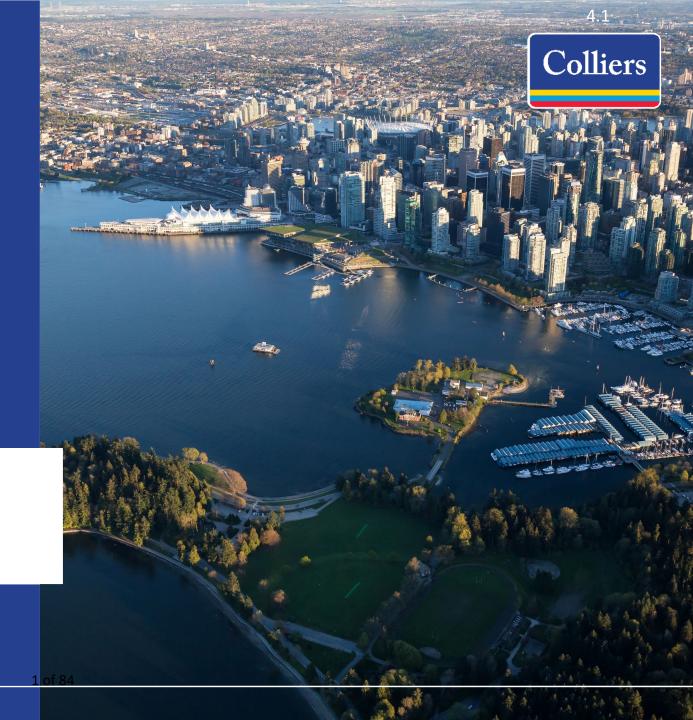
Impacts of E-Commerce On Industrial Lands & Transportation Systems

Friday February 10, 2023

Presented to: Metro Vancouver

Presented by: Colliers Strategy and Consulting



Agenda

Part 1 What is E-Commerce?

Part 2 Lessons Learned

Part 3 Recommendations



Colliers Planning & Placemaking

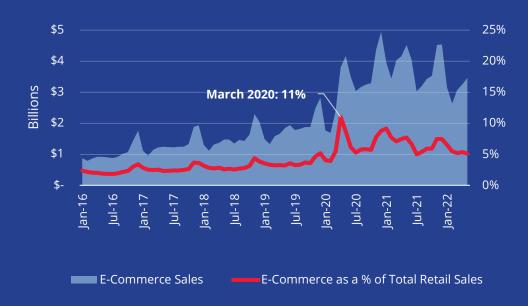
We are passionate urban planners and land economists who strive toward the development of inclusive, equitable, and sustainable communities.





Industrial Market

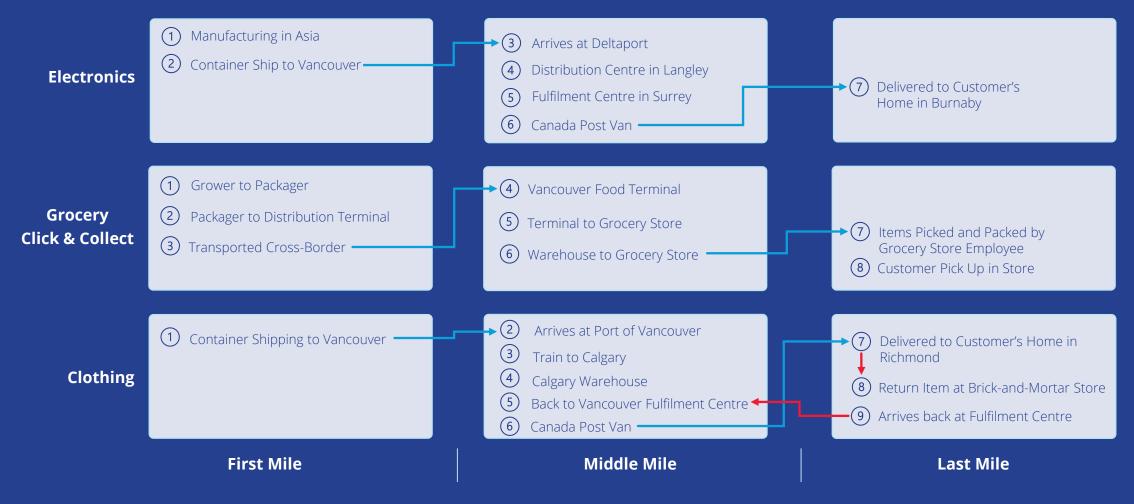
Canadian E-Commerce Sales Q1 2016 – Q2 2022



Metro Vancouver Industrial Completions and Vacancy
Q1 2016 – Q2 2022



Goods Movement





How was the Study Conducted?

Stakeholder Engagement

Case Studies

Literature Review

Lessons Learned

Curb Management Data Barriers & Opportunities Data Collection Supporting Existing Infrastructure Last Mile Distribution by Cargo Bike

Lessons Learned

Curb Management Data Barriers & Opportunities Data Collection Supporting Existing Infrastructure Last Mile Distribution by Cargo Bike

Importance of Location

Port Activity

Flexible Zoning Promoting Innovation

Built Form Opportunities

Zoning Barriers & Opportunities

Industrial Land Inventory

Lessons Learned

Curb Management Data Barriers & Opportunities Data Collection

Supporting Existing Infrastructure Last Mile Distribution by Cargo Bike

Importance of Location Flexible Zoning Promoting Innovation Built Form Opportunities

Port Activity Zoning Barriers & Opportunities Industrial Land Inventory

Transportation Infrastructure Alternative Delivery Methods Traffic Congestion

Brick & Mortar Evolution Safety & Community Vibrancy

Environmental Sustainability Labour Impacts Changes to Employment Patterns



- Demand for goods ordered online and delivered to homes is anticipated to remain, with potential to grow.
- Additional monitoring of the changes to the demand for e-commerce and the affiliated impacts is needed.
- Additional information can allow municipalities to implement policy changes necessary to address the growth of this sector.
- Flexible industrial and commercial land use zoning regulations that can accommodate innovative solutions to e-commerce demand are needed.

Expand traffic data collections efforts to better cover curb and sidewalk use.

Incorporate flexibility into industrial zoning.



Expand traffic data collections efforts to better cover curb and sidewalk use.

Incorporate flexibility into industrial zoning.

- Traffic congestion
- Safety
- Loading zone use
- Alternate delivery modes on sidewalks

Expand traffic data collections efforts to better cover curb and sidewalk use.

Incorporate flexibility into industrial zoning.



Expand traffic data collections efforts to better cover curb and sidewalk use.

Incorporate flexibility into industrial zoning.

- Broadening the allowable uses while maintaining the primary uses of the lands
- Reconsidering floor area ratio restrictions
- Allowing temporary uses

Expand traffic data collections efforts to better cover curb and sidewalk use.

Incorporate flexibility into industrial zoning.



Expand traffic data collections efforts to better cover curb and sidewalk use.

Incorporate flexibility into industrial zoning.

- Conduct impact studies
- Review "dark store" business license requests

collections efforts to better cover curb and sidewalk use.

Incorporate flexibility into industrial zoning.

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Thank You

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Regional Industrial Lands Portfolio Update

Eric Aderneck, RPP, MPL, BCOM, DULE

Senior Planner, Regional Planning and Housing Services

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INDUSTRIAL LANDS CONTEXT & CHALLENGES Constrained Pressures on **Land Supply Industrial Lands Complex Jurisdictional Site and Adjacency** Issues **Environment** 22 of 84

INDUSTRIAL LANDS DEMAND DRIVERS

Population

Employment

Multiple drivers of industrial demand
Although disrupted by COVID-19 pandemic

Economy

Trade

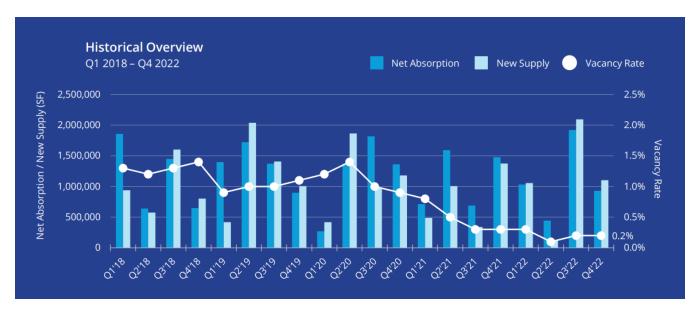
INDUSTRIAL MARKET

Vacancy Rate: 0.2%

Asking Rents: \$21 per sq ft

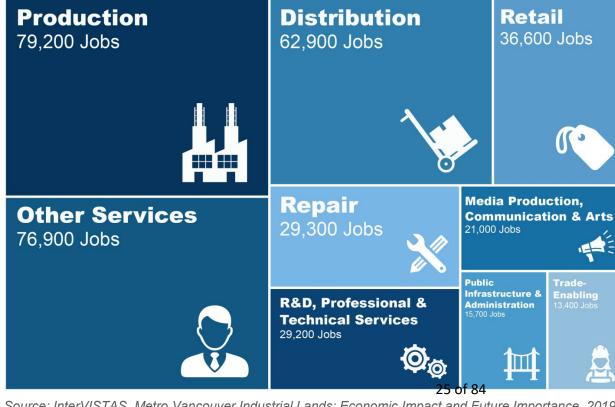
Building Inventory: 222 million sq ft

Construction: 7 million sq ft



Source: Colliers, Greater Vancouver Area, Industrial Market Report, Q4 2022

INDUSTRIAL ECONOMIC ACTIVITIES



- 4% of the region's land base
- 27% of jobs in the region (direct employment = 364,100 jobs)
- 55% are industrial jobs (200,400 jobs)
- \$9 Billion in tax contributions to governments

Source: InterVISTAS, Metro Vancouver Industrial Lands: Economic Impact and Future Importance, 2019

INDUSTRIAL BUSINESS TRENDS

- Changing nature of work and industry
- Evolving definition of industrial uses
- Growth of e-commerce
- New technologies: automation, robotics, etc.
- Further stratification and intensification
- Ongoing pressure to convert industrial land

DEFINITION OF 'INDUSTRIAL' USES

Industrial:

- Production
- Distribution
- Repair
- Construction
- Infrastructure
- Outdoor storage
- Wholesale

Employment:

- Indoor / self storage
- Stand-alone office
- Stand-alone recreation
- Retail / Wholesale (big box, auto, furniture)
- High-Tech software development
- Consulting services

Non-Industrial:

- Residential
- Artist studio
- Live / work space
- Agriculture (soil based)
- Places of worship
- Institutional uses (e.g. schools, day cares, hospitals)

REGIONAL INDUSTRIAL LANDS STRATEGY



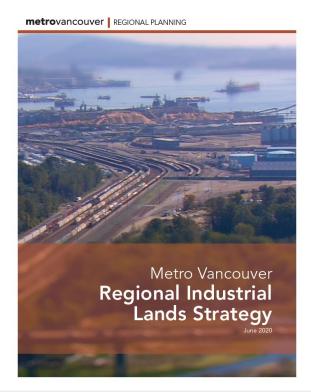




VISION: Ensure sufficient industrial lands to meet the needs of a growing and evolving economy to 2050

INDUSTRIAL LANDS STRATEGY HIGHLIGHTS

- 34 recommendations, with 10 priority actions, organized in 4 'big moves'
 - 1. Protect Remaining Industrial Lands
 - 2. Intensify and Optimize Industrial Lands
 - 3. Bring Existing Supply to Market & Address Site Issues
 - 4. Ensure a Coordinated Approach



INDUSTRIAL STRATEGY - IMPLEMENTATION

Protect Remaining Industrial Lands

- 1. Define Trade-Oriented Lands
- 2. Regional Land Use Assessment
- 3. Strengthen regional policy
- 4. Seek municipal consistency in definitions and permitted uses

Intensify & Optimize Industrial Lands

5. Facilitate industrial intensification / densification forms

Bring Land to Market / Address Site Issues

- 6. Advance bring-to-market strategies for vacant / under-developed lands
- 7. Ensure transportation connectivity

Ensure a Coordinated Approach

- 8. Coordinate strategies for economic growth
- 9. Improve data and monitoring
- 10. Framework for economic and land use planning coordination

1. DEFINE TRADE-ORIENTED LANDS

- Trade-oriented industrial uses are a crucial part of the region's gateway role
- Their low-density nature means that they often struggle to compete with other uses
- Results in less competitiveness for industrial and trade related development, longer truck trips for moving containers





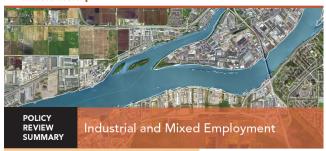
2. REGIONAL LAND USE ASSESSMENT

- The parcel-based assessment includes all land use types across the region
- Document lands by attributes, characteristics, and possible uses
- Match projected demand with supply of lands by use to better understand pressures and gaps

3. STRENGTHEN REGIONAL POLICY

- Metro 2040 Policy Review
- Updating the regional growth strategy policies to protect industrial lands
- Stronger policy: trade-oriented overlay, clearer definitions, encourage intensification, flexibility for employment lands near rapid transit stations

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About Metro 2050

Metro Vancouver is updating Metro Vancouver 2040: Shaping our Future (Metro 2040), the regional growth strategy. Since its adoption in 2011, Metro 2040 has been a strong and effective tool representing the regional federations collective vision for livability and managing growth anticipated to come to our region over the long term.

Hawing a regional growth strategy allows Metro Vancouver and member jurisdictions to prevent uban pravel by focusing growth (i.e., new homes and new jobs) in transit-oriented locations to support the development of liveble neighborhordoes, with a range of housing, jobs, and amenties. The strategy also protects the regions valid agricultural, ecologically important, and industrial lands. These efforts support the provision of affordable housing, a diverse economy, and climate changed to they help prepare the region for the impacts of climate changes.

Metro 200 was co-created and supported by all municipalities in the region. Sawwassen First Nation, Translufia, adjacent regional districts, and the Metro Vancouver Board. The direction provided by the strategy recognises the regions collective sition for the future and the importance of cooperation among member jurisdictions to create that future to accompany the company of the contraction of the contraction

The regional growth strategy is being updated. Though many of the goals, actions, and tools that are working well in Metro 2040 will remain unchanged, updates will advand the strategy to the year 2503 and allow the region to better respond to critical and emerging issues such as climate change, social equity, recilience, and housing affordability. Updates will also align the strategy with Transport 2509 (TransLink's new regional transportation strategy) and implement policy improvements in a number of areas. The updated strategy, anticipated to be completed in 2022, will be called Metro 2509.

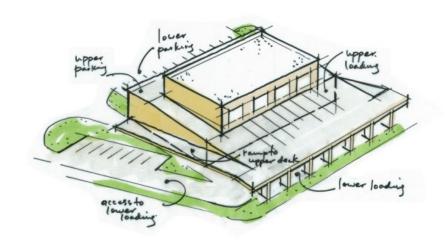


Policy Review Summaries

Content for Metro 2050 is being developed through a series of 11 themed Policy Reviews scoped to address specific policy topics in the regional growth strategy like Agriculture or the Environment. Each Policy Review is looking at the current policies in Metro 2040 related to the topic area, identifying gaps and opportunities engaging with stakeholders and others, and developing policy recommendations to be integrated into Metro 2050. Upon completion of the Policy Reviews, Metro Vancouver is producing Policy Review Summaries to support a broad understanding by decision makers and interested stakeholders of the issues and updates proposed that will guide the drafting of amended and new policy directions for each topic area in Metro 2050.

5. FACILITATE INDUSTRIAL INTENSIFICATION

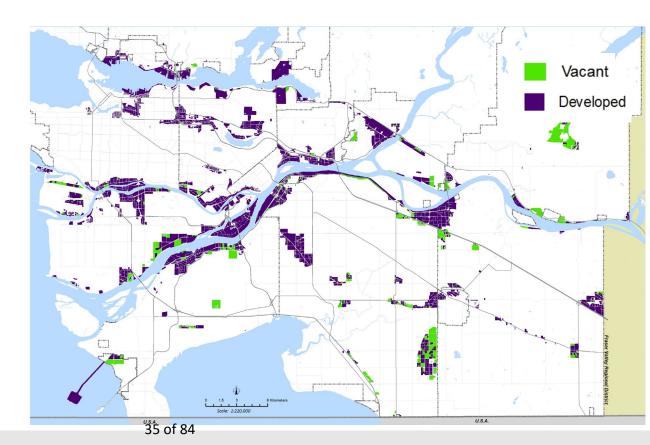
- Many different definitions of 'intensification' / 'densification'
- Develop regional guidelines to optimize opportunities
- Recognizing local contexts, encourage appropriate new forms of industrial
- Incentives or removal of regulatory barriers



9. IMPROVE DATA AND MONITORING

Industrial Lands Inventory:

- Completed in: 2005, 2010, 2015, 2020
- 11,500 ha (28,400 ac) of land
- 30 detailed and 7 consolidated land use classifications





Thank you

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Metro 2050 Climate Policy Enhancement Study

Erin Rennie

Senior Planner, Regional Planning and Housing Services

Regional Planning Committee | February 10, 2023 58061505

60+ YEARS OF CONTINUOUS IMPROVEMENT





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METRO 2050 & CLIMATE ACTION

- GHG Emission Reduction Targets (Carbon Neutrality by 2050)
- Metro 2040 Climate and Natural Hazards Policy Review
- 2020 Resilience Study
- Carbon Neutral Region Modelling Study
- Climate change lens applied to all Metro 2050 policies



Helicopters lift hundreds to safety after motorists trapped on B.C. highway

Up to 275 people had been stuck on Hwy 7 since late Sunday

2 Minutes Ago

Storm sends barge straight into Vancouver's seawall

'Atmospheric river' in B.C. to be followed by high winds and snow in some areas

Relentless rain causing flooding, road closures, evacuations across southern B.C.

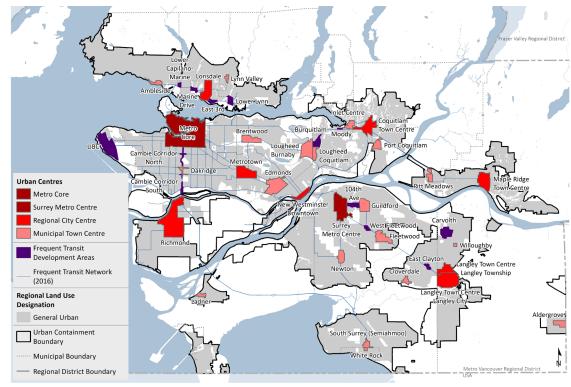


MARCH 25, 2022 MVRD BOARD RESOLUTION

Given the urgent need to respond to climate change and prepare for extreme weather events, direct staff to undertake work and engagement with an **aim to proposing an early amendment to Metro 2050 post-adoption to strengthen climate action language and policy** including the intent to improve integration of climate action into other Metro 2050 priorities.

METRO 2050 & GHG REDUCTIONS (MITIGATION)

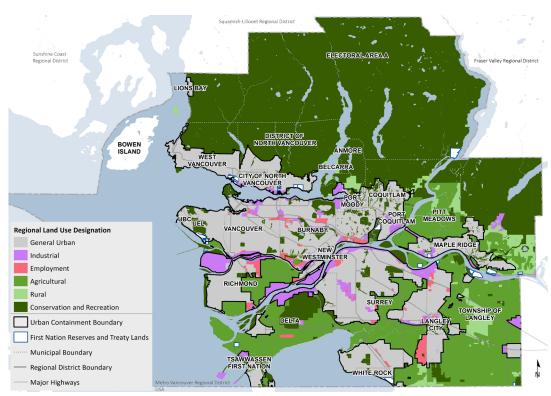
- Urban Containment Boundary supports carbon storage
- Urban Centres and Frequent Transit
 Development Areas
 support compact
 communities, shorter
 trips, more energy
 efficient homes



METRO 2050 & RESILIENCE TO CLIMATE CHANGE

(ADAPTATION)

- Urban Containment
 Boundary and Land Use
 Designations discourage
 development on hazard
 lands
- Policy supports resilient forms and communities



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METRO 2050 CLIMATE POLICY ENHANCEMENT STUDY

Objectives:

- Identify potential Metro 2050
 amendment options to reduce
 GHG Emissions and enhance
 resilience
- 2. Coordinate with *Climate 2050*Land Use and Urban Form
 Roadmap



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PROJECT TIMELINE

- ✓ Background review & early engagement (Q2/3 2022)
- ✓ Develop, Refine, Organize Policy Ideas (Q4 2022)
- Engage with stakeholders and subject matter experts (Q1/2 2023)
- □ Prepare recommendations (Q 2/3 2023)
- ☐ Initiate Potential amendment (Q4 2023)



ENGAGEMENT

- Gather and Refine Ideas (Q1 2023)
 - Joint engagement with Climate 2050 Land Use and Urban Form Roadmap
- Comment Referral on Draft Recommendations (Q2/3 2023)



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CLIMATE ACTION & LAND USE POLICY WORKSHOPS

- January 26 in person
- Feb 1 online
- Facilitated discussion on climate action ideas "worksheets"
- Opportunity for written feedback post-workshop
- Opportunity to leverage to support local climate policy work



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NEXT STEPS

- Forward scoping report to Climate Action, Liquid Waste, and Parks Committees for information
- Review input and prepare draft recommendations
- Circulate draft recommendations for comments
- Joint Regional Planning and Climate Action Committees meeting to review



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Thank you



Climate 2050 Land Use and Urban Form Roadmap

Project Scope and Update

Stefanie Ekeli

Planner, Regional Planning and Housing Services

Regional Planning Committee Meeting | February 10, 2023

CLIMATE 2050 STRATEGY

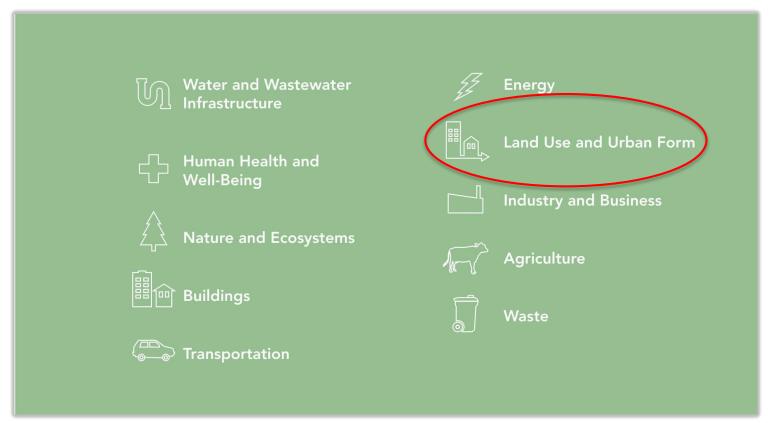
Bold leadership in response to climate change:

- Carbon neutral region by 2050
- Infrastructure, ecosystems, and communities are resilient to the impacts of climate change
- 10 Roadmaps on issue areas



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CLIMATE 2050 ROADMAP ISSUE AREAS



LUUF ROADMAP PROJECT DESCRIPTION

- Climate action strategies specific to land use and urban form (e.g. where and how we build)
- Informed by Metro 2050
- Include 'big moves', 'best practices', 'innovative ideas' or 'stretch goals'



LUUF ROADMAP – OPPORTUNITIES

- Land use practices and urban form, key levers for climate action
- Link to other management plans and other *Climate 2050* Roadmaps
- Improve climate equity
- Enhance relationships and reflect First Nation interests in the Roadmap



METRO 2050: POTENTIAL CLIMATE POLICY ENHANCEMENTS

- Staff are working to:
 - Coordinate the work programs
 - Reduce engagement fatigue
 - Avoid redundancies
 - To ensure mutually-supportive policy directions



LUUF ROADMAP TIMELINE & ENGAGEMENT



ROADMAP APPROVALS PROCESS

- Climate 2050 led by Metro Vancouver's Air Quality and Climate Change Division
- Regional Planning Staff leading the development of the LUUF Roadmap
- For approvals / input:
 - Leading committee: Climate Action Committee
 - Reports forwarded to Regional Planning, Liquid Waste, and Regional Parks Committees for information
 - Board to consider final endorsement



Thank you



Housing Trends from Metro Vancouver's Housing Data Book

Diana Jeliazkova

Senior Policy & Planning Analyst, Regional Planning and Housing Services

Regional Planning Committee – February 10, 2023 57661759

IN THE NEWS...



Census shows Vancouver's housing problem persisting

Financialization of real estate blamed as domiciles fall short for 166,000 in region.



Real Estate / Politics / News / Local News / Homes

How many new homes are needed in Metro Vancouver? The number is shocking

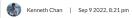
NEWS »

What can a wealth of recent reports tell us about the affordable housing situation in Vancouver?

by V. S. Wells on December 22nd, 2022 at 7:35 AM

NEWS REAL ESTATE POLITICS CITY HALL URBANIZED

61% of Vancouver residents considering leaving region due to housing affordability: survey



Opinion / Local News / Columnists

Dan Fumano: Planning for Metro Vancouver's 'next million' residents is just as hard as it looks

Canada's population is booming – and we aren't building nearly enough homes

THE EDITORIAL BOARD

PUBLISHED SEPTEMBER 17, 2022

THE METRO VANCOUVER HOUSING DATA BOOK

Making housing data easily accessible to everyone

 A large collection of regional and municipal level data on the region's housing market and the people impacted by it

- A resource for local government policy makers, researchers, and the public
- Topics include:
 - Household profile population, households, incomes
 - Housing stock profile starts, completions, demolitions
 - Ownership housing values, prices, and sales
 - Rental housing types, rents, and vacancies
 - Non-market rental & social housing
 - Housing need & homelessness























KEY TRENDS

POPULATION GROWTH

The largest cities are still attracting the largest number of people

HOUSING CONSTRUCTION

- Residential construction is below historical per capita levels
- Rental construction is not keeping pace with rental demand

RENTAL HOUSING

- There were more purpose-built rentals in 1991 than in 2021
- More and more renters are living in secondary rentals (e.g. condos)

HOUSING NEEDS & HOMELESSNESS

- The number of households in core housing need has increased
- Homelessness and social housing waitlists have increased faster than the pace of population growth



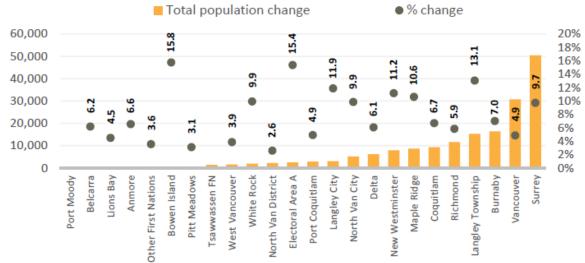
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POPULATION GROWTH ACROSS THE REGION

The largest cities are still attracting the largest number of people

Figure 1.1.1. Population Change, Metro Vancouver Jurisdictions, 2016 to 2021 Census



Source: Statistics Canada, 2021 Census of Population

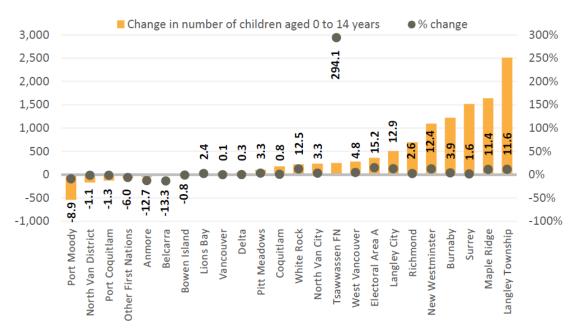
Note: Tsawwassen First Nation's % change is not displayed due to relatively large value.

- Surrey and Vancouver added the largest number of people, but some outlying municipalities grew at a faster rate
- Surrey added more people than Vancouver, continuing the growing trend it has experienced since the 1980s

CHILDREN & FAMILIES

Where are children (and their families) choosing to live in the region?

Figure 1.1.4. Change in Children, Metro Vancouver Jurisdictions, 2016 to 2021 Census



- Langley Township,
 Maple Ridge, and
 Surrey saw the largest
 increase in the
 number of children,
 and Tsawwassen had
 the largest growth rate
- Some municipalities saw a decrease in the number of children since the last Census

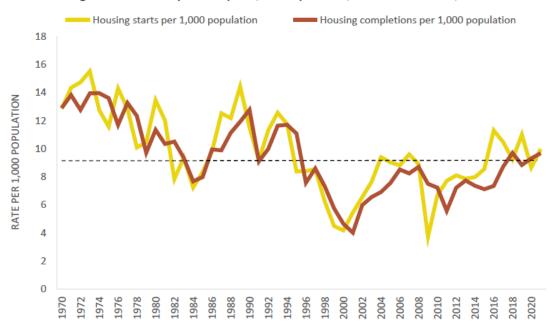
Source: Statistics Canada, 2021 Census of Population



HOUSING CONSTRUCTION IS NOT KEEPING PACE

Per capita residential construction is below 1970s, 1980s, and 1990s levels

Housing Starts and Completions per 1,000 Population, Metro Vancouver, 1970 to 2021

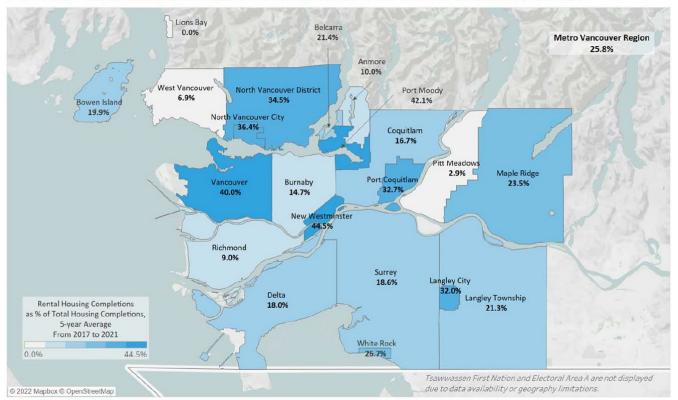


- Although housing construction has *increased* in the past decade, it is still not keeping pace with historical per capita levels
- The per capita construction rate decreased significantly in the 1990s and has yet to recover to the levels seen during the 1970s

Source: Statistics Canada, CMHC

RENTAL CONSTRUCTION IS NOT KEEPING PACE

Map 2.9. Rental Housing Completions as Percentage of Total Housing Completions, Metro Vancouver, 2017 to 2021 (5 year average)



- 26% of housing units completed in the region in the past five years were purpose-built rentals units
- In comparison,
 38% of
 households in
 the region were
 renter
 households

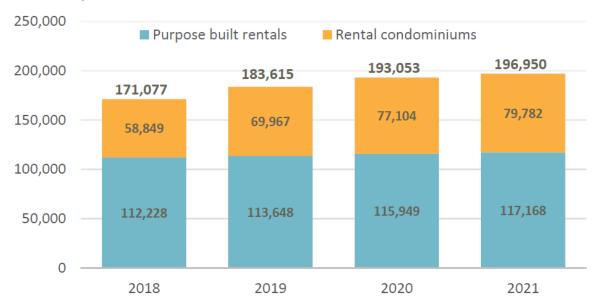
Source: CMHC Starts and Completions Survey



MORE RENTERS LIVE IN SECONDARY RENTALS

Rented condominiums represent a growing portion of the rental housing stock

Figure 4.7.1. Purpose-Built Rental Apartments and Rental Condominiums, Metro Vancouver, 2018 to 2021



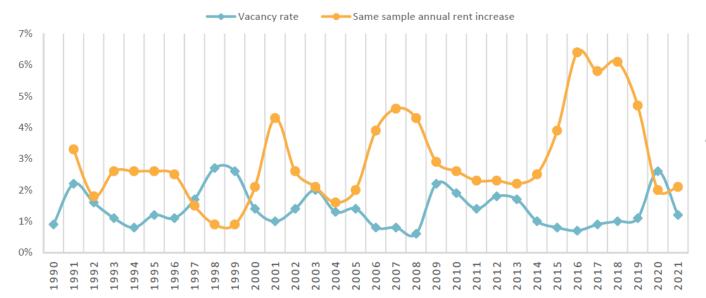
- the number of rental condos increased by 36% (+20,933 condos), while the number of purpose-built rentals increased by 4% (+4,940 rental units)
- On average, 29% of all condos in the region are rentals

Source: CMHC Rental Market Survey

INCREASING DEMAND + LOW SUPPLY = HIGH RENTS

There is a clear relationship between low vacancy rates and high rental prices

Figure 4.6.3. Vacancy Rate and Average Annual Rent Increase of Purpose-Built Market Rentals (Apartments and Townhouses), Metro Vancouver, 1990 to 2021



Source: CMHC Rental Market Survey

- In the past 30
 years, the
 average vacancy
 rate in the region
 has remained
 below 3%
- In the past 20 years (2002-2022), median rents in the region almost doubled, increasing by 96.7%

EVEN HIGHER ASKING RENTS UPON UNIT TURNOVER

Vacant units are more expensive than occupied units

Figure 4.4.4. Difference Between Average Rents of Vacant and Occupied Market Rental Units (Apartments and Townhouses), Metro Vancouver Jurisdictions, 2021



On average across the region, the asking rent for vacant units was **10.1%** higher than the average rent for occupied units

Source: CMHC Rental Market Survey



MANY PEOPLE LIVE BELOW HOUSING STANDARDS

Both owners and renters are living below housing standards

Figure 6.4.2. People Living Below Housing Standards, by Housing Standard and Tenure, Metro Vancouver, 2021



Source: Statistics Canada, 2021 Census of Population

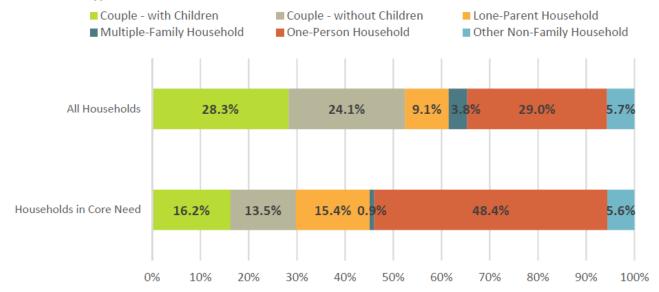
- Over half a million people were living in unaffordable housing in the region in 2021
- Renters more likely than owners to live in *unsuitable* housing (*not enough bedrooms*)
- Owners more likely than renters to live in *inadequate* housing (*in need of major* repairs)
- Renters more likely to be in core housing need

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MORE HOUSEHOLDS ARE IN CORE HOUSING NEED

Single persons and single parents are most in need

Figure 6.3.3. Distribution of All Households and Households in Core Housing Need by Household Type, Metro Vancouver, 2021



Source: Statistics Canada, 2021 Census of Population

- In 2021, 166,100
 households living in core housing need in the region
- This number has increased by nearly 10,000 households since 2016
- Single persons and lone parents were over-represented among households in core housing need

HOMELESSNESS IS INCREASING

Continues to worsen despite efforts to build more supportive housing

Figure 6.4.1. Sheltered and Unsheltered Individuals Experiencing Homelessness, Metro Vancouver, 2002 to 2020



Source: BC Non-Profit Housing Association, 2020 Homeless Count in Metro Vancouver. *In 2020, at least 241 individuals stayed in Extreme Weather Response (EWR) shelters. Those staying in EWRs would likely have been unsheltered if an Extreme Weather Alert had not been activated on Homeless Count day.

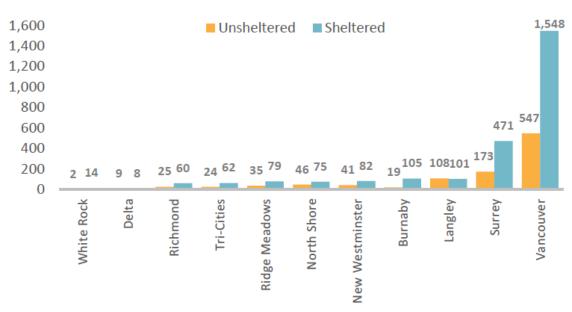
- During the 2020 Homeless Count, 3,634 individuals were identified as experiencing homelessness in Metro Vancouver
- Over 1,000 people were unsheltered
- Since 2005, homelessness has increased by 67% in the region while population has increased by 25%

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HOMELESSNESS ACROSS THE REGION

Unevenly distributed across the region

Figure 6.4.2. Sheltered and Unsheltered Individuals Experiencing Homelessness by Sub-Region in Metro Vancouver, 2020



- In 2020, seniors aged 55+ represented 24% of the homeless population, an increase from 22% in 2017
- In 2020, 33% identified as Indigenous. *Indigenous people* are *13.2 times more likely* to experience homelessness than their presence in the general population would suggest.
- Black people are 3.7 times more likely to experience homelessness than their presence in the general population would suggest.

20

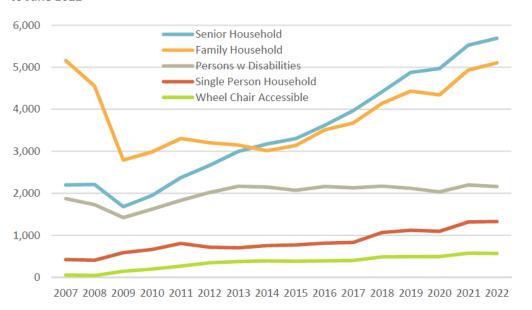
Source: BC Non-Profit Housing Association, 2020 Homeless Count in Metro Vancouver.
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BC HOUSING SOCIAL HOUSING WAITLIST

Continues to increase despite efforts to build more social housing

Figure 6.1.1. BC Housing Social Housing Waitlist by Category, Metro Vancouver, June 2007 to June 2022

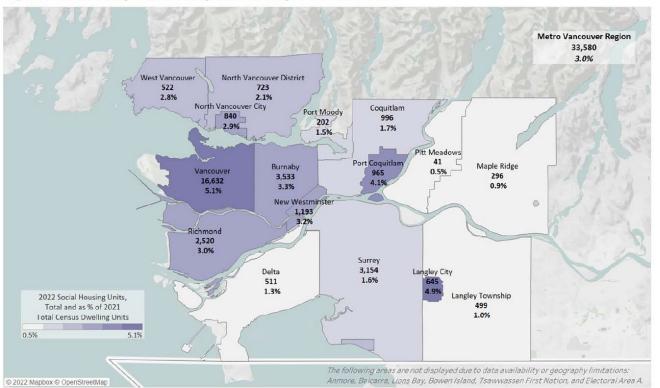


- In 2022, there were 14,857
 households on the BC
 Housing social housing
 waitlist in the region.
- The BCH social housing waitlist has continued to grow since 2009 (+124%).
- Senior households
 represent the largest group
 on the waitlist (38%), and are
 the fastest growing group,
 followed by families.

Source: BC Housing

SOCIAL HOUSING "DENSITY" ACROSS THE REGION

Map 5.2. Total Social Housing Units as Percentage of Total Dwellings, Metro Vancouver, 2022



- In 2022, there were 33,580 total social housing units in the region, representing just 3.0% of all housing units.
- Metro Vancouver Housing, one of the largest non-profit housing providers in BC, has ~3,400 units.

Source: Metro Vancouver Jurisdictions



CAN OUR REGION KEEP UP?

ECONOMY

Canada wants to welcome 500,000 immigrants a year by 2025. Can our country keep up?

Policy makers say higher immigration is necessary to fuel Canada's economic growth, and in particular, to ease labour shortages, but with a population boom comes growing pains

- On average since 2016, 12% of Canada's immigrants have settled in our region every year.
- By 2025, our region can expect an average of 55,000 new immigrants every year.

POLICY ACTIONS UNDERWAY

How Metro Vancouver will support actions to meet increasing housing demand

- Increasing regional housing policy leadership
 - Metro 2050 Goal 4: Provide Diverse and Affordable Housing Choices
 - Research, data, and planning support for our member jurisdictions
 - Convening our member jurisdictions and other regional partners to discuss housing policy coordination and share resources and best practices
- Metro Vancouver Housing Corporation has an ambitious goal to preserve, renew, and expand its housing portfolio
 - Target of a minimum of 1,350 new and redeveloped units over 10 years
 - Committing \$190 million to preserving and building affordable housing



Thank You

metrovancouver