

OFFICIAL COMMUNITY PLAN
5-Year Review

OCP Monitoring Program



Annual Review

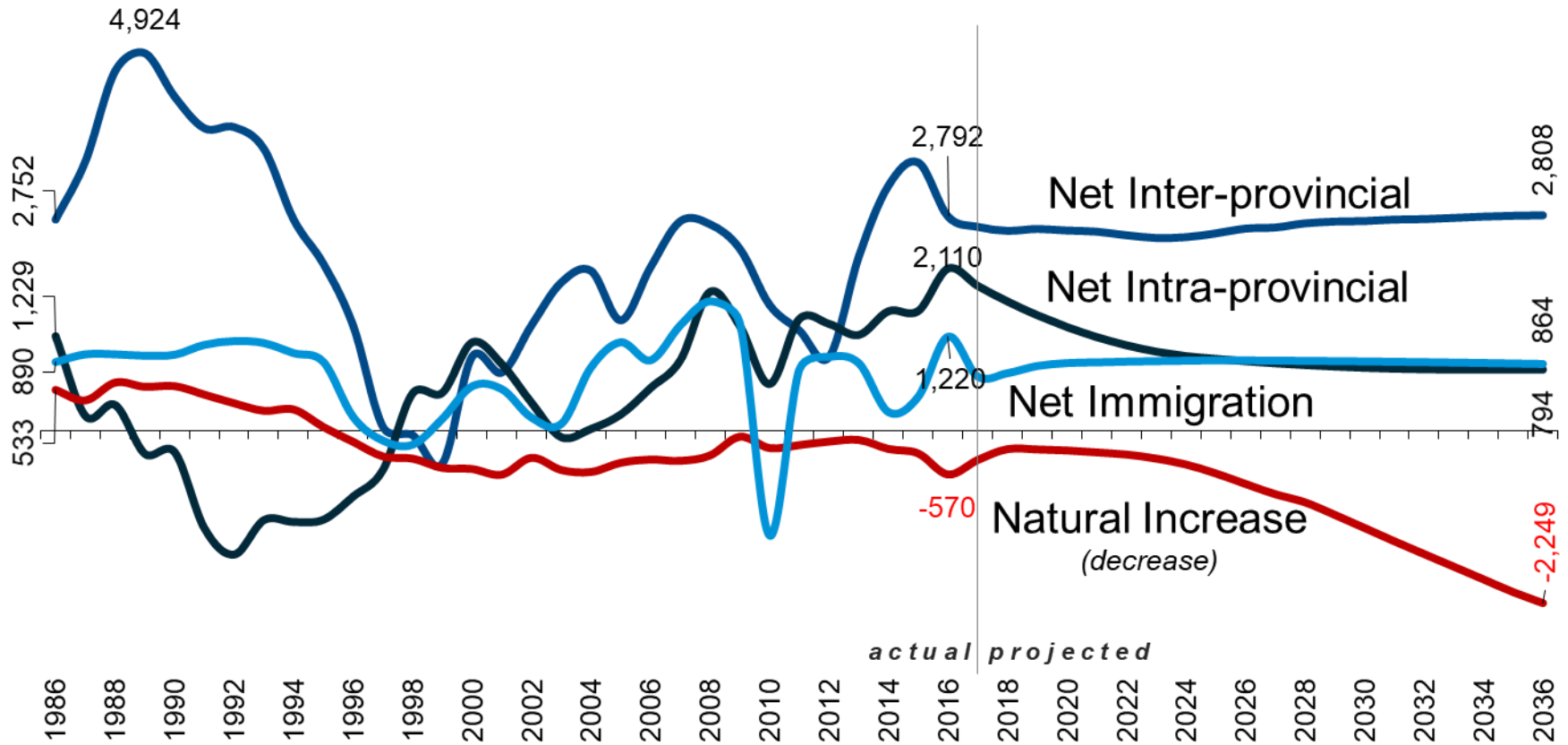
- Snapshot of progress
- 17 annual indicators

Five Year Review

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

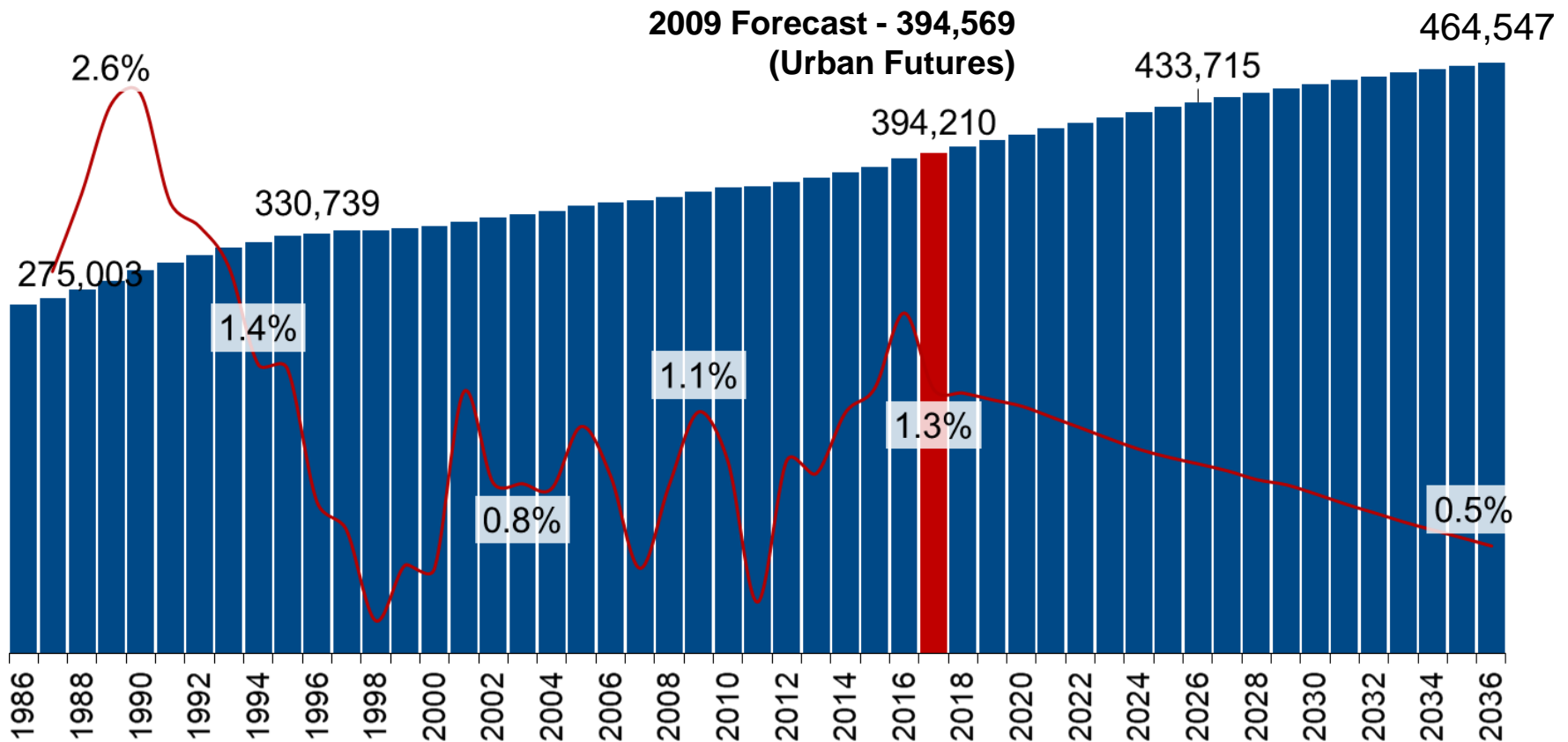
Population and Demographics

Components of Change, Capital Region



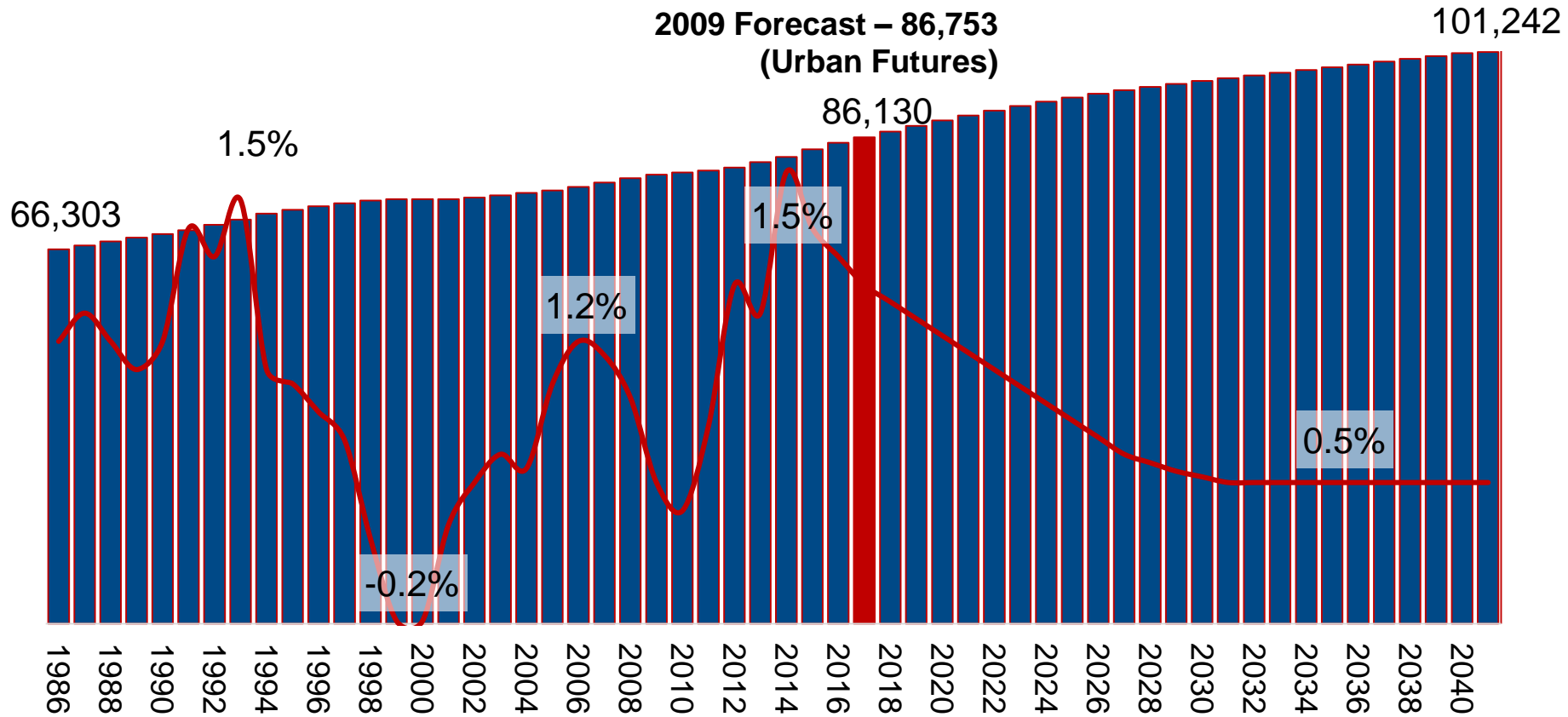
Source: Statistics Canada, Annual Demographic Statistics, Urban Futures

2018 Population Forecast, Capital Regional District



Source: Statistics Canada, Annual Demographic Statistics, Urban Futures

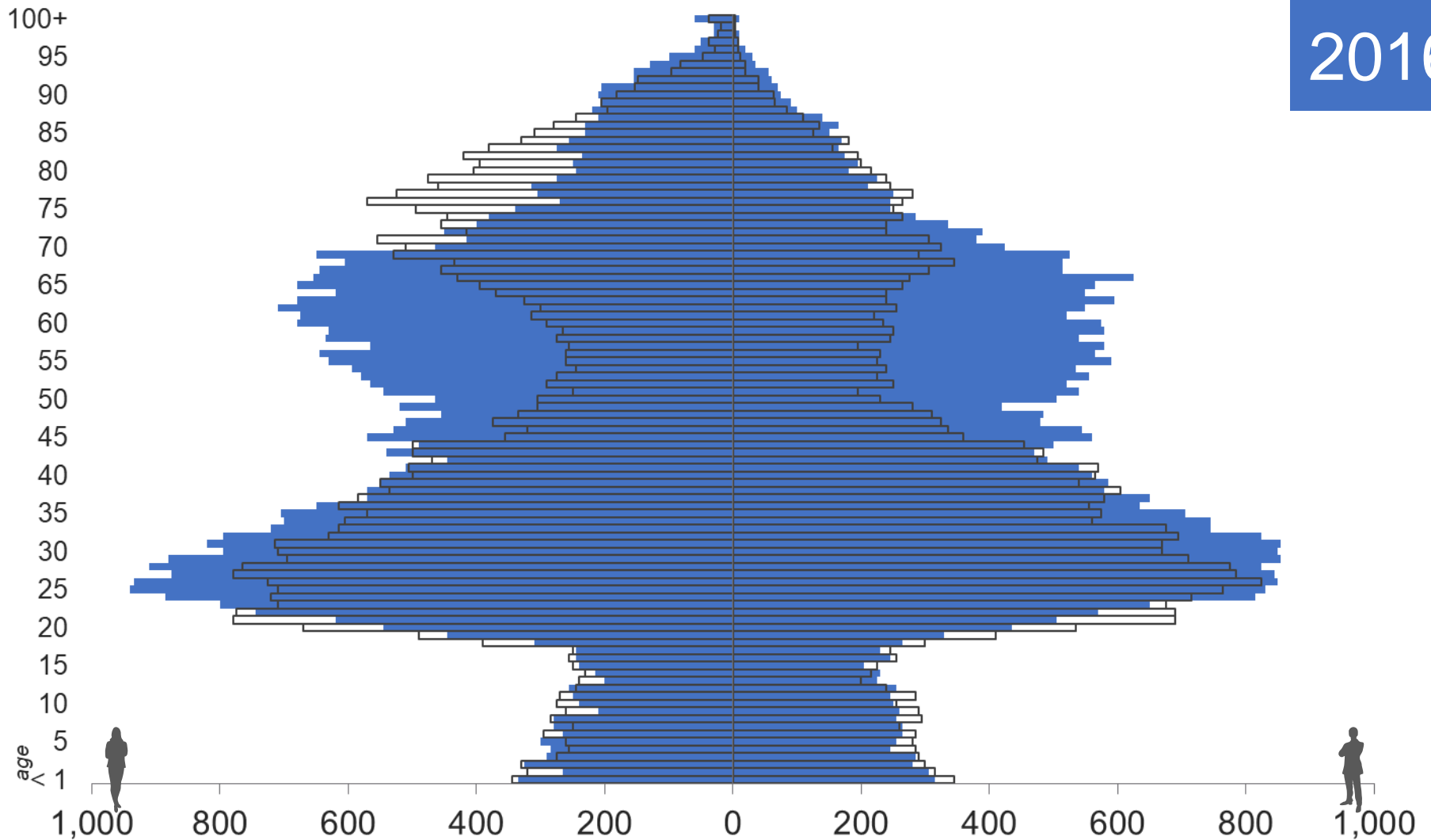
2018 Population Forecast, City of Victoria



Source: Statistics Canada, City of Victoria, Urban Futures

Population by Age, City of Victoria

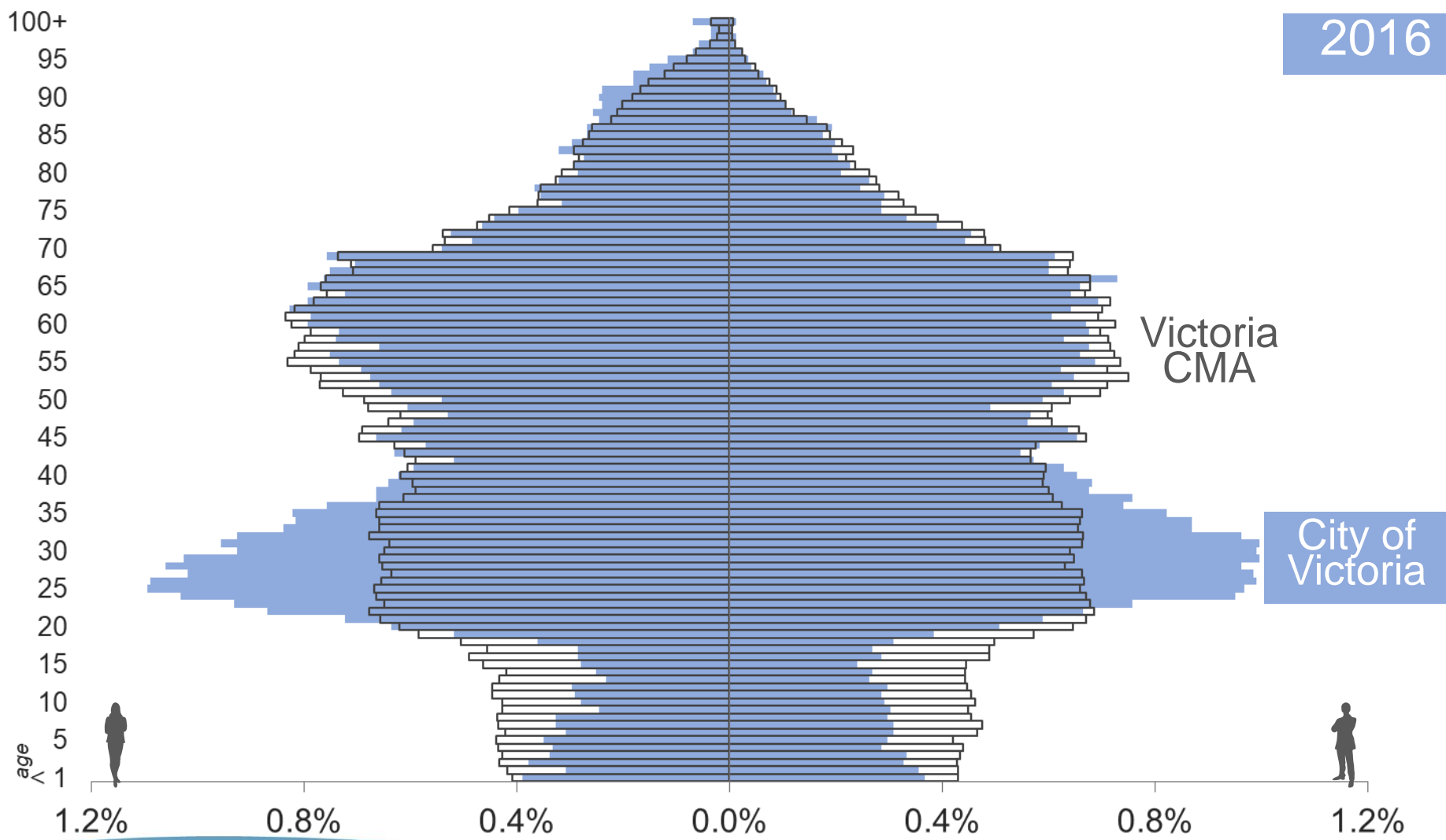
1991
2016



Source: Statistics Canada

Population by Age, City of Victoria & Victoria CMA

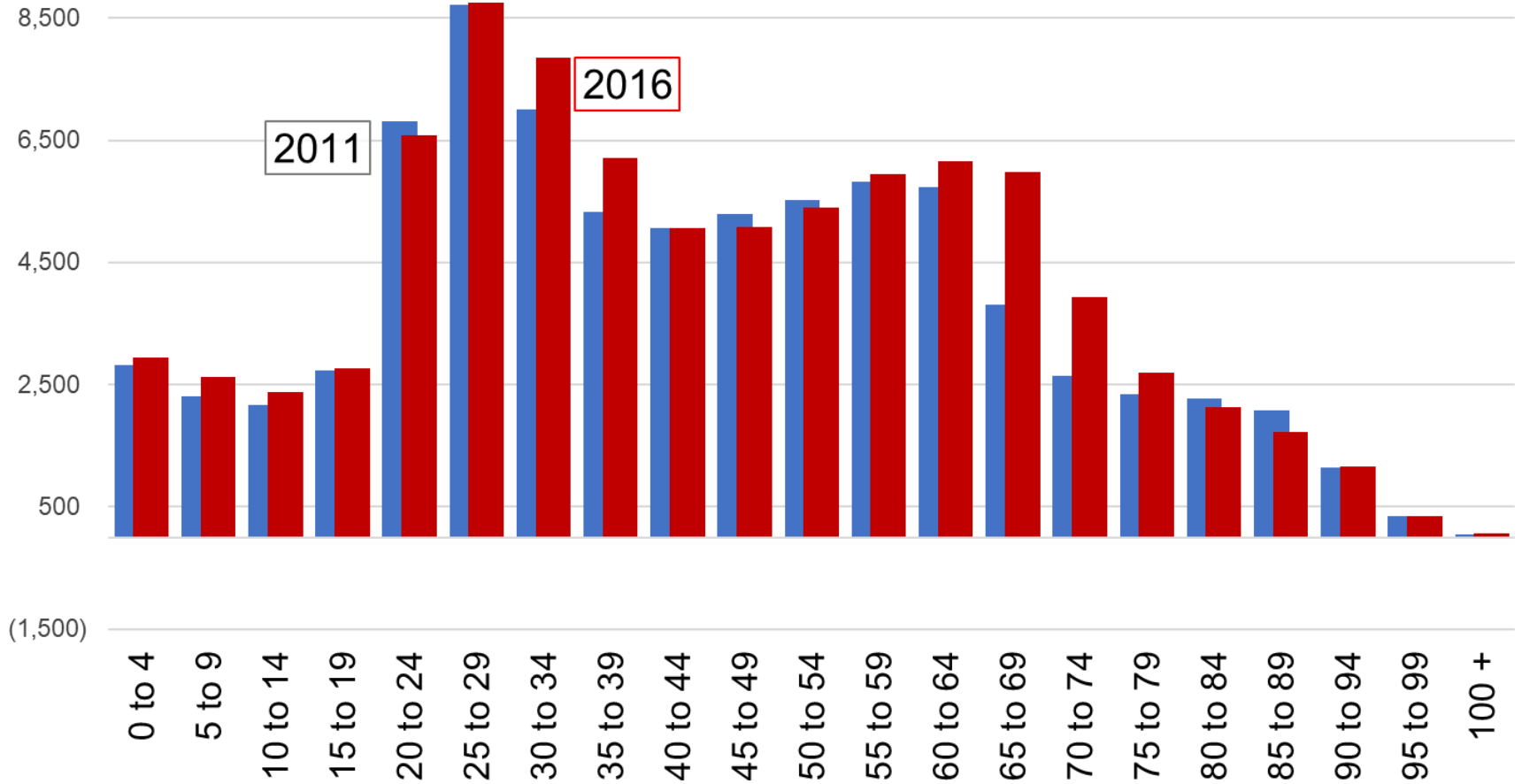
2016



Source: Statistics Canada

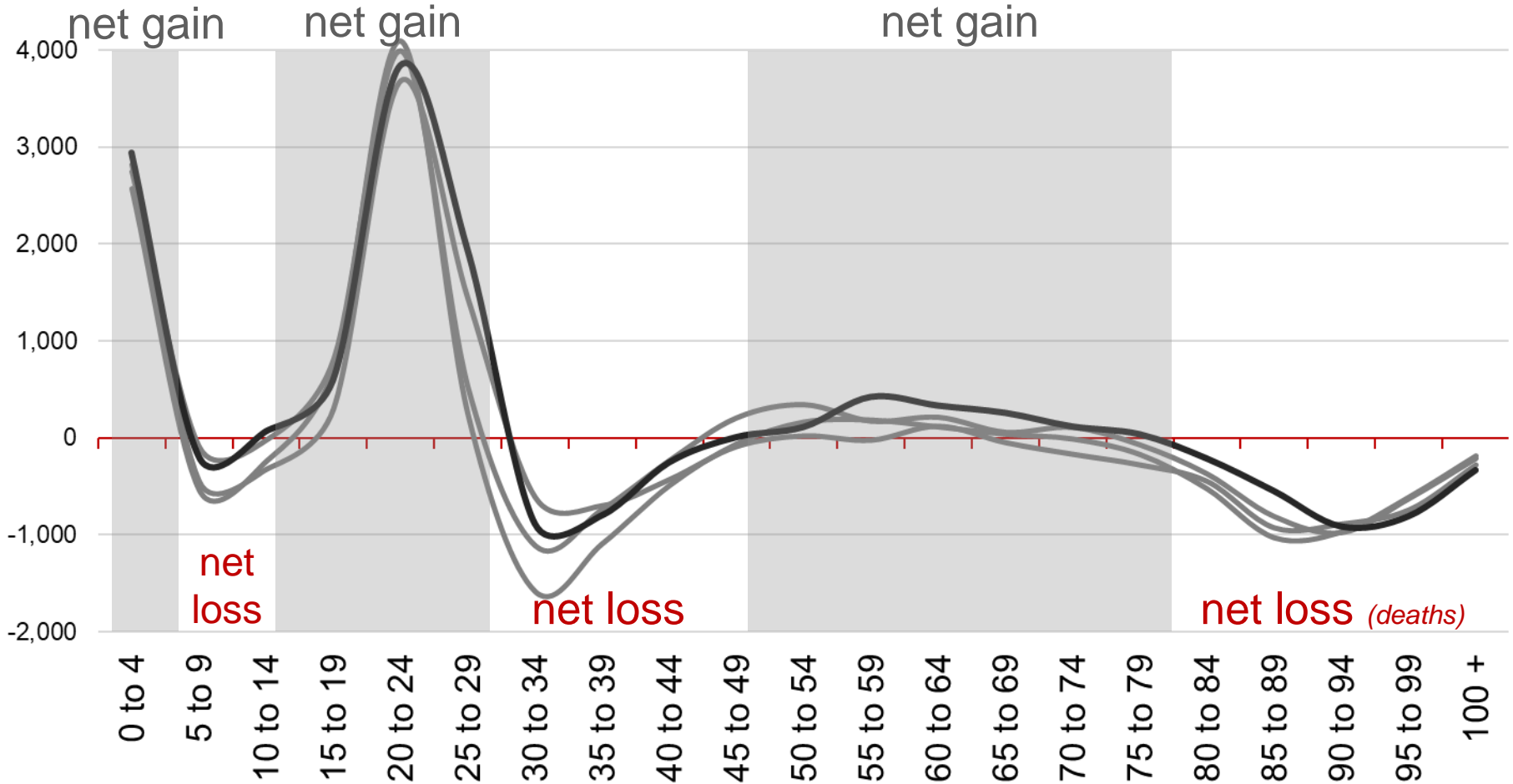


Population by 5-Year Age Group, City of Victoria



Source: Statistics Canada

1996 to 2016 Change in Population by Cohort, City of Victoria

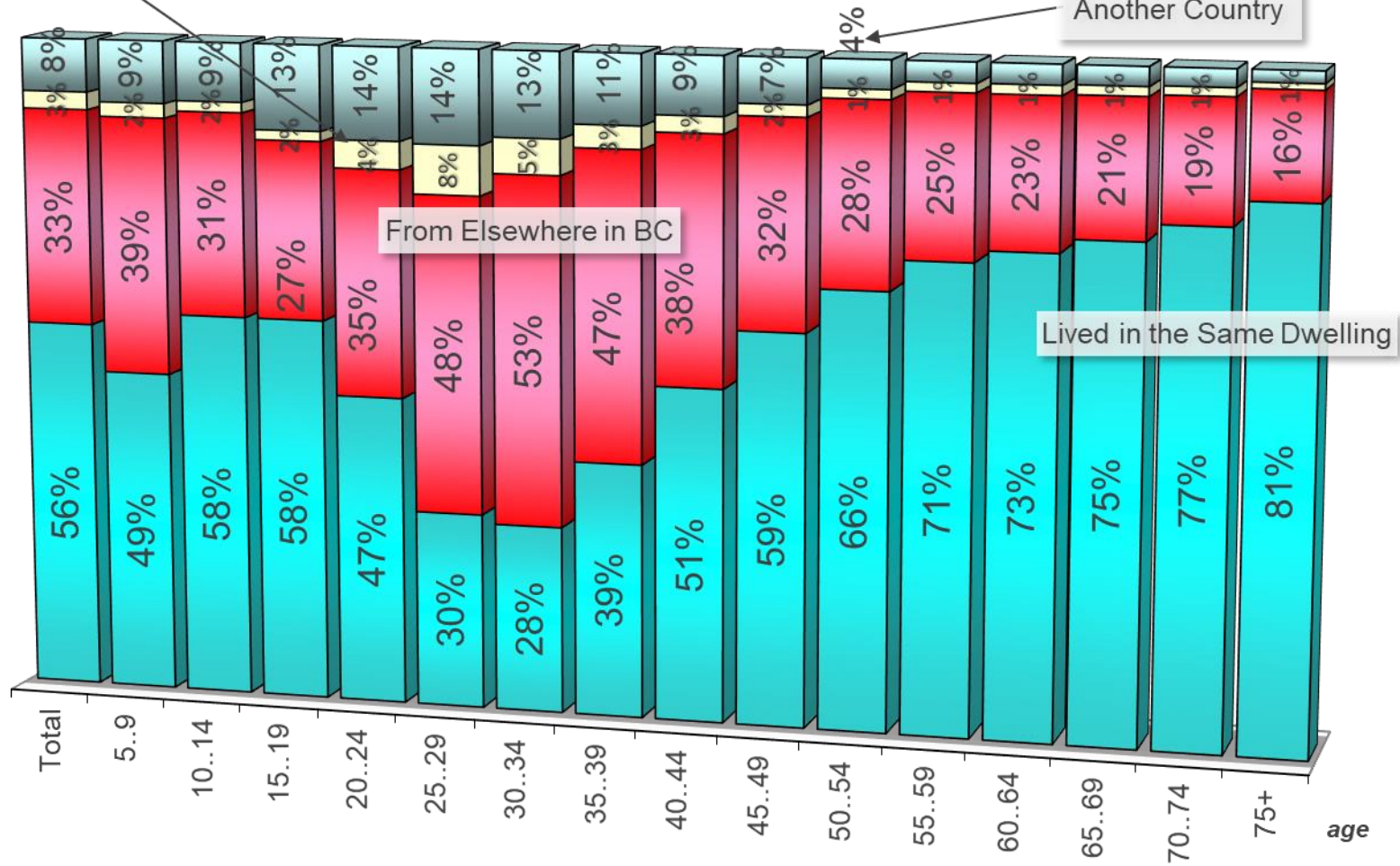


Source: Statistics Canada

Victoria's CMA's 2016 Residents by Place of Residence in 2011

Moved From Another Province

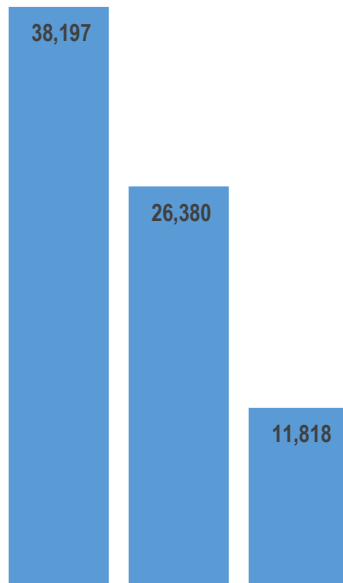
Moved From Another Country



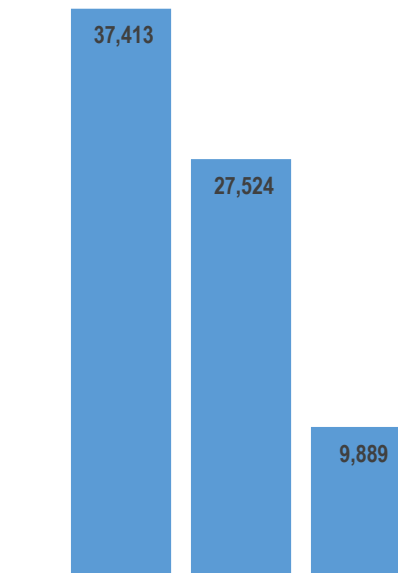
Housing

Housing Unit Demand Forecast 2017-2041

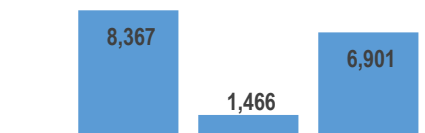
**Urban Futures Forecast
(Regional) 2017 – 2041 (Adj.)**



**CRD Housing Forecast
(Regional) 2016-2041 (Adj.)**



**CRD Housing Forecast (City
of Victoria) 2017-2041 (Adj.)**



Total Units

Ground-Oriented

Apartment

Total Units

Ground-Oriented

Apartment

Total Units



Ground-Oriented

Apartment

Source: Urban Futures, CRD

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

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

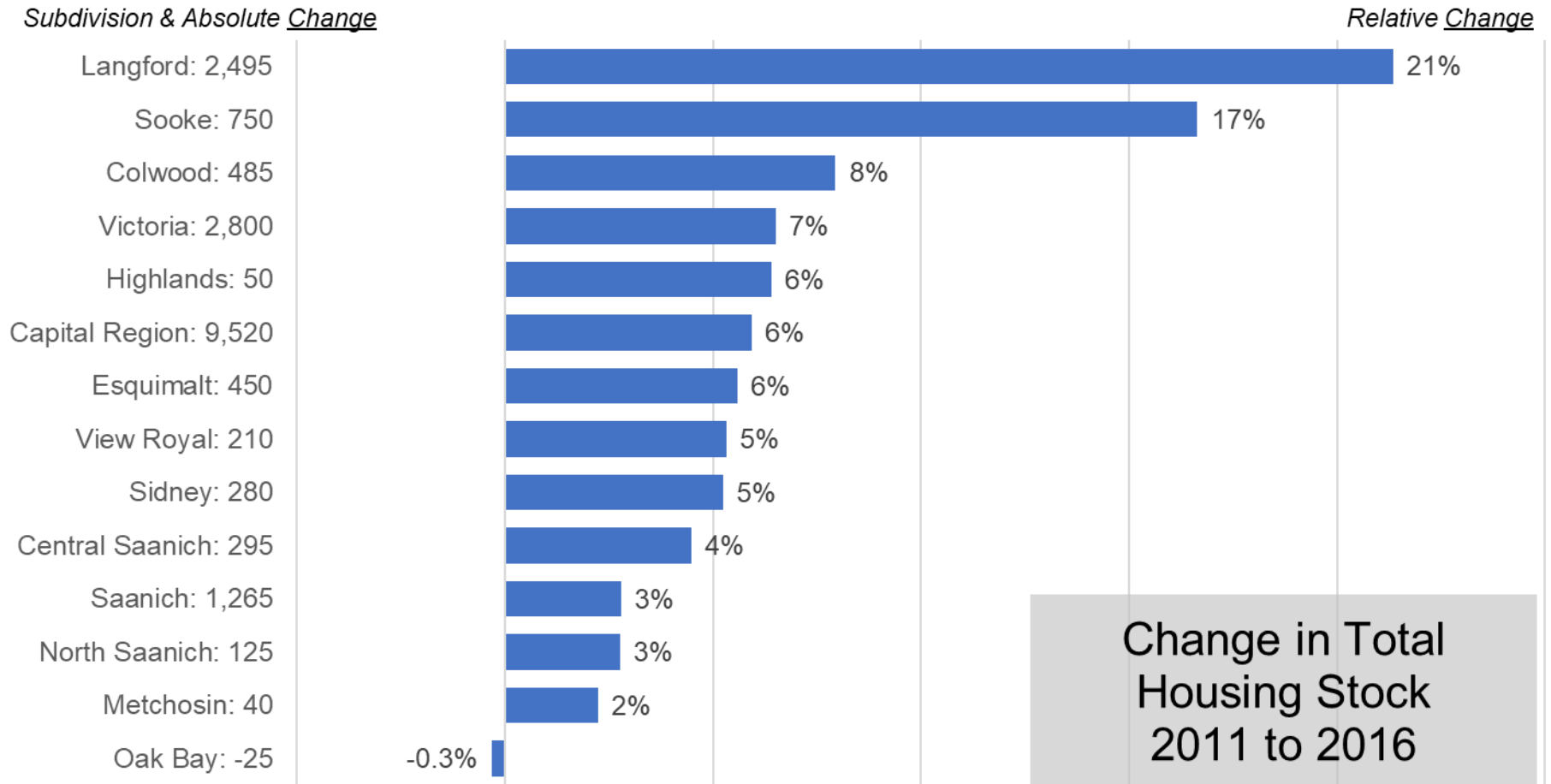


Below targets



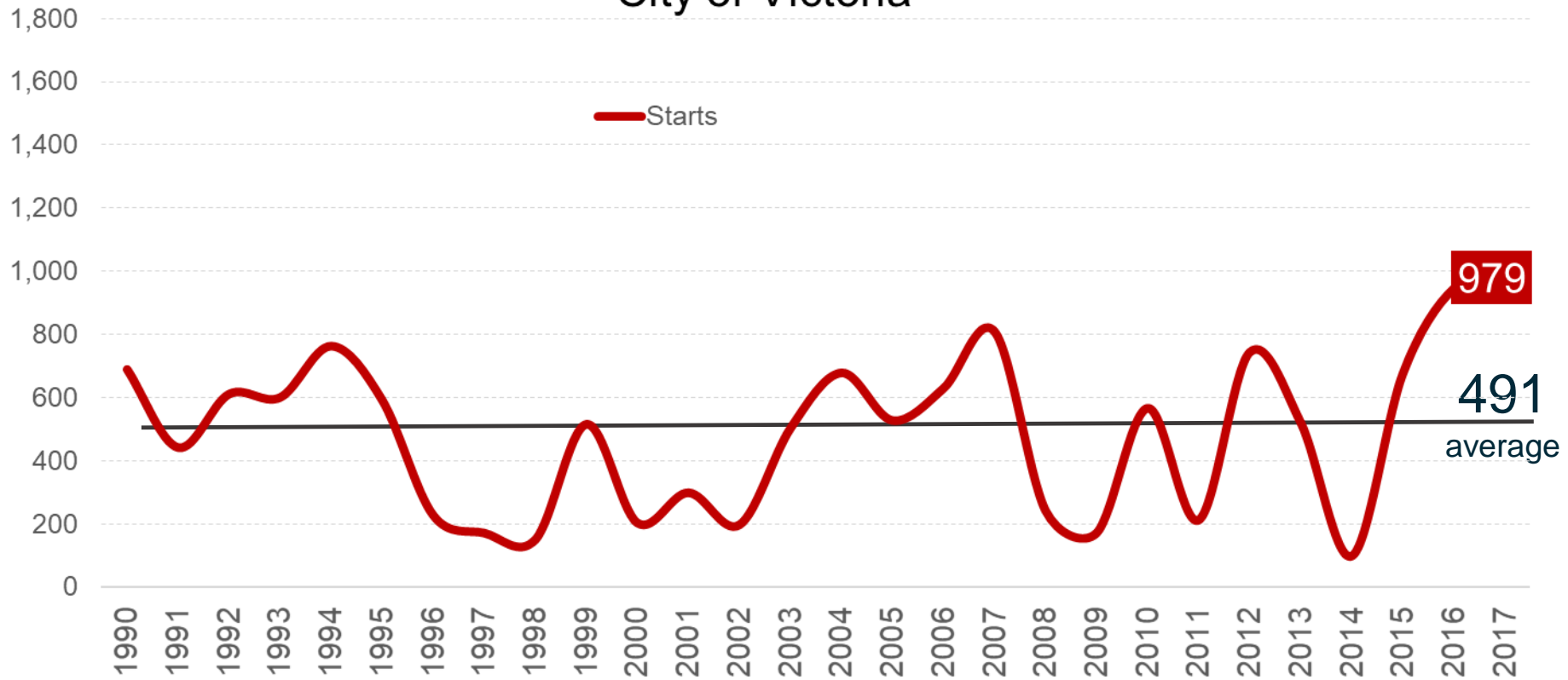
Exceeding targets

Housing Growth 2011-2016



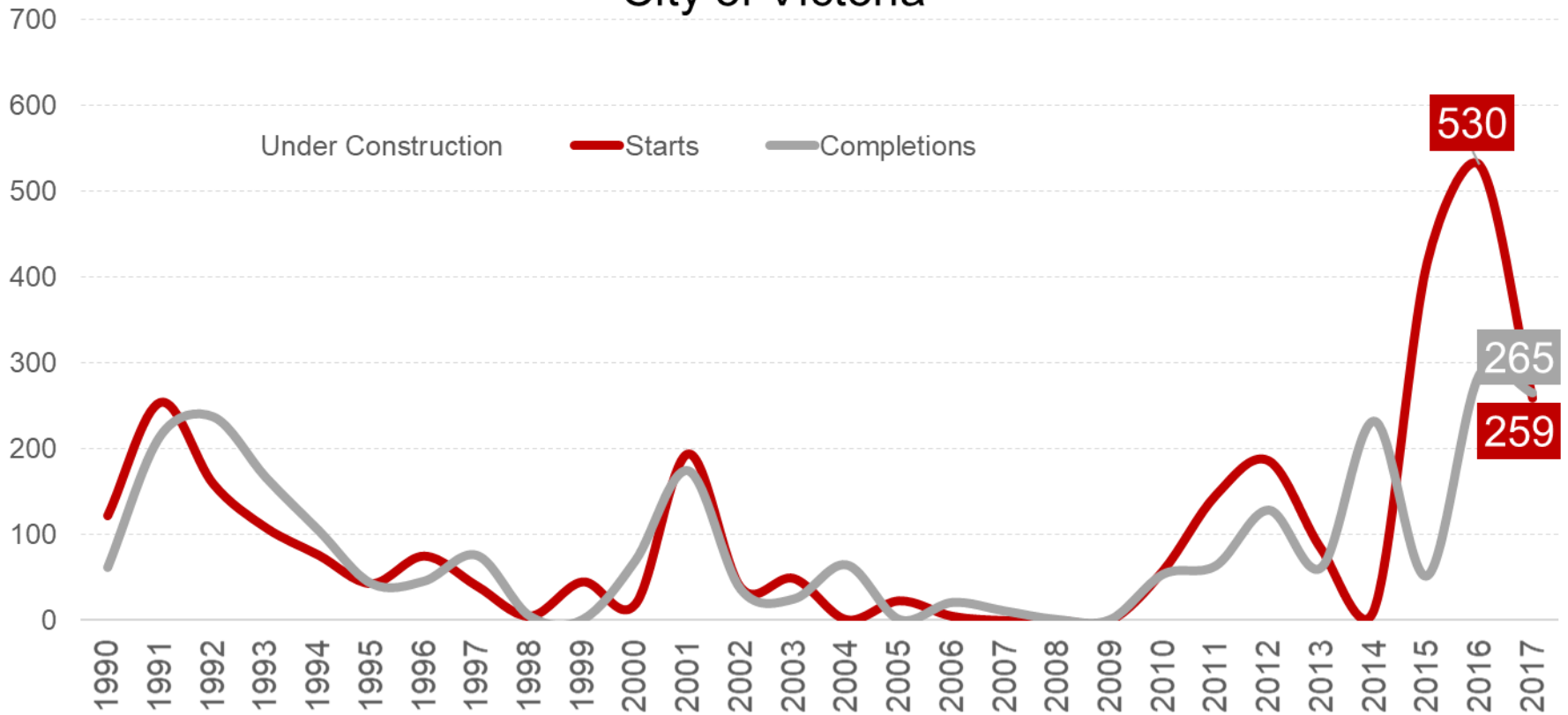
Source: Statistics Canada

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



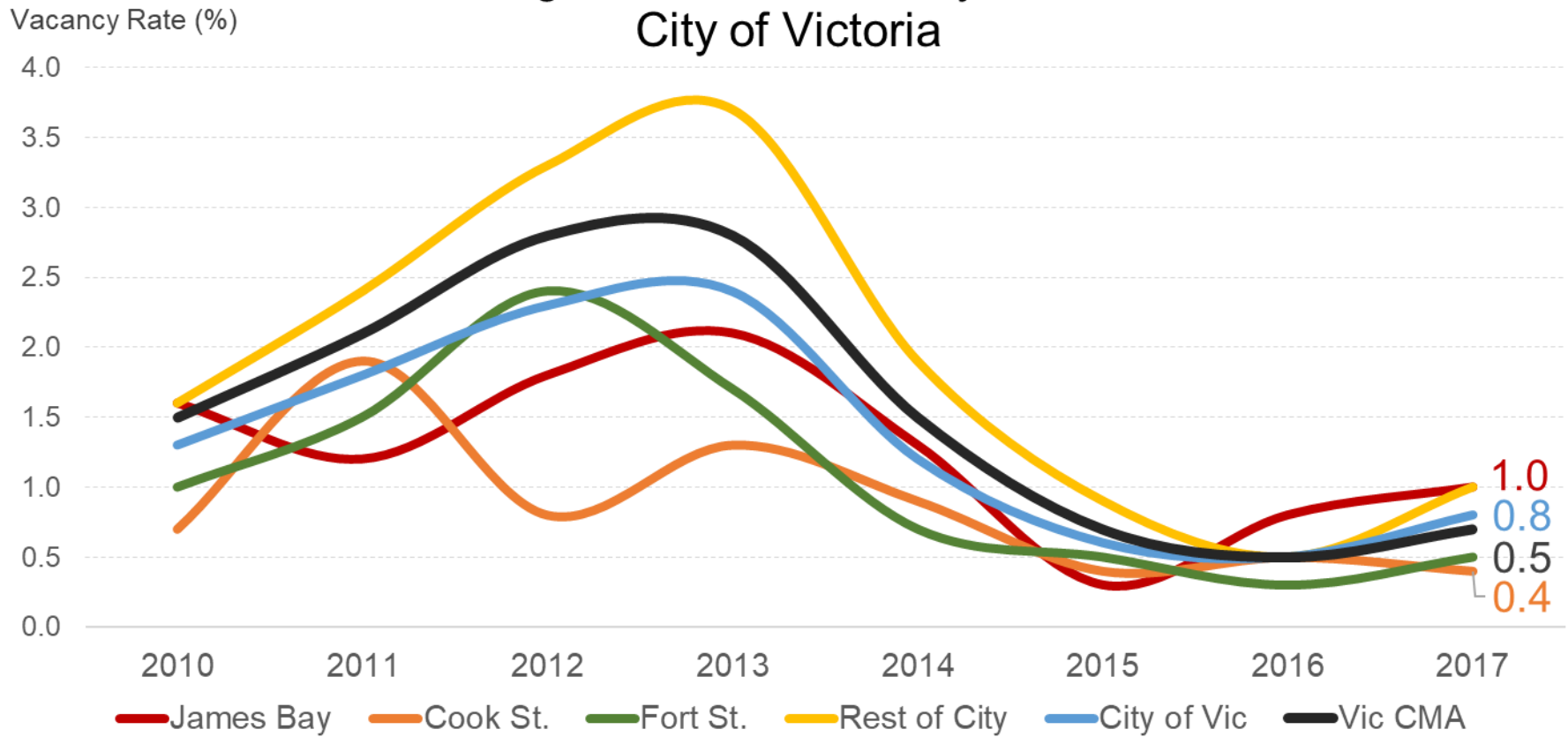
Source: CMHC

Rental Housing Under Construction, Starts, & Completions, Apartments City of Victoria

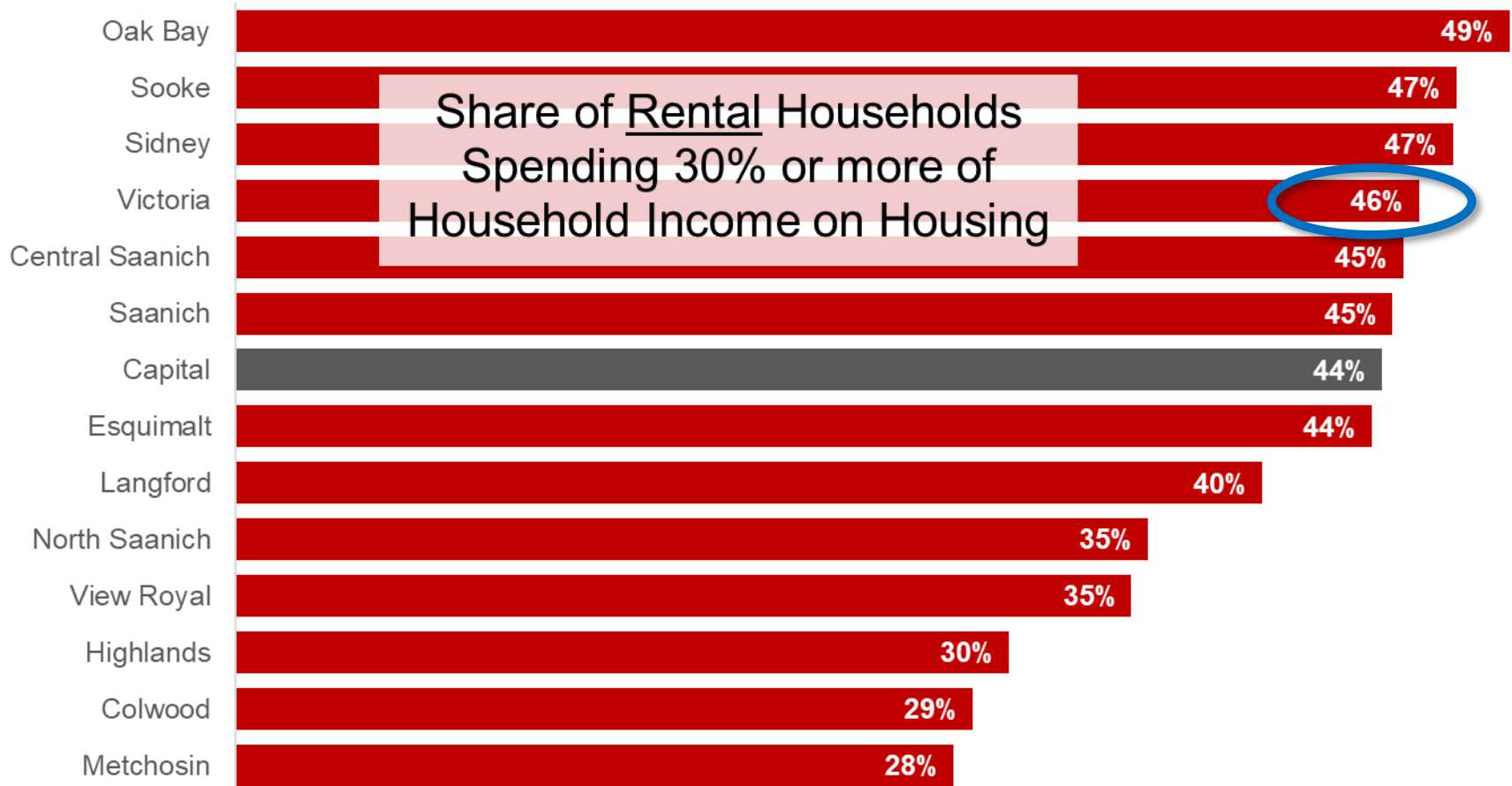


Source: CMHC

Neighbourhood Vacancy Rates City of Victoria

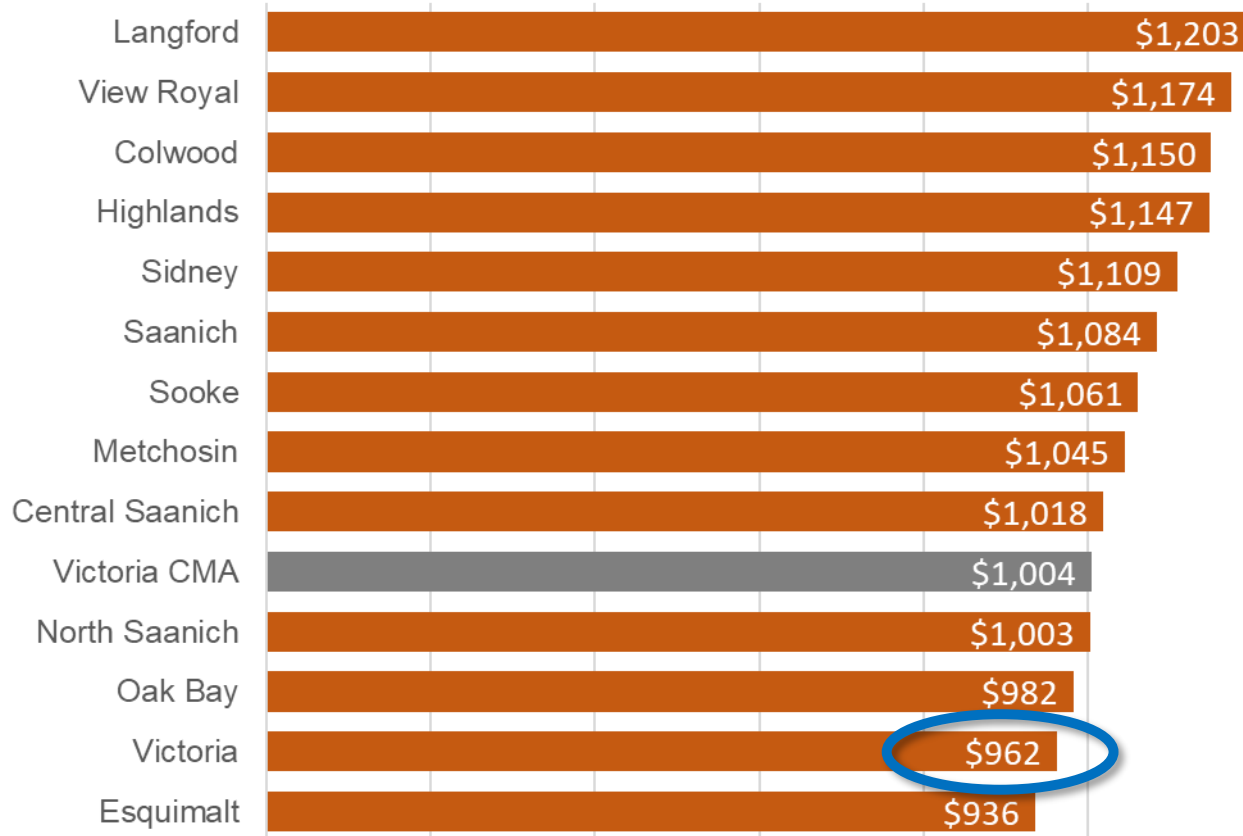


Source: CMHC

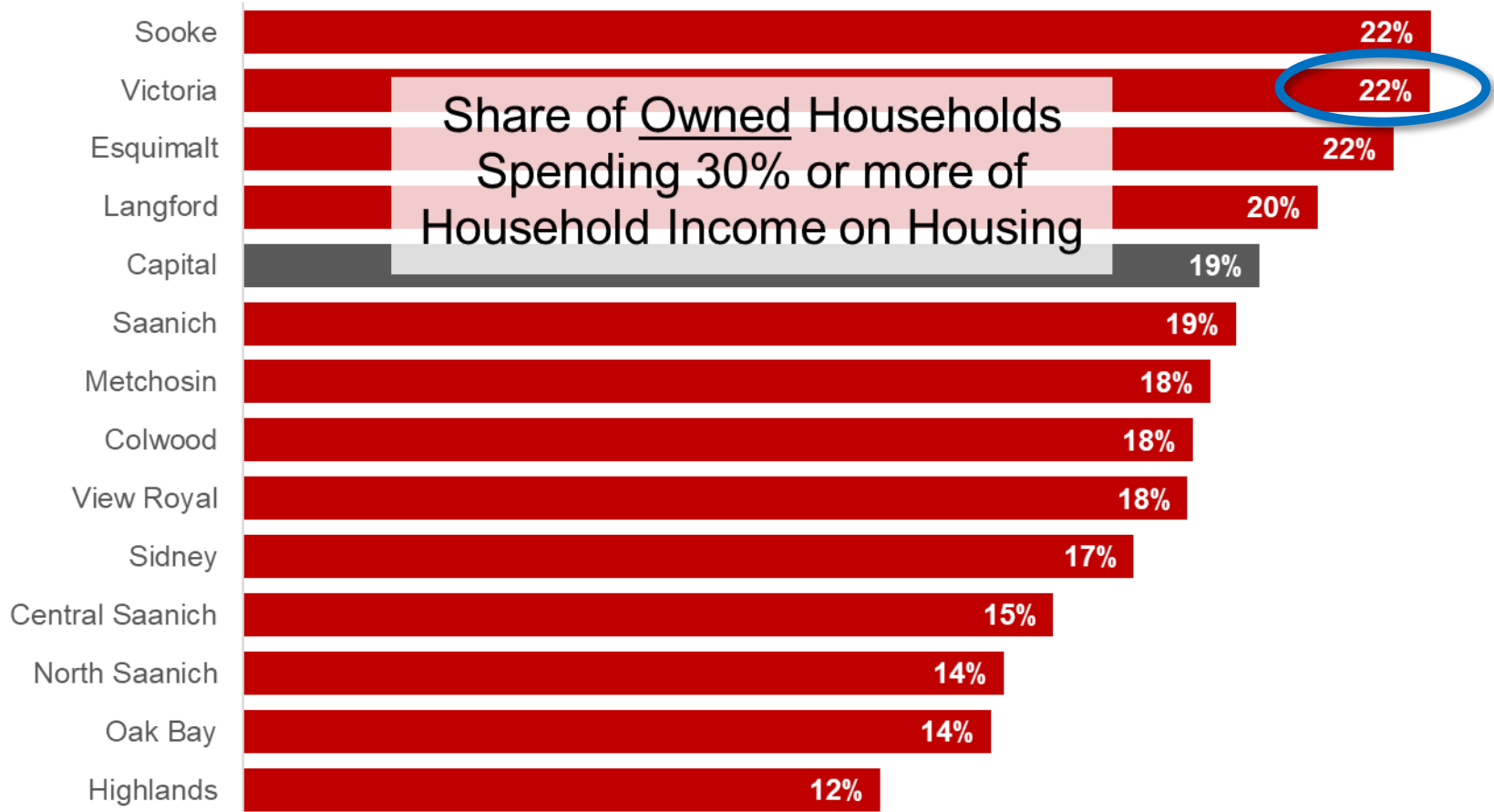


Source: Statistics Canada

Median monthly shelter costs for rented dwellings, 2016

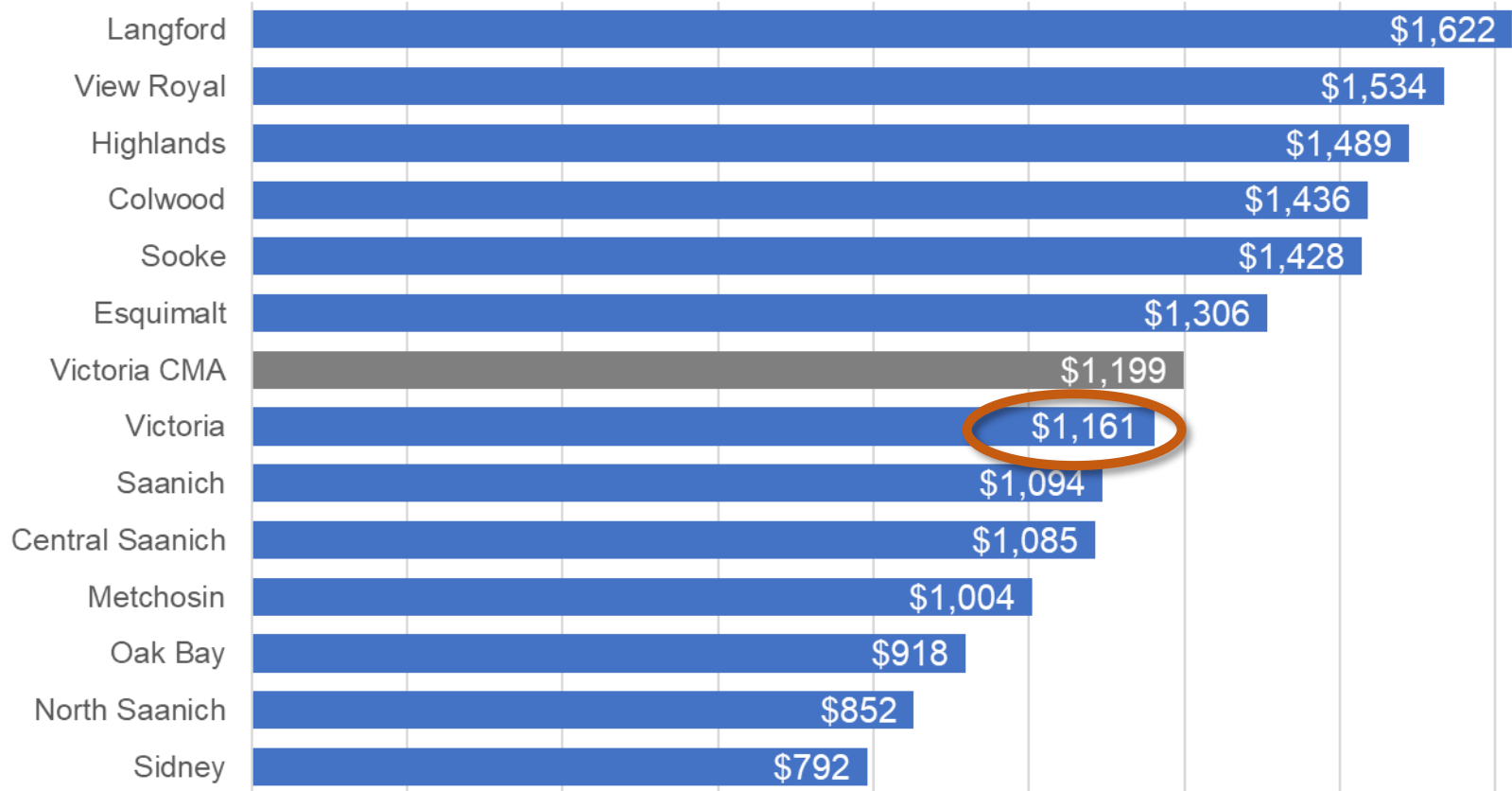


Source: Statistics Canada



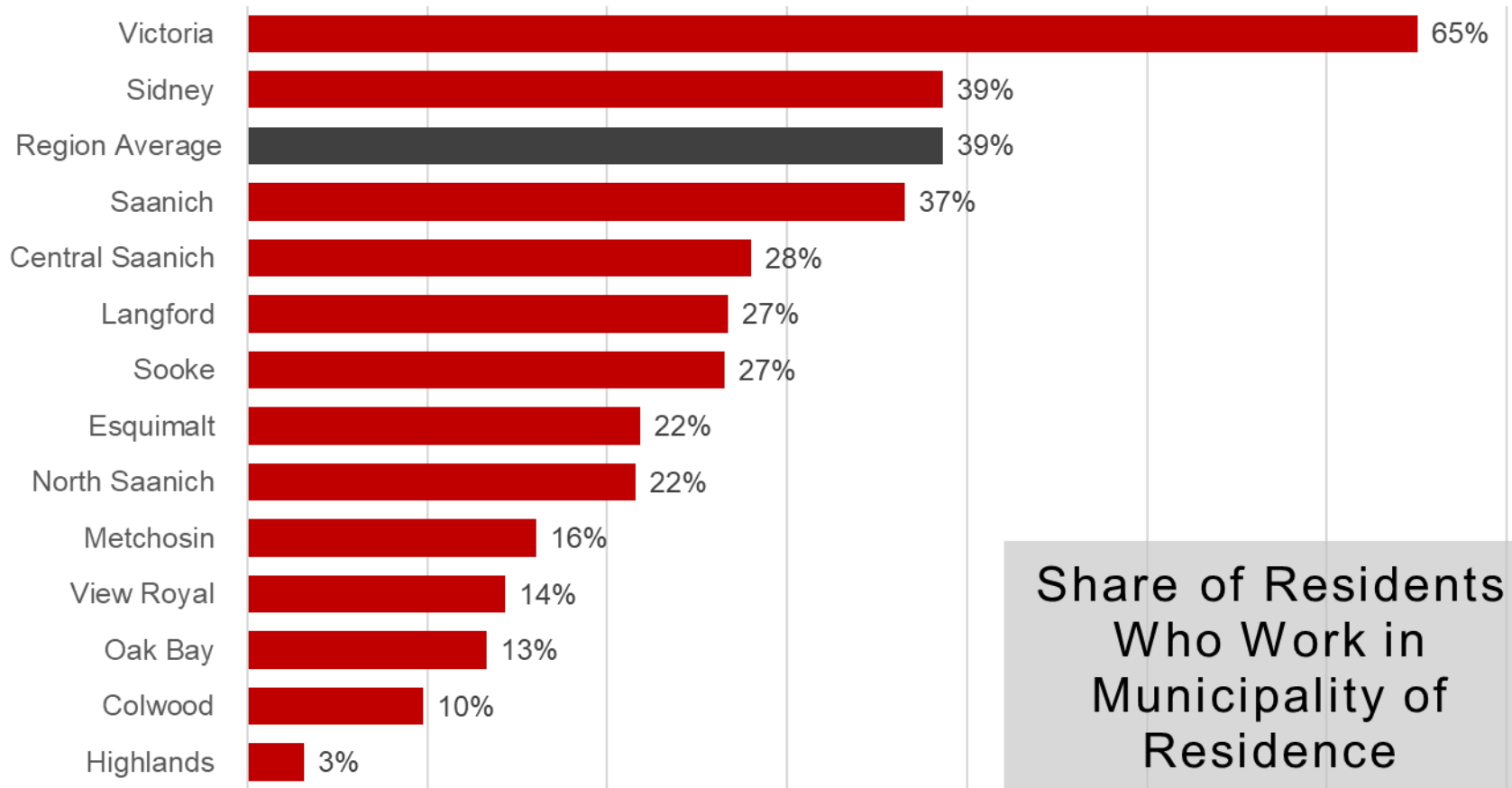
Source: Statistics Canada

Median monthly shelter costs for owned dwellings, 2016



Source: Statistics Canada

Transportation and Mobility



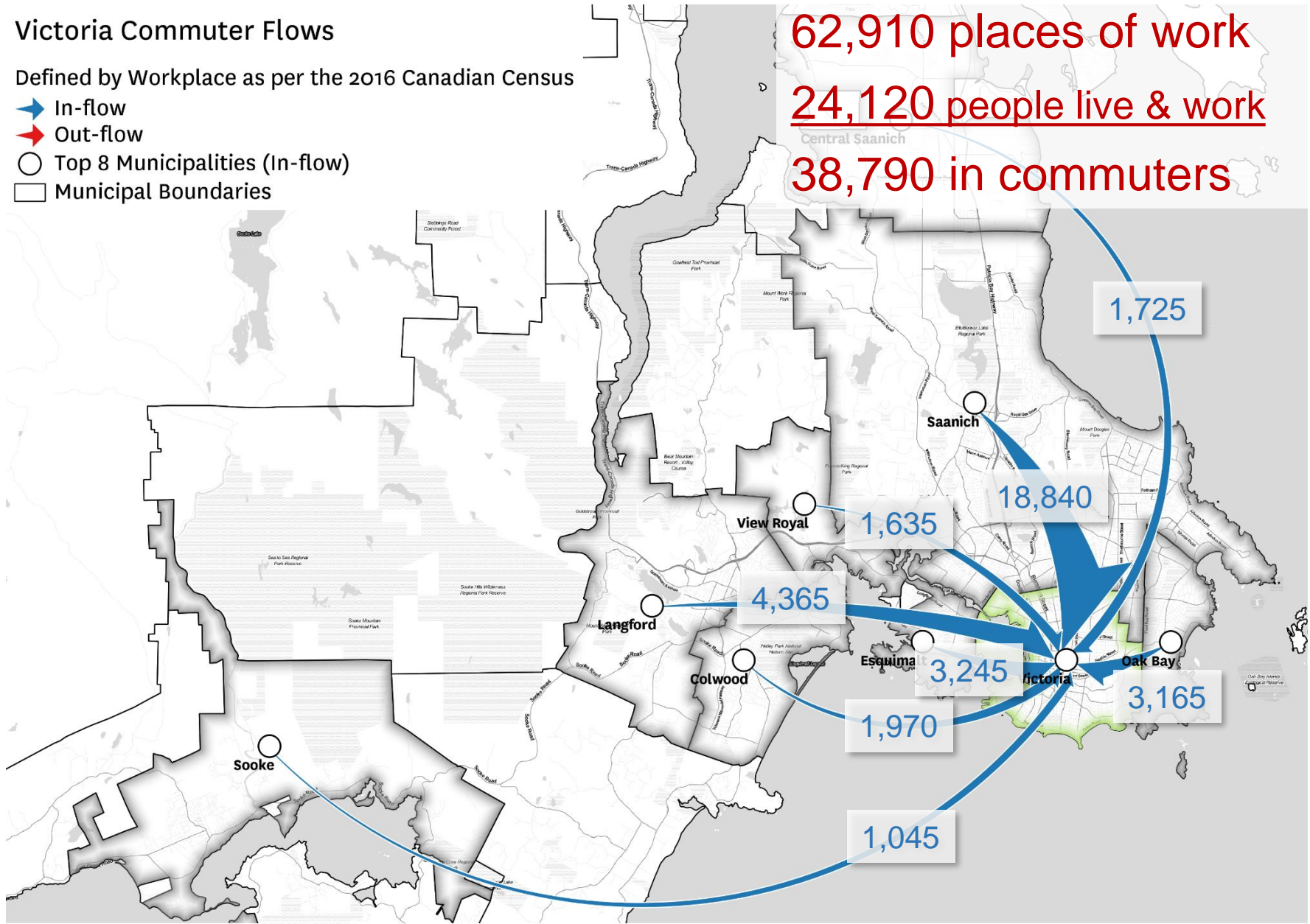
Share of Residents Who Work in Municipality of Residence

Source: Statistics Canada

Victoria Commuter Flows

Defined by Workplace as per the 2016 Canadian Census

- ➡ In-flow
- ➡ Out-flow
- Top 8 Municipalities (In-flow)
- Municipal Boundaries

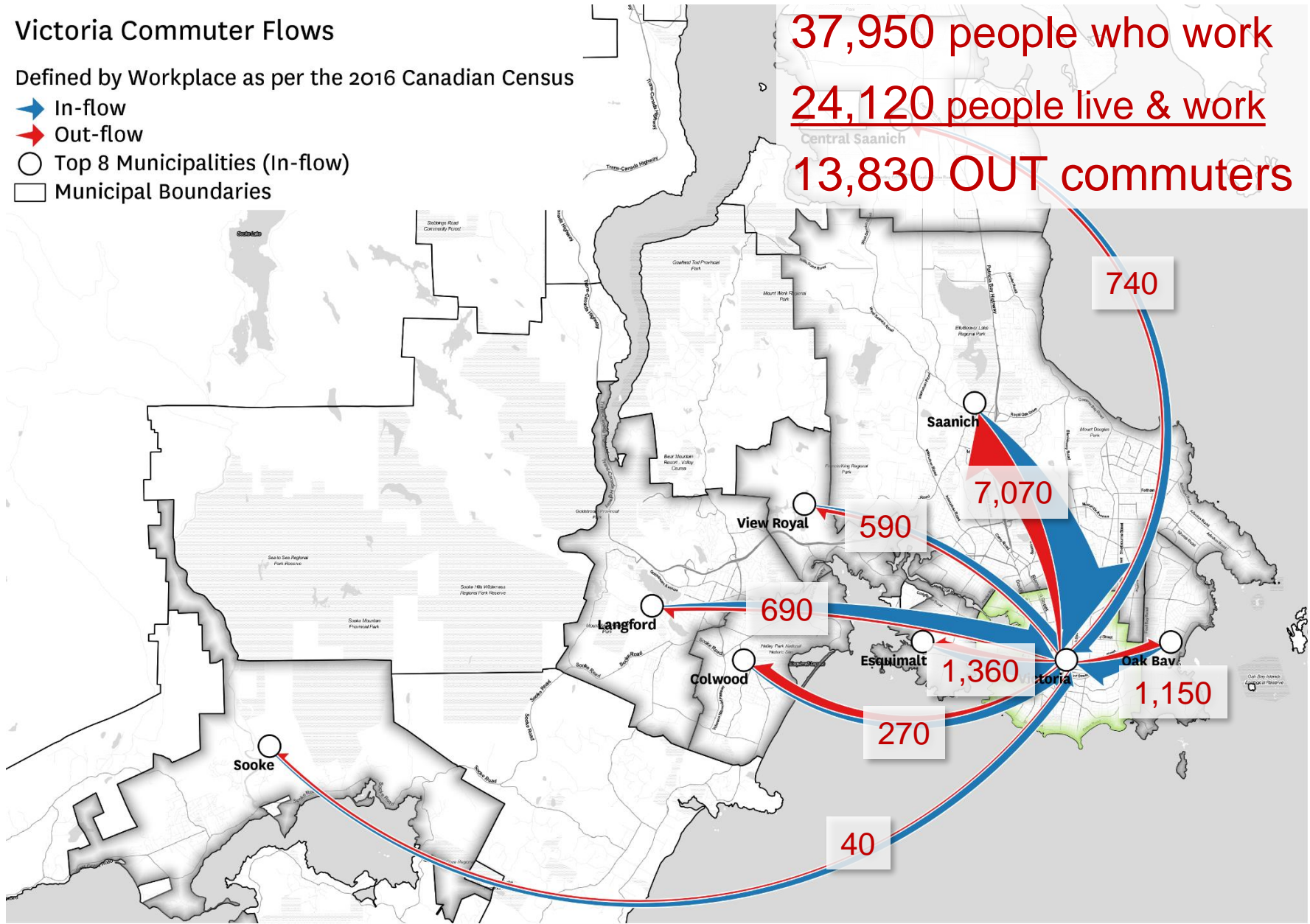


Source: Statistics Canada

Victoria Commuter Flows

Defined by Workplace as per the 2016 Canadian Census

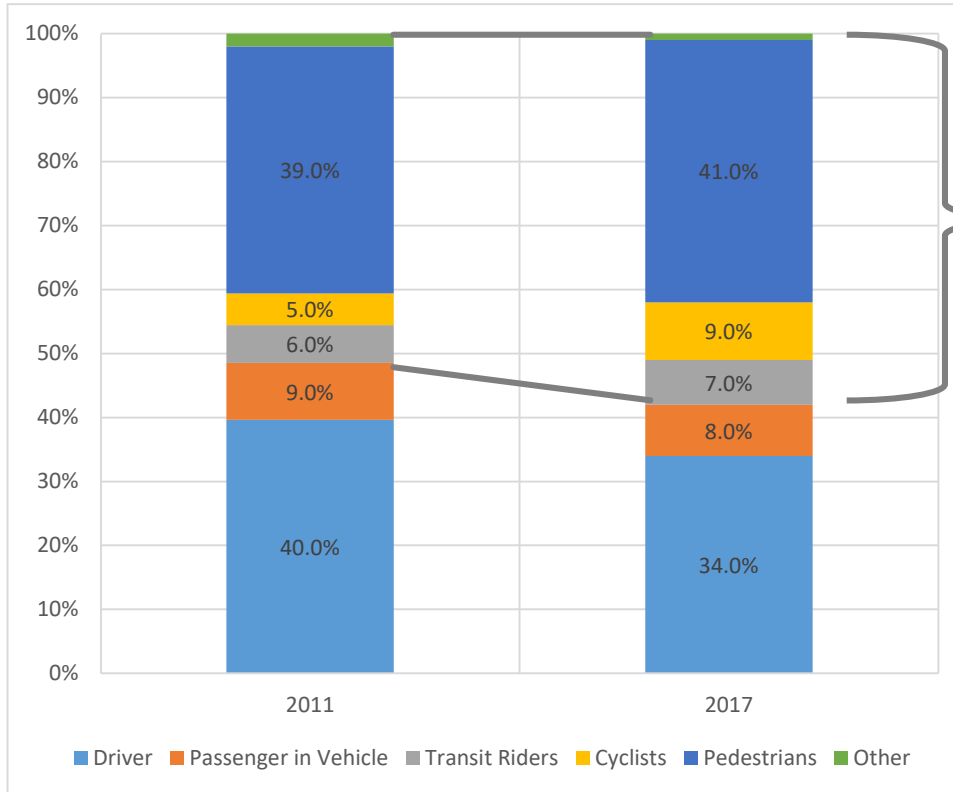
- ➔ In-flow
- ➔ Out-flow
- Top 8 Municipalities (In-flow)
- Municipal Boundaries



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%)



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

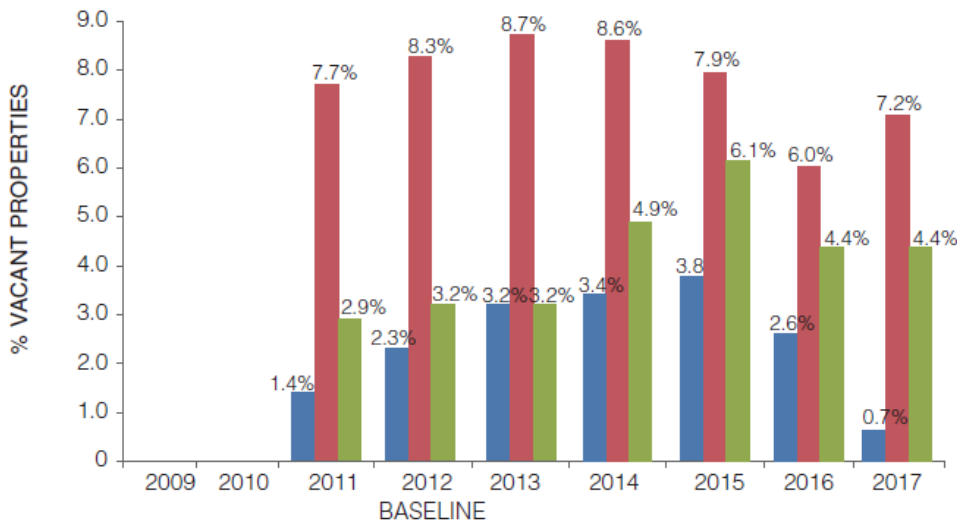
Total length of signed cycling routes (2017): 41 km

¹Map and diagram reconciled in 2017

Employment

Vacancy Rates

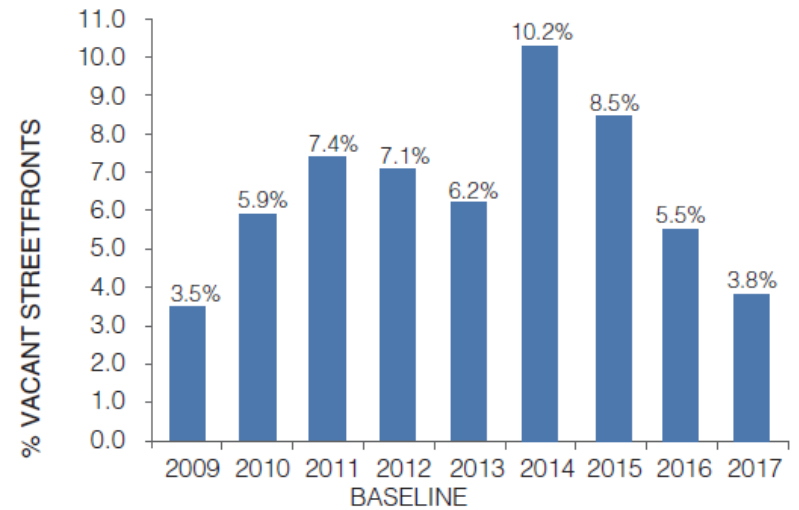
Retail, Commercial and Industrial Vacancy Rates



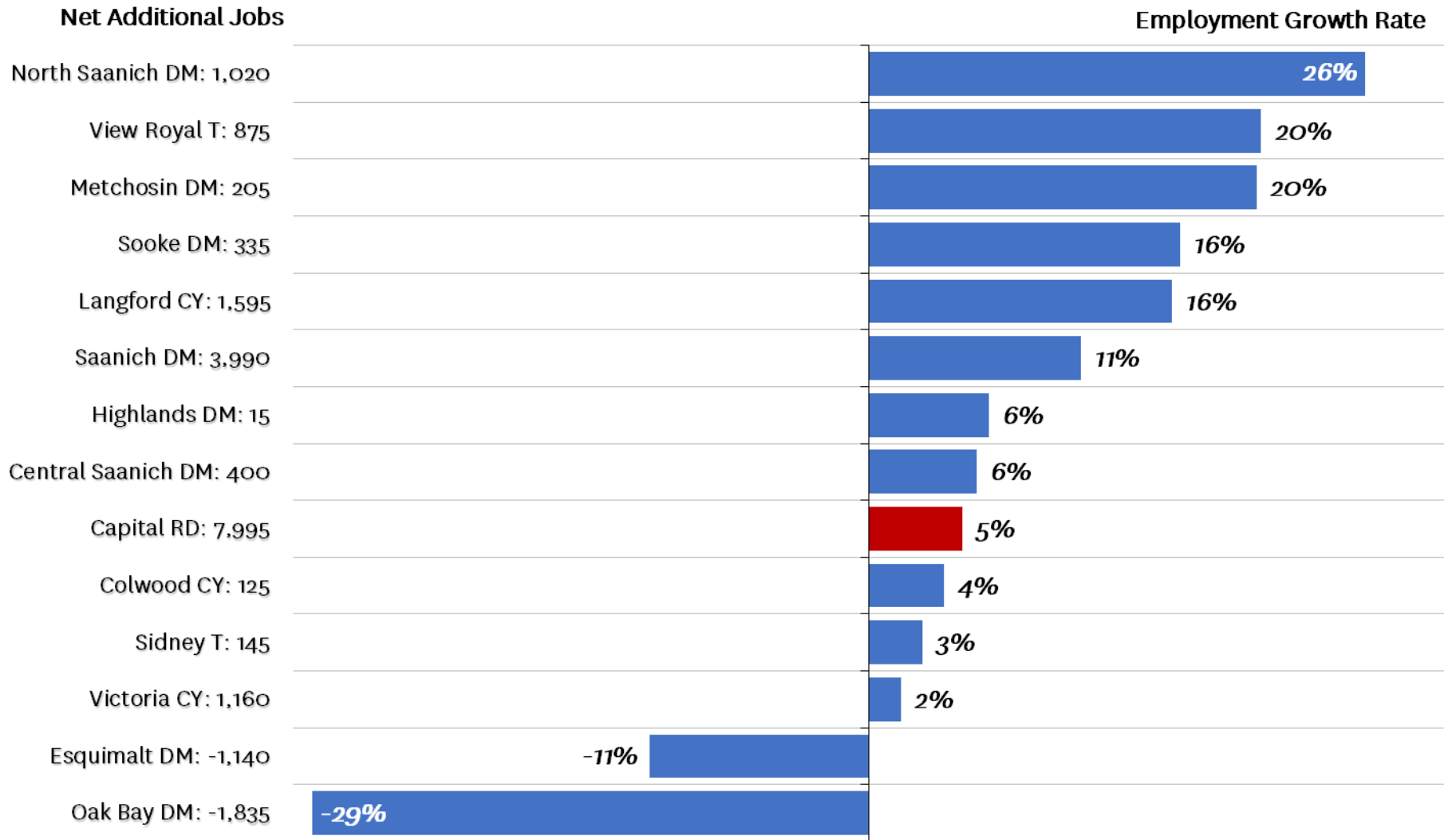
SOURCE: COLLIERS INTERNATIONAL REAL ESTATE REPORTS VICTORIA, BRITISH COLUMBIA, 2016: INDUSTRIAL (SUMMER 2016); OFFICE (Q4 2016); RETAIL (Q4 2016)

- Industrial (City-wide)
- Office (Downtown)
- Retail Shopping Centres¹ (City-wide)

Downtown Streetfront Vacancy Rate



Employment* Change by Selected Municipalities, 2011 - 2016



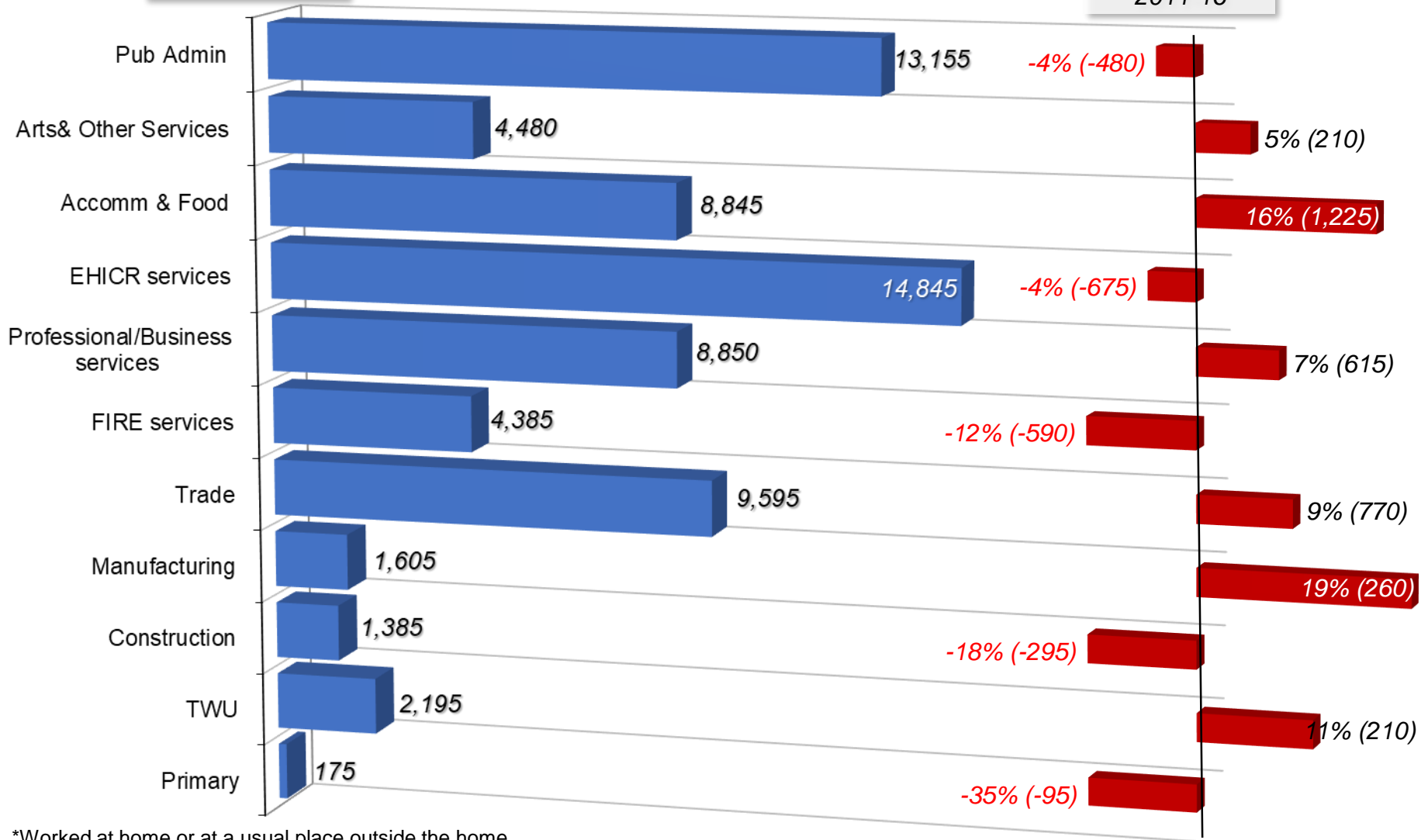
*Employment counts by Census Subdivision of Work (worked at home or at a usual place outside the home)

Source: Statistics Canada

Employment* Composition by Industry Sector, 2016

City of Victoria

Change
2011-16



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

Source: Statistics Canada

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

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)

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

Recommendations (continued)

That Council:

2. Consider the data and trends highlighted in the OCP 5-Year Review to inform future policy initiatives and priorities.
3. Direct staff to report back with the second annual review of the Victoria Housing Strategy at a Council workshop in November 2018 to summarize progress on action items and establish new actions for an updated strategy.