

Changing Composition of the Housing Stock

Metro Vancouver's Role

Every five years, the Census of Canada provides benchmark data that is instrumental in analyzing and evaluating local government planning policies and services. Representing member jurisdictions, Metro Vancouver takes a lead role in assembling, interpreting and distributing Census and related data, and in preparing analyses of Census data in relation to regional and sub-regional trends.

This bulletin is part of an analytical report series that focuses primarily on trends and issues related to *Metro Vancouver 2040: Shaping our Future (Metro 2040)*, the regional growth strategy, along with other related local government policy topics.

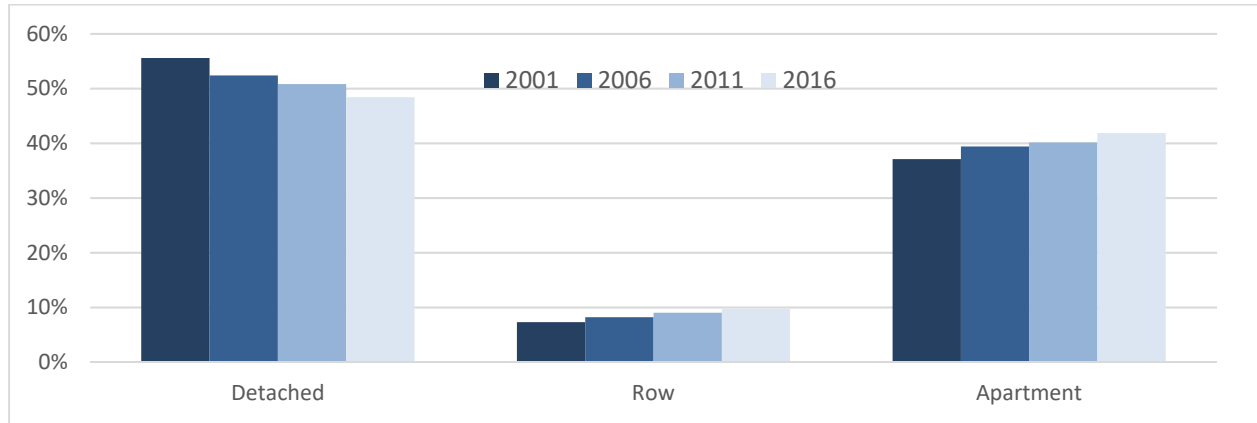
Regional Trends in Dwelling Unit Composition

The first release of 2016 Census data included population and dwelling counts, indicating that Metro Vancouver's population grew by 150,000 residents over the past five years, from 2,313,500 in 2011 to 2,463,000 in 2016. With that growth there was a corresponding increase of 71,000 units in the housing stock, from 889,000 units in 2011 to 960,000 units in 2016.

The 2016 Census clearly establishes the accelerating trend toward multiple unit housing forms in the region. In 2016, apartment dwelling units comprised 42% (402,000 units) of the total housing stock, up from 37% in 2001. Furthermore, the 5% increase in total stock results from apartments taking an average of 60% of housing unit growth over that 15-year period. Row housing shows a steady but more modest increase from 8% to 10%. Figures 1 and 2 show the changes in composition of Metro Vancouver's housing stock since 2001.

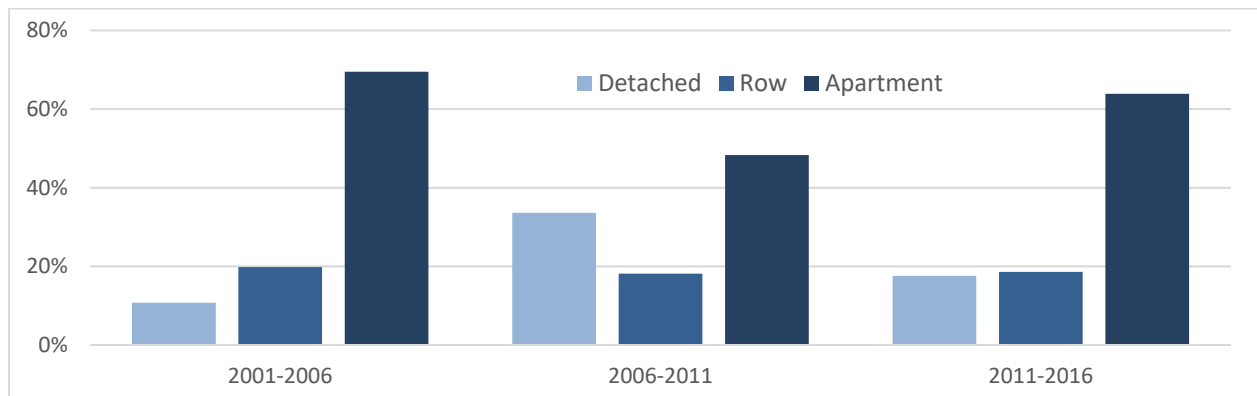
Corresponding to the increasing apartment and row housing share is the decrease in share of detached housing from 55% to 49%. However, some qualification is needed as this category includes traditional single unit detached homes along with a variety of multi-unit detached dwelling types. While municipal building permit records show a high number of single detached housing starts, most are a 1 to 1 replacement, or replacement with a multi-unit detached structure. Although not shown clearly in the Census data, information from alternate sources indicates the declining growth in actual single unit detached dwellings has been countered by an increase in multi-unit detached dwellings.

Figure 1. Changing Composition of Metro Vancouver’s Total Housing Stock 2001- 2016



Source: Census of Canada 2001, 2006, 2011, 2016

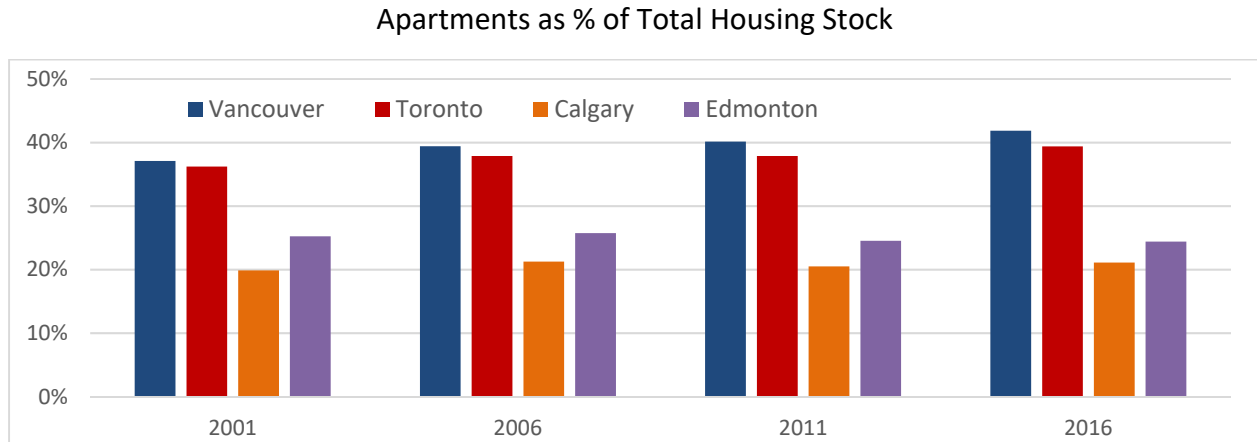
Figure 2. Share of Growth in Metro Vancouver’s Housing Stock 2001-2016



Source: Census of Canada 2001, 2006, 2011, 2016

While the shift toward multiple unit housing forms is not unique to Metro Vancouver, the trend is more distinct in our region. Figure 3 shows the comparative composition of housing stock in 4 of Canada’s major Metropolitan areas. Metro Vancouver’s 60% apartment share of housing stock growth compares to Toronto (50%), Calgary (24%) and Edmonton (22%). The metropolitan areas around the U.S. cities of Seattle and San Francisco have apartment shares around 40-45% of housing stock growth.

Figure 3. Comparing Composition of Housing Stock Among Major Metropolitan Areas

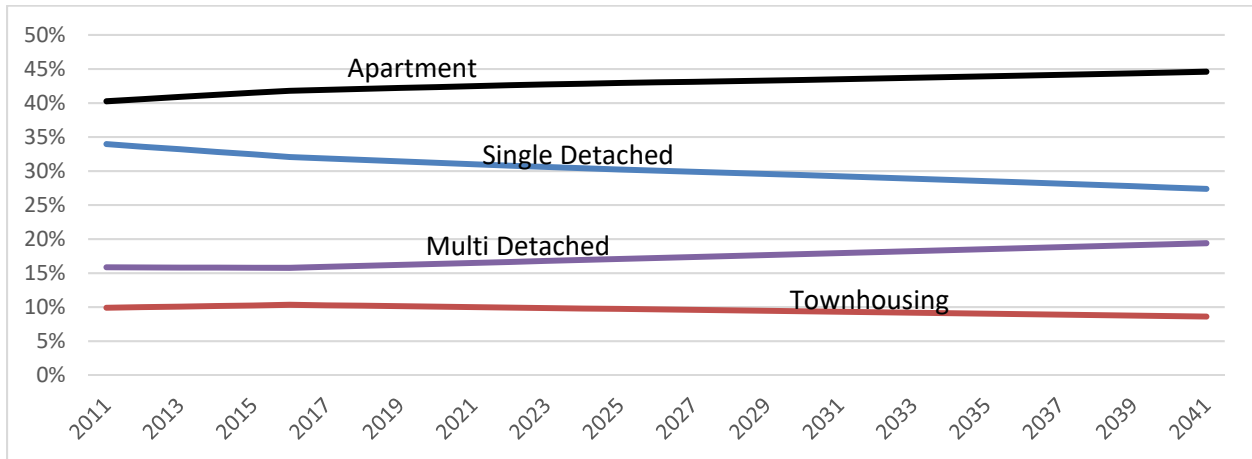


Source: Census of Canada 2001, 2006, 2011, 2016

Regional Trend Projections

It is anticipated that the trend in Metro Vancouver’s apartment composition patterns will continue. However, another significant trend emerging in housing stock composition that has been somewhat obscured by past reclassifications of Census dwelling categories, is the growing prominence of multi-unit detached dwellings. This includes new detached dwellings with one or more secondary units, additional carriage or laneway dwellings built on a property, conversions of existing single detached homes to include secondary units, as well as a variety of duplex to x-plex forms. While apartment projects are largely located in central locations and along transit corridors, multi-unit detached densification is organically occurring within neighbourhoods. Given that Metro Vancouver’s growth will be primarily through densification of existing developed areas in the coming years, apartments and multi-detached conversions will become the most prominent forms of new housing supply. Figure 4 provides Metro Vancouver’s current projections on the changing share of dwelling stock to the year 2041.

Figure 4. Projected Composition of Metro Vancouver Housing Stock to 2041

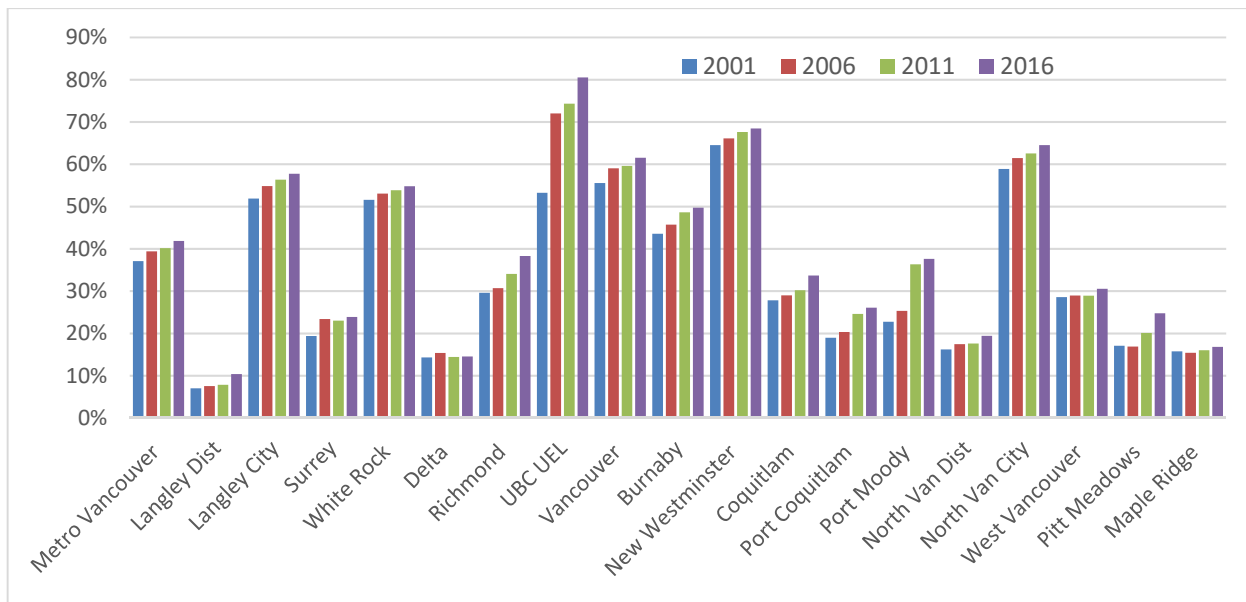


Source: Metro Vancouver

Housing Composition among Metro Vancouver Subregions and Municipalities

Composition of the housing stock differs among municipalities, but the trend toward apartment form is occurring in most areas of the region. Figure 5 shows the comparative change in the share of apartment units (and the corresponding decrease in ground oriented housing) among Metro Vancouver municipalities over the past 15 years.

Figure 5. Comparing Apartment Share of Housing Stock Among Municipalities – 2001-2016



Source: Census of Canada 2001, 2006, 2011, 2016

Growth Distributions and *Metro 2040* Growth Targets

Metro 2040 establishes growth targets for the share of housing growth within the Urban Containment Boundary, within Urban Centres, and along major corridors. The 2016 Census provides a benchmark for *Metro 2040*, which was adopted in 2011. Initial review of the data suggests that residential growth has been generally consistent with *Metro 2040*'s objectives through the first five years of implementation. The following bullets summarize preliminary dwelling growth distributions in relation to *Metro 2040* objectives and targets:

- About 98% of dwelling unit growth was within the Urban Containment Boundary;
- About 39% of all new dwelling units (mostly apartment units) were within Metro Vancouver's designated Urban Centres. The *Metro 2040* target is 40%. The Metropolitan Core (downtown Vancouver/ South False Creek), along with Richmond City Centre were the most prominent Regional City Centre locations for apartment growth;
- Roughly, about 50% of dwelling unit growth was proximate to TransLink's 2016 Frequent Transit Network (including Urban Centre locations);
- About 85% of dwelling unit growth was infill and intensification within established urban areas, and 15% was within planned new residential neighbourhoods developing within the Urban Containment Boundary.

While there are geographic constraints on land supply in Metro Vancouver, there is long term capacity for additional ground oriented housing throughout the region. Some of this capacity is available in the 4,000 to 5,000 hectares of land currently available within the Urban Containment Boundary that is planned for future urban residential communities. These areas are primarily in Surrey, Langley Township, Maple Ridge and Coquitlam and have the potential to accommodate housing development through to the late 2020s. Many of these areas are currently developing a mix of housing types (single detached – most with secondary units, townhouses and some apartments) at significantly higher densities than previously established neighbourhoods in these municipalities.

There is also large potential capacity for redevelopment / intensification of older ground oriented large lot housing stock in many communities of the region. Many of these areas are at various stages of transition, providing a net increase in ground oriented housing options while retaining neighbourhood context.

Combining the trends toward apartment forms, the ground oriented intensification potential of many existing residential communities, and the availability of urban residential land for new communities within the Urban Containment Boundary, there is sufficient capacity for Metro Vancouver to accommodate the projected *Metro 2040* population and housing growth over the next 30 years and beyond.