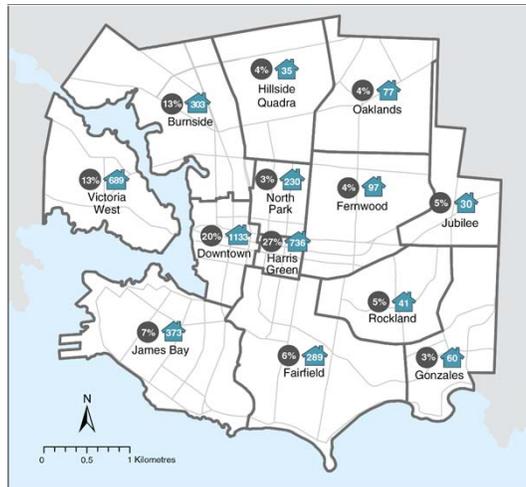


Source: Urban Futures, CRD



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Neighbourhood Growth



- Net New Housing Units 2012-2016 (City of Victoria, Building Permit)
- Population Growth 2011-2016 (Statistics Canada Census, 2011, 2016)

Source: City of Victoria



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Growth in Target Areas, 2017



Source: City of Victoria



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Growth in Target Areas 2012-2017

Share of New Housing Units in Growth Target Areas								
Growth Area	2012	2013	2014	2015	2016	2017	2012-2017 Cumulative	Target for 2041
Urban Core	73%	33%	33%	81%	67%	78%	61%	50%
In or within walking distance of a Town Centre or Large Urban Village	17%	28%	48%	12%	22%	14%	24%	40%
Small Urban Village or the remainder of the residential areas	10%	39%	19%	7%	11%	8%	15%	10%

↑ Exceeding targets

↓ Below targets

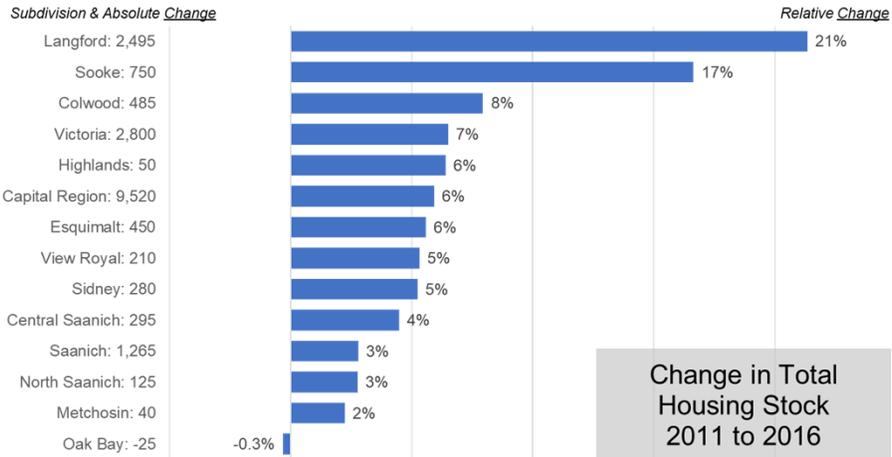
↑ Exceeding targets

Source: City of Victoria



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Housing Growth 2011-2016



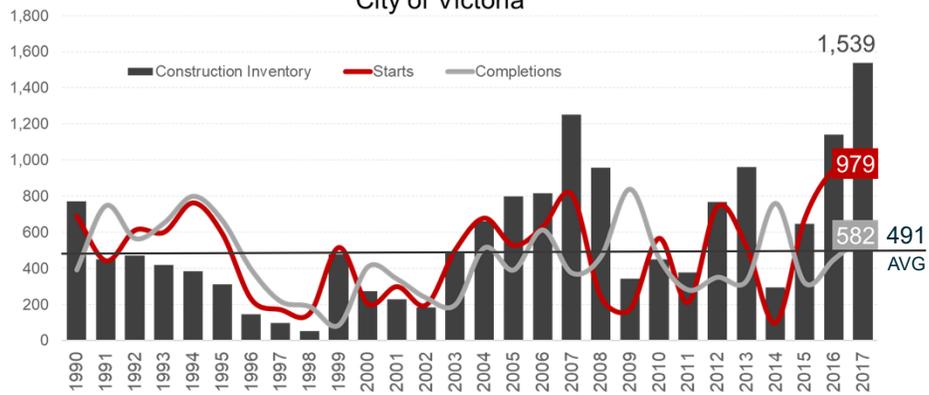
Change in Total Housing Stock 2011 to 2016

Source: Statistics Canada



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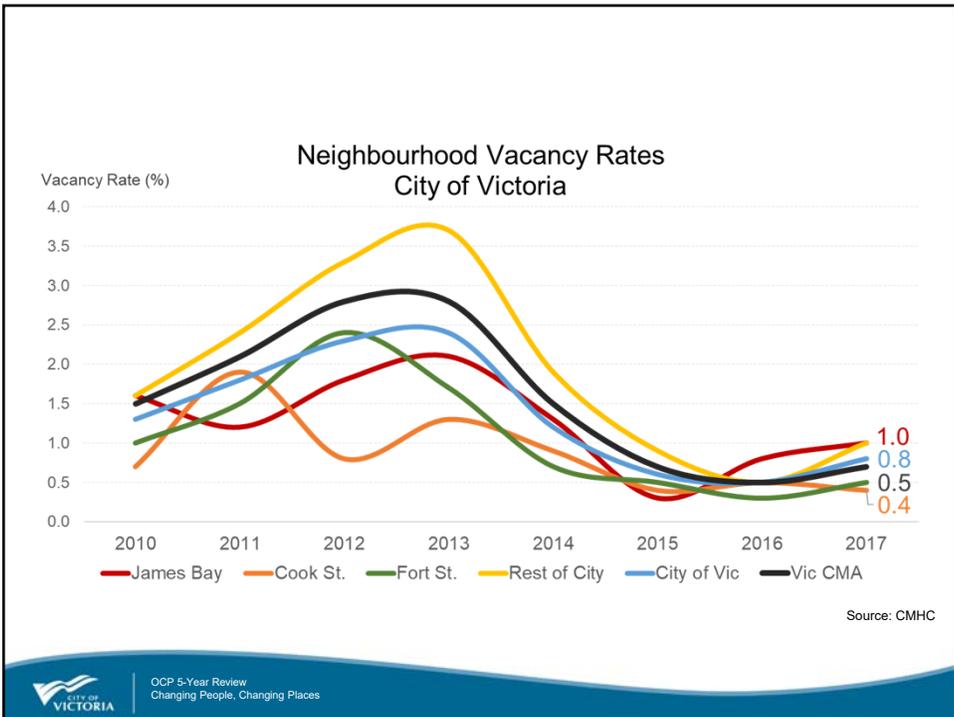
Housing Under Construction, Starts, & Completions, All Property Types City of Victoria

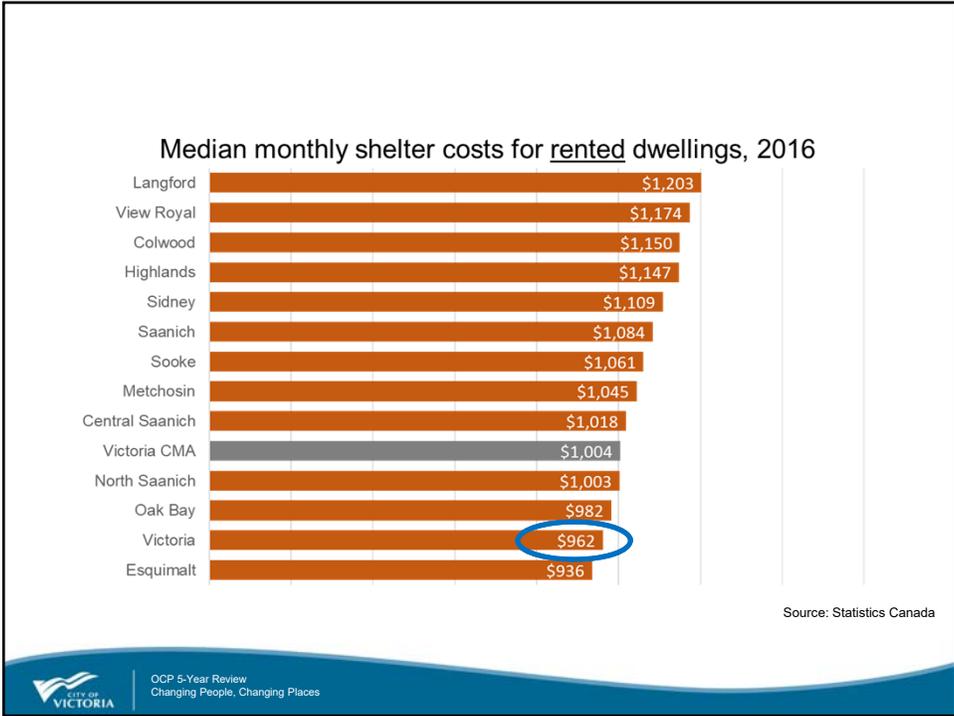
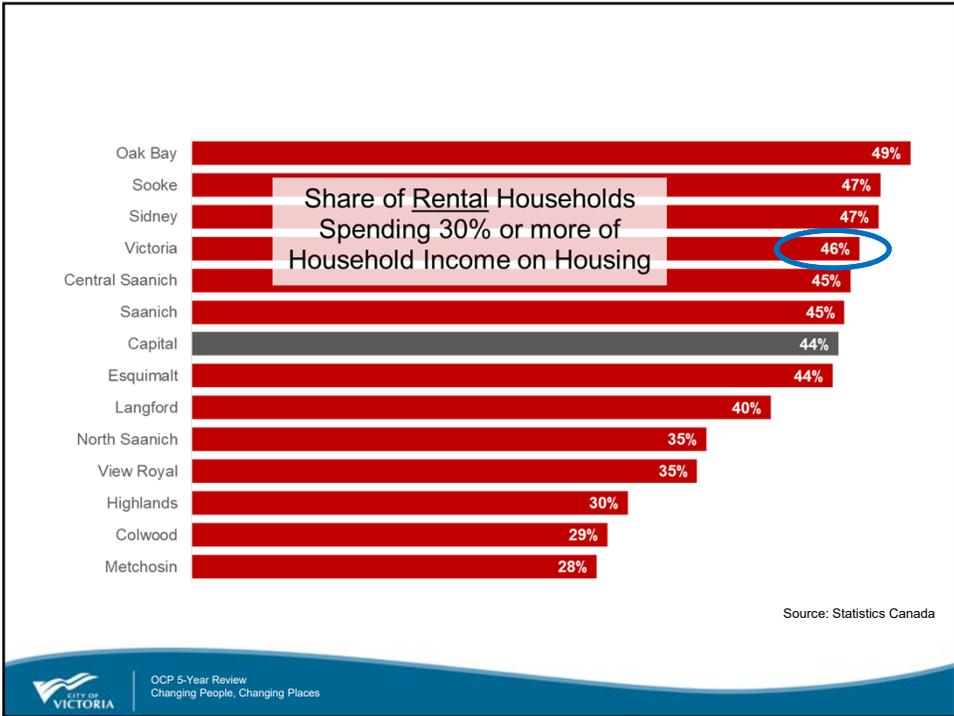


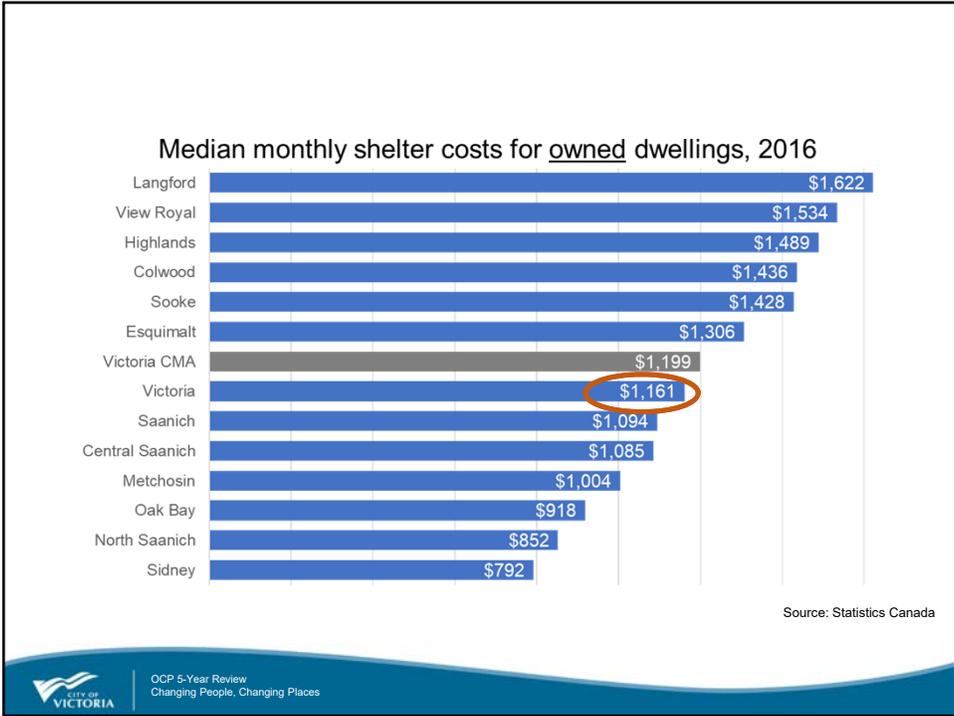
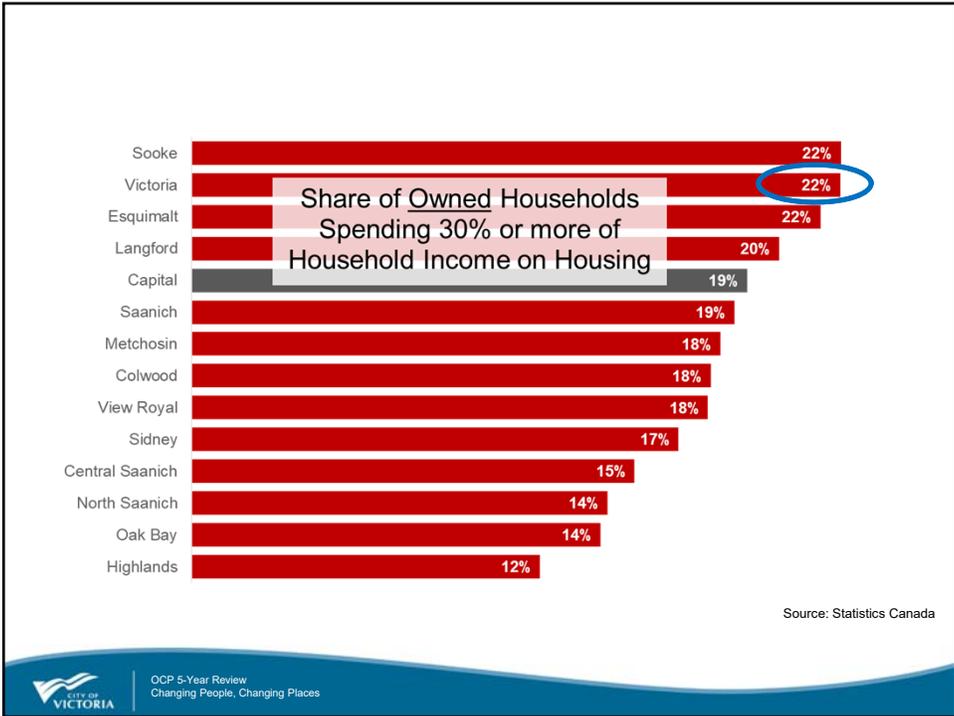
Source: CMHC



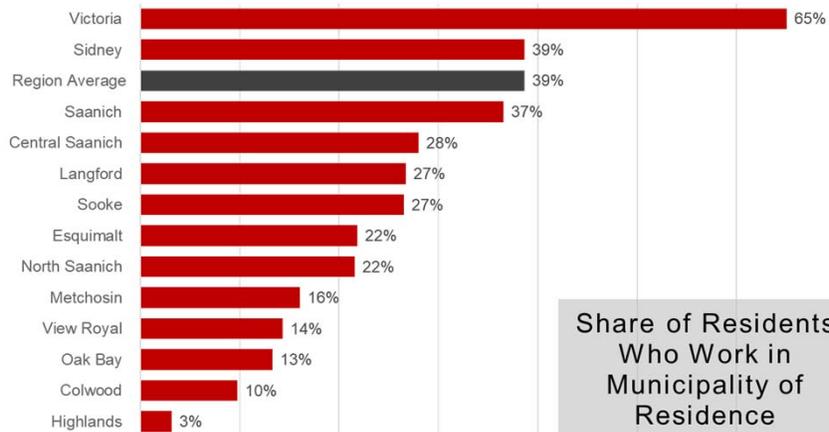
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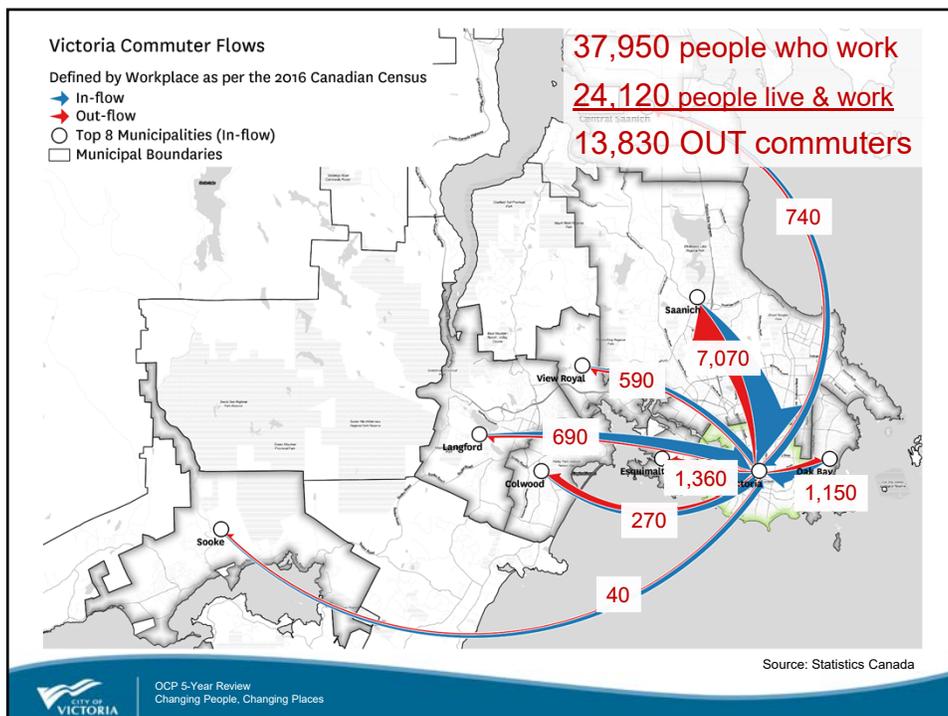
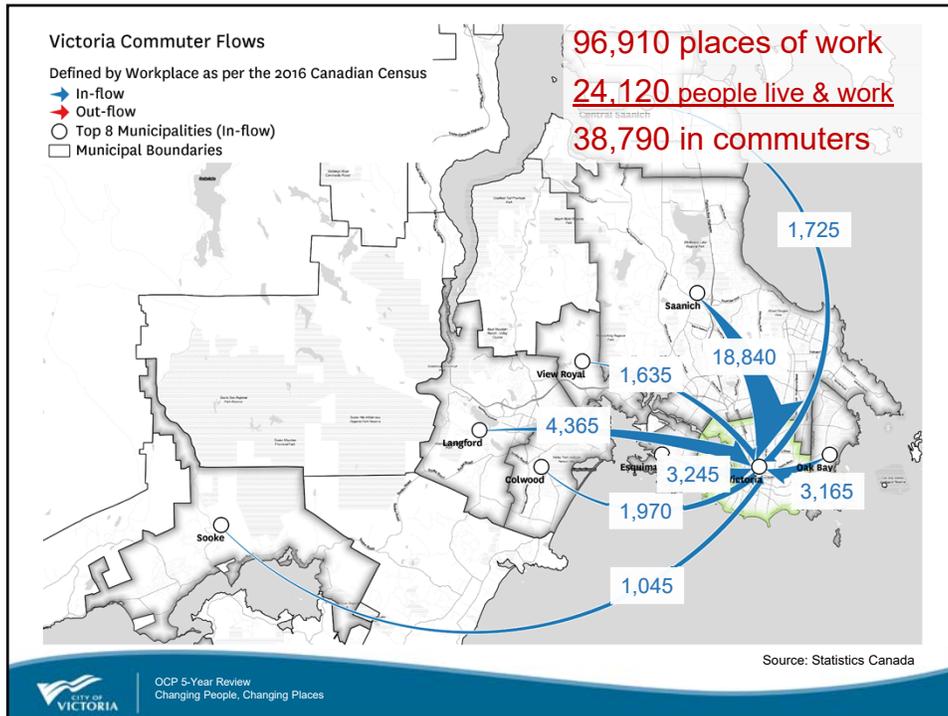
Transportation and Mobility



Share of Residents Who Work in Municipality of Residence

Source: Statistics Canada





CRD Origin and destination survey 2017

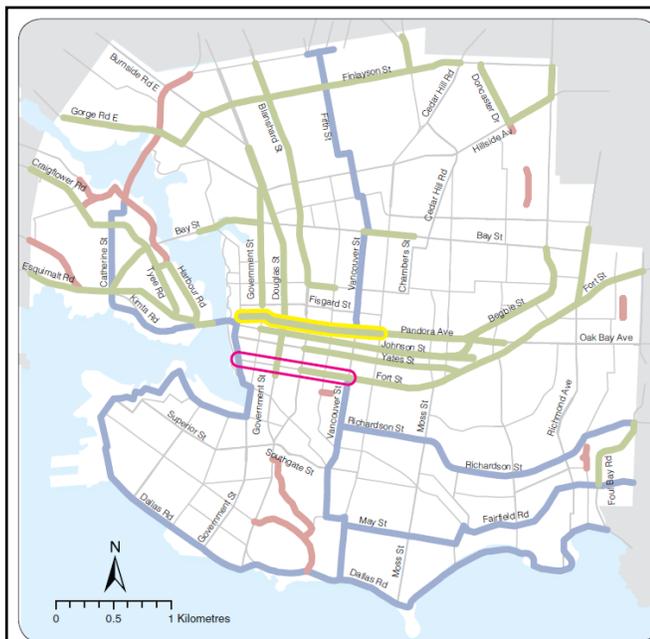
Travel within Victoria



Increasing use of transit, walking and cycling for all trips within Victoria between 2011 (50%) and 2017 (57%)



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MAP 4:
Improvements to Cycling Network (1995-2017)

- On-street cycling lane (1995 - 2017)
- Off-street multi-use trail (1995 - 2017)
- Signed cycle route (1995 - 2014)
- Improvements completed in 2017
- Improvements initiated in 2017

Total lane length of off-street multi-use trail (2017): 8.9 km¹
 Total lane length of improvements (to date) to on-street cycling lanes (2017): 48 km
 Total length of signed cycling routes (2017): 41 km

¹Map and diagram reconciled in 2017

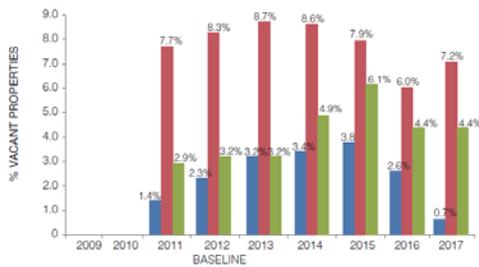


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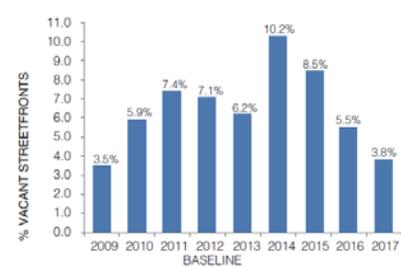
Employment

Vacancy Rates

Retail, Commercial and Industrial Vacancy Rates



Downtown Streetfront Vacancy Rate



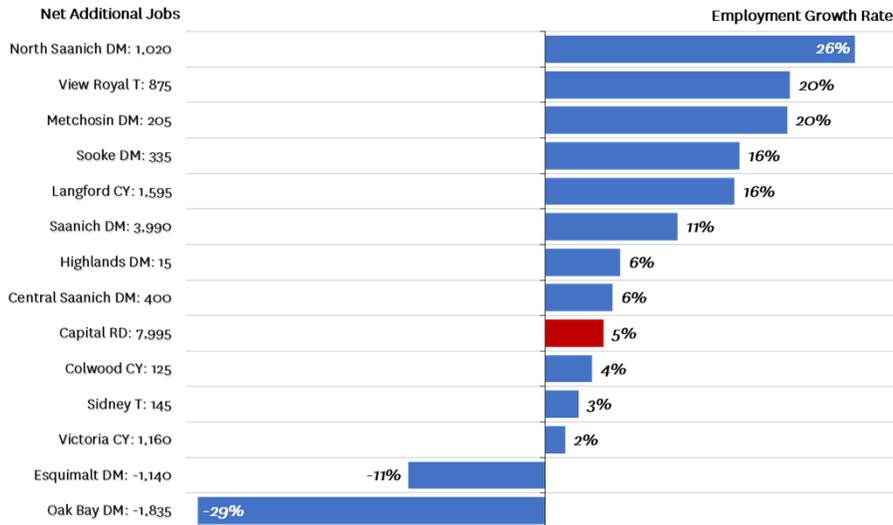
SOURCE: COLLIER INTERNATIONAL REAL ESTATE REPORTS VICTORIA, BRITISH COLUMBIA, 2016: INDUSTRIAL (SUMMER 2016); OFFICE (Q4 2016); RETAIL (Q4 2016)

- Industrial (City-wide)
- Office (Downtown)
- Retail Shopping Centres (City-wide)



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Employment* Change by Selected Municipalities, 2011 - 2016



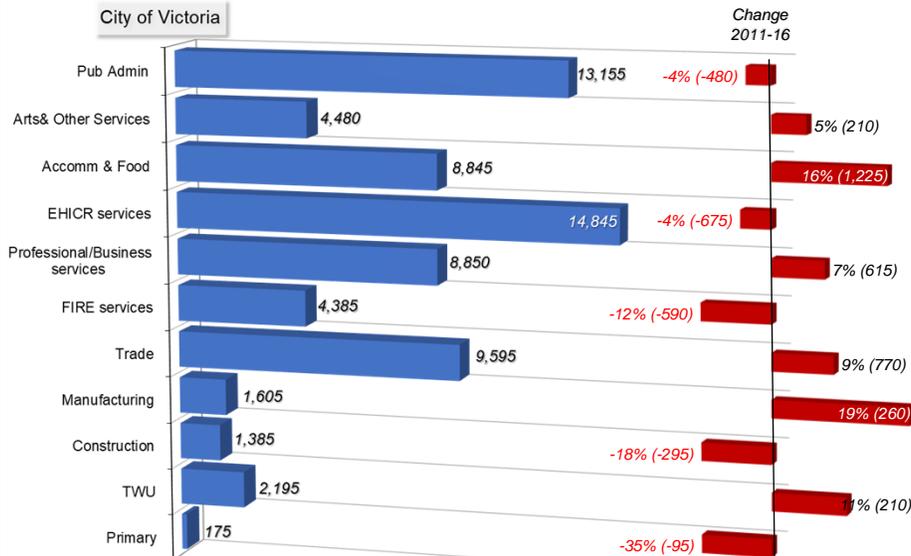
*Employment counts by Census Subdivision of Work (worked at home or at a usual place outside the home)

Source: Statistics Canada



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Employment* Composition by Industry Sector, 2016



*Worked at home or at a usual place outside the home

Source: Statistics Canada



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Policy Considerations

Policy Considerations

Victoria population growing as anticipated

- ✓ 2009 projection indicated growth by ~20,000 people to **101,142** by 2041
- ✓ Actual growth aligned with projection 2017 population **86,130** vs. projection of **86,753**
- ✓ Reaffirms OCP growth targets

OCP policies are proving effective

- ✓ Exceeding targets for regional share of new housing
- ✓ Exceeding growth targets for core area growth

Policy Considerations (continued)

Lower share of housing developed in and near town centres and villages:

- ✓ Downtown Core Area experiences largest share of development
- ✓ Informs and being addressed through neighbourhood planning
- ✓ Consider additional ways to facilitate housing supply and diversity to support life stages and commercial vitality

Connection between demographic growth and housing

- ✓ Suggests further analysis to support family and seniors housing



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Policy Considerations (continued)

Increased need and demand for rental housing

- ✓ Significant increase in rental housing construction experienced in 2015-2017
- ✓ Continued demand and low vacancy indicates potential need to support rental housing going forward

Majority of Victoria residents (65%) work in Victoria

- ✓ Consider additional ways to facilitate workforce housing
- ✓ Creates opportunities to meet sustainable mobility goals

Modest employment growth overall

- ✓ Reaffirms importance of protecting employment lands
- ✓ Continue and enhance initiatives to remove barriers for economic development (Business Hub, zoning initiatives)



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Recommendations

That Council:

1. Receive the following for information and direct staff to communicate the findings and highlights to the public:
 - a) OCP Annual Review 2017
 - b) City of Victoria 2017 Housing Report
 - c) OCP Annual Review 2016
 - d) City of Victoria 2016 Housing Report
2. Consider the data and trends highlighted in the OCP 5-Year Review to inform future policy initiatives and priorities.



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