metrovancouver
SERVICES AND SOLUTIONS FOR A LIVABLE REGION

METRO VANCOUVER REGIONAL DISTRICT
REGIONAL PLANNING COMMITTEE

MEETING

Thursday, September 11, 2025
9:00 am
28th Floor Committee Room, 4515 Central Boulevard, Burnaby, British Columbia
Webstream available at https://www.metrovancouver.org

A G E N D A

A. ADOPTION OF THE AGENDA

1. September 11, 2025 Meeting Agenda
That the Regional Planning Committee adopt the agenda for its meeting scheduled for September 11, 2025 as circulated.

B. ADOPTION OF THE MINUTES

1. July 3, 2025 Meeting Minutes *pg. 8*
That the Regional Planning Committee adopt the minutes of its meeting held July 3, 2025 as circulated.

C. DELEGATIONS

D. INVITED PRESENTATIONS

E. REPORTS FROM COMMITTEE OR CHIEF ADMINISTRATIVE OFFICER

1. Housing and Transportation Cost Burden Study Update *pg. 13*

Executive Summary
This report updates Metro Vancouver's Housing and Transportation ("H+T") Cost Burden Study, analyzing how combined housing and transportation expenses affect household affordability across the region. Combined household H+T costs average $41,000 per year, with wide variation in costs between jurisdictions and in the ratios of housing costs to transportation costs.

Key findings include:

- Transportation costs can rival, and sometimes exceed, housing costs;
- Centres and Corridors, especially those along the SkyTrain network, consistently demonstrate lower combined costs;
- Rental tenure greatly scales the affordability benefits of SkyTrain; and
- Population density alone does not materially affect H+T affordability.

The findings suggest that location and tenure matter; Small-Scale Multi-Unit Housing, for example, is unlikely to contribute to affordability if it does not offer transit proximity, rental tenure, and convenient access to jobs and services. Transit-Oriented Areas around SkyTrain, on the other hand, could enable greater levels of affordability if the housing is purpose-built rental.

These insights support policies that promote transit-oriented development (particularly affordable rental housing), strategic housing growth in affordable areas, investment in improved public transit and job creation in transit-accessible locations, all of which can improve regional affordability and guide future growth management.

Recommendation

That the MVRD Board:

a) receive for information the report dated August 19, 2025, titled "Housing and Transportation Cost Burden Study Update";
b) request that the Board Chair forward a copy of the report dated August 19, 2025 titled "Housing and Transportation Cost Burden Study Update" to Member Jurisdictions and TransLink with an offer of a presentation to Council upon request; and
c) request that the Board Chair forward a copy of the report dated August 19, 2025, titled "Housing and Transportation Cost Burden Study Update" to the Provincial Minister of Housing and Municipal Affairs and the Federal Minister of Housing and Infrastructure.

2. Population Projections Update *pg. 116*

Executive Summary

Metro Vancouver's average annual net population growth projection has been revised from 50,000 to approximately 40,500 residents per year, reflecting the impact of recent federal policy changes affecting immigration and non-permanent residents. These shifts have introduced increased volatility in population projections, causing both upward and downward swings in regional growth estimates over the past few years. Between 2025 and 2027, growth is expected to temporarily slow due to reduced immigration targets and fewer non-permanent residents, with a modest dip anticipated in 2026 before returning to more stable growth. Until federal policies stabilize, projections will remain more volatile and subject to change. Under the Medium Growth Scenario, Metro Vancouver's population is expected to reach 4 million by 2047 and 4.2 million by 2051.

Metro Vancouver updates population projections for the region annually to support long-range planning for housing, infrastructure, utilities, and transit. These projections are developed in collaboration with member jurisdictions and regional agencies, using the latest demographic data, economic indicators, and government policy inputs. The projections inform capital planning across Metro Vancouver's utilities and guide coordinated regional growth strategies.

Recommendation

That the MVRD Board:

a) receive for information the report dated August 19, 2025, titled "Population Projections Update"; and
b) request that the Board Chair send a copy of the report dated August 19, 2025 titled "Population Projections Update" to member jurisdictions with an offer of a presentation including local demographic profiles to Council upon request.

3. Housing 2050: Affordable Housing Gap Analysis *pg. 129*

Executive Summary

There has been a significant increase in support for affordable housing in recent years, however, the scale of the current and projected need for non-market housing in the region far exceeds these efforts. Over the past five years, between 12,500 and 19,500 affordable rental housing units have been initiated across the region through a combination of federal, provincial, and local government programs, including approximately $1.2 billion in contributions from regular federal and provincial funding programs, and significant support from local governments through planning tools, incentives, and land contributions.

The Affordable Housing Gap Analysis identifies a need for between 29,250 and 54,500 affordable rental units over the next five years, requiring a $10.1 billion to $19.3 billion investment, inclusive of all government tools, to both address current underhoused need and to repair historic underinvestment in the sector. While this scale of investment is unattainable in the short term, all efforts to build on recent progress towards closing the gap are critical and will yield meaningful improvements in housing outcomes and community well-being.

Taking steps to address this gap requires coordinated action across all orders of government. The primary responsibility for funding rests with senior governments whose sustained and scaled investment is essential to meeting the region's affordable housing needs. And, local governments play a critical enabling role by implementing land use policies, streamlining development approvals, and offering financial and regulatory incentives that improve project viability.

Recommendation

That the MVRD Board:

a) receive for information the report dated August 18, 2025, titled "Housing 2050: Affordable Housing Gap Analysis";
b) request that the Board Chair forward a copy of the report dated August 18, 2025, titled "Housing 2050: Affordable Housing Gap Analysis" to member jurisdictions; and
c) request that the Board Chair forward a copy of the report dated August 18, 2025, titled "Housing 2050: Affordable Housing Gap Analysis" to the Provincial Minister of Housing and Municipal Affairs and the Federal Minister of Housing, Infrastructure.

4. Housing 2050 Engagement Update *pg. 186*

Executive Summary

This report provides an update on the engagement for Housing 2050 from January to August 2025. Engagement was focused on individuals and organizations directly involved in non-market housing policy, planning, and delivery, including municipalities, First Nations, senior governments, housing providers, and sectoral organizations. Engagement included 16 facilitated meetings, one workshop, and an online questionnaire with 79 participants. Over 750 comments were received. Participants shared insights on regional priorities, opportunities for alignment, and strategies to advance affordable housing outcomes.

Key themes included:

- Advocacy and funding: Calls for increased senior government investment, flexible financing, and access to land and supports;
- Collaboration and coordination: Emphasis on cross-sector partnerships and regional alignment;
- Policy and implementation: Input on optimizing delivery, protecting tenants, and addressing homelessness;
- Data and engagement: Interest in shared research tools and ongoing, responsive
- engagement; and
- First Nations priorities: Desire for continued dialogue and stronger relationships around housing policy.

This input will be used in developing potential policy alternatives and advocacy strategies that will be presented to engagement audiences at the next stage.

Recommendation

That the Regional Planning Committee receive for information the report dated August 15, 2025, titled "Housing 2050 Engagement Update".

5. Metro 2050 – 2024 Annual Performance Monitoring Report *pg. 210*

Executive Summary

The 2024 Annual Performance Monitoring Report provides the annual update on the 29 key performance indicators established in Metro 2050, the regional growth strategy. These indicators track progress across a range of policy areas and offer a comprehensive view of how the region is advancing toward its long-term vision. The Metro 2050 Performance Monitoring Dashboard supports this report by offering detailed data, visualizations, and status updates for each measure. It serves as a transparent and accessible tool for the Metro Vancouver Board, member jurisdictions, TransLink, regional agencies, and the public to monitor implementation, evaluate outcomes, and inform collective decision-making.

Highlights include:

- 41% of dwelling unit growth (2016–2021) occurred in Urban Centres (target is 40%);
- Area inside the Urban Containment Boundary reduced by 391 ha, primarily due to the removal of Lions Bay;
- Vehicle km travelled by auto drivers declined from 43.6M km/day (2017) to 41.4M km/day (2023);
- Walking trips increased from 14.2% to 18.2% of all trips (2017–2023);
- Only 2.3% of newly completed units (2018–2023) in growth areas were affordable rentals (target: 15% by 2050);
- Office space in Urban Centres remained stable at 55M sq ft, despite a regional decline in total office space; and
- Five amendments to Metro 2050 were approved in 2024, reflecting ongoing implementation and refinement of the regional growth strategy.

Recommendation

That the MVRD Board:

a) receive for information the report dated August 11, 2025, titled "Metro 2050 – 2024 Annual Performance Monitoring Report"; and

b) direct staff to forward a copy of the report dated August 11, 2025, titled "Metro 2050 – 2024 Annual Performance Monitoring Report" to the Ministry of Municipal Affairs and the Ministry of Citizen's Services.

6. Manager's Report *pg. 227*

Recommendation

That the Regional Planning Committee receive for information the report dated August 19, 2025, titled "Manager's Report".

F. INFORMATION ITEMS

G. OTHER BUSINESS

H. RESOLUTION TO CLOSE MEETING

Note: The Committee must state by resolution the basis under section 90 of the Community Charter on which the meeting is being closed. If a member wishes to add an item, the basis must be included below.

I. ADJOURNMENT

That the Regional Planning Committee adjourn its meeting of September 11, 2025.

Membership:

Woodward, Eric (C) – Langley Township	Henderson, Tasha – New Westminster	Locke, Brenda - Surrey
Hodge, Craig (VC) – Coquitlam	Knight, Megan – White Rock	Loo, Alexa – Richmond
Bligh, Rebecca – Vancouver	Kruger, Dylan – Delta	McEwen, John – Anmore
Carreras, Korleen – Maple Ridge	Lahti, Meghan – Port Moody	Santiago, Maita – Burnaby
Girard, Angela – North Vancouver City	Lambur, Peter – West Vancouver	West, Brad – Port Coquitlam

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SERVICES AND SOLUTIONS FOR A LIVABLE REGION

METRO VANCOUVER REGIONAL DISTRICT
REGIONAL PLANNING COMMITTEE

Minutes of the Regular Meeting of the Metro Vancouver Regional District (MVRD) Regional Planning Committee held at 9:00 am on Thursday, July 3, 2025 in the 28th Floor Committee Room, 4515 Central Boulevard, Burnaby, British Columbia.

MEMBERS PRESENT:
Chair, Director Eric Woodward, Langley Township
Vice Chair, Director Craig Hodge, Coquitlam
Director Rebecca Bligh, Vancouver
Councillor Korleen Carreras, Maple Ridge
Councillor Angela Girard, North Vancouver City*
Councillor Tasha Henderson, New Westminster (arrived at 9:04 am)
Director Megan Knight, White Rock*
Director Dylan Kruger, Delta
Director Meghan Lahti, Port Moody
Councillor Peter Lambur, West Vancouver
Director Brenda Locke, Surrey*
Councillor Alexa Loo, Richmond
Councillor Maita Santiago, Burnaby (arrived at 9:02 am)
Director Brad West, Port Coquitlam*

*denotes electronic meeting participation as authorized by the *Procedure Bylaw*

MEMBERS ABSENT:
Director John McEwen, Anmore

STAFF PRESENT:
Jerry W. Dobrovolny, Chief Administrative Officer
Jonathan Cote, Deputy General Manager, Regional Planning and Housing Development
Hadir Ali, Legislative Services Coordinator, Board and Information Services
Agatha Czekajlo, Senior Policy and Planning Analyst, Regional Planning and Housing Services
Heather McNell, Deputy Chief Administrative Officer, Policy and Planning
Mark Seinen, Senior Planner, Regional Planning and Housing Services
Harji Varn, Chief Financial Officer / General Manager, Financial Services
Sinisa Vukicevic, Program Manager, Regional Planning Analytics

A. ADOPTION OF THE AGENDA

1. July 3, 2025 Meeting Agenda

It was MOVED and SECONDED
That the Regional Planning Committee adopt the agenda for its meeting scheduled for July 3, 2025 as circulated.

CARRIED

B. ADOPTION OF THE MINUTES

1. June 5, 2025 Meeting Minutes

It was MOVED and SECONDED
That the Regional Planning Committee adopt the minutes of its meeting held June 5, 2025 circulated.

CARRIED

C. DELEGATIONS

No items presented.

D. INVITED PRESENTATIONS

No items presented.

E. REPORTS FROM COMMITTEE OR CHIEF ADMINISTRATIVE OFFICER

1. Regional Parking Study – Final Report

Report dated June 9, 2025 from Mark Seinen, Senior Planner, Regional Planning and Housing Services, informing the Regional Planning Committee and MVRD Board of the findings of the Regional Parking Study.

Mark Seinen provided the committee with a verbal update of the report noting that the findings are for the whole region and parking utilization varies significantly across the region from one municipality to another.

9:02 am Councillor Santiago arrived at the meeting.
9:04 am Councillor Henderson arrived at the meeting.

It was MOVED and SECONDED
That the MVRD Board:

a) receive for information the report dated June 9, 2025, titled "Regional Parking Study – Final Report"; and
b) forward a copy of the report dated June 9, 2025 titled "Regional Parking Study – Final Report" to member jurisdictions with an offer of a presentation to Council upon request.

CARRIED

2. Historic Regional Demographic Patterns

Report dated June 10, 2025, from Sinisa Vukicevic, Program Manager, Regional Planning Analytics and Agatha Czekajlo, Senior Policy and Planning Analyst, Regional Planning and Housing Services providing the Regional Planning Committee and MVRD Board with details about historical demographic patterns, which inform the methodologies applied to the Metro Vancouver population, dwelling unit, and employment projections.

Sinisa Vukicevic and Agatha Czekajlo provided the committee with a presentation titled "Historic Regional Demographic Patterns" presenting Metro Vancouver's 2024 updates to population, housing, and employment projections which reflect the most recently released 2021 Census data.

It was MOVED and SECONDED
That the MVRD Board:

a) receive for information the report dated June 10, 2025, titled "Historic Regional Demographic Patterns"; and
b) forward a copy of the report dated June 10, 2025, titled "Historic Regional Demographic Patterns" to member jurisdictions with an offer of a presentation including local demographic profiles to Council upon request.

CARRIED

3. Best Practice Review & Proposed Updates for Development Cost Charge Categories

Report dated June 25, 2025 from Laurel Cowan, Division Manager, Regional Land Use Policy and Planning, Regional Planning and Housing Services providing the Regional Planning Committee a presentation of the report previously presented to the June 12, 2025 Finance Committee and the June 27, 2025 MVRD Board.

Laurel Cowan provided the committee with a presentation titled "Proposed Updates to DCC Categories" which was previously provided to the Finance Committee and informed members of next steps which include targeted engagement with stakeholders and a report to an upcoming Finance Committee meeting.

It was MOVED and SECONDED
That the Regional Planning Committee receive for information the report dated June 25, 2025, titled "Best Practice Review & Proposed Updates for Development Cost Charge Categories".

CARRIED

4. Scope of Work – Regional Industrial Lands Inventory
Report dated June 9, 2025 from Laurel Cowan, Division Manager, Regional Land Use Planning & Policy, Regional Planning and Housing Services informing the Regional Planning Committee about the scope of work for the 2025 Industrial Lands Inventory update and to provide an opportunity for committee feedback.

It was MOVED and SECONDED
That the Regional Planning Committee receive for information the report dated June 9, 2025, titled "Scope of Work – Regional Industrial Lands Inventory".

CARRIED

5. Manager's Report
Report dated June 10, 2025 from Jonathan Cote, Deputy General Manager, Regional Planning and Housing Development, Regional Planning and Housing Services, informing the committee that the Planning team was recently recognized by the Planning Institute of British Columbia for their work on the Metro Vancouver Tree Guide in the category of "Research and New Directions".

It was MOVED and SECONDED
That the Regional Planning Committee receive for information the report dated June 10, 2025, titled "Manager's Report".

CARRIED

F. INFORMATION ITEMS
No items presented.

G. OTHER BUSINESS
No items presented.

H. RESOLUTION TO CLOSE MEETING
No items presented.

I. ADJOURNMENT

It was MOVED and SECONDED
That the Regional Planning Committee adjourn its meeting of July 3, 2025.

CARRIED
(Time: 10:00 am)

Hadir Ali,
Legislative Services Coordinator

Eric Woodward,
Chair

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SERVICES AND SOLUTIONS FOR A LIVABLE REGION

To: Regional Planning Committee

From: Mark Seinen, Senior Planner and Charles Pan, Senior Policy and Planning Analyst, Regional Planning and Housing Services

Date: August 19, 2025 Meeting Date: September 11, 2025

Subject: **Housing and Transportation Cost Burden Study Update**

RECOMMENDATION

That the MVRD Board:

a) receive for information the report dated August 19, 2025, titled "Housing and Transportation Cost Burden Study Update";
b) request that the Board Chair forward a copy of the report dated August 19, 2025 titled "Housing and Transportation Cost Burden Study Update" to Member Jurisdictions and TransLink with an offer of a presentation to Council upon request; and
c) request that the Board Chair forward a copy of the report dated August 19, 2025, titled "Housing and Transportation Cost Burden Study Update" to the Provincial Minister of Housing and Municipal Affairs and the Federal Minister of Housing and Infrastructure.

EXECUTIVE SUMMARY

This report updates Metro Vancouver's Housing and Transportation ("H+T") Cost Burden Study (Attachment 1), analyzing how combined housing and transportation expenses affect household affordability across the region. Combined household H+T costs average $41,000 per year, with wide variation in costs between jurisdictions and in the ratios of housing costs to transportation costs.

Key findings include:

- Transportation costs can rival, and sometimes exceed, housing costs;
- Centres and Corridors, especially those along the SkyTrain network, consistently demonstrate lower combined costs;
- Rental tenure greatly scales the affordability benefits of SkyTrain; and
- Population density alone does not materially affect H+T affordability.

The findings suggest that location and tenure matter; Small-Scale Multi-Unit Housing, for example, is unlikely to contribute to affordability if it does not offer transit proximity, rental tenure, and convenient access to jobs and services. Transit-Oriented Areas around SkyTrain, on the other hand, could enable greater levels of affordability if the housing is purpose-built rental.

These insights support policies that promote transit-oriented development (particularly affordable rental housing), strategic housing growth in affordable areas, investment in improved public transit and job creation in transit-accessible locations, all of which can improve regional affordability and guide future growth management.

PURPOSE
To inform the MVRD Board of the findings of the Housing and Transportation Cost Burden Study Update.

BACKGROUND
In 2015, Metro Vancouver released its first Housing and Transportation Cost Burden Study (Reference 1), which introduced a more comprehensive approach to understanding household affordability by examining the combined costs of housing and transportation, the two largest expenditures for most households. The study revealed that transportation costs, while often overlooked, can significantly impact household budgets, particularly for renters and lower-income families. It also demonstrated that proximity to transit can help households better manage high housing costs.

Building on these insights, *Metro 2050* incorporates a policy directive requiring Member Jurisdictions to adopt Regional Context Statements that promote the integration of land use and transportation planning. The goal is to enable households to reduce their combined housing and transportation costs through more strategic development patterns.

The 2025 Housing and Transportation Cost Burden Study Update supports the implementation of this *Metro 2050* direction by providing refreshed data and analysis. It offers a more detailed and current understanding of cost burdens across the region, reinforcing the importance of transit-oriented development and integrated planning in advancing regional affordability objectives.

METHODOLOGY
The Housing and Transportation Cost Burden Study Update analyzes the interplay among three key variables at the household level: housing costs, transportation costs and income. These are reported as averages across multiple geographic levels, including census tracts, Member Jurisdictions, subregions and the Meto Vancouver region, to identify patterns in household spending. Costs are described on an absolute basis (in dollars), while affordability is assessed using the concept of “cost burden,” defined as the percentage of gross income spent on housing and transportation.

Where data allows, results are disaggregated by housing tenure (owners vs. renters) and transportation mode (e.g., automobile, transit, cycling). Housing and income data are sourced from the 2021 Census, which includes shelter costs beyond rent or mortgage payment – for example, property taxes, utilities, and strata fees.

Transportation costs required a custom analysis based upon TransLink’s Trip Diary data. Travel patterns were assigned costs based on vehicle ownership, fuel prices, and transit fares, then annualized and averaged. Due to the complexity of this analysis, Metro Vancouver retained Steer to conduct the transportation cost research, the detailed results and methodology for which are contained in Attachment 2.

The 2025 study improves upon the 2015 methodology by:

- Incorporating costs for more transportation modes (e.g., bicycle, car share, taxi);
- Mapping housing cost and income data at the census tract level; and
- Conducting regression analysis to isolate the effect of various factors.

KEY FINDINGS

The Housing and Transportation Cost Burden Study Update features a number of exhibits (Reference 2)[1] that allow for deep analysis of household cost patterns in the Metro Vancouver region, revealing that:

- **There is significant variation in costs between Member Jurisdictions and subregions.** The North Shore subregion experiences the highest housing and transportation costs, at an average of $49,000 per household annually. The Burrard Peninsula has the lowest such costs, at $38,000 annually. New Westminster, Vancouver, Langley City, Burnaby and White Rock have average housing and transportation costs under $40,000 per household annually. West Vancouver, Anmore, Lions Bay, North Vancouver District and Belcarra have average housing and transportation costs exceeding $50,000 per household annually.

- **Transportation costs can rival, and sometimes exceed, housing costs.** Housing costs the average Metro Vancouver household $22,000 per year, while transportation costs $19,000. In several Member Jurisdictions, however – Maple Ridge, Langley Township, Langley City, Port Coquitlam and Delta – transportation costs exceed housing costs, on average.

- **Centres and Corridors are more affordable.** Many Urban Centres enjoy combined costs in the $30,000 to $40,000 per year range, including Langley, Maple Ridge, Guildford, New Westminster, Richmond, Lougheed, Coquitlam, and Lonsdale. In no Urban Centre do households average more than $50,000 in annual combined costs. Figure 3 shows that, on average, *Metro 2050*'s Centres and Corridors are more affordable than other General Urban areas outside of these overlays. Analysis indicates that this pattern is the result of multiple factors linked to greater levels of affordability, including: proximity to SkyTrain; availability of rental housing; and smaller unit sizes.

- **SkyTrain is linked to H+T affordability.** The map in Figure 2 reveals a high-cost perimeter around the region, circumscribing the relatively more affordable centre loosely represented by the SkyTrain system. The Metro Core, Metrotown, and Surrey Metro Centre, all along the Expo SkyTrain Line, stand out as having among the lowest combined H+T costs in the region, with large portions of these Urban Centres having combined costs below $30,000 per year, on average. Similar to the findings for Centres and Corridors, the relatively greater affordability for households living around SkyTrain is facilitated by the type and tenure of development (namely, rental housing and smaller units) available in those neighbourhoods, in addition to the influence of the SkyTrain service itself.

[1] The accompanying Appendix of Maps and Charts includes the complete suite of analytical exhibits that informed this study, including full-resolution versions of all maps.

- **Rental tenure greatly scales the affordability benefits of SkyTrain.** Rental tenure, and particularly non-market rental, consistently makes a more significant difference to both housing and transportation costs than transit service alone. However, rental housing tends to concentrate around SkyTrain, suggesting that SkyTrain plays a role in facilitating rental tenure. Promoting the two together – i.e. transit-oriented affordable housing – would yield the greatest benefit.

- **Population density alone does not materially affect H+T affordability**. Regression modelling found that population density had a statistically insignificant relationship with combined H+T costs. Density must be combined with other factors – such as proximity to SkyTrain, rental tenure, and access to jobs – to make an impact on affordability. One implication of this finding is that location and tenure matter; to the extent that it does not offer these attributes, Small-Scale Multi-Unit Housing is unlikely to contribute to combined H+T affordability. Transit-Oriented Areas around SkyTrain, on the other hand, could enable greater levels of affordability if the housing is purpose-built rental.

- **There is no clear relationship – inverse or otherwise – between housing costs and transportation costs.** Analysis found that there is a very weak relationship between housing costs and transportation costs, with the latter explaining only about four percent of the variation in the former (and vice versa). This finding suggests that housing and transportation costs behave independently of each other. Therefore, planning decisions should consider both types of costs together, rather than assuming one offsets the other.

- **Transportation costs are driven largely by vehicle ownership.** Across Metro Vancouver, auto costs comprise 98 per cent of total transportation costs. Households with two or more vehicles spend, on average, $30,815 annually on transportation; single-vehicle households spend an average of $13,798; and zero-vehicle households spend an average of $2,530. This suggests that public policy enabling more households to own fewer vehicles (e.g. transit-oriented development) can have an impact on overall household costs.

Figure 1 presents the average annual housing and transportation costs for households across Metro Vancouver's Member Jurisdictions and subregions. It highlights the wide variation in combined costs, with some areas exceeding $50,000 annually, while others remain below $40,000.

Figure 1: Average Annual Household H+T Costs ($ Thousands)

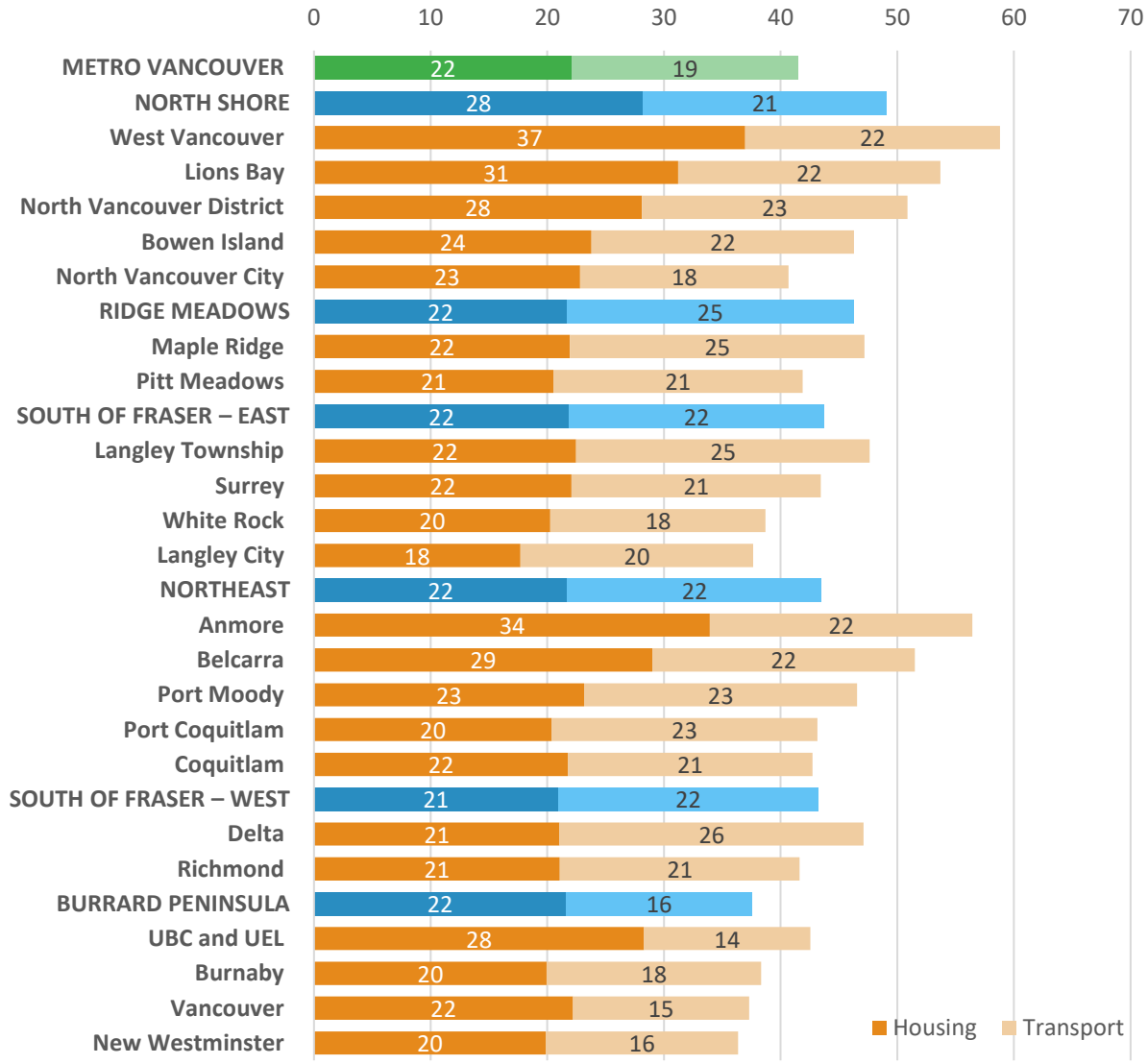


Figure 2 visualizes the spatial distribution of combined costs across the region. It reveals a high-cost perimeter surrounding the more affordable central areas served by the SkyTrain network. Urban Centres such as the Metro Core, Metrotown, and Surrey Metro Centre show the lowest combined costs, reinforcing the link between transit access and affordability.

Figure 2: Average Annual Household H+T Costs

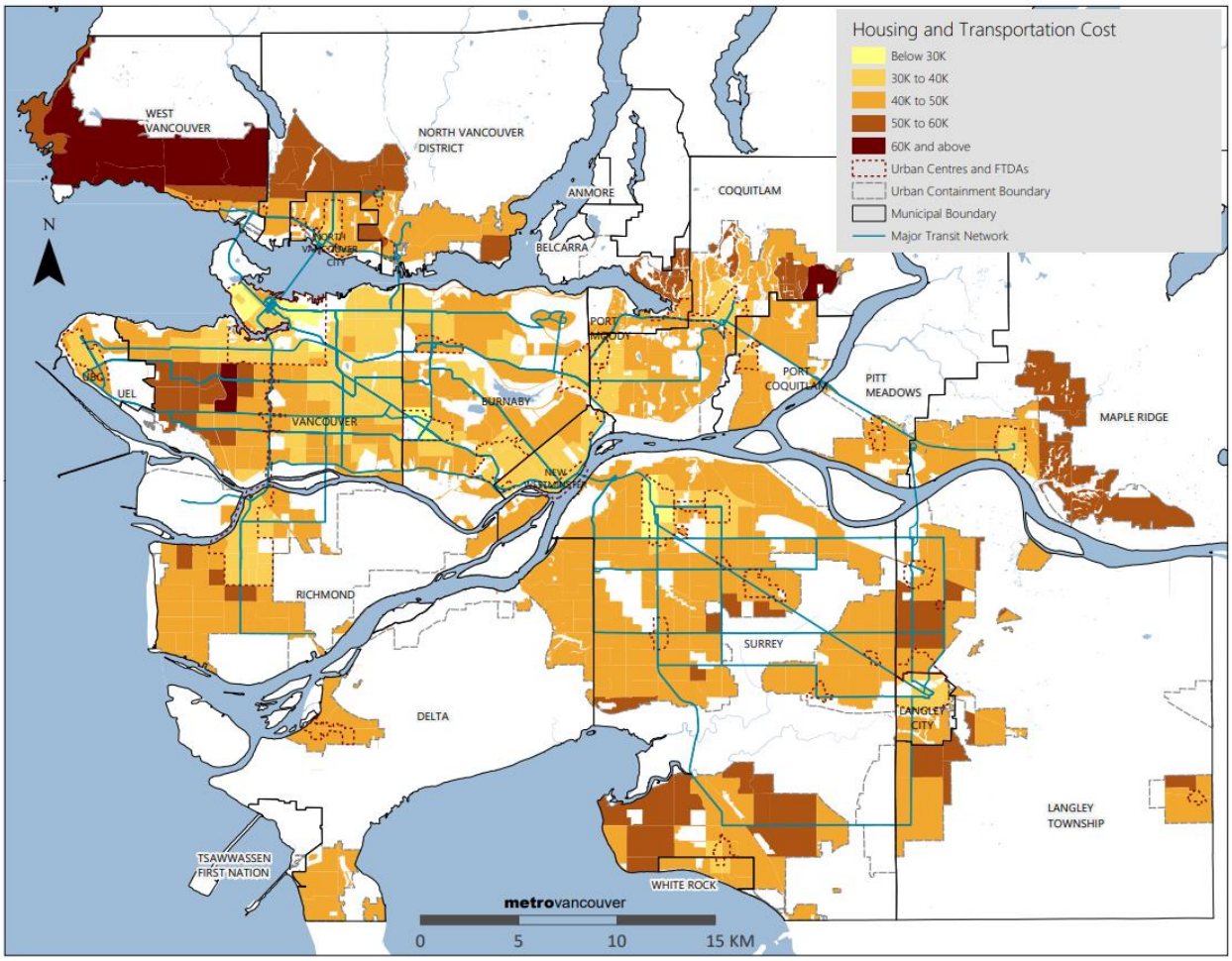
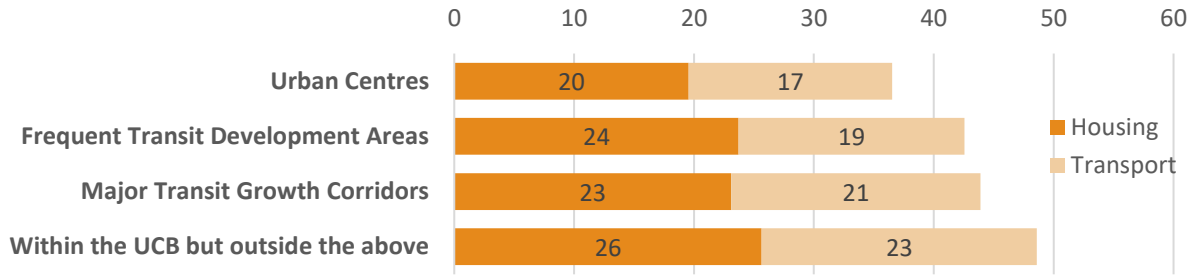


Figure 3 compares housing and transportation costs across different regional growth designations, including Urban Centres, Frequent Transit Development Areas, Major Transit Growth Corridors, and other areas within the Urban Containment Boundary. The data shows that areas prioritized in *Metro 2050* for growth, particularly those with strong transit connections, tend to have lower combined costs.

Figure 3: Average Annual Household Cost by Priority Growth Area ($ Thousands) [2]



IMPLICATIONS FOR REGIONAL GROWTH MANAGEMENT

The findings of the Housing and Transportation Cost Burden Study Update offer valuable insights for shaping regional growth strategies. Most notably, the data demonstrates that strategic investments in public transit can significantly improve household affordability, an important consideration for Metro Vancouver, where housing costs remain a major challenge.

Households in areas with strong transit access consistently experience lower combined housing and transportation costs. This underscores the importance of aligning land use planning with transit infrastructure to support more affordable living. Transit-oriented development can reduce reliance on costly personal vehicles and enable more efficient use of land for mid-rise, rental, and wood-frame housing forms.

To maximize these benefits, regional growth policies should continue to prioritize development in areas with existing or planned rapid transit service. In particular, the Major Transit Growth Corridor overlay presents an opportunity to strategically shape future growth areas that support affordability. While *Metro 2050* currently emphasizes Urban Centres and Frequent Transit Development Areas, expanding the use of the Major Transit Growth Corridor concept could help guide housing and employment growth toward locations where transit access and land economics align to deliver more affordable outcomes.

[2] UCB refers to the Urban Containment Boundary. The analysis is confined to General Urban lands only, as this is the regional land use designation associated with residential land uses.

Regional growth management should also prioritize rental tenure housing. The Housing and Transportation Cost Burden Study Update finds that population density alone has a statistically insignificant effect on H+T costs. *Metro 2050*'s first guiding principle – "put growth in the right places" – could be updated by incorporating the notion of "the right tenure." Recent provincial housing legislation encourages housing supply in both SkyTrain station areas and neighbourhoods zoned for single-detached housing.[3] Because it is agnostic to housing tenure, this legislation may have little impact on housing affordability unless supplemented by regional and local policy that encourages rental housing.

Additionally, increasing employment opportunities in transit-accessible areas can have a dual benefit: boosting household incomes while reducing commuting costs. This integrated approach to land use, transportation, and economic development can help Metro Vancouver advance its affordability goals.

Finally, the Housing and Transportation Cost Burden Study Update has implications for ongoing performance monitoring. This could include setting a benchmark for housing and transportation cost burden to track progress over time. Based on the distribution of housing and transportation costs in Metro Vancouver, along with local incomes, a threshold of 45 percent[4] could serve as an appropriate benchmark for the region.

ALTERNATIVES

1. That the MVRD Board:
   a) receive for information the report dated August 19, 2025, titled "Housing and Transportation Cost Burden Study Update – Final Report";
   b) request that the Board Chair forward a copy of the report dated August 19, 2025 titled "Housing and Transportation Cost Burden Study Update – Final Report" to Member Jurisdictions and TransLink with an offer of a presentation to Council upon request; and
   c) request that the Board Chair forward a copy of the report dated August 19, 2025 titled "Housing and Transportation Cost Burden Study Update – Final Report" to the Provincial Minister of Housing and Municipal Affairs and the Federal Minister of Housing and Infrastructure.

2. That the MVRD Board receive for information the report dated August 19, 2025, titled "Housing and Transportation Cost Burden Study Update – Final Report".

FINANCIAL IMPLICATIONS

This project was delivered as part of Regional Planning's regular work program and was included within the approved departmental budget. The transportation cost analysis was supported through consultant services in the amount of $50,000, while the housing and affordability components were completed by Metro Vancouver staff.

[3] Transit-Oriented Areas (TOAs) and Small-Scale Multi-Unit Housing (SSMUH), respectively.

[4] The 45 percent affordability benchmark (30 percent for housing and 15 percent for transportation) was originally developed by the Center for Neighborhood Technology, which pioneered the concept of an H+T index.

CONCLUSION

The Housing and Transportation Cost Burden Study Update provides a comprehensive analysis of the financial pressures facing households across Metro Vancouver. By examining the combined impact of housing and transportation costs, the study offers a more complete picture of regional affordability and highlights the critical role of transit accessibility in shaping household expenditures.

The findings reinforce the importance of integrated land use and transportation planning, particularly in a region facing persistent housing affordability challenges. This data-driven approach can support more strategic growth management decisions, helping to guide future investments, policy development, and planning initiatives that improve affordability outcomes for residents across the region.

ATTACHMENTS

1. Metro Vancouver 2025 Housing and Transportation Cost Burden Study Update.
2. Steer 2024 Transportation Cost Estimates and Technical Report.
3. Presentation re: Housing and Transportation Cost Burden Study Update.

REFERENCES

1. Metro Vancouver. (2015). *The Metro Vancouver Housing and Transportation Cost Burden Study.* Retrieved from https://metrovancouver.org/services/regional-planning/Documents/housing-and-transportation-cost-burden-report-2015.pdf
2. Metro Vancouver. 2025. Housing and Transportation Cost Burden Study Update – Appendix of Maps and Charts. Retrieved from https://metrovancouver.org/services/regional-planning/Documents/housing-transportation-cost-burden-study-update-appendix-maps-charts.pdf

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Housing and Transportation Cost Burden Study

2025 Update

August 2025

Prepared by:
Regional Planning

Prepared for:
Regional Planning Committee
MVRD Board

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1.0 EXECUTIVE SUMMARY

This report updates Metro Vancouver's Housing and Transportation ("H+T") Cost Burden Study, analyzing how combined housing and transportation expenses affect household affordability across the region. Combined household H+T costs average $41,000 per year, with wide variation in costs between jurisdictions and in the ratios of housing costs to transportation costs.

Key findings include:

- Transportation costs can rival, and sometimes exceed, housing costs;
- Centres and Corridors, especially those along the SkyTrain network, consistently demonstrate lower combined costs;
- Rental tenure greatly scales the affordability benefits of SkyTrain; and
- Population density alone does not materially affect H+T affordability.

The findings suggest that location and tenure matter; Small-Scale Multi-Unit Housing, for example, is unlikely to contribute to affordability if it does not offer transit proximity, rental tenure, and convenient access to jobs and services. Transit-Oriented Areas around SkyTrain, on the other hand, could facilitate greater levels of affordability, particularly for purpose-built rental.

These insights support policies that promote transit-oriented development (particularly affordable rental housing), strategic housing growth in affordable areas, investment in improved public transit and job creation in transit-accessible locations, all of which can improve regional affordability and guide future growth management.

2.0 INTRODUCTION

Metro Vancouver's 2015 Housing and Transportation ("H+T") Cost Burden Study made the case that housing and transportation costs – the two largest costs for a typical household – should be considered together in conversations about affordability in this region.

Direct housing costs are well-understood by renters and mortgage-holders: rents or mortgage payments, property taxes and condominium fees, and utilities.[1] Transportation costs, on the other hand, are less visible. Beyond the upfront cost of personal vehicles, transportation costs are paid in smaller increments (e.g. fuel, vehicle maintenance, financing, or transit fares), can vary from month to month, and may be spread across different modes (e.g. personal vehicles, transit, or ride-hailing).

The 2015 Housing and Transportation Cost Burden Study quantified transportation costs and confirmed that they were a significant aspect of household expenditures. In some cases – such as renter households in certain sub-regions – transportation costs exceeded housing costs, on average. This represented a new way of looking at affordability, with implications for regional and local planning. Key findings from the 2015 H+T Study included:

- renters and lower-income families are feeling the combined cost impacts the most; and
- living near transit makes it easier for households to absorb high housing costs.

Much has changed in Metro Vancouver since the 2015 study was published. The COVID-19 pandemic caused seismic shifts in employment and housing patterns, with work-from-home (WFH) enabling some households to relocate further away from their job locations. As a result, some households are now commuting longer distances, but less often.

Other trends in housing and transportation complicate the picture. Since 2015, housing costs have continued to escalate in both the ownership and rental markets. Rental housing construction has seen an uptick. Meanwhile, new mobility options (such as ride-hailing) have emerged and walking and cycling trips have grown at the expense of single-occupant vehicle trips and transit.[2]

This study therefore examines whether the original findings still hold. Specifically, it attempts to answer three questions:

1. What is the effect on affordability when transportation costs are added to housing costs?
2. How do household income, housing tenure, and proximity to transit influence affordability?
3. What are the implications for regional growth planning for advancing household affordability?

This study also supports implementation of *Metro* 2050, which included a policy focused on the "H+T" concept. Policy 4.1.8(c)(v) requires that Member Jurisdictions "identify policies and actions that contribute to … integration of land use and transportation such that households can reduce their combined housing and transportation costs."

[1] Dictionary, Census of Population, 2021 – Shelter cost

[2] TransLink's Trip Diaries from 2017 and 2023 report the following changes, expressed in percentage points: auto driver (-5.2), transit (-0.9), walk (+3.9) and bike (0.7).

The data and analysis in this study may be used:

- by households considering the cost implications of their housing and transportation decisions; and
- by policymakers seeking strategies to expand transit, increase housing supply in transit-oriented locations, strategically locate jobs, and generally apply the "H+T" lens in growth management.

After a brief methodology section, this study takes an additive approach, beginning with an overview of housing costs in Metro Vancouver. Transportation costs are then examined. Finally, these two datasets are synthesized into an analysis of *combined* "H+T" costs. Additional variables, including household income and housing tenure, are then layered into the analysis. The report concludes with recommendations for how the findings might be actioned within regional growth management.

3.0 METHODOLOGY

This study analyzes the interplay between three key variables at the household level: housing costs, transportation costs and income. These are reported as averages across multiple geographic levels, including census tracts, Member Jurisdictions, subregions and the Meto Vancouver region, to identify patterns in household spending. Costs are described on an absolute basis (in dollars), while affordability is assessed using the concept of "cost burden," defined as the percentage of gross income spent on housing and transportation.

Where data allows, results are disaggregated by housing tenure (owners vs. renters) and transportation mode (e.g., automobile, transit, cycling). Housing and income data are sourced from the 2021 Census, which includes shelter costs beyond rent or mortgage payment – for example, property taxes, utilities, and strata fees.

Transportation costs required a custom analysis based upon TransLink's Trip Diary data. Travel patterns were assigned costs based on vehicle ownership, fuel prices, and transit fares, then annualized and averaged. Due to the complexity of this analysis, Metro Vancouver retained Steer to conduct the transportation cost research, the results and methodology for which are detailed in the accompanying Appendix D, *Transportation Cost Estimates and Technical Report.*

This study improves upon the 2015 methodology by:

- Incorporating costs for more transportation modes (e.g., bicycle, car share, taxi);
- Increasing the precision of transportation subareas (from 40 to 47);
- Providing tenure-specific transportation cost estimates at the member jurisdiction level;
- Mapping housing cost and income data at the census tract level; and
- Conducting regression analysis to isolate the effect of various factors.

A detailed data dictionary is provided in Appendix A.

Deliverables
The results are presented in narrative form, supported by three types of exhibits:

1. Maps – revealing spatial patterns at the census tract or (for transportation) subarea levels;
2. Charts – summarizing results at the member jurisdiction, subregional and regional levels; and
3. Regression modelling – statistically quantifying the relationships between various factors (for example, the impact of SkyTrain proximity on household expenditures).

Terminology

- "Housing and transportation" is occasionally abbreviated as "H+T."
- "Combined costs" refer to housing plus transportation costs.
- "Cost burden" refers to costs divided by gross household income.
- All costs and income statistics are reported on an annual basis at the household level (i.e. not at the person level), unless specified otherwise.
- Dollar figures represent the year in which the data was published, unless specified otherwise.

- Urban Centres, Frequent Transit Development Areas (FTDAs) and Major Transit Growth Corridors (MTGCs) are geographic overlays defined in Metro Vancouver's regional growth strategy, *Metro 2050*. These overlays are sometimes abbreviated as "Centres and Corridors" or "priority growth areas."
- "Member jurisdictions" refer to the federation of 23 local governments that comprise the Metro Vancouver Regional District.
- "Subregions" are geographic groupings of Member Jurisdictions, as defined in *Metro 2050.*
- "Subareas" are used only for transportation cost mapping, as the TransLink Trip Diary does not report results at the census tract level.

Important Caveats

This study aims to provide an overview of affordability in the region that considers both housing and transportation costs. It takes a geographic approach, highlighting spatial patterns and making connections to topics in regional planning – for example, housing tenure, job access and transportation choice. It is not intended to be a definitive study of housing affordability, nor does it attempt to investigate the root causes of the housing affordability crisis in Metro Vancouver. Extensive work by other organizations covers these topics in greater detail.

The data in this study is expressed as averages across geographic areas. This approach necessarily hides much of the variability between households as a means to identify broad spatial patterns. It is likely that no individual household experiences the precise mix of housing and transportation costs outlined in this study. Moreover, a household moving to a new location would not necessarily experience cost savings or cost increases merely by relocating there. Individual circumstances and choices are critical to household expenditures, regardless of location.

This study attempts to use the best and most recent data sources for each topic at the time of analysis, ranging from the 2021 Canadian Census of Population to TransLink's 2017 Trip Diary survey. These data sources do not share the same collection methods nor publication schedules. Readers should therefore approach the aggregated data with caution. The purpose of this study is to assess geographic patterns and make order-of-magnitude comparisons between housing and transportation costs, rather than provide the most precise or current data for any specific location or topic.

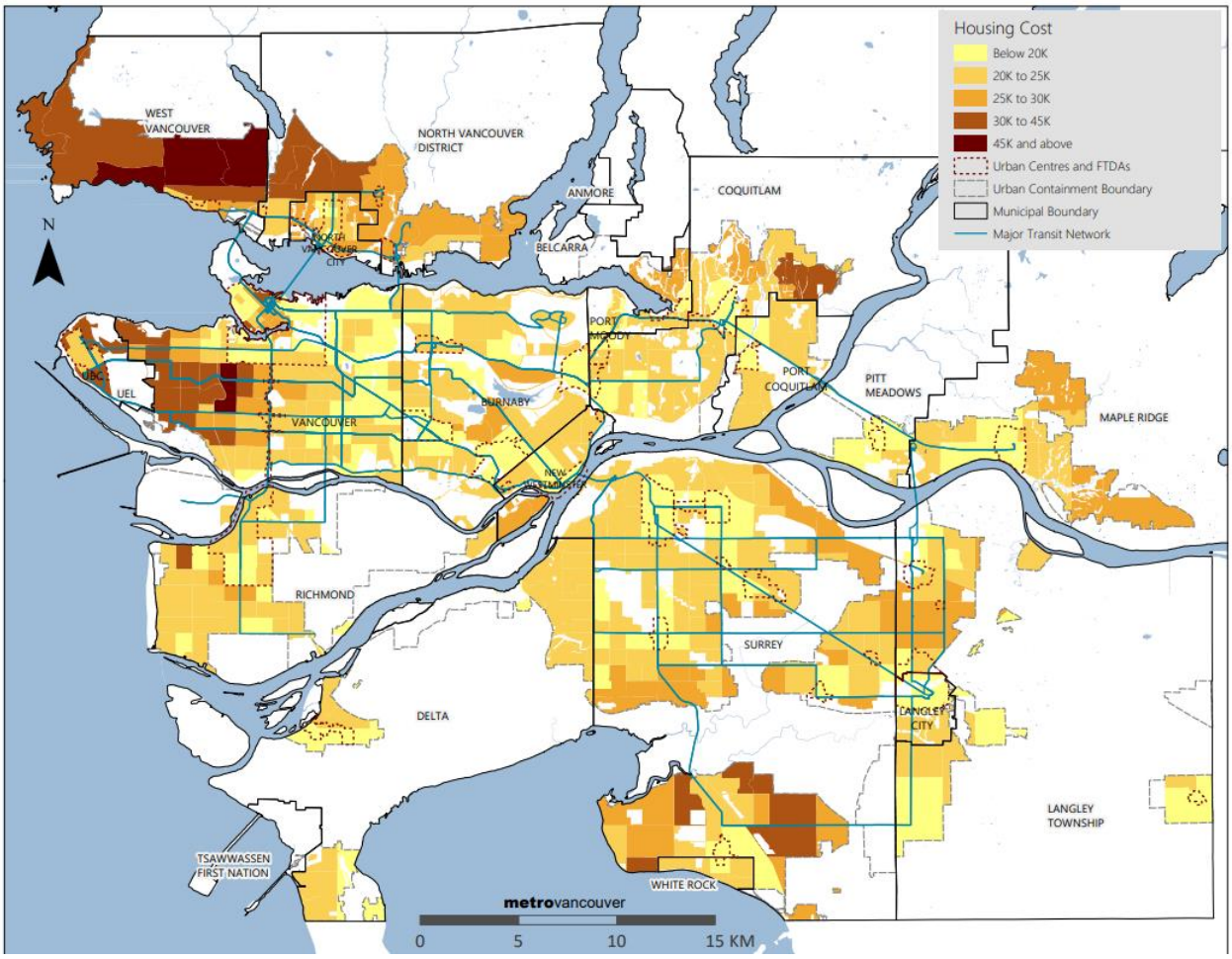
Key exhibits are reproduced within the body of this report. Full regression results are presented in Appendix B, a comprehensive package of maps and charts is available in Appendix C, and transportation-related is contained in Appendix D. The purpose of these appendices is to 1) make available the complete suite of analytical work that informed this study; and 2) provide full-resolution versions of all maps.

4.0 HOUSING COSTS

Across Metro Vancouver, housing costs are highest in West Vancouver, Vancouver's West Side and South Surrey and tend to be lower in Urban Centres and transit corridors such as the Expo and Millennium SkyTrain lines (Figure 1). While housing costs averaged around $22,000 across the region in 2021, there is great variability, ranging from a high of around $37,000 in West Vancouver to a low of around $18,000 in the City of Langley (Figure 2).

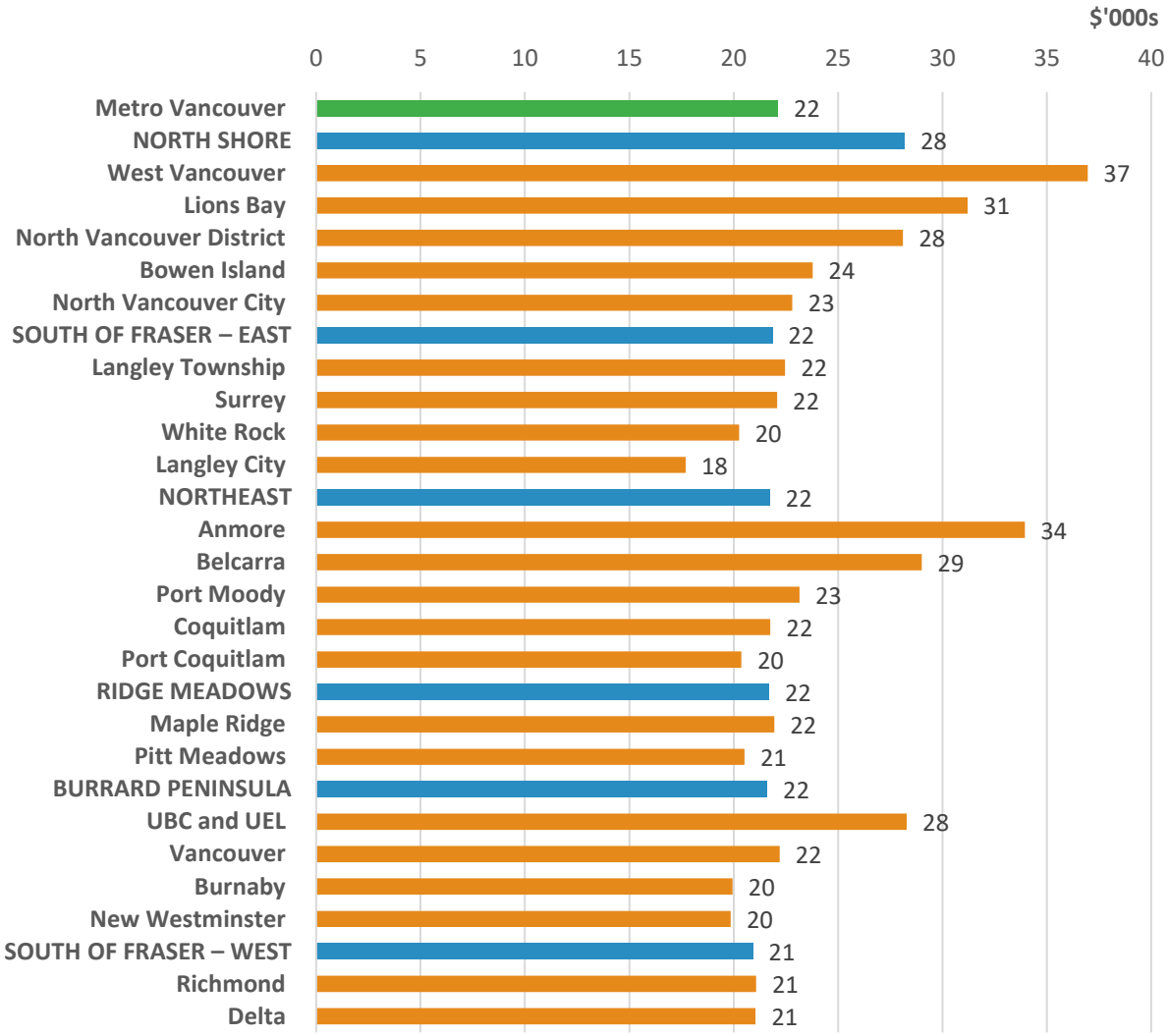
These estimates are averages that represent a combination of renter households, owner households with mortgages and mortgage-free owner households. Disaggregated data for owner households and renter households are contained in Appendix C.

Figure 1. Housing costs



Source: Statistics Canada, 2021.

Figure 2. Housing Costs



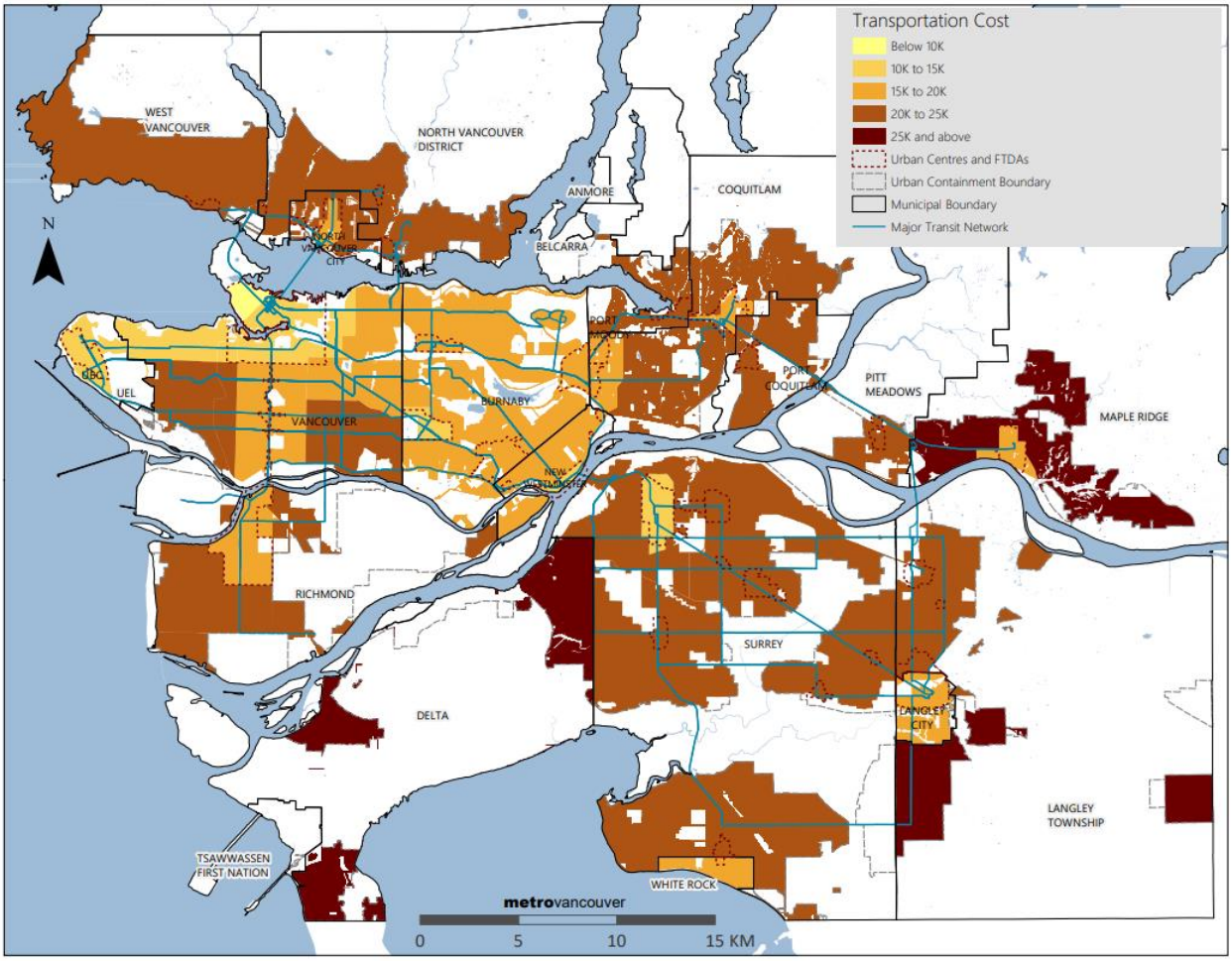
Source: Statistics Canada, 2021.
Note: Tsawwassen First Nation is not displayed due to lack of data. For the same reason, the UBC and UEL data is for Electoral Area A: 99.2% of its population is in UBC and the UEL.

5.0 TRANSPORTATION COSTS

The highest average transportation costs in Metro Vancouver tend to be found at the edges of the region, in communities such as Maple Ridge, Delta, and the Township of Langley – although it is notable that the Urban Centres in such communities enjoy lower transportation costs than their surrounding areas (Figure 3). The lowest average transportation costs are found in the Metro Core, with West End households experiencing average transportation costs below $10,000 annually. Other Urban Centres along the Expo SkyTrain line, including Metrotown, New Westminster and Surrey Metro Centre, also have low average transportation costs.

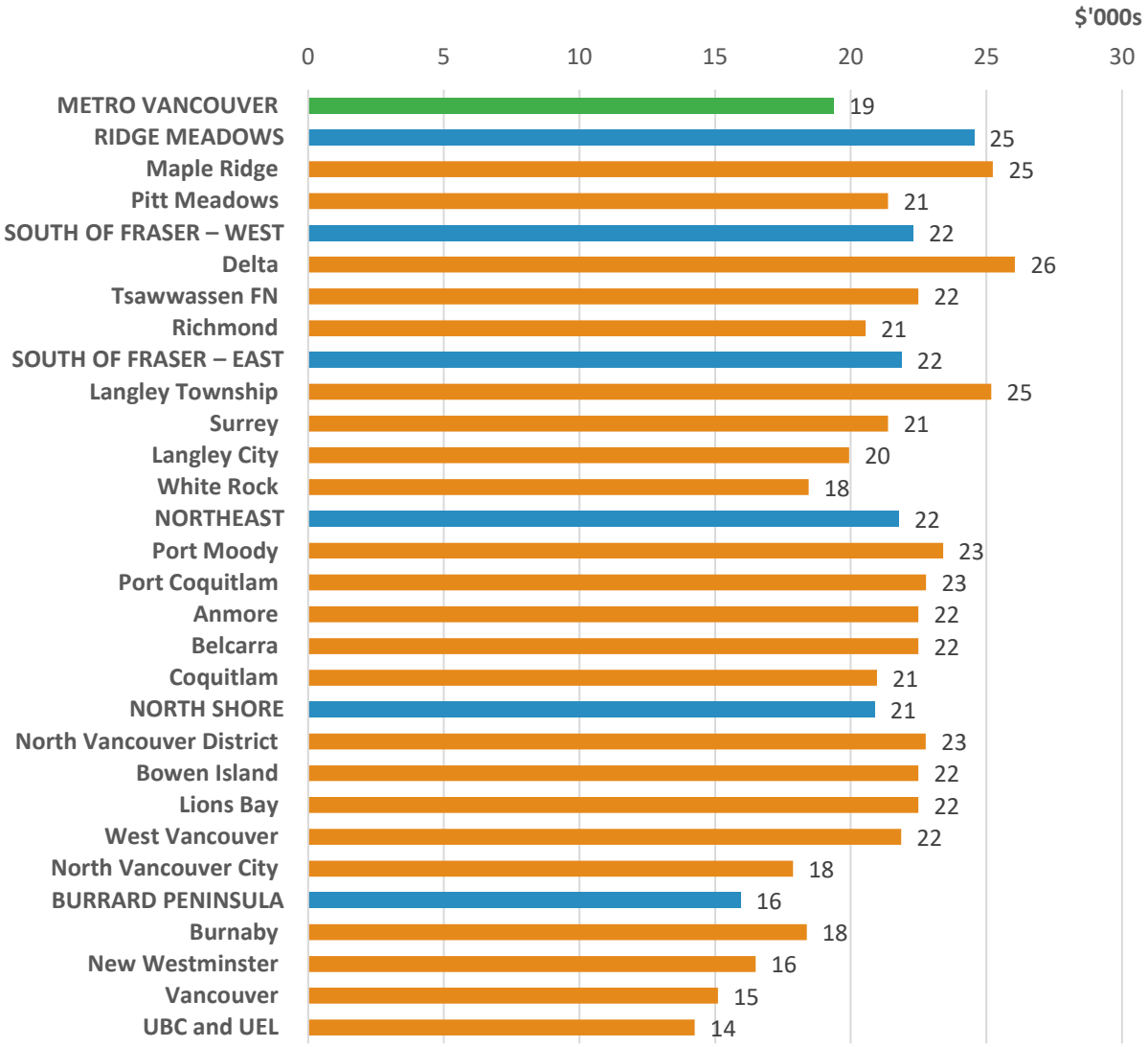
At the member jurisdiction scale, average transportation costs vary around the regional average of $19,000, from $14,000 in UBC and the University Endowment Lands (UEL) to $26,000 in Delta (Figure 4). These findings suggest that proximity to the employment-rich Metro Core and access to fast and frequent transit service are key drivers of transportation costs. Both of these factors are linked to the necessity to drive, and Steer's analysis confirms that personal vehicle costs comprise a full 98 percent of all transportation costs in the region. Moreover, transportation expenditures scale with vehicle ownership: zero-vehicle households spend an average of $2,530; single-vehicle households spend an average of $13,798; and households with two or more vehicles spend, on average, $30,815 annually on transportation.

Figure 3. Transportation costs



Source: Steer, 2024.
Note: These are 2022 dollars.

Figure 4. Transportation Costs



Source: Steer, 2024.
Note: These are 2022 dollars.

6.0 COMBINED HOUSING AND TRANSPORTATION COSTS

The previous maps and charts for housing costs and transportation costs, respectively, reveal a complex pattern in which there is no obvious relationship – inverse or otherwise – between housing and transportation costs.[3] It is therefore not intuitive to predict the results of combining the housing and transportation cost data into a single "H+T" estimate.

Combining housing and transportation costs does, however, reveal a pattern unlike that found for either housing costs or transportation costs: a high-cost perimeter around the region, circumscribing the relatively more affordable centre loosely represented by the SkyTrain system (Figure 5). The Metro Core, Metrotown, and Surrey Metro Centre, all along the Expo SkyTrain Line, stand out as having among the lowest combined H+T costs in the region, with large portions of these Urban Centres boasting combined costs below $30,000 per year, on average. Many other Urban Centres enjoy combined costs in the $30,000 to $40,000 per year range, including Langley, Maple Ridge, Guildford, New Westminster, Richmond, Lougheed, Coquitlam, and Lonsdale. In no Urban Centre do households average more than $50,000 in annual combined costs.

Few Member Jurisdictions have uniformly low or high H+T costs, with most having at least some less-affordable areas and some more-affordable areas. On average, the communities with the highest combined costs (above $50,000 annually) are West Vancouver, Anmore, Lions Bay, Belcarra and North Vancouver District. The communities with the lowest combined costs (under $40,000 annually) are New Westminster, Vancouver, Langley City, Burnaby and White Rock (Figure 6).

As a whole, Metro Vancouver households average around $41,000 in annual household H+T costs. But there is significant variation: the North Shore subregion experiences the highest housing and transportation costs, at an average of around $49,000 per household annually. The Burrard Peninsula[4] has the lowest such costs, at around $38,000 annually.

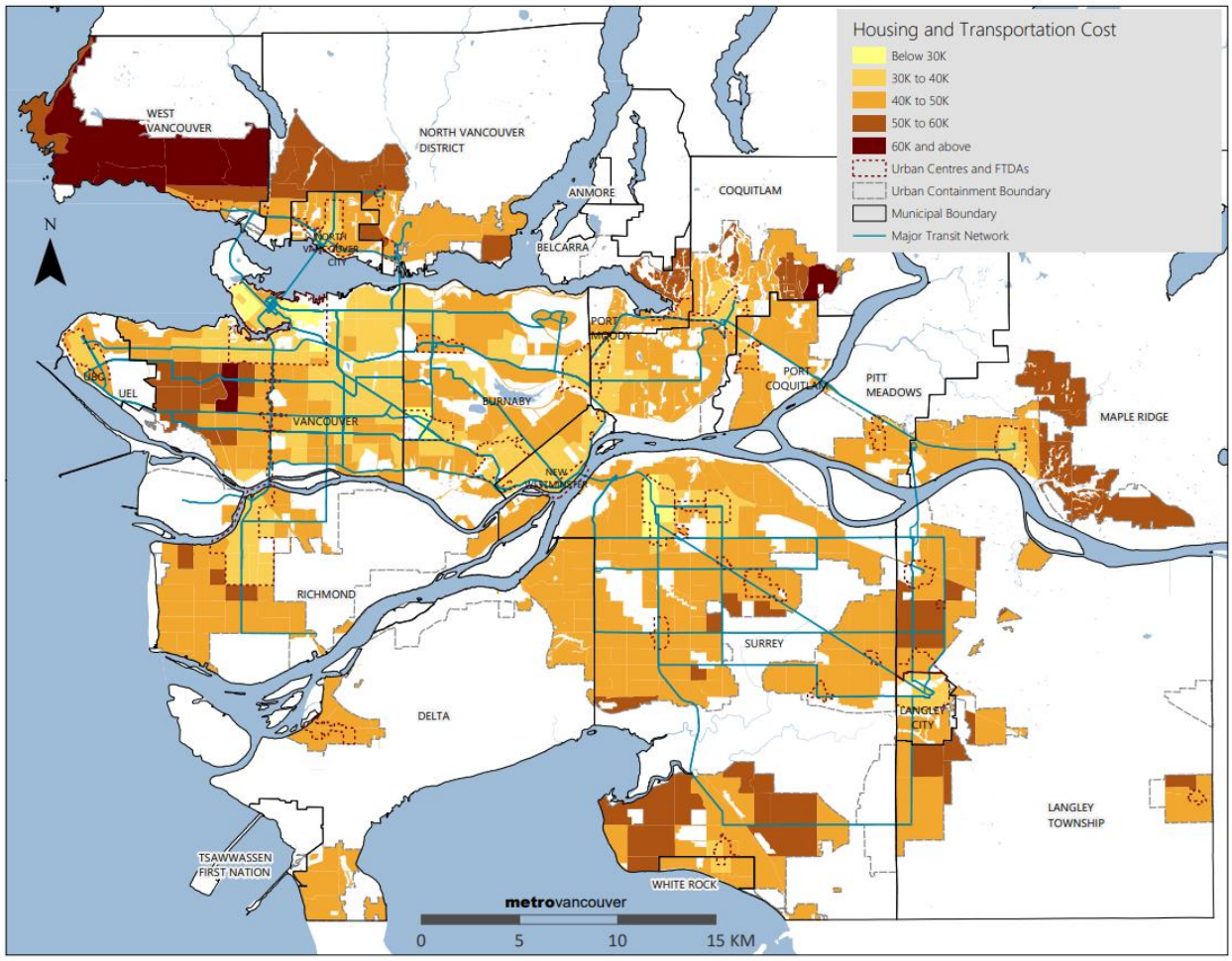
The combined H+T data also allows for a comparison of housing costs in relation transportation costs. Housing costs the average Metro Vancouver household $22,000 per year, while transportation costs $19,000. In several Member Jurisdictions – Maple Ridge, Langley Township, Langley City, Port Coquitlam and Delta – transportation costs exceed housing costs, on average.

Figure 7 compares housing and transportation costs across different regional growth designations, including Urban Centres, Frequent Transit Development Areas, Major Transit Growth Corridors, and other areas within the Urban Containment Boundary. The data shows that areas prioritized in *Metro 2050* for growth, particularly those with strong transit connections, tend to have lower combined costs.

[3] Regression modelling confirms this observation: with an R^2 value of just 0.0393, there is a very weak relationship between housing costs and transportation costs, with the latter explaining only about four percent of the variation in the former (and vice versa).

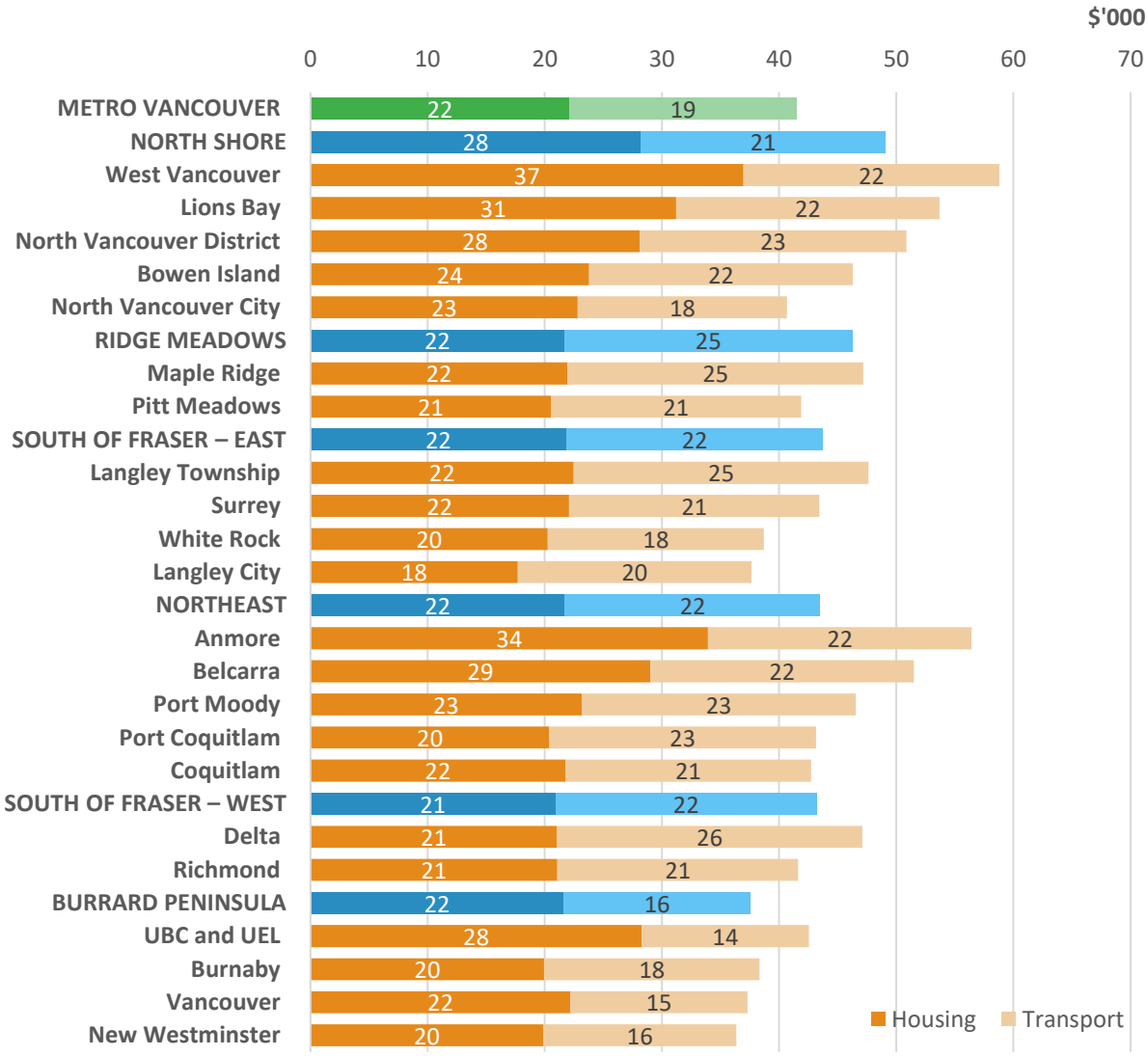
[4] The Burrard Peninsula is comprised of Vancouver, Burnaby, New Westminster and (for the purposes of this study) UBC / UEL.

Figure 5. Combined housing and transportation costs



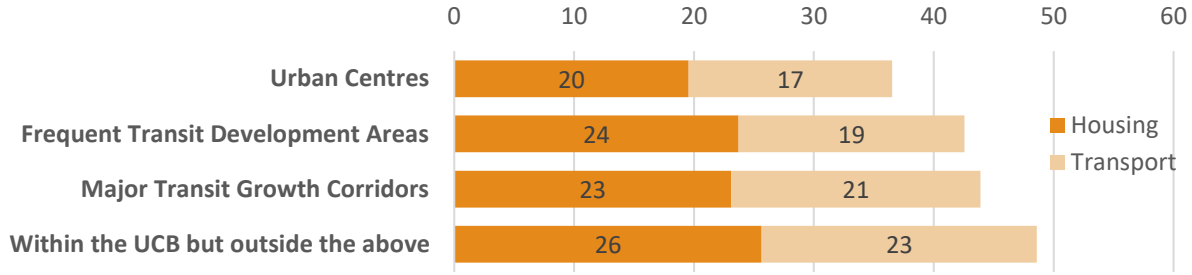
Sources: Statistics Canada, 2021; Steer, 2024.
Note: Housing costs are in 2021 dollars, transportation costs in 2022 dollars.

Figure 6. Combined housing and transportation costs



Source: Statistics Canada, 2021; Steer, 2024.
Note: Housing costs are in 2021 dollars, transportation costs in 2022 dollars. Rounding may make some totals smaller or greater than they appear.

Figure 7. Combined housing and transportation costs by priority growth area ($ thousands) [5]



6.1. EXPLORING THE TRANSIT CONNECTION

The preceding section observed an apparent connection between rapid transit (SkyTrain) and lower combined H+T costs. To test this connection statistically, the research team performed a regression analysis (Figure 8) to quantify the relationship between SkyTrain proximity and combined H+T costs. The resulting analysis carries an R^2 value – a measurement of model fit – of 0.3157, meaning that about 32 percent of differences in combined H+T costs around the region can be explained by proximity to SkyTrain.

The regression analysis found that, as distance from SkyTrain increases, costs increase as well. The effect is particularly pronounced within two kilometres of stations – i.e. the area which could reasonably be considered "transit-oriented." On average, moving ten percent closer to a SkyTrain station lowers annual combined costs roughly by a modest $117 per household per year (2025 dollars), with the financial benefits increasing exponentially within walking range of SkyTrain stations.

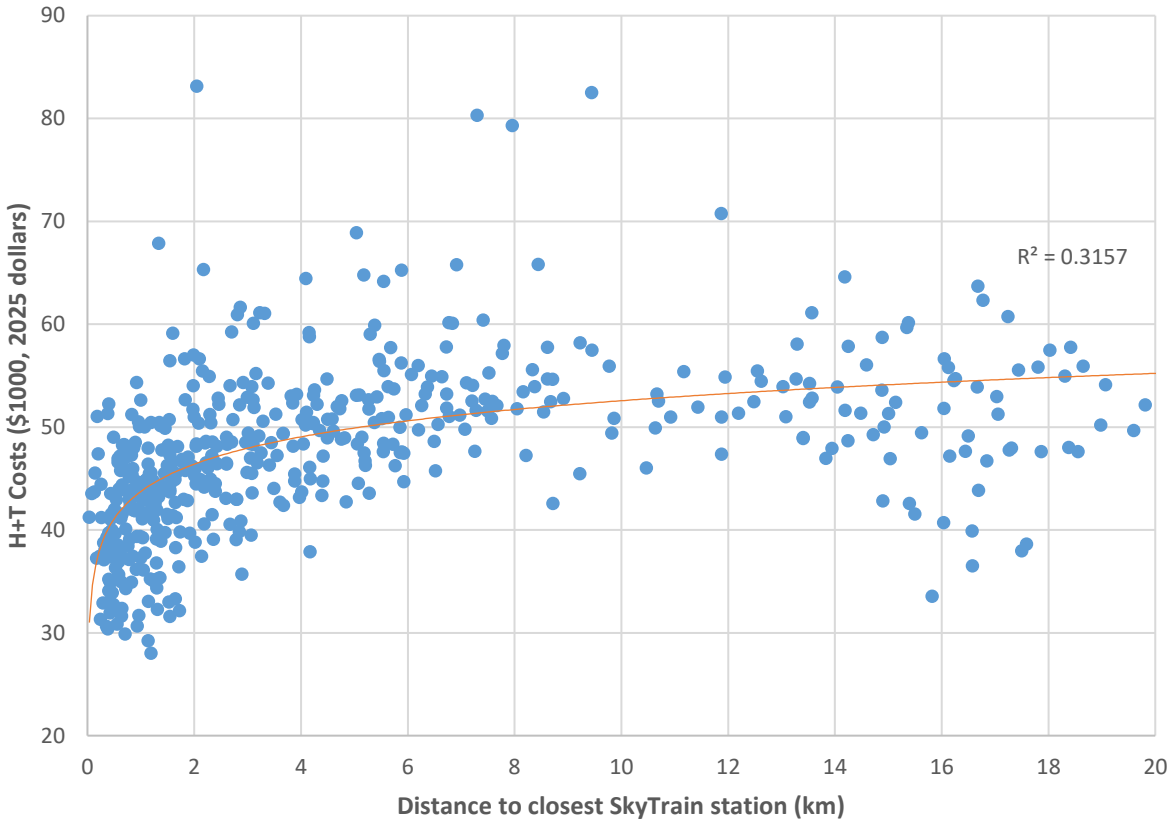
It is important to note that, aside from its role in providing a lower-cost transportation option, SkyTrain proximity serves as a proxy for other variables. The housing near SkyTrain is more likely to be rental tenure and the units are smaller, on average. Both of these factors imply lower costs.

The regression analysis also found that proximity to frequent bus service does not materially affect combined costs. Other transit service types, such as RapidBus, may also be tested in the future. However, as the RapidBus program only started rolling out in 2020, its effects are not yet visible within the data used for this study.

Complete results of the regression analysis are contained in Appendix B.

[5] UCB refers to the Urban Containment Boundary. The analysis is confined to General Urban lands only, as this is the regional land use designation associated with residential land uses.

Figure 8. Combined housing and transportation costs, by distance to SkyTrain



Sources: Statistics Canada, 2021; Steer, 2024; Metro Vancouver calculations, 2025.
Note: Distance is determined by census tract centroids. Housing costs are in 2021 dollars, transportation costs in 2022 dollars.

7.0 DEMOGRAPHIC FACTORS

7.1. HOUSEHOLD INCOME

An analysis of affordability – i.e. cost burden, as opposed to absolute cost – is not complete without considering the question of household income. Once incomes are incorporated,[6] the geographic pattern becomes substantially less clear, with pockets of both high cost burden and low cost burden areas scattered around the region (Figure 9). This scattering of the spatial pattern seen in the previous section may suggest the role of lifestyle in making housing location decisions – the reality that households will spend based on what they can afford and self-select into more or less costly locations depending upon needs and preferences.

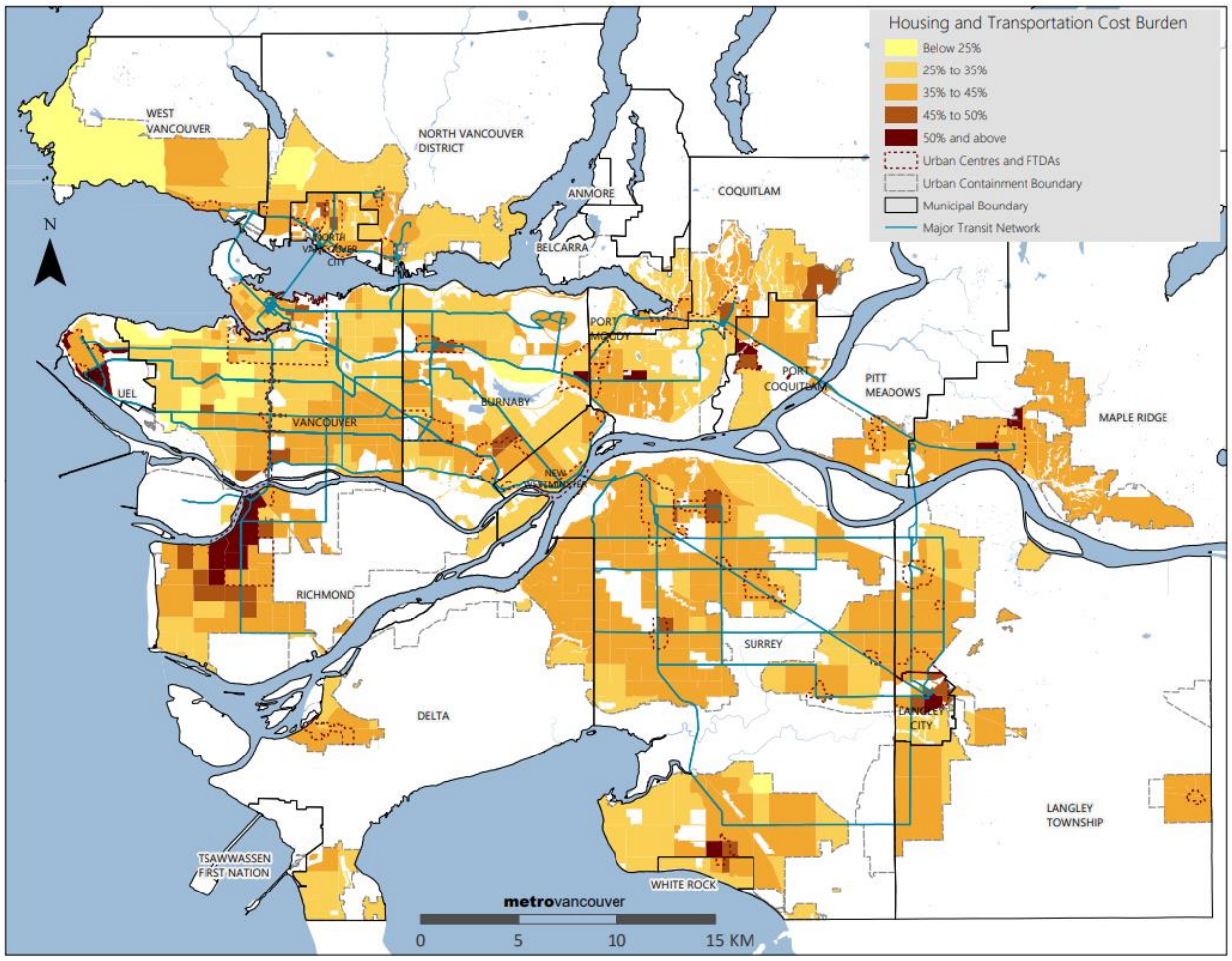
Figure 10 suggests that, when considering cost burden (i.e. costs divided by income), the role of income overtakes geographic factors such as regional centrality or transit accessibility. On average, the communities with the lowest combined cost burdens (below 30 percent of gross household income) are Belcarra, Anmore, Lions Bay, West Vancouver, Bowen Island and North Vancouver District. The communities with the highest cost burdens (above 40 percent of gross household income) are Langley City, UBC / UEL and Richmond.

Housing and transportation cost burden in Metro Vancouver averages 36 percent, which is below the 45 percent threshold that is sometimes used as a guideline for combined H+T costs.[7] All Member Jurisdictions and sub-regions are, on average, below the 45 percent threshold, but some neighbourhoods exceed 50 percent. The area-based averaging approach used for this study hides the variation between households, and the reality that many Metro Vancouver households are financially squeezed when considering not only housing and transportation costs, but other costs as well (daycare, groceries, and so forth).

[6] Calculated as average combined H+T costs divided by average income and expressed as a percentage (%).

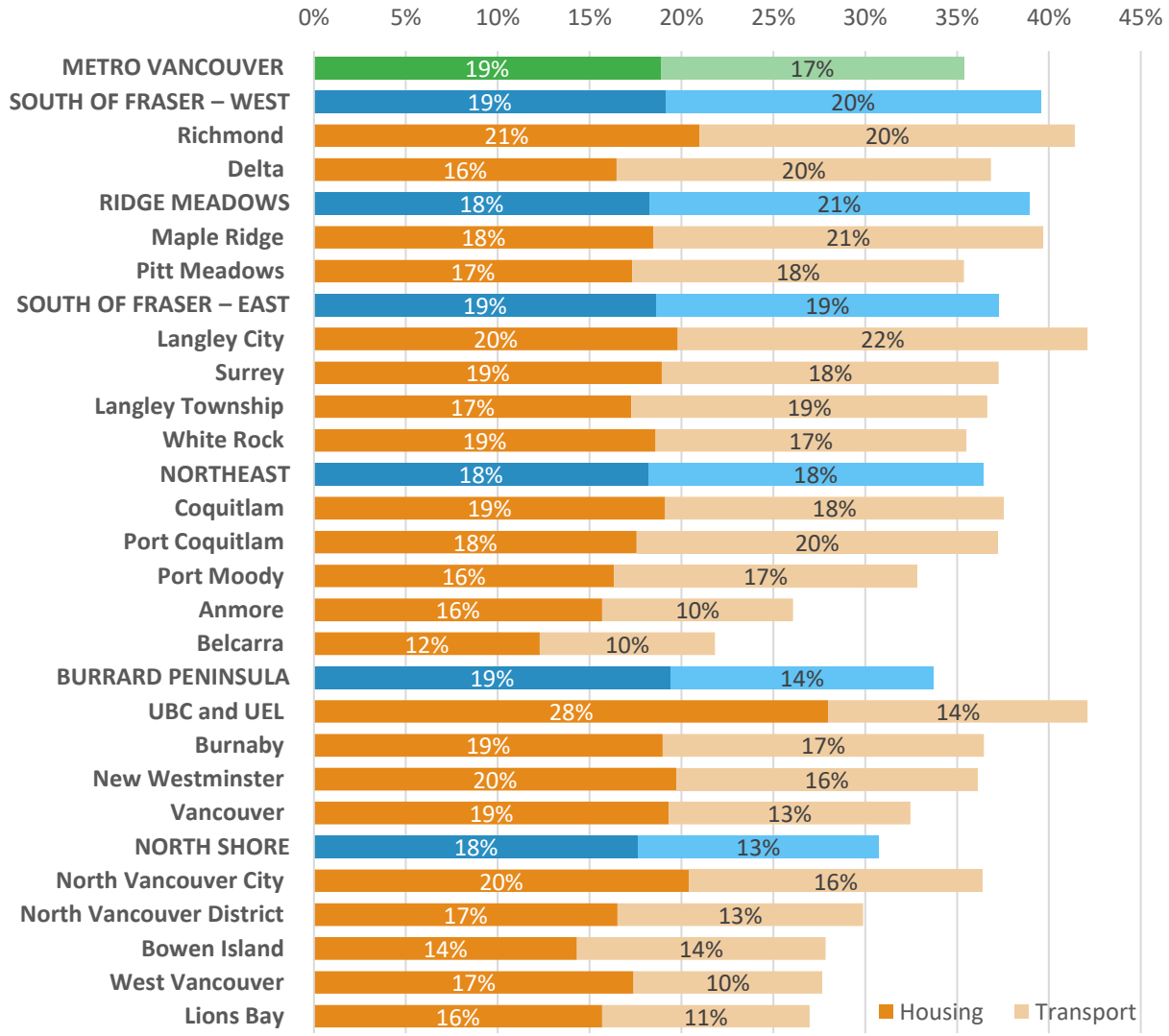
[7] 30 percent is typically used as the threshold for housing cost burden, while 15 percent is used for transportation cost burden.

Figure 9. Combined housing and transportation cost burden



Source: Statistics Canada, 2021; Steer, 2024.

Figure 10. Combined housing and transportation cost burden

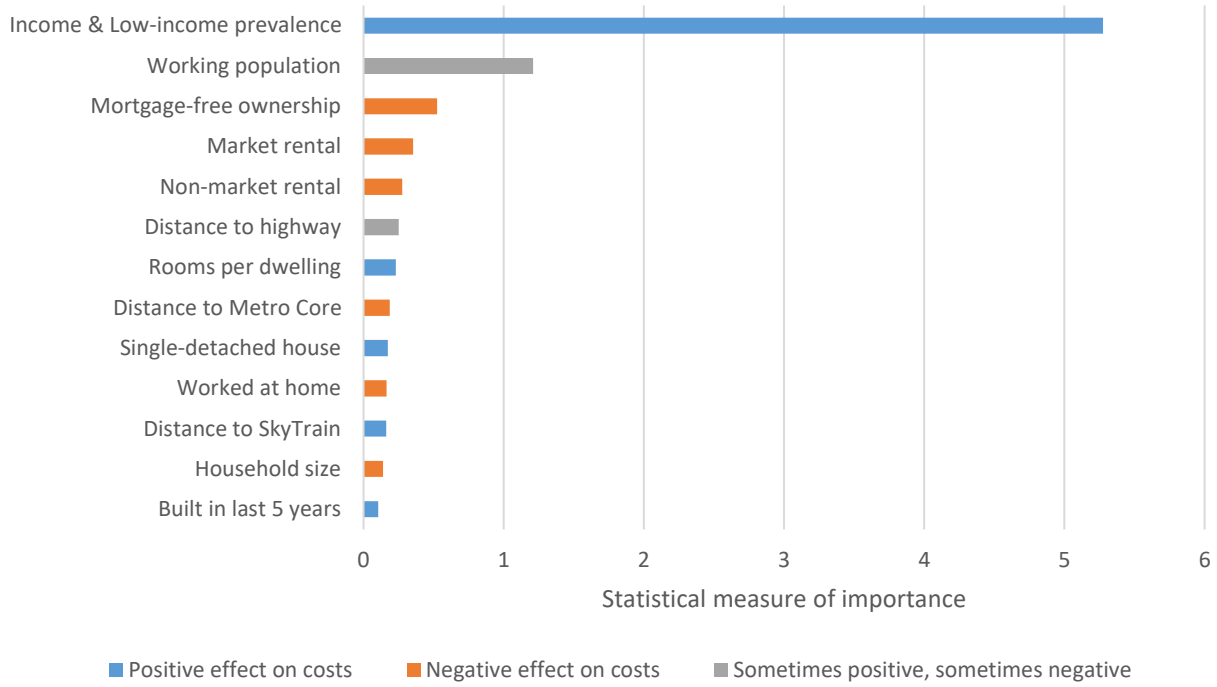


Source: Statistics Canada, 2021; Steer, 2024.

The research team also performed a regression analysis (Figures 11 and 12) to quantify the relationship between household income and combined H+T costs.

The model shows that household income, interacting with low-income prevalence, is the most important factor by far in explaining combined costs, followed by the proportion of the working population and housing tenure (Figure 11).

Figure 11. Importance of various factors to combined housing and transportation costs in Metro Vancouver

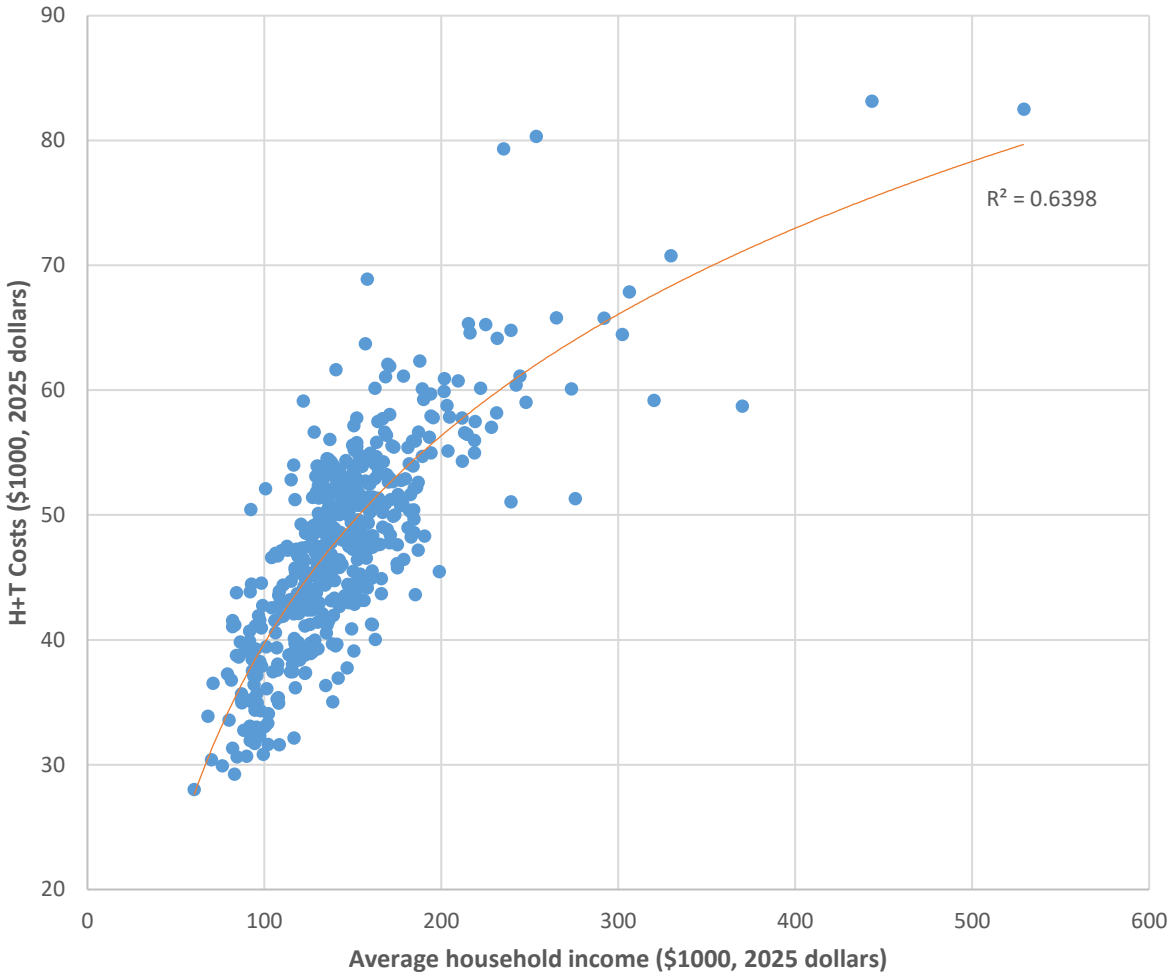


Source: Statistics Canada, 2021; Steer, 2024; Metro Vancouver analysis, 2025
Note: The statistical measure is standardized effect sizes. The "Working population" variable is linked to reduced costs up until the point at which around 2/3^{rds} of the population is employed; after that point, costs increase. "Greater distance to highway" increases costs until about 3.5 km away, then costs decline.

Specifically, as household income rises, so do expenditures (Figure 12). Each ten percent increase in income is associated with a $1,773 increase in combined costs (2025 dollars). The analysis carries an R^2 value of 0.6398, meaning that about 64 percent of differences in combined H+T costs around the region can be explained by household income.

This finding corroborates the intuitive observation that households can only spend what they make, along with the idea that households who make more are likely to spend more.

Figure 12. Combined housing and transportation costs, by average household income



Sources: Statistics Canada, 2021; Steer, 2024.
Note: distance is determined by census tract centroids.

7.2. HOUSING TENURE

How does housing tenure influence affordability? Owning with a mortgage is associated with the highest costs, followed by market rental, mortgage-free ownership, and finally non-market rental. Table 1 therefore uses mortgage-holding ownership as a benchmark against which other forms of tenure are considered, with the understanding that owners' shelter costs are not fully comparable with renters' shelter costs.

Analysis indicates that tenure has a stronger influence on combined costs than does transit accessibility. For instance, moving ten percent closer to SkyTrain reduces per-household combined costs by about $117 per year, while increasing the proportion of market rental units in an area by about ten percentage points can reduce costs by about $1,854 (compared with mortgage-holding ownership units). Similar order-of-magnitude differences exist for non-market rental and mortgage-free owners as well. All three tenure types analyzed have a stronger relationship to H+T costs than distance to SkyTrain or distance to the Metro Core (Figure 12).

Table 1. Effects on combined H+T costs for changes in housing tenure composition (other factors being equal)

Within a census tract, a 10 percentage-point increase in the proportion of:	Means combined costs H+T are lower than mortgage-holding owners by about:
Market renter households	$1,854
Non-market renter households	$4,132
Mortgage-free owner households	$4,058

Note: There is high uncertainty at low levels of non-market rental. These are 2025 dollars.

8.0 CONCLUSION

The Housing and Transportation Cost Burden Study Update features a number of exhibits (Appendix C) that allow for deep analysis of household cost patterns in the Metro Vancouver region, revealing that:

- **There is significant variation in costs between Member Jurisdictions and subregions.** The North Shore subregion experiences the highest housing and transportation costs, at an average of $49,000 per household annually. The Burrard Peninsula has the lowest such costs, at $38,000 annually. New Westminster, Vancouver, Langley City, Burnaby and White Rock have average housing and transportation costs under $40,000 per household annually. West Vancouver, Anmore, Lions Bay, North Vancouver District and Belcarra have average housing and transportation costs exceeding $50,000 per household annually.

- **Transportation costs can rival, and sometimes exceed, housing costs.** Housing costs the average Metro Vancouver household $22,000 per year, while transportation costs $19,000. In several Member Jurisdictions, however – Maple Ridge, Langley Township, Langley City, Port Coquitlam and Delta – transportation costs exceed housing costs, on average.

- **Centres and Corridors are more affordable.** Many Urban Centres enjoy combined costs in the $30,000 to $40,000 per year range, including Langley, Maple Ridge, Guildford, New Westminster, Richmond, Lougheed, Coquitlam, and Lonsdale. In no Urban Centre do households average more than $50,000 in annual combined costs. On average, *Metro 2050*'s Centres and Corridors are more affordable than other General Urban areas outside of these overlays. Analysis indicates that this pattern is the result of multiple factors linked to greater levels of affordability, including: proximity to SkyTrain; availability of rental housing; and smaller unit sizes.

- **SkyTrain is linked to H+T affordability.** The map in Figure 5 reveals a high-cost perimeter around the region, circumscribing the relatively more affordable centre loosely represented by the SkyTrain system. The Metro Core, Metrotown, and Surrey Metro Centre, all along the Expo SkyTrain Line, stand out as having among the lowest combined H+T costs in the region, with large portions of these Urban Centres having combined costs below $30,000 per year, on average. Similar to the findings for Centres and Corridors, the relatively greater affordability for households living around SkyTrain is facilitated by the type of transit-oriented development (namely, rental housing and smaller units) available in those neighbourhoods, in addition to the influence of the SkyTrain service itself.

- **Rental tenure greatly scales the affordability benefits of SkyTrain.** Rental tenure, and particularly non-market rental, consistently makes a more significant difference to both housing and transportation costs than transit service alone. However, rental housing tends to concentrate around SkyTrain, suggesting that SkyTrain plays a role in facilitating rental tenure. Promoting the two together – i.e. transit-oriented affordable housing – would yield the greatest benefit.

- **Population density alone does not materially affect H+T affordability.** Regression modelling found that population density had a statistically insignificant relationship with combined H+T costs. Density must be combined with other factors – such as proximity to SkyTrain, rental tenure, and access to jobs – to make an impact on affordability. One implication of this finding is that location and tenure matter; to the extent that it does not offer these attributes, Small-Scale Multi-Unit Housing is unlikely to contribute to combined H+T affordability. Transit-Oriented Areas around SkyTrain, on the other hand, could enable greater levels of affordability if the housing is purpose-built rental.

- **There is no clear relationship – inverse or otherwise – between housing costs and transportation costs.** Analysis found that there is a very weak relationship between housing costs and transportation costs, with the latter explaining only about four percent of the variation in the former (and vice versa). This finding suggests that housing and transportation costs behave independently of each other. Therefore, planning decisions should consider both types of costs together, rather than assuming one offsets the other.

- **Transportation costs are driven largely by vehicle ownership.** Across Metro Vancouver, auto costs comprise 98 per cent of total transportation costs. Households with two or more vehicles spend, on average, $30,815 annually on transportation; single-vehicle households spend an average of $13,798; and zero-vehicle households spend an average of $2,530. This suggests that public policy enabling more households to own fewer vehicles (e.g. transit-oriented development) can have an impact on overall household costs.

8.1. IMPLICATIONS FOR REGIONAL GROWTH MANAGEMENT

The findings of the Housing and Transportation Cost Burden Study Update offer valuable insights for shaping regional growth strategies. Most notably, the data demonstrates that strategic investments in public transit can significantly improve household affordability, an important consideration for Metro Vancouver, where housing costs remain a major challenge.

Households in areas with strong transit access consistently experience lower combined housing and transportation costs. This underscores the importance of aligning land use planning with transit infrastructure to support more affordable living. Transit-oriented development can reduce reliance on costly personal vehicles and enable more efficient use of land for mid-rise, rental, and wood-frame housing forms.

To maximize these benefits, regional growth policies should continue to prioritize development in areas with existing or planned rapid transit service. In particular, the Major Transit Growth Corridor overlay presents an opportunity to strategically shape future growth areas that support affordability. While *Metro 2050* currently emphasizes Urban Centres and Frequent Transit Development Areas, expanding the use of the Major Transit Growth Corridor concept could help guide housing and employment growth toward locations where transit access and land economics align to deliver more affordable outcomes.

Regional growth management should also prioritize rental tenure housing. The Housing and Transportation Cost Burden Study Update finds that population density alone has a statistically insignificant effect on H+T costs. *Metro 2050*'s first guiding principle – "put growth in the right places" –

could be updated by incorporating the notion of "the right tenure." Recent provincial housing legislation encourages housing supply in both SkyTrain station areas and neighbourhoods zoned for single-detached housing.[8] Because it is agnostic to housing tenure, this legislation may have little impact on housing affordability unless supplemented by regional and local policy that encourages rental housing.

Additionally, increasing employment opportunities in transit-accessible areas can have a dual benefit: boosting household incomes while reducing commuting costs. This integrated approach to land use, transportation, and economic development can help Metro Vancouver advance its affordability goals.

Finally, the Housing and Transportation Cost Burden Study Update has implications for ongoing performance monitoring. This could include setting a benchmark for housing and transportation cost burden to track progress over time. Based on the distribution of housing and transportation costs in Metro Vancouver, along with local incomes, a threshold of 45 percent[9] could serve as an appropriate benchmark for the region.

[8] Transit-Oriented Areas (TOAs) and Small-Scale Multi-Unit Housing (SSMUH), respectively.

[9] The 45 percent affordability benchmark (30 percent for housing and 15 percent for transportation) was originally developed by the Center for Neighborhood Technology, which pioneered the concept of an H+T index.

APPENDIX A – DATA DICTIONARY

Below are the variables used in the regression analysis. Not all were included in the final model. All data is at the census tract level, which are areas of about 2,500 to 8,000 people, except for transportation costs, which are calculated at the subarea level.

Due to data availability, First Nations reserves and treaty lands were excluded. As the focus is on urban residential areas, census tracts with no General Urban lands were excluded, along with 11 other census tracts around the edge of the Urban Containment Boundary whose populations generally resided on Agricultural or Rural lands as identified in *Metro 2050*.

Variable	Description	Source & Year	Transformations
Housing costs (2021 Canadian dollars)	Average household shelter costs. These include mortgage payments, rent, property taxes and condominium fees, utilities, and other municipal services.[10] Due to data availability, this was calculated using the following formula: (Number of Renter Households * Average Annual Household Housing Costs for Renter Households + Number of Owner Households * Average Annual Household Housing Costs for Owner Households) / (Total Number of Renter and Owner Households)	Statistics Canada, 2021 Census of Population	For the regression analysis, figures were inflated to 2025 based on the Bank of Canada's inflation calculator. Kept 2021 dollars for maps and charts.
Transport costs (2022 Canadian dollars)	Total average household spending on transportation, including driving (including parking costs), car sharing, ride hailing, transit, and cycling, with adjustments to account for the recent shift to more working from home as well as hybrid and electric vehicles. This only includes private monetary costs, not not public costs, time costs, environmental costs, health costs, or any other costs associated with travel. These other costs also differ between modes. This is the only variable at the "subarea" level, a TransLink geography roughly corresponding to neighbourhoods	Steer, 2024, using the 2017 TransLink Trip Diary, the Canadian Automobile Association driving costs calculator, and other sources [Data is for 2022]	For the regression analysis, figures were inflated to 2025 based on the Bank of Canada's inflation calculator. Kept 2022 dollars for maps and charts.
Household income (2020 Canadian dollars)	Receipts of money of all household members, before taxes and deductions, of a generally recurring nature. This includes for example money from employment, dividends, pension,	Statistics Canada, 2021 Census of Population [Data is for 2020]	For the regression analysis, figures were inflated to 2025 based on

[10] Dictionary, Census of Population, 2021 – Shelter cost

	Employment Insurance, or child/spousal support but excludes for example cash inheritances, TFSA/RRSP withdrawals, capital gains, and voluntary inter-household transfers.[11]		the Bank of Canada's inflation calculator and modelled as a logarithmic relationship (percentage change). Kept original 2020 figures for maps and charts.
Population density (People per square kilometre)	The population in the entire census tract divided by General Urban lands in each census tract. For four census tracts in West Vancouver and Coquitlam whose General Urban lands included large swathes of undeveloped forest, the population density of a nearby tract with similar development patterns, or the average of two nearby ones, was taken. Note that some jurisdictions designate non-General Urban lands to a greater detail than others (e.g., including or excluding golf courses), so population densities are not entirely comparable between census tracts.	Metro Vancouver analysis, using 2021 census data	For the regression analysis, this was modelled as a logarithmic relationship (percentage change)
Distance to Metro Core (metres)	The straight-line distance from the centroid of the General Urban lands within each census tract to Vancouver City Centre SkyTrain Station	Metro Vancouver analysis in 2025	
Distance to SkyTrain (metres)	The straight-line distance from the centroid of the General Urban lands within each census tract to the closest SkyTrain station	Metro Vancouver analysis using 2023 TransLink data	For the regression analysis, this was modelled as a logarithmic relationship (percentage change)
Distance to frequent bus (metres)	The straight-line distance from the centroid of the General Urban lands within each census tract to the closest point along bus routes on the Frequent Transit Network. This excludes SkyTrain, SeaBus, and West Coast Express.	Metro Vancouver analysis based on 2022 data from TransLink	For the regression analysis, this was modelled as a logarithmic relationship (percentage change)
Distance to highway (metres)	The straight-line distance from the centroid of the General Urban lands within each census	Metro Vancouver analysis using *Metro 2050*	For the regression analysis, this was modelled as a

[11] Profile table, Census Profile, 2021 Census of Population - Vancouver [Census metropolitan area], British Columbia, Note 26

	tract to the closest "Major Highway" as shown in *Metro 2050* maps in 2025	geographies in 2025	quadratic relationship (effect increases then decreases or decreases then increases)
Distance to water (metres)	The straight-line distance from the centroid of the General Urban lands within each census tract to the closest water body as in Metro Vancouver's GIS database, which includes some, but not all courses of water	Metro Vancouver analysis using internal database geographies in 2025	For the regression analysis, this was modelled as a quadratic relationship (effect increases then decreases or decreases then increases)
Distance to parks (metres)	The straight-line distance from the centroid of the General Urban lands within each census tract to the closest Conservation and Recreation land as identified in *Metro 2050* in 2025	Metro Vancouver analysis using *Metro 2050* geographies in 2025	For the regression analysis, this was modelled as a logarithmic relationship (percentage change)
Distance to industry (metres)	The straight-line distance from the centroid of the General Urban lands within each census tract to the closest Industrial land as identified in *Metro 2050* in 2025	Metro Vancouver analysis using *Metro 2050* geographies in 2025	For the regression analysis, this was modelled as a quadratic relationship (effect increases then decreases or decreases then increases)
Elevation (Metres)	The mean elevation for the General Urban lands within each census tract	Metro Vancouver analysis based on 1985-86 data from the Province of BC[12] (20 metre contour resolution)	For the regression analysis, this was modelled as a quadratic relationship (effect increases then decreases or decreases then increases)
Household size (persons)	The average number of people in a household for the census tract. To get precise numbers, this was calculated by dividing the population by the number of households. A household is a person or group of persons who occupy the same dwelling and do not	Statistics Canada, 2021 Census of Population	

[12] Government of BC - TRIM Updates by Year

	have a usual place of residence elsewhere.[13] They do not have to be related.		
Rooms per dwelling (rooms)	The average number of rooms per dwelling in the census tract. Rooms are enclosed, finished areas suitable for year-round living. This includes kitchens, bedrooms and finished rooms in the attic or basement but excludes bathrooms, halls, vestibules, and rooms used solely for business purposes.[14]	Statistics Canada, 2021 Census of Population	
Single-detached house (%)	The percentage of dwelling units in the census tract that are single-detached houses. This excludes houses with recorded secondary suites.[15]	Statistics Canada, 2021 Census of Population	
High-rise apartments (%)	The percentage of dwelling units in the census tract that are apartments in buildings that have five or more storeys	Statistics Canada, 2021 Census of Population	
Major repairs needed (%)	The percentage of dwelling units in the census tract that require major repairs. This is a measure of housing condition. This does not include regular maintenance, minor repairs, or desirable remodelling or additions.	Statistics Canada, 2021 Census of Population	
Built within 5 years (%)	The percentage of dwelling units that were built between 2016 and 2021	Statistics Canada, 2021 Census of Population	
Built 2001-2015 (%)	The percentage of dwelling units that were built between 2001 and 2015. We technically generated 2001-2021 data and subtracted the 2016-2021 data.	Statistics Canada, 2021 Census of Population	
Children (%)	The percentage of the population in a census tract aged 0 to 14 years	Statistics Canada, 2021 Census of Population	This or seniors was excluded in different models to serve as the reference group
Seniors (%)	The percentage of the population in a census tract aged 65 years and over	Statistics Canada, 2021 Census of Population	This or children was excluded in different models to serve as the reference group
Working-age population (%)	The percentage of the population in a census tract aged 15 to 64 years. We technically calculated it using: 100 – Children – Seniors	Statistics Canada, 2021 Census of Population	
Working population (%)	The percentage of the population (not just working-age) in a census tract that worked full-time, part-time, or part of the year	Statistics Canada, 2021 Census of Population	For the regression analysis, this was modelled as a quadratic relationship

[13] Dictionary, Census of Population, 2021 – Household

[14] Profile table, Census Profile, 2021 Census of Population - Vancouver [Census metropolitan area], British Columbia, Footnote 53

[15] Houses with a recorded secondary suite would count as a duplex. Type of Dwelling Reference Guide, Census of Population, 2021

			(effect increases then decreases or decreases then increases)
Worked at home (%)	The percentage of the population (not just workers) that worked from home	Statistics Canada, 2021 Census of Population	
Long commuters (%)	The percentage of the population (not just workers) that commuted 45 minutes or more.	Statistics Canada, 2021 Census of Population	
Moved within 5 years (%)	The percentage of the population that had a different place of residence five years ago	Statistics Canada, 2021 Census of Population	
Low-income prevalence (%)	The proportion of the population in a census tract whose household incomes falls below 50% of the median-adjusted after-tax household income in Canada, adjusted for household size. This is the "Prevalence of low income based on the Low-income measure, after tax (LIM-AT) (%)" line in the census.	Statistics Canada, 2021 Census of Population	
Market renters (%)	The percentage of households in a census tract that are renters in non-subsidized housing	Statistics Canada, 2021 Census of Population	
Non-market renters (%)	The percentage of households in a census tract that are renters in subsidized housing	Statistics Canada, 2021 Census of Population	
Mortgage-free owners[16] (%)	The percentage of households in a census tract that are owners without a mortgage.	Statistics Canada, 2021 Census of Population	

[16] Mortgage-holding owners served as the reference group for the tenure variables—one of them must be excluded for the regression to work.

APPENDIX B – REGRESSION ANALYSIS

Below are the results of the regression modelling, when including only housing costs, only transport costs, or both. The table shows how these variables relate to costs when the other listed variables are controlled for. Only variables that were consistently significant for combined costs are modelled here. These variables explain 90% of the variation in housing costs, 77% for transportation costs, and 89% for combined costs. All dollars are for 2025, and are reported on an annual basis, per household. Figures are approximate—there is a range of uncertainty around each one—and are developed using census tract-level data.

Regression results for housing (H) and transportation (T) costs in Metro Vancouver

Variable	When this variable…	H costs…	T costs…	H+T Costs…
Household income ($)	Increases by 10%[17]	+$1,847***	Statistically insignificant	+$1,773***
Low-income prevalence (%)	Increases by 10 percentage points[18]	+$5,850***	-$983*	+$4,868***
Distance to Metro Core (km)	Decreases by 1 km	+$114***	Statistically insignificant	+$129***
Distance to SkyTrain (km)	Decreases by 10%	-$28*	-$89***	-$117***
Distance to highway (km)	Increases	+ to 2.6 km* - after	+ to 4.1 km*** - after	+ to 3.5 km*** - after
Household size	Increases by 1 person	-$1,077**	-$958*	-$2,035***
Rooms per dwelling	Increases by 1 room	+$783***	Statistically insignificant	+$1,257***
Single-detached house (%)	Increases by 10 percentage points	+$262**	+$313**	+$575***
Built within 5 years (%)	Increases by 10 percentage points	+$636***	Statistically insignificant	+$847***
Working population (%)	Increases	- to 66%*** + after	Statistically insignificant	- to 67%*** + after
Worked at home (%)	Increases by 10 percentage points	Statistically insignificant	-$2,160***	-$2,235***
Market renters (%)	Increases by 10 percentage points	-$721***[19]	-$1,133***	-$1,854***
Non-market renters (%)	Increases by 10 percentage points	-$3,443***	-$689*	-$4,132***
Mortgage-free owners (%)	Increases by 10 percentage points	-$3,276***	-$781**	-$4,058***

*Significance levels: * = a less than 5% chance that the relationship occurred by chance; ** = <1%; *** = <0.1%*

[17] When assuming a constant region-wide low-income prevalence of 11.1%. Analysis finds that the effect of household income on costs depends on the level of low-income prevalence in the census tract. The higher the low-income prevalence, the more that household income increases costs.

[18] When assuming a constant region-wide average household income of $140,555. Analysis similarly finds that the effect of low-income prevalence on costs depends on the level of household income in the census tract. At higher incomes, low-income prevalence increase costs more. While unintuitive, low-income prevalence may capture receipts of money outside Statistics Canada's definition of "income," such as TFSA/RRSP withdrawals, capital gains, and voluntary inter-household transfers, or the more general concept of "wealth." For the definition of "income," see: Profile table, Census Profile, 2021 Census of Population - Vancouver [Census metropolitan area], British Columbia, Note 26.

[19] For market renters, non-market renters, and mortgage-free owners, the cost effects are compared with mortgage-holding owners.

Sources: Statistics Canada, 2021; Steer, 2024; Metro Vancouver analysis, 2025
Note: For highway and working population, the p-values of the linear term are shown. Rounding may affect totals.

The following variables were found to be statistically insignificant for combined costs, either consistently or with random subsets of the data:

- Population density
- Distance to frequent bus
- Distance to water
- Distance to parks
- Distance to industry
- Elevation
- High-rise apartments
- Major repairs needed
- Built 2001-2015
- Children
- Seniors
- Working-age population
- Long commuters
- Moved within 5 years

APPENDIX C – MAPS AND CHARTS

Provided as a separate resource available on the Metro Vancouver web site, metrovancouver.org.

APPENDIX D – TRANSPORTATION COST ESTIMATES

Provided as a separate resource available on the Metro Vancouver web site, metrovancouver.org.

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Technical Report
March 2024

Transportation Cost Estimates and Technical Report

Metro Vancouver
Our ref: 24366001

steer

Technical Report
March 2024

Transportation Cost Estimates and Technical Report

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Executive summary

This report outlines a study to estimate updated household transportation costs across Metro Vancouver. This work is intended to be part of a larger Metro Vancouver study to understand the interplay between transportation and housing costs throughout the region. The estimated transportation costs described in this report will therefore be used in conjunction with a separate housing costs study to develop combined transportation and housing cost estimates.

For the purposes of this research, transportation-related costs were compiled and calculated by municipality and subarea. Trips considered in the analysis were for those made by residents of Metro Vancouver, which means that trips made into the region by those resident outside the region were excluded (for example residents of the Fraser Valley Regional District commuting into Metro Vancouver).

This study builds upon the 2015 Transportation and Housing Cost Burden Study. This previous report developed a general index of average housing plus transportation costs as a proportion of average household income. For this current study, in addition to updating the data utilized to estimate transportation costs, several additional estimates have been included to better reflect total transportation costs, including estimates for the cost of carshare, taxis and cycling. Additionally, the new analysis takes into account a shift towards more work-from-home days.

1 Introduction

The purpose of the Metro Vancouver Transportation Cost Burden Study is to provide an updated estimate of the household transportation costs across the region, based on available data. This will in turn form part of a wider study that considers housing costs as well, to develop an estimate of combined transportation and housing costs.

This technical report outlines the finding of this study, and is structured as follows:

- Chapter 2 describes the source data used for the study
- Chapter 3 outlines the results of the transportation cost estimates
- Chapter 4 discusses results by target groups
- Chapter 5 contains overall findings
- Appendix A includes further technical details on the methodology employed for this study

This report is also accompanied by the dataset used for the analysis presented here, which can potentially used for additional queries in the future.

2 Source data

A range of data sources was used for this study, with the main data source being the 2017 Trip Diary published by TransLink. The Regional Trip Diary is a survey of randomized households completed every five years to understand the travel patterns of households in Metro Vancouver and modes used to achieve their transportation needs. The types of data the Trip Diary presents includes the origins and destinations of Metro Vancouver survey respondents, the diversity of modes selected by the survey respondents, the average length of trip, and trip purposes.

The 2017 Trip Diary collected information on travel patterns on single fall weekdays for a sample of 28,000 households in the Lower Mainland. It compiles household data; person data; and trip data. As the survey primarily focuses on trip making behaviour, it was necessary to draw on various other data sources in order to use the trip data from the Trip Diary to estimate transportation costs. The main data sources used include:

- Auto costs: Canadian Automobile Association (CAA)'s Driving Cost Calculator
- Transit costs: 2022 TransLink fares
- Cycle-related costs: Victoria Transport Policy Institute estimates

Further details on data sources and assumptions are included in the methodology memo in Appendix A.

Geographies

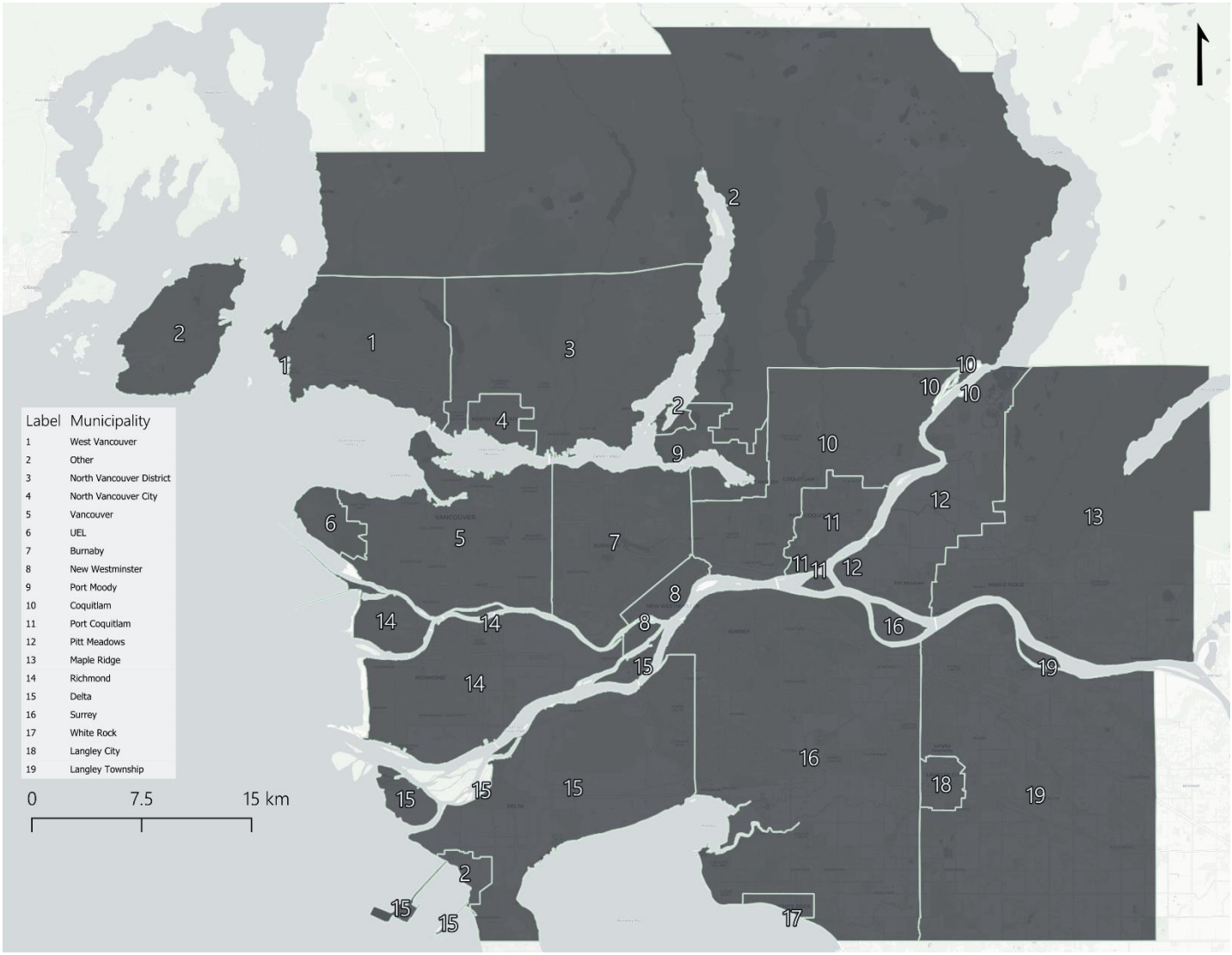
The results in this report are presented at three spatial scales, as defined by TransLink for the purpose of the 2017 Trip Diary:

- Metro Vancouver
- Municipality
- Subarea

A map of municipalities is included in Figure 2.1 below. Due to low sample sizes, certain municipalities were combined by TransLink, and coded as follows:

- UEL: Includes University Endowment Lands (UEL) and the University of British Columbia (UBC)
- Other: Includes Lions Bay, Electoral Area A North, Bowen Island, Belcarra, Anmore, and Tsawwassen First Nation

Figure 2.1: Municipalities as defined by TransLink for the purposes of the 2017 Trip Diary



The data from the 2017 Trip Diary was also disaggregated by TransLink into subareas. Defined (and named) by TransLink, these are generally subdivisions of municipalities, with each municipality containing between one and nine subareas. A map of these subareas is included in Figure 2.2 below, and they are also listed in Table 2.1 below.

Figure 2.2: Subareas as defined by TransLink for the purposes of the 2017 Trip Diary

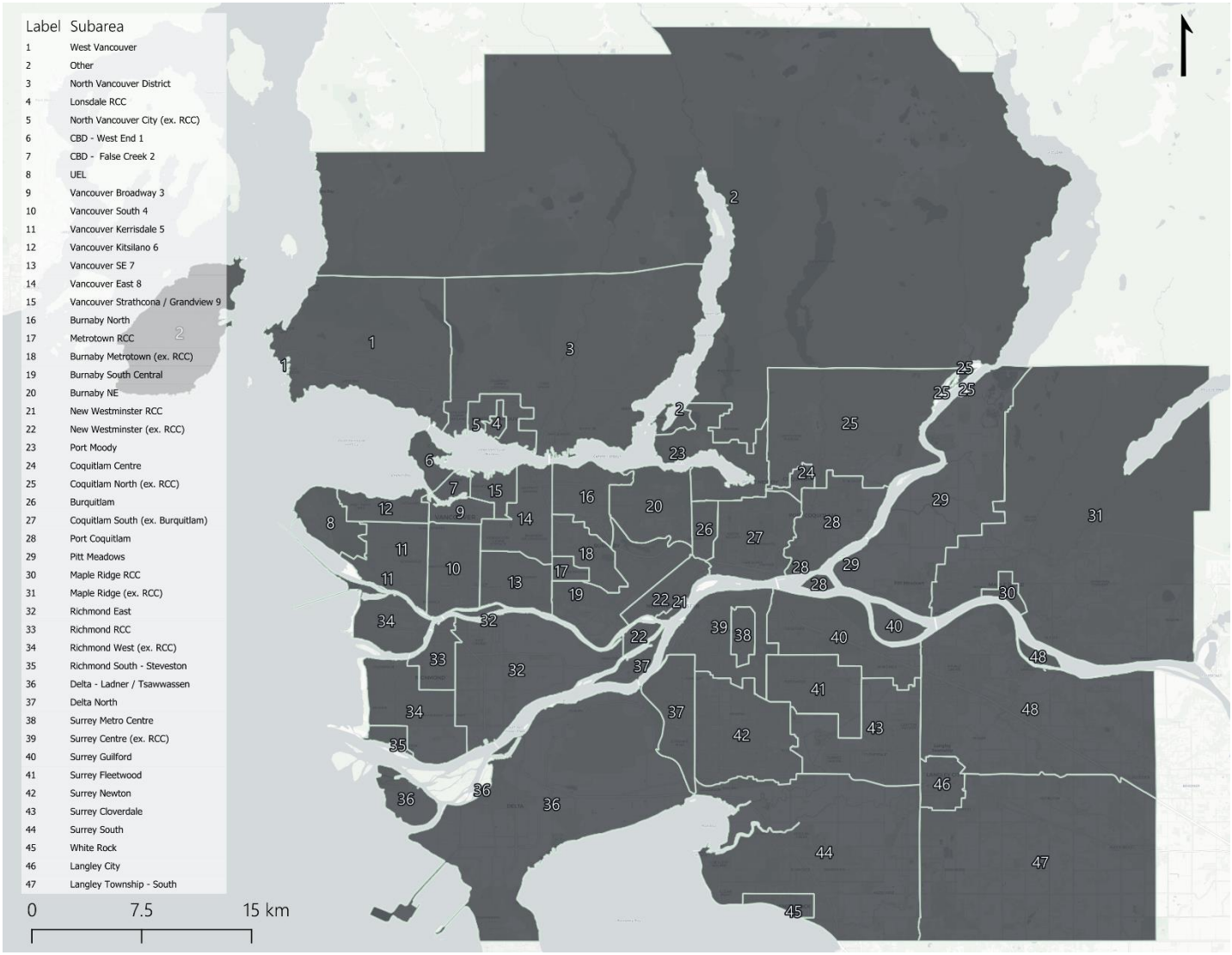


Table 2.1: List of municipalities and subareas

Municipality	Subarea
Burnaby	Burnaby North
	Metrotown RCC
	Burnaby Metrotown (ex. RCC)
	Burnaby South Central
	Burnaby NE
Coquitlam	Coquitlam Centre
	Coquitlam North (ex. RCC)
	Burquitlam
	Coquitlam South (ex. Burquitlam)
Delta	Delta - Ladner / Tsawwassen
	Delta North
Langley City	Langley City
Langley Township	Langley Township - South
	Langley Township - North
Maple Ridge	Maple Ridge RCC
	Maple Ridge (ex. RCC)
New Westminster	New Westminster RCC
	New Westminster (ex. RCC)
North Vancouver City	Lonsdale RCC
	North Vancouver City (ex. RCC)
North Vancouver District	North Vancouver District
Other	Other
Pitt Meadows	Pitt Meadows
Port Coquitlam	Port Coquitlam
Port Moody	Port Moody
Richmond	Richmond East
	Richmond RCC
	Richmond West (ex. RCC)
	Richmond South - Steveston

Municipality	Subarea
Surrey	Surrey Metro Centre
	Surrey Centre (ex. RCC)
	Surrey Guilford
	Surrey Fleetwood
	Surrey Newton
	Surrey Cloverdale
	Surrey South
UEL	UEL
Vancouver	CBD - West End 1
	CBD - False Creek 2
	Vancouver Broadway 3
	Vancouver South 4
	Vancouver Kerrisdale 5
	Vancouver Kitsilano 6
	Vancouver SE 7
	Vancouver East 8
	Vancouver Strathcona / Grandview 9
West Vancouver	West Vancouver
White Rock	White Rock

3 Results of transportation costs estimates

The outputs of the analysis describe the estimated annual transportation costs for households in different municipalities and subareas in the Metro Vancouver region. The outputs of the analysis are categorized by mode:

- Auto-related costs
- Transit-related costs
- Cycle-related costs

Additionally, combined transportation costs are calculated for the different municipalities and subareas. These combined costs are then segmented by different key household characteristics, to provide additional insight into how transportation costs change for different groups. These segmentation characteristics include:

- Household income
- Housing tenure
- Vehicle ownership

The following sections provide visual and quantitative descriptions of annual transportation costs and high-level discussion of results.

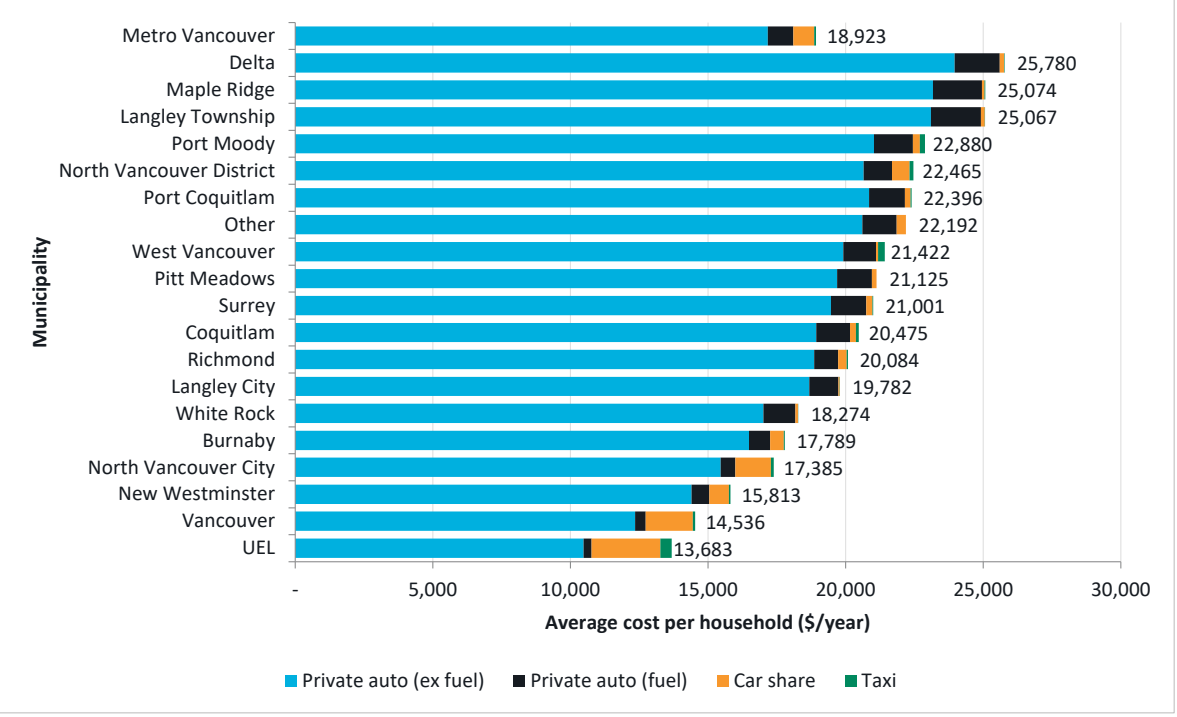
Annual auto-related costs

The majority of household transportation costs in the Metro Vancouver region come from car ownership and usage. Although auto costs vary significantly throughout the region, auto costs are several times higher than costs from transit and cycling combined. Annual auto-related costs combine non-fuel and fuel private auto costs, with additional costs from car share and taxi trips.

Auto costs by municipality

The estimated average annual household auto costs by municipality are shown in Figure 3.1.

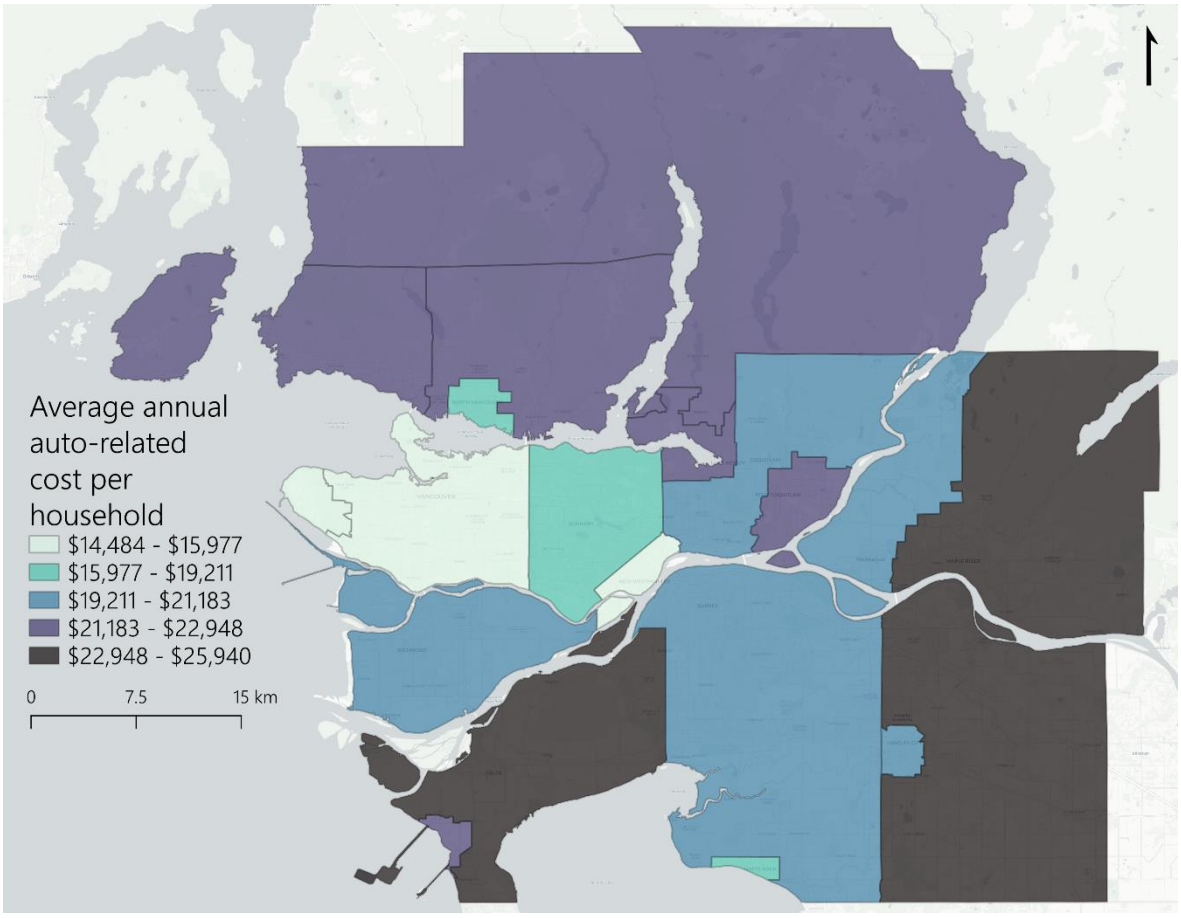
Figure 3.1: Average annual household auto costs by municipality



Note: Metro Vancouver indicates the average across the region; this value is slightly different from the value in the subareas graph due to the household weighting process.

The estimated average annual household auto costs by municipality are illustrated in Figure 3.2.

Figure 3.2: Map of average annual household auto costs by municipality



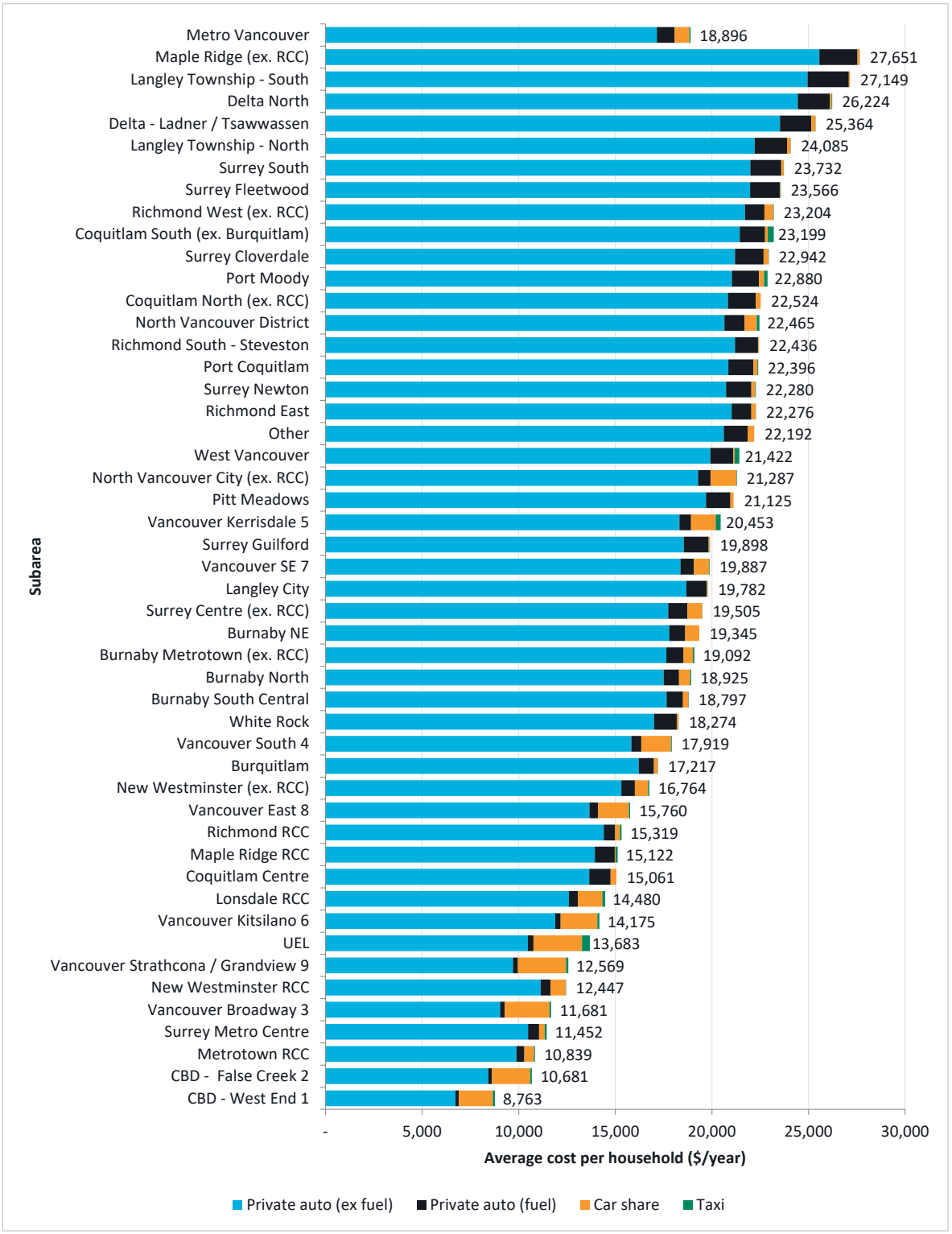
Average annual household auto costs very greatly across Metro Vancouver, with the highest costs in Delta, Maple Ridge, and Langley Township, and the lowest costs in UEL and Vancouver. In general, it appears that costs are lowest in central, urban areas which have higher population densities. In all cases, private auto (excluding fuel) costs are by far the largest component. However, there is variation in what the second largest component is: it is generally private auto (fuel) costs for municipalities with higher overall costs, whereas for those with lower overall costs it is generally car share costs. This is likely to reflect the geographical availability of car share services in 2017, as well as a positive correlation between car share use and lower private auto use and ownership. The only exception to this is for West Vancouver, where taxi costs are higher than car share costs. In all other municipalities, taxi costs are the smallest component.

More generally, higher density and centralized locations may enable households in these municipalities have access to more alternatives to travel by private autos, or that costs and constraints of driving in dense areas make alternatives more attractive. In contrast, the highest costs are in outer municipalities, where they are generally fewer alternative to travel by private autos.

Auto costs by subarea

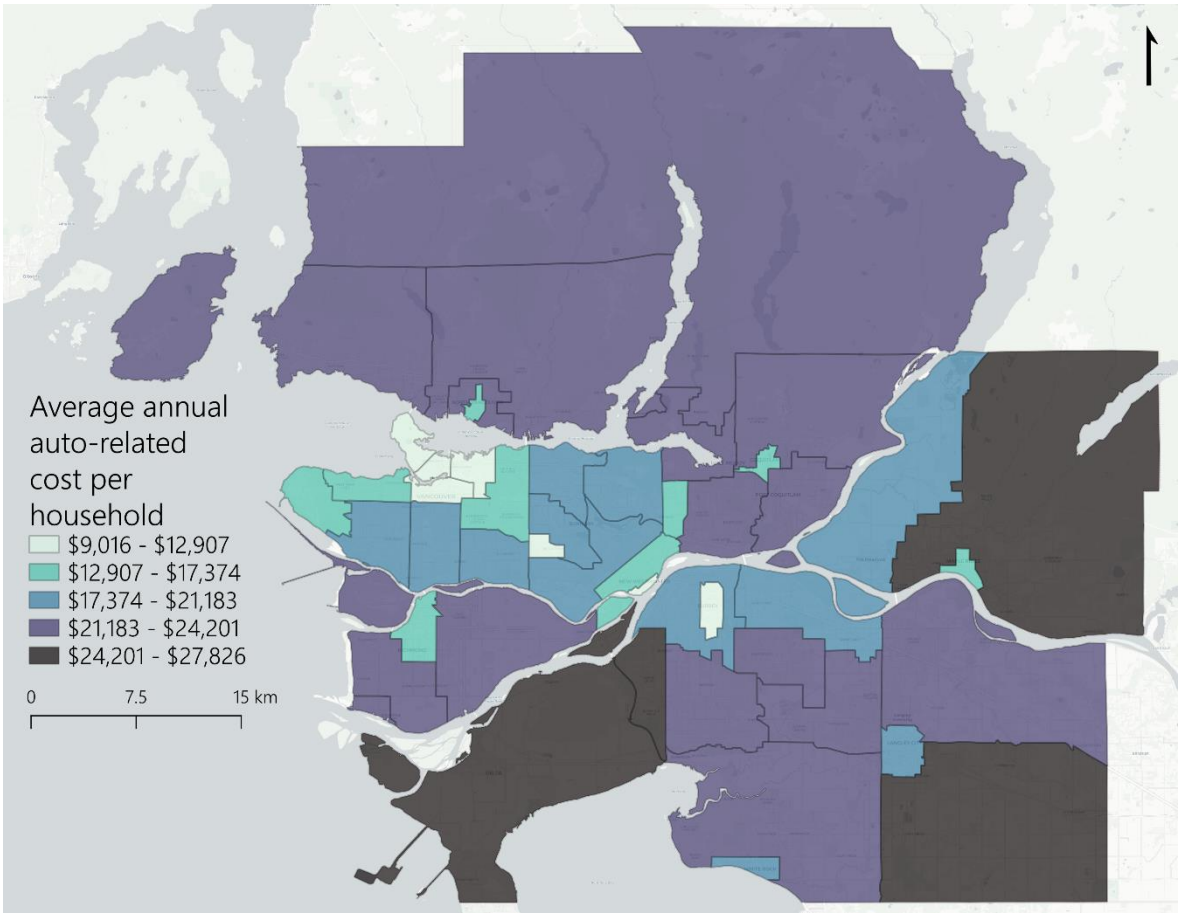
The estimated average annual household auto costs by subarea are shown in Figure 3.3 and Figure 3.4.

Figure 3.3: Average annual household auto costs by subarea



Note: Metro Vancouver indicates the average across the region; this value is slightly different from the value in the municipalities graph due to the household weighting process.

Figure 3.4: Map of average annual household auto costs by subarea



This analysis of average annual household auto costs by subarea shows the same general patterns as the analysis by municipality described above. However, the analysis by subarea reveals that there are noticeable differences between different subareas within a given municipality. In general, where then are subareas that are denser and more well-connected by transit, then these tend to have lower costs compared to other less dense subareas within the same municipality. This is most notable with costs in New Westminster RCC being lower than New Westminster (ex. RCC), Surrey Metro Centre being lower than other subareas in Surrey, or Metrotown RCC being lower than all other subareas in Burnaby. Apart from these, the central subareas of Vancouver (CBD - West End 1, CBD - False Creek 2 and Vancouver Broadway 3) are among the subareas with the lowest costs.

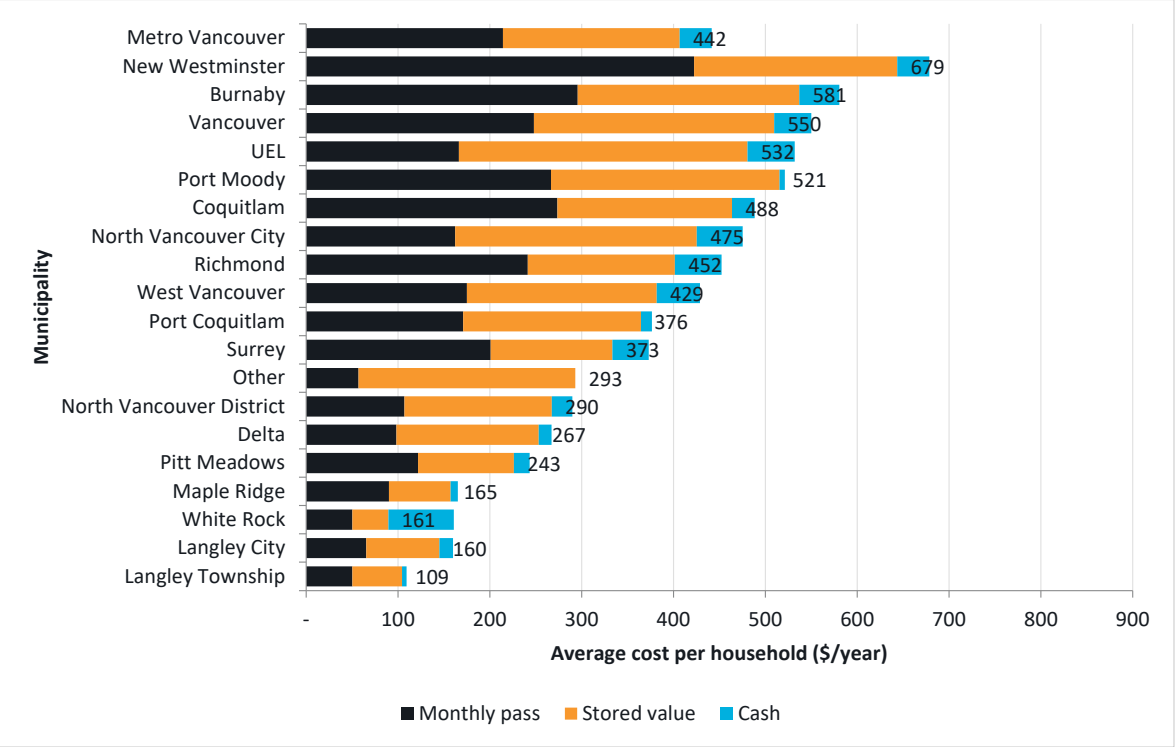
Annual transit-related costs

Annual transit costs combine data on people using monthly passes, stored value and cash. The results are summarised in the following section.

Transit-related costs by municipality

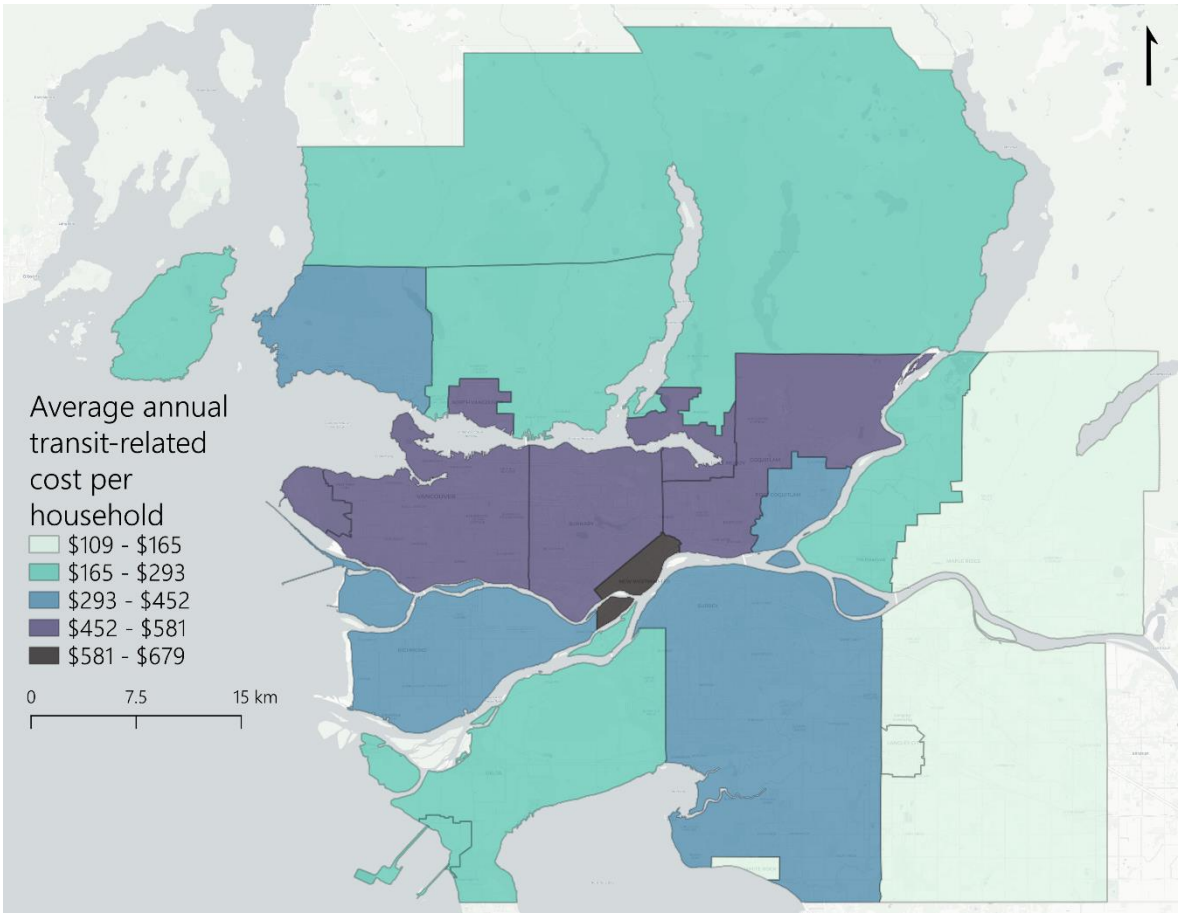
The estimated average annual household transit costs by municipality are shown in Figure 3.5 and Figure 3.6.

Figure 3.5: Average annual household transit costs by municipality



Note: Metro Vancouver indicates the average across the region.

Figure 3.6: Map of average annual household transit costs by municipality



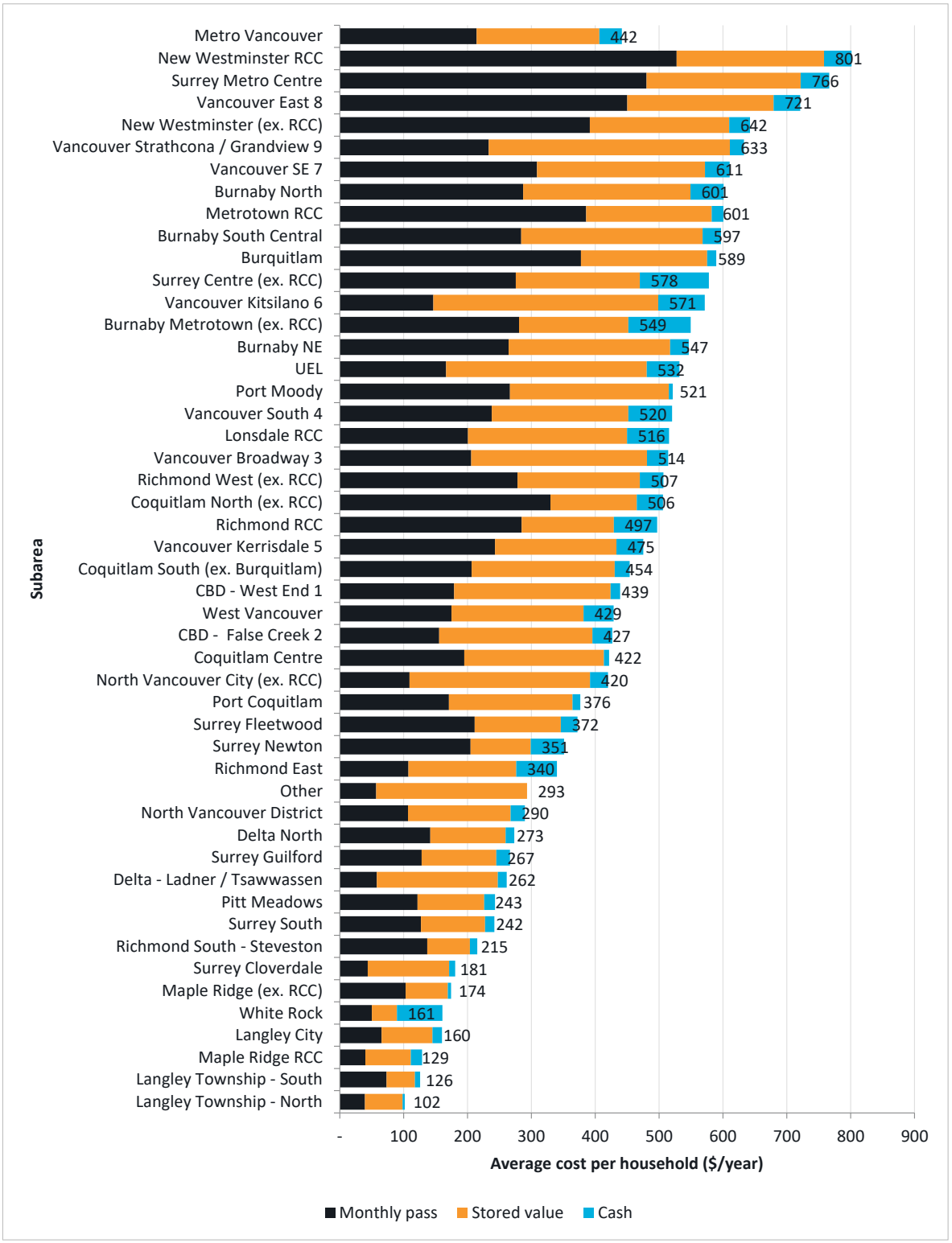
The geographic variation in average annual household transit costs by municipality is influenced by a combination of the availability and usage of transit in each municipality. In general, the highest costs are found in central, urban municipalities, with the top three being New Westminster, Burnaby and Vancouver. The lowest transit costs are found in more suburban areas, which could reflect more occasional use of transit by transit-using households in these municipalities.

Both at the Metro Vancouver level, and for almost all municipalities, the payment types with the highest amount by far are monthly passes and stored value, with a much lower amount paid for by cash. The exception to this is White Rock where cash is the payment type with the highest amount, although this is likely due to a low sample size in this municipality.

Transit-related costs by subarea

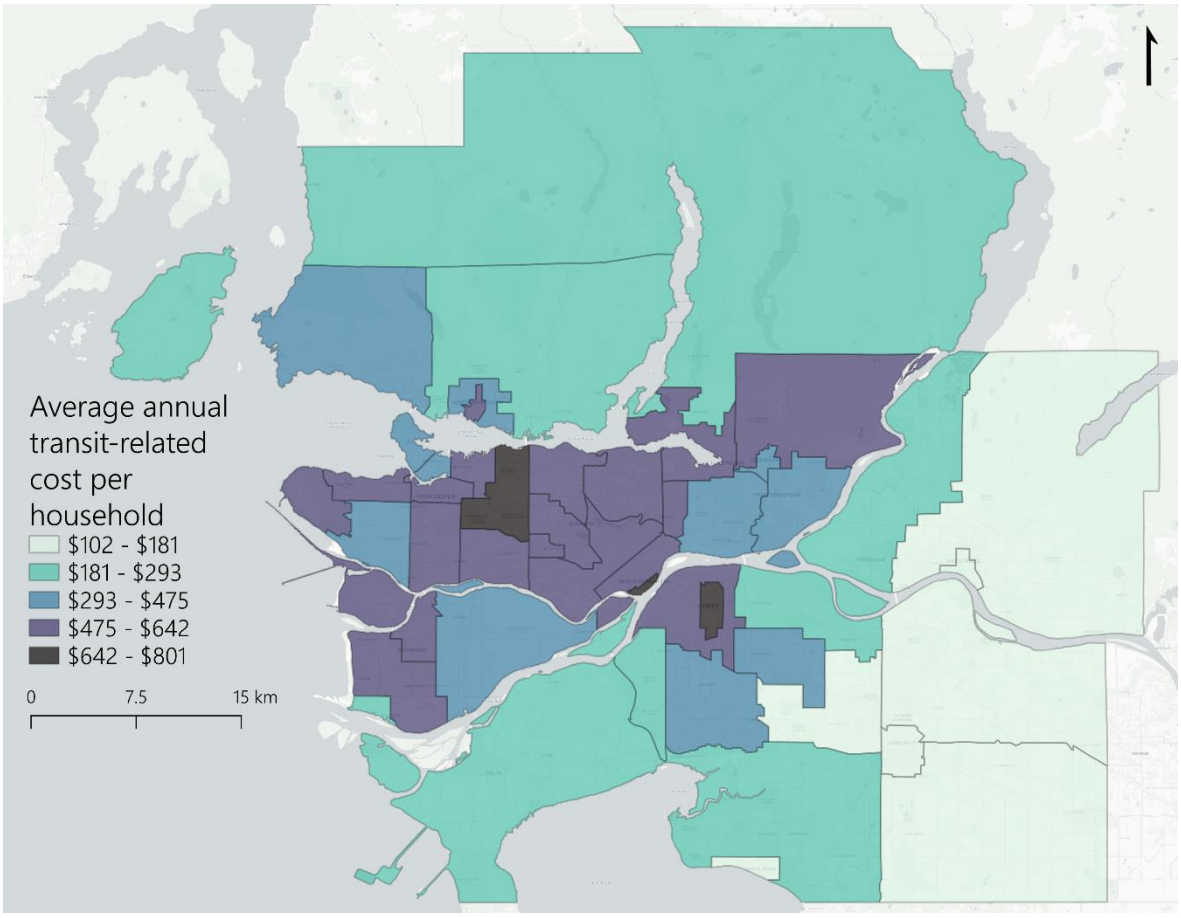
The estimated average annual household transit costs by subarea are shown in Figure 3.7 and Figure 3.8.

Figure 3.7: Average annual household transit costs by subarea



Note: Metro Vancouver indicates the average across the region.

Figure 3.8: Map of average annual household transit costs by subarea



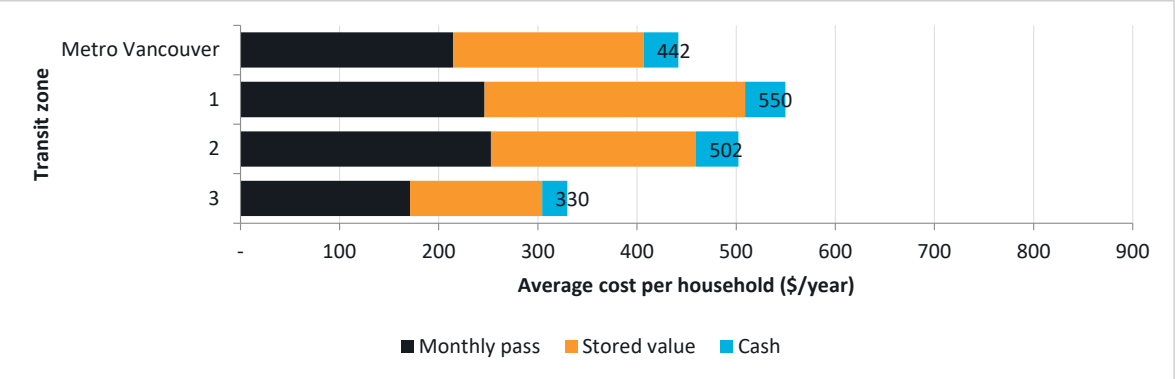
This subarea analysis gives more insight into variations in average annual household transit costs within municipalities. As with auto costs, the analysis by subarea reveals that there are noticeable differences between different subareas within a given municipality, but with the opposite pattern. In general, where there are subareas that are denser and more well-connected by transit, then these tend to have higher transit costs compared to other less dense subareas within the same municipality. This is most notable with transit costs in New Westminster RCC being higher than New Westminster (ex. RCC) and Surrey Metro Centre being higher than other subareas in Surrey. Metrotown RCC has higher transit costs than all other subareas in Burnaby except for Burnaby North.

However, the subareas within Vancouver show a different pattern, with the most central subareas of Vancouver (CBD - West End 1 and CBD - False Creek 2) showing the lowest transit costs; this may be due to their central location making travel by active modes possible for more trips. When examining all of the subareas, the lowest transit costs are again found in more suburban areas, which could reflect more occasional use of transit by transit-using households in these municipalities.

Transit-related costs by transit fare zone

The estimated average annual household transit costs by transit zone are shown in Figure 3.9.

Figure 3.9: Average annual household transit costs by transit fare zone



Note: Metro Vancouver indicates the average across the region.

Average annual household transit costs are highest in Zone 1 and slightly lower in Zone 2, while being noticeably lower in Zone 3. Zone 1 is mostly made up of Vancouver, and therefore reflects the transit costs for this municipality. Zone 2 contains many of the municipalities with the highest transit costs, reflecting the availability and usage of transit in them. Zone 3 includes many municipalities that are more suburban, and that generally have less access to transit.

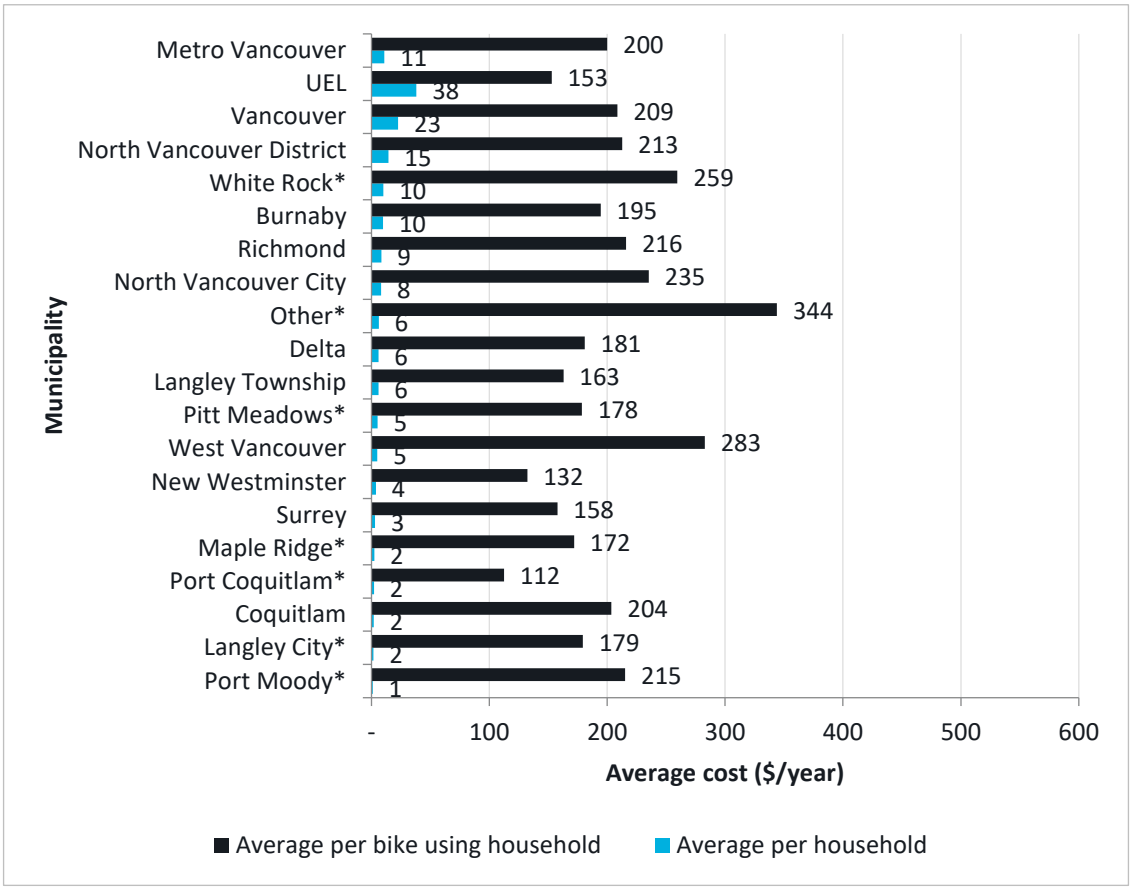
Annual cycle-related costs

Cycle-related costs were estimated based on a combined per kilometre cost.

Cycle-related costs by municipality

The estimated average annual household cycle-related costs by municipality are shown in Figure 3.10. These are shown for both the average annual cost for all households (for comparability with other modes), as well as the average annual cost per bike-using household (given that the values for all households are extremely low). It should be noted that the sample sizes for some municipalities (indicated with a star) were less than ten, which means that the costs for them should be treated with caution.

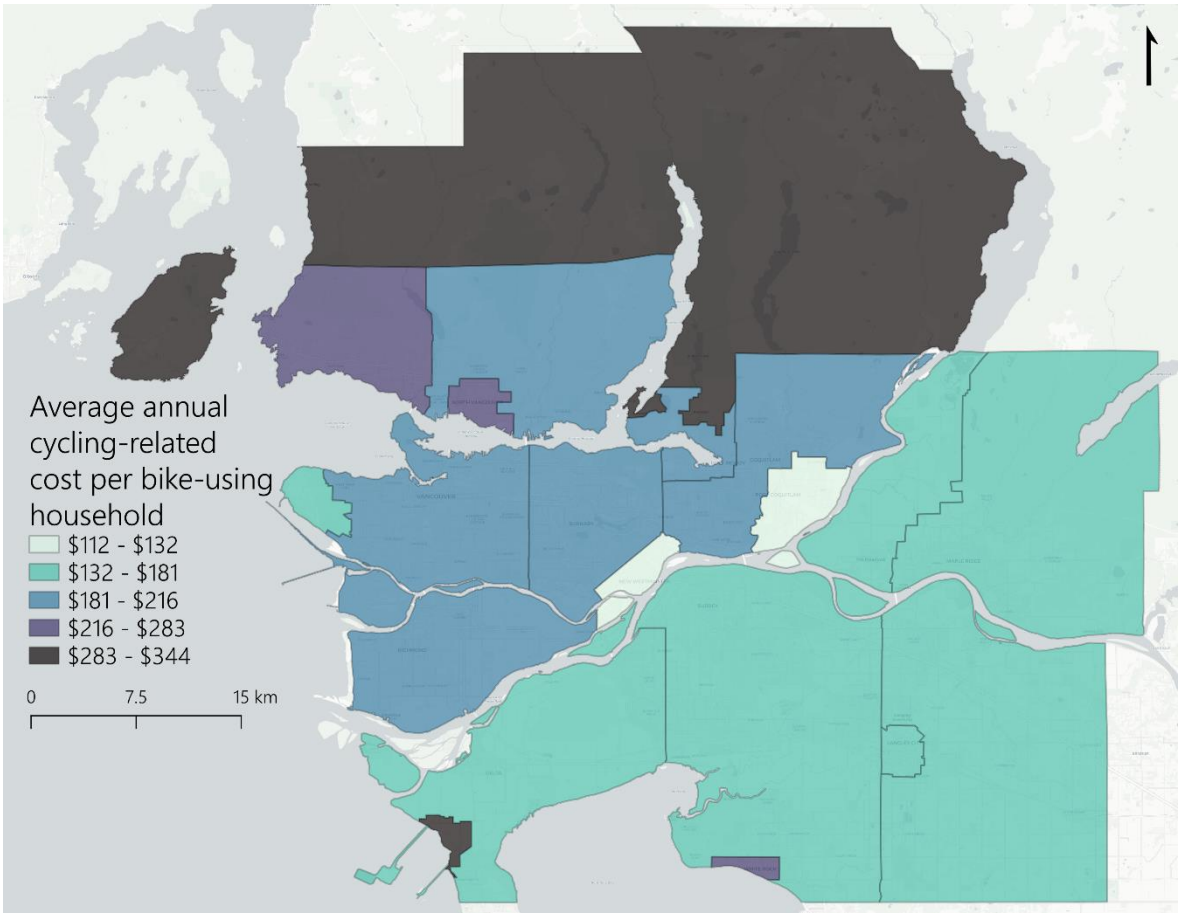
Figure 3.10: Average annual household cycle-related costs by municipality



Note: Metro Vancouver indicates the average across the region; this value is slightly different from the value in the subareas graph due to the household weighting process. * denotes a geography with a sample size <10.

The estimated average annual household cycle-related costs by municipality for bike-using households are illustrated in Figure 3.11.

Figure 3.11: Map of average annual household cycle-related costs by municipality

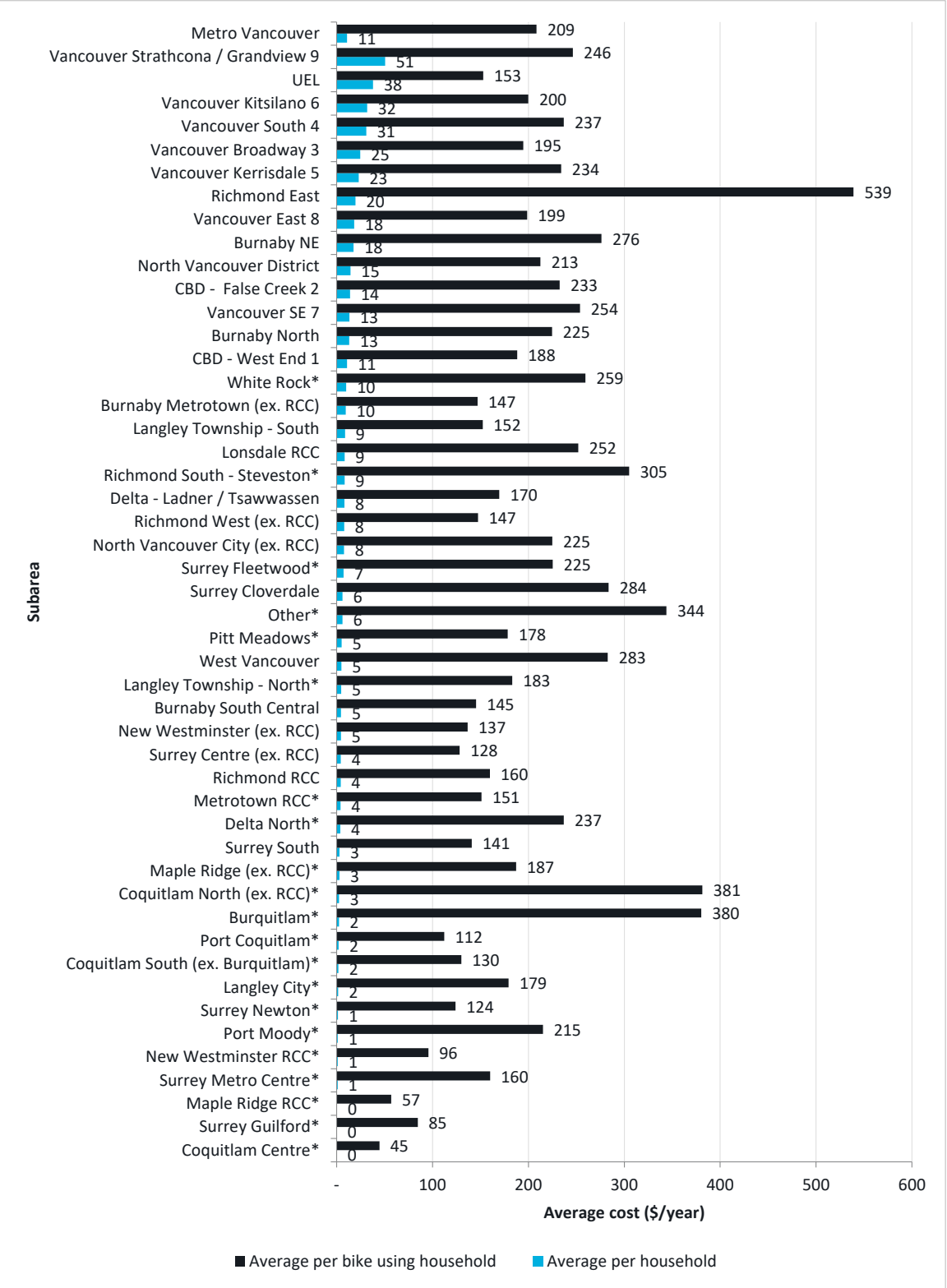


Although there are some variations, when considering all households, average annual household cycle-related costs are generally highest in Vancouver and UEL. This could be because there are more households that use cycling as a form of transport, given that distances to many key destinations (such as downtown Vancouver or UBC) are more likely to be within cycling distance, and also given the presence of a denser network of cycling infrastructure. The municipalities with the lowest cycling-related costs are generally more suburban. In general there is less variability in the relative range of cycling-costs when only considering bike-using households, with some of the outlying values likely to be caused by lower sample sizes.

Cycle-related costs by subarea

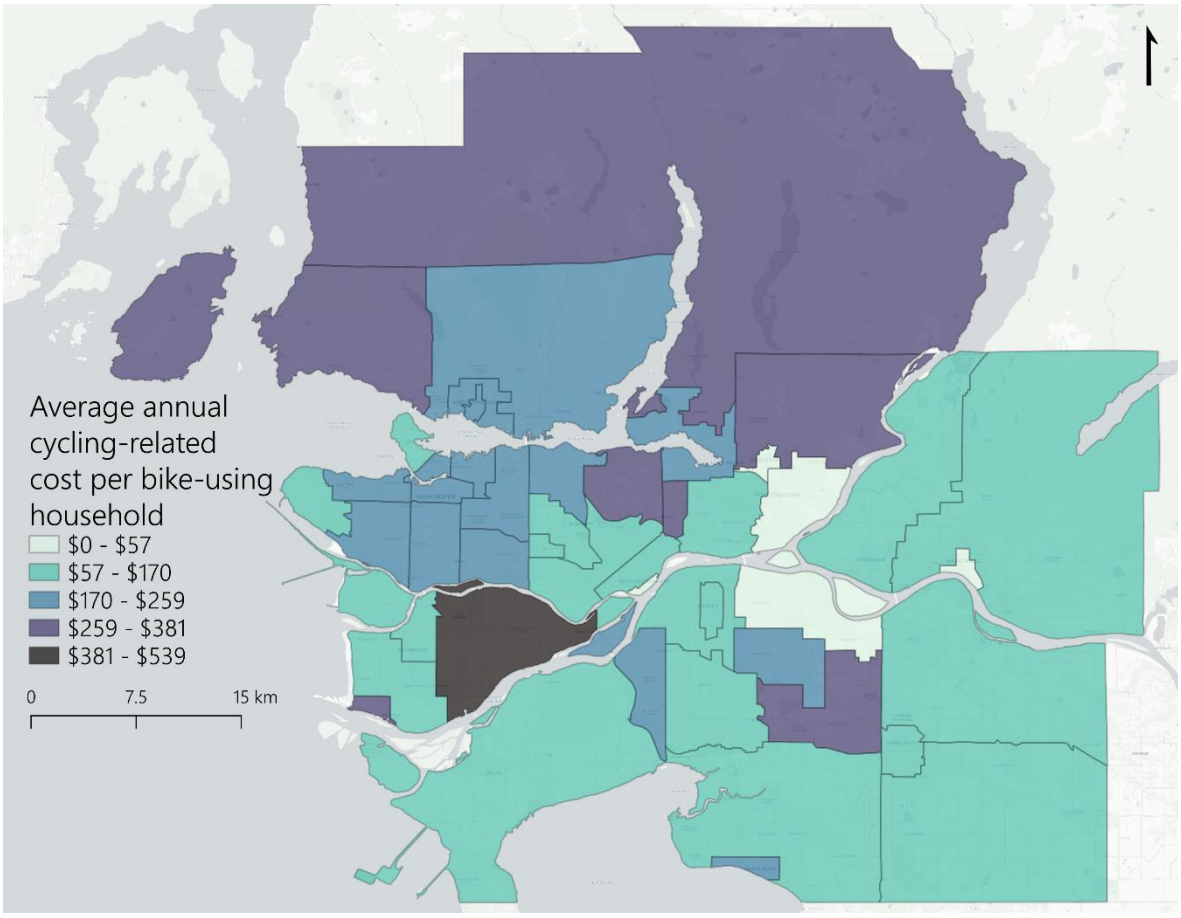
The estimated average annual household cycle-related costs by subarea are shown in Figure 3.12 and Figure 3.12. It should be noted that the sample sizes for many of the subareas (indicated with a star) were less than ten, which means that the costs for them should be treated with caution.

Figure 3.12: Average annual household cycle-related costs by subarea



Note: Metro Vancouver indicates the average across the region; this value is slightly different from the value in the municipalities graph due to the household weighting process. * denotes a geography with a sample size <10.

Figure 3.13: Map of average annual household cycle-related costs by subarea



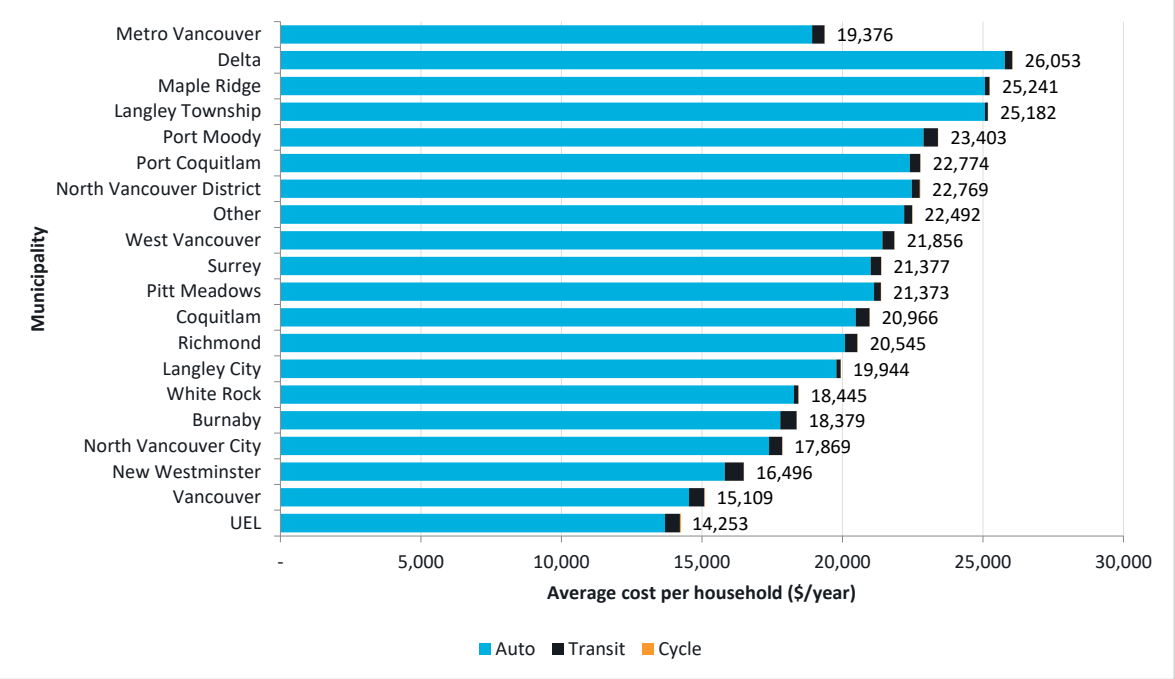
The overall variability in average annual household cycle-related costs across subareas appears to be similar to the data by municipality, although there is more variability. One notable finding is that when looking at all households in the Vancouver subareas, it tends to be the ring of subareas around downtown Vancouver that have the highest cycle-related costs, with those in the two most central subareas (CBD – West End 1 and CBD – False Creek 2) having lower cycle-related costs. However, these results should be interpreted with caution, due to low sample sizes in many of the subareas.

Combined transportation costs

Combined transportation costs by municipality

The estimated average annual household combined transportation costs by municipality by municipality are shown in Figure 3.14.

Figure 3.14: Average annual household combined transportation costs by municipality



Note: Metro Vancouver indicates the average across the region; this value is slightly different from the value in the subareas graph due to the household weighting process.

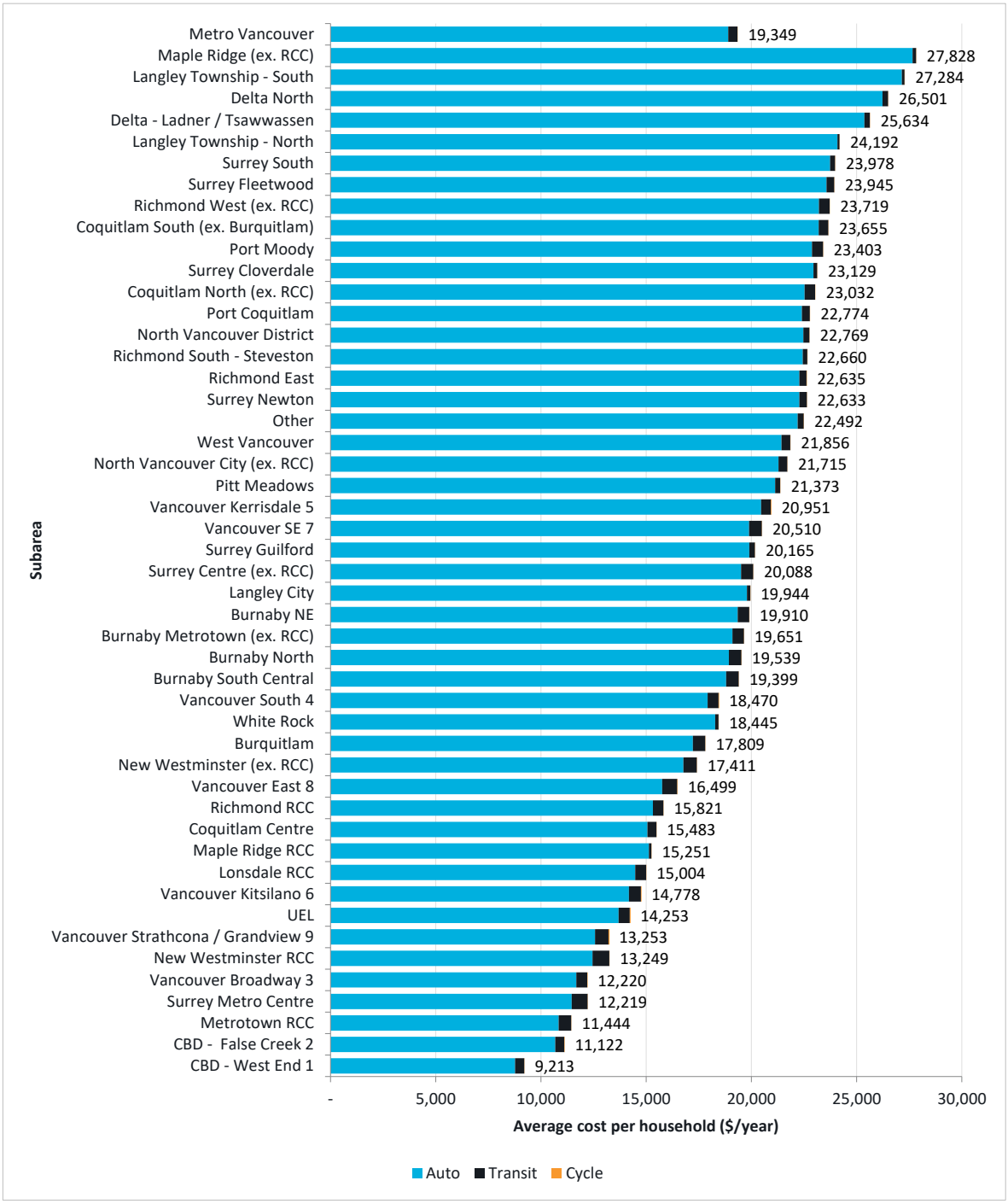
The overall pattern for average annual household combined transportation costs by municipality aligns with that for auto costs. This is not surprising, given that auto costs make up by far the largest proportion of combined transportation costs.

Across Metro Vancouver, auto costs make up 97.7% of combined transportation costs, with this figure varying from a low of 95.9% in New Westminster, to a maximum of 99.5% in Langley Township. Transit costs are the next largest component, forming 2.3% of combined transportation costs across Metro Vancouver, varying from a low of 0.4% in Langley Township, to a high of 4.1% in New Westminster. Cycling-related costs are almost negligible in comparison, forming 0.1% of combined transportation costs across Metro Vancouver. As such, the main interplay that can be observed is the proportion of combined transportation costs that are made up of auto costs vs transit costs, with more suburban municipalities that have lower level of transit access generally seeing the highest proportion of auto costs.

Combined transportation costs by subarea

The estimated average annual household combined transportation costs by subarea are shown in Figure 3.15.

Figure 3.15: Average annual household combined transportation costs by subarea



Note: Metro Vancouver indicates the average across the region; this value is slightly different from the value in the municipalities graph due to the household weighting process.

Again, the overall pattern for average annual household combined transportation costs by subarea aligns with that for auto costs, given that auto costs are by far the largest component. When examining the proportion of auto costs vs transit costs, a similar pattern emerges as for municipalities, with more nuance. For example, there are subareas in Surrey with among the highest proportion of transit costs, with Surrey Metro Centre (6.3%) having the highest proportion, and Metrotown RCC (5.2%) having the third highest proportion. As such, the subarea analysis highlights that for subareas that have better transit access, a greater proportion of combined transportation costs is made up of transit costs.

4 Results for target groups

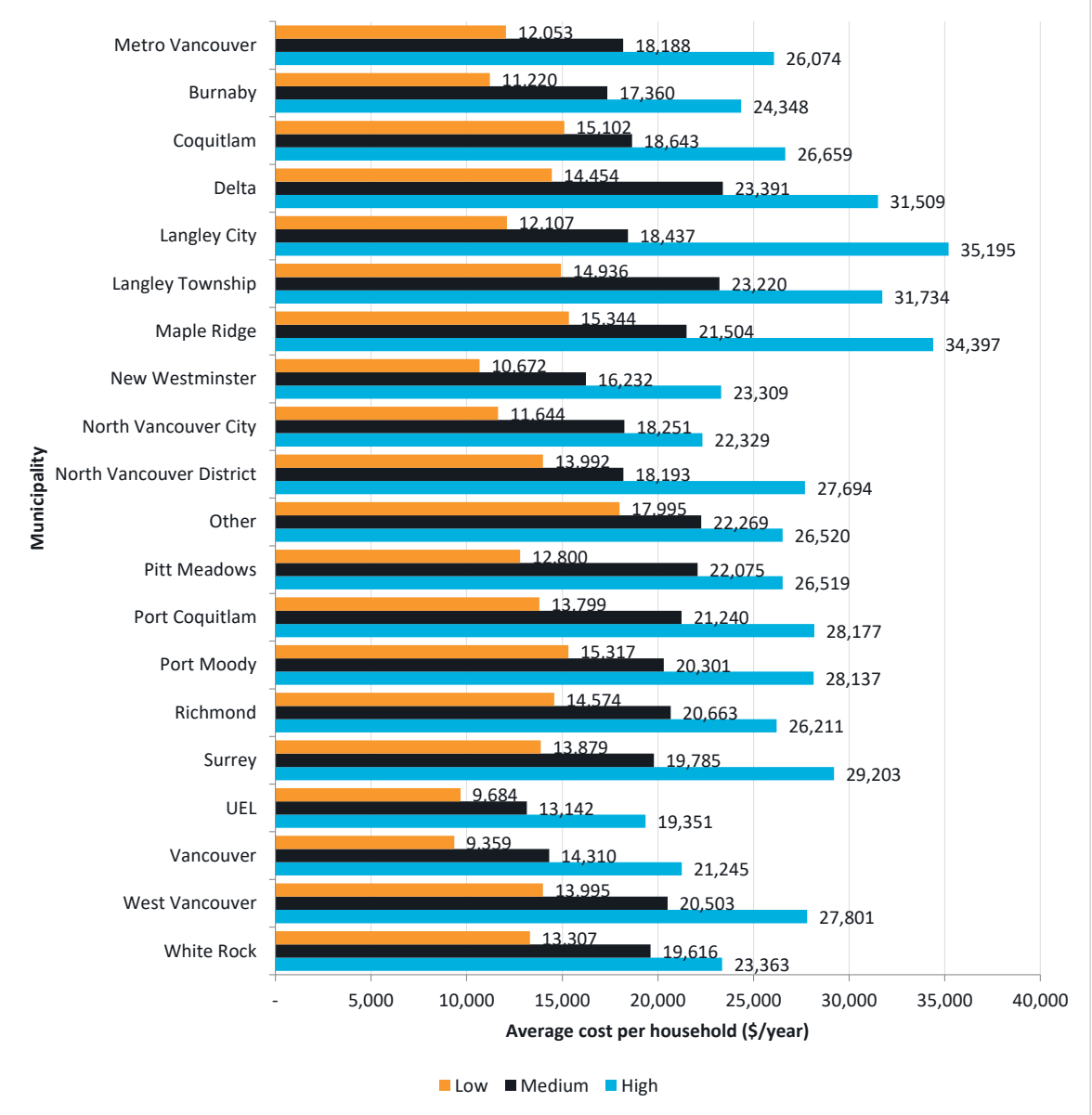
As transportation costs are a significant household expenditure, these costs can be quite impactful to households in Metro Vancouver. In order to contextualize these results in how these costs impact residents of the region differently, costs were segmented by key household characteristics. The selected characteristics of income, housing tenure and vehicle ownership were selected because they were coded in the 2017 Trip Diary data, and because these are all important factors that influence and are impacted by household transportation costs. The results are presented at the municipal level and reflect combined transportation costs.[1]

[1] Although results are available for auto, transit and cycle-related costs, and by subarea, presenting this data as average annual household combined transportation costs only at the municipal level helps mitigate increased margin of error due to variable sample sizes as data is further segmented.

Income

As transportation is a key household expense, it is important to look at transportation costs in relationship to income. Figure 4.1 shows average annual household combined transportation costs by municipality and income level[2].

Figure 4.1: Average annual household combined transportation costs by municipality and income level



Note: Metro Vancouver indicates the average across the region. Households that did not provide their household income are not included.

[2] Three income categories were used based on annual household income: low is less then $50,000; medium is $50,000 to less than $100,000; high is $100,000 or more.

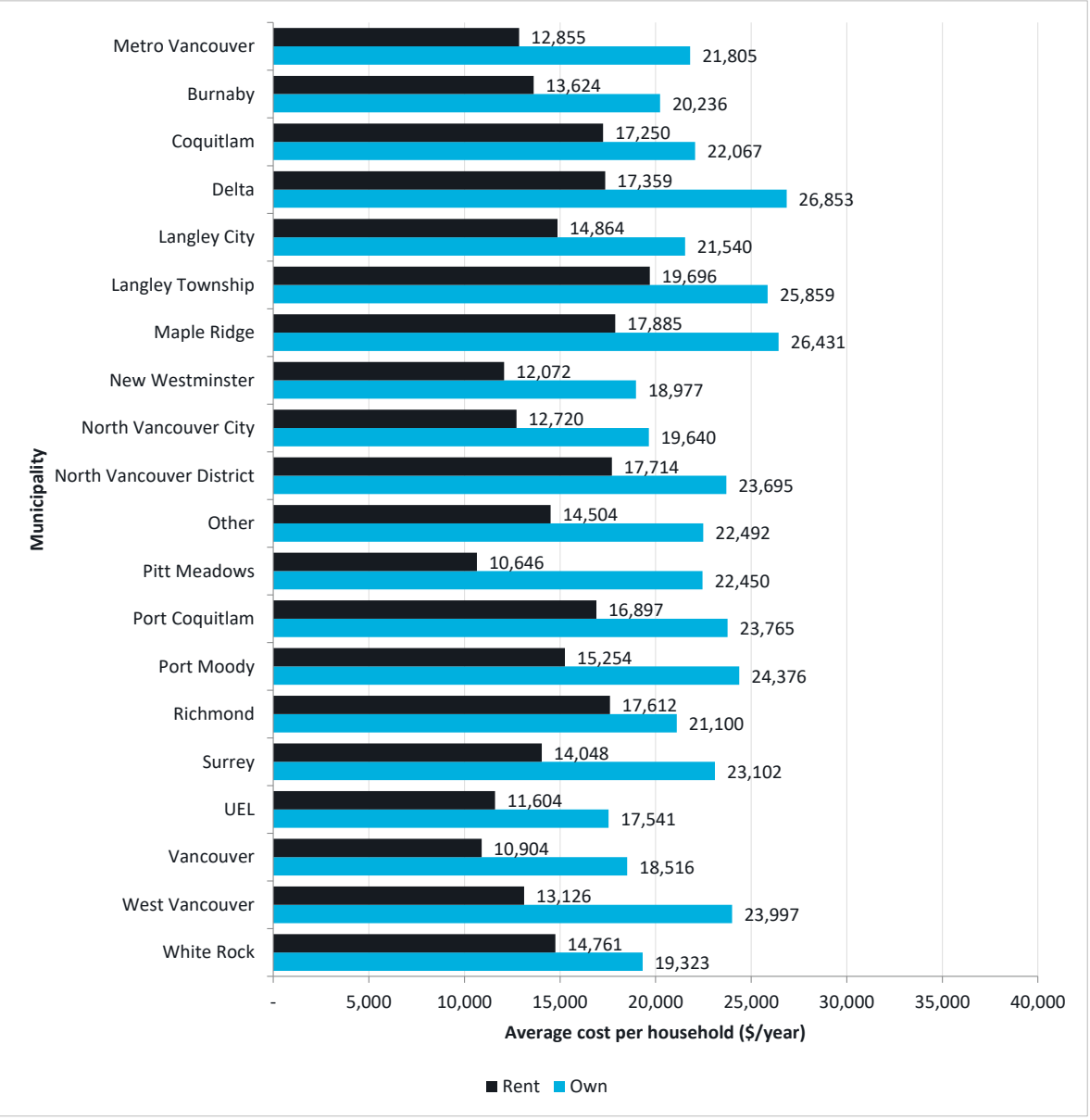
Average annual household combined transportation costs are highest for high-income households and the lowest for low-income households, reflecting that lower income households are less likely to own vehicles. For example, according to the 2017 Trip Diary data, for high-income households, 66% owned two or more vehicles, with only 4% not owning a vehicle. Conversely, for low-income households, 27% do not own a vehicle, with only 11% owning two or more vehicles. What this analysis does not capture is the proportion of income allocated for transportation costs by income level. While high-income households spend more on combined transportation costs, they may be spending less of their annual household income proportionally than lower income households. However, with the data available from the 2017 Trip Diary, it is not possible to calculate this proportion, given that household income was only reported in ranges.

Another interesting finding is that the difference between the combined transportation costs by low-income households and high-income households varies in size between different municipalities. For example, high-income households in Vancouver and UEL spend about the same or slight less on combined transportation costs than medium-income households in many other municipalities.

Tenure

There are interdependencies between housing and transportation costs; rental housing may be more prevalent in areas that have a correlation with the presence of various transportation alternatives. Figure 4.2 shows average annual household combined transportation costs by municipality and housing tenure.

Figure 4.2: Average annual household combined transportation costs by municipality and housing tenure



Note: Metro Vancouver indicates the average across the region. Households that did not answer this question or answers 'other' are not included.

Across all municipalities, average annual household combined transportation costs are higher for owner householders than renter householders. This is not surprising, given that homeowners

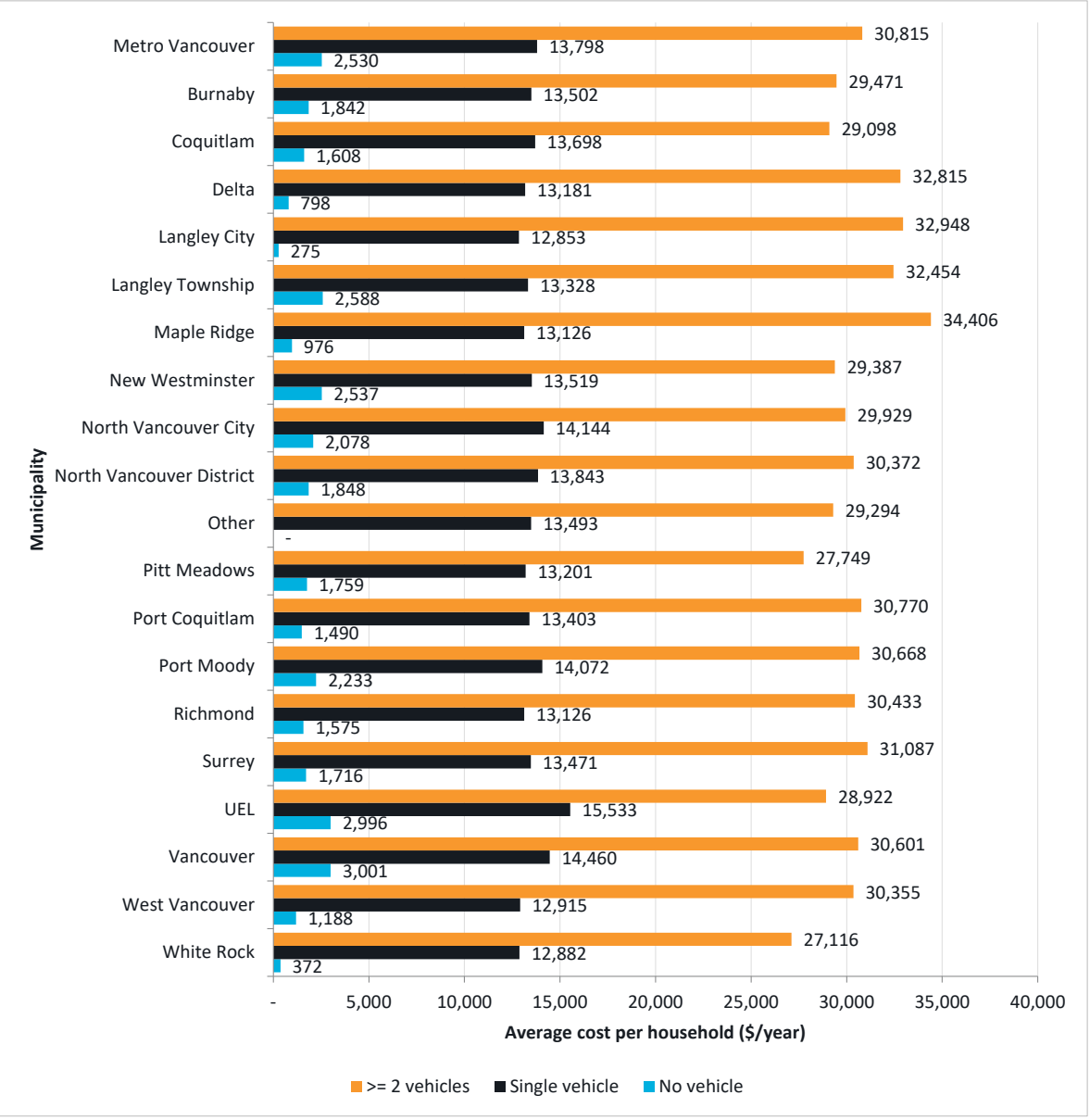
generally have higher car ownership than renters. For renter households across Metro Vancouver, the 2017 Trip Diary data indicates that 32% do not own a vehicle, with only 16% owning two or more vehicles. Conversely, for owner households, only 6% do not own a vehicle, with 51% owning two or more vehicles. Similarly, owner households are also more likely to have higher household incomes compared to renter households. According to the 2017 Trip Diary data, 41% of owner households across Metro Vancouver are high-income, with 21% being low-income. Conversely, for renter households 18% are high-income, with 47% being low-income.

There is wide variation in combined transportation costs by municipality, with costs for owner households in some municipalities being lower than or similar to costs for renter households in other municipalities. This is likely to reflect the greater range of transportation options in the former, with residents of the latter being more likely to have higher auto costs.

Vehicle ownership

As auto costs account for such a high proportion of average annual household combined transportation costs in Metro Vancouver, the number of vehicles owned per household is a significant driver of combined transportation costs. Estimated average annual household combined transportation costs by municipality and vehicle ownership are shown in Figure 4.3.

Figure 4.3: Average annual household combined transportation costs by municipality and vehicle ownership



Note: Metro Vancouver indicates the average across the region. Some of the value for 'no vehicle' for individual municipalities are affected by small sample sizes.

Combined transportation costs are significantly impacted by the number of vehicles in a household. Across Metro Vancouver, households with one vehicle spend greater than $10,000

more per year on annual combined transportation costs than those with no vehicle. In turn, households with two or more vehicles spend more than double on combined transportation costs compared to those with one vehicle.

This is generally consistent across all municipalities, although the combined transportation costs for households with no vehicle in individual municipalities need to be treated with caution due to low sample sizes. Notwithstanding this, a key finding is that the number of vehicles owned by a household has a very strong influence on that household's combined transportation costs.

5 Overall findings

Although more meaningful insights are likely to emerge once the transportation cost estimates in this report have been combined with the housing cost estimates that will be prepared separately, there are still a number of useful findings that have emerged. These include:

- Auto costs are by far biggest component of household transportation costs. These costs vary greatly across Metro Vancouver, generally being the lowest for municipalities closer to the core of the region that may have better access to non-car transportation options, and being highest for more peripheral municipalities.
- In addition to varying between municipalities, auto costs also vary noticeably between subareas within individual municipalities. Again, it generally appears that auto costs are lower in areas with better access to transit and active transportation infrastructure.
- Combined transportation costs are almost entirely driven by auto costs, which means that geographic variations in combined transportation costs largely follow the same patterns as for auto costs.
- Vehicle ownership has a very strong relationship with combined transportation costs. In all municipalities, households with more than two vehicles spend much more on transportation than households owning a single vehicle, with households not owning a vehicle spending very little in comparison.
- Annual household income levels show a strong relationship with combined transportation costs in all municipalities, with high-income households spending a larger amount on transportation than low-income households. However, geography also appears to play a key role, with high-income households in some municipalities (such as Vancouver and UEL) spending less or a similar amount on combined transportation costs than medium-income households in other municipalities. This appears to be driven by high-income households being much more likely to own a greater number of vehicles compared to low-income households.
- In all municipalities, owner households spend more on combined transportation costs than renter households. However, geographic factors also play a role, with homeowners in some municipalities spending around the same on transportation as renters in other municipalities. Again, this appears to be driven by owner households being more likely to own a greater number of vehicles, compared to renter households.

However, it is also important to keep in mind the limitations of this analysis. Further details are included in Appendix A, but some key limitations include:

- This study was undertaken using available data, primarily the 2017 Trip Diary conducted by TransLink. The key limitations of this data source are that it was undertaken before the COVID-19 pandemic, and also its limited sample size.

- Given that the available data sources did not directly observe how much households spend on transportation each year, a range of assumptions were necessary to convert the surveyed trip making behaviour to annual transportation costs.
- There may be confounding factors that this study has not been able to consider. For example, household size and household composition are factors that could also influence transportation costs, but it was not possible to take them into account for this study.

It is difficult to compare the results in this report to the previous 2015 study, as that study reported on transportation costs for working households, rather than all households. The 2015 study reported that average annual household combined transportation costs for these households was approximately $12,300, while this study has found that the same figure for all households is approximately $19,300. This difference may be due to a combination of inflation and methodological differences.

For future studies on transportation costs, it is recommended that further work on integrating additional and more up to date data sources be undertaken. For example, applying more sophisticated analytical techniques that could allow Trip Diary data to be combined with other data sources (such as census data) may yield more nuanced insights into the characteristics that drive variations in transportation costs, and how they vary at a more disaggregated spatial resolution. However, this is likely to be a much more resource intensive endeavour.

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From	Steer	
Date	13 March 2024	
Project	Transportation Cost Estimates for the Housing and Transportation Cost Burden Study Update	Project No. 24366001

Appendix A: Transportation Cost Methodology Memo

Introduction

This memo outlines the methodology used for the 2022 Transportation Cost Estimates for the Housing and Transportation Cost Burden Study.

Overall approach

2017 Trip Diary

The main data source used for this study is the 2017 Trip Diary published by TransLink. The Regional Trip Diary is a survey of randomized households completed every five years to understand the travel patterns of households in Metro Vancouver and modes used to achieve their transportation needs. The types of data the 2017 Trip Diary presents includes the origins and destinations of Metro Vancouver survey respondents, the diversity of modes selected by the survey respondents, the average length of trip, and trip purposes.

The 2017 Trip Diary collected information on travel patterns on single fall weekdays for a sample of 28,000 households in the Lower Mainland. It compiles household data; person data; and trip data. As the survey primarily focuses on trip making behaviour, it was necessary to draw on various other data sources in order to use the trip data from the Trip Diary to estimate transportation costs. These are described further below.

Geographies

The results in this report are presented at three spatial scales, as defined by TransLink for the purpose of the 2017 Trip Diary:

- Metro Vancouver
- Municipality
- Subarea

A map of municipalities is included in Figure 1 below. Due to low sample sizes, certain municipalities were combined by TransLink, and coded as follows:

- UEL: Includes University Endowment Lands (UEL) and the University of British Columbia (UBC)
- Other: Includes Lions Bay, Electoral Area A North, Bowen Island, Belcarra, Anmore, and Tsawwassen First Nation

The data from the 2017 Trip Diary was also disaggregated by TransLink into subareas. Defined (and named) by TransLink, these are generally subdivisions of municipalities, with each municipality containing between one and nine subareas. A map of these subareas is included in Figure 2 below, and they are also listed in Table 1 below.

Figure 1: Municipalities as defined by TransLink for the purposes of the 2017 Trip Diary

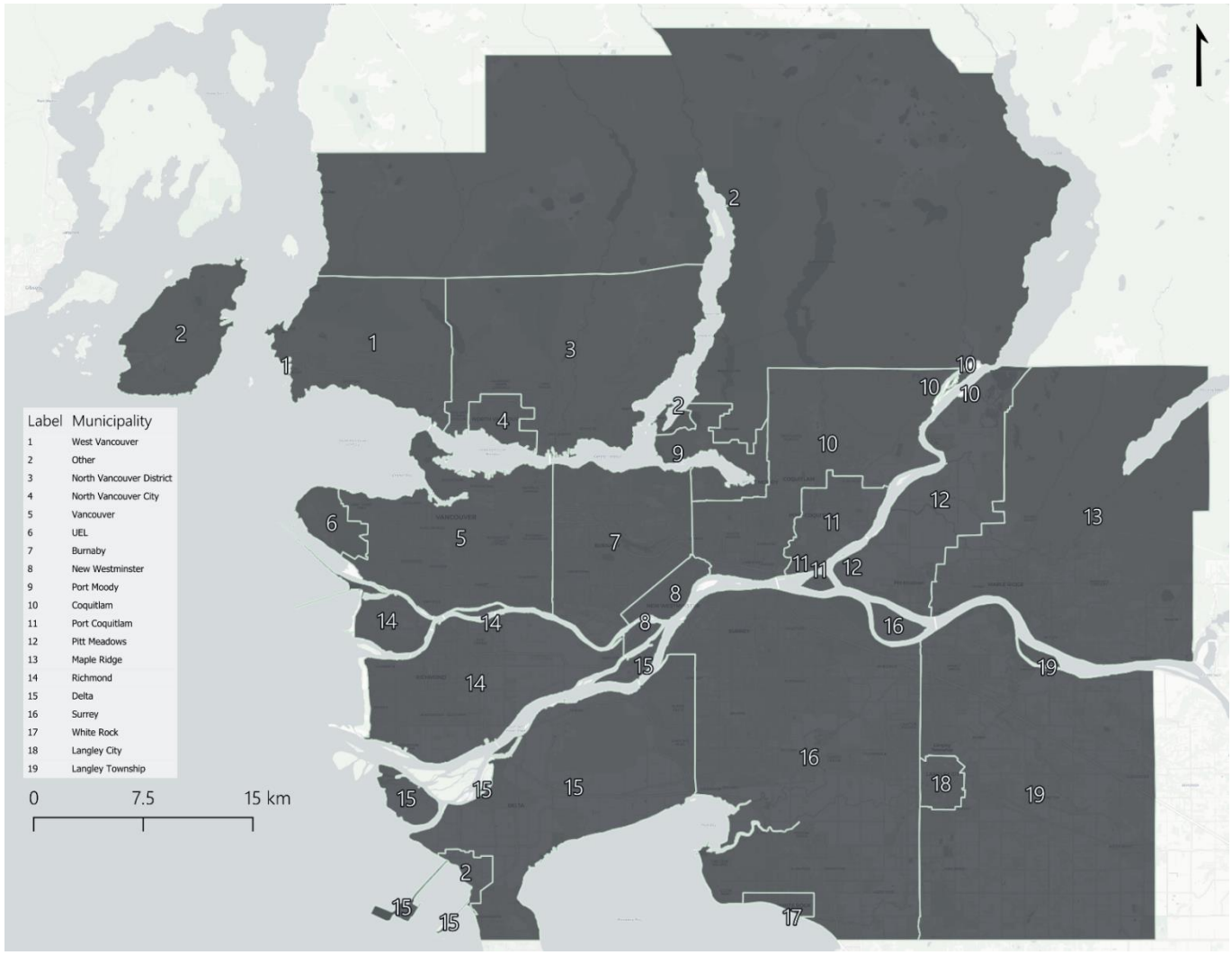

Figure 2: Subareas as defined by TransLink for the purposes of the 2017 Trip Diary

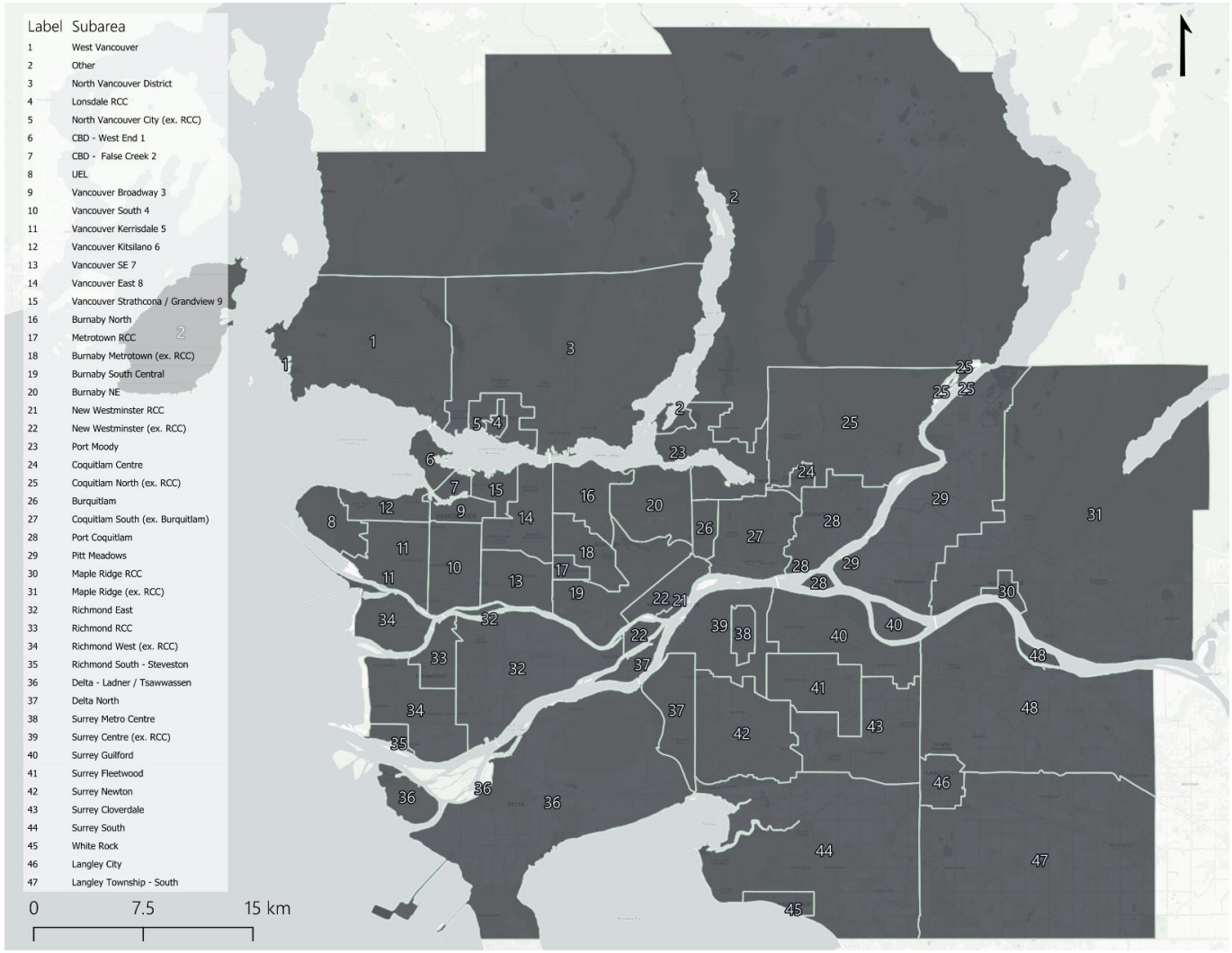

Table 1: List of municipalities and subareas

Municipality	Subarea
Burnaby	Burnaby North
	Metrotown RCC
	Burnaby Metrotown (ex. RCC)
	Burnaby South Central
	Burnaby NE
Coquitlam	Coquitlam Centre
	Coquitlam North (ex. RCC)
	Burquitlam
	Coquitlam South (ex. Burquitlam)
Delta	Delta - Ladner / Tsawwassen
	Delta North
Langley City	Langley City
Langley Township	Langley Township - South
	Langley Township - North
Maple Ridge	Maple Ridge RCC
	Maple Ridge (ex. RCC)
New Westminster	New Westminster RCC
	New Westminster (ex. RCC)
North Vancouver City	Lonsdale RCC
	North Vancouver City (ex. RCC)
North Vancouver District	North Vancouver District
Other	Other
Pitt Meadows	Pitt Meadows
Port Coquitlam	Port Coquitlam
Port Moody	Port Moody
Richmond	Richmond East
	Richmond RCC
	Richmond West (ex. RCC)
	Richmond South - Steveston

Municipality	Subarea
Surrey	Surrey Metro Centre
	Surrey Centre (ex. RCC)
	Surrey Guilford
	Surrey Fleetwood
	Surrey Newton
	Surrey Cloverdale
	Surrey South
UEL	UEL
Vancouver	CBD - West End 1
	CBD - False Creek 2
	Vancouver Broadway 3
	Vancouver South 4
	Vancouver Kerrisdale 5
	Vancouver Kitsilano 6
	Vancouver SE 7
	Vancouver East 8
	Vancouver Strathcona / Grandview 9
West Vancouver	West Vancouver
White Rock	White Rock

Other data sources

The Insurance Corporation of British Columbia (ICBC) collects and publishes data relating to the vehicle population using insurance registration information. This data helped inform vehicle ownership in the region and helped to make assumptions about average vehicle characteristics, which informs the fixed and variable car costs.

The Transportation Cost and Benefit Analysis II – Vehicle Costs is a report compiled and published by the Victoria Transport Policy Institute. The cost tool utilizes their data for cycle-related and taxi cost calculations.

Disaggregation by other factors

Costs were also segmented by key household characteristics, based on the available data in the 2017 Trip Diary data:

- Household income (annual)
  - Low: less then $50,000
  - Medium: $50,000 to less than $100,000
  - High: $100,000 or more
- Housing tenure:
  - Rent
  - Own

- Household vehicle ownership
    - No vehicle
    - Single vehicle
    - Two vehicles or more

These were selected as they are all important factors that influence and are impacted by household transportation costs. This segmented data is only presented at the municipal level (rather than also at the subarea level), to help mitigate increased margin of error due to variable sample sizes as data is further segmented.

Combined transportation cost components

Auto-related costs

Private auto costs

The cost of driving an automobile considers both fixed costs (e.g., insurance, license, registration fees, sales taxes, depreciation) as well as operating costs (e.g., fuel, maintenance, tire wear).

- The fixed cost per year of owning a car was calculated through the Canadian Automobile Association (CAA)'s Driving Cost Calculator, where total cost of ownership was summarized for each vehicle fuel type and municipality, and the resulting value was weighted against the ratio suggested by the ICBC vehicle population data. While the ICBC vehicle population data provided detailed accounts of the vehicle population in each municipality, several smaller municipalities were combined with larger neighbouring municipalities in the process to unifying the geographies.
- The operating cost per kilometre was also gathered through the CAA's Driving Cost Calculator, where the program summarizes all operating costs. As the Trip Diary provides information on the distance of each trip an individual makes to and from their home zone, the final costs were calculated through multiplying the distance with the operating cost per kilometre.

This method differs from the previous 2015 study by taking into account the different costs of gasoline, gas-hybrid and electric vehicles.

Fuel Type	Description
 Gasoline	The most prevalent gas vehicle in the Metro Vancouver area for 2021 is the Honda Civic LX, according to vehicle registrations provided by Insurance Corporation of British Columbia (ICBC). Using CAA's driving cost calculator, this car model was used to assign costs to gas vehicles in the region.
 Gas-Hybrid	The most prevalent gas-hybrid vehicle in the Metro Vancouver area for 2017-2021 is the 5 door Toyota Prius, according to vehicle registrations provided by ICBC. Using CAA's driving cost calculator, this car model was used to assign costs to hybrid vehicles in the region.
 Electric Vehicles	With EVs having substantially less operating cost as compared with gasoline powered cars, a different formula was considered to accurately estimate the cost. The most prevalent EV in the Metro Vancouver area for 2019, 2020, and 2021 is the Tesla Model 3, according to vehicle registrations provided by ICBC. Using CAA's driving cost calculator, this model was used to assign costs to EVs of the region. EV costs included a variable charging cost component which includes electricity rates and fuel economy in the calculation. This calculation method includes the assumption that all charging will happen at home. As the electricity rates are variable, based on usage, the typical driving distances of 10,000-20,000 miles per year for a car will result in having a portion of the electricity usage moved up to a more expensive rate. To account for the rate differences, we average the two threshold rates provided by BC Hydro.

The cost of parking is also included in private auto costs. TransLink's Regional Transportation Model (RTM) provides the estimation of parking costs in Metro Vancouver in the year 2022. The costs were then calculated with the trip destination and frequency recorded on the Trip Diary survey. However, as the data was stored in the Transportation Analysis Zones (TAZ), and the Trip Diary was summarized in subareas, the TAZ level data was expanded to match the subareas.

If an auto trip has an associated parking cost, the cost is multiplied by the expanded trips and an annualization factor, if applicable. This cost could be an hourly rate, cost per day, a monthly cost, or a yearly rate. If a respondent paid but did not remember the cost or if no cost was supplied, it was assumed that a two-hour parking rate was paid if the trip was for shopping/personal business or for a social, recreational, or dining purpose. If not, an eight-hour rate was used.

Car share costs

Car share cost estimates are based on each carshare company members' car share use assumptions made in a **Metro Vancouver SUMC study**, as well as the published costs for each car share company based on this usage. One time registration fees and refundable member share costs are not included in these calculations as the registration costs are minimal and member share fees are refundable. Since the 2017 Trip Diary survey includes data on the car share membership status of individuals, including the specific car share company they belong to, the cost estimates for car share members could be summarized through determining the number of members of each carshare company in each subarea and calculating the cost of each driving trip for members who do not own a car.

However, one major problem for this calculation is that many major carshare operators that were operating in 2017 are no longer in operation in 2022. Those include Zipcar and Car2go. While several carshare operators, including Evo and Modo, remain in operation between 2017 and 2022, their expanded presence in

Metro Vancouver is not captured in the survey and data regarding their membership across the region is unavailable.

Taxi costs

As the 2017 Trip Diary took place before ride hail services existed in Metro Vancouver, it only provides details on trips taken using a taxi. The Victoria Transport Policy Institute Report provides an estimate of costs per mile of using taxi services. This could therefore be combined with the 2017 Trip Diary data on the length and frequency of taxi trips, to estimate a cost for each trip.

Transit-related costs

The cost of public transit is estimated using 2017 Trip Diary data and data on 2022 TransLink fares. Transit costs were calculated for people using:

- Monthly passes
- Stored value
- Cash

These calculations have a number of assumptions that underpin them. There are outlined below.

- As the 2017 Trip Diary provides data on whether riders use a monthly pass, stored value or cash, the analysis assumes that the payment type used for all transit trips will be consistent throughout the year.
- Stored value and cash:
    - To assign fares to trips which either stored value or cash was used to pay, first the number of fare zones boundaries crossed during a trip is determined using a trip's origin and destination, and then the cost is assigned based on what time the trip occurred, whether the traveler is eligible for a concession based on their age, and how many fare zones were crossed. Concessions are given to travelers between 5 and 18 and those who are 65 and older, and trips taken after 6:30 pm are treated as though they crossed no fare zone boundaries and are 1-zone trips.
- Monthly pass:
    - Monthly pass costs are assigned based on the trip with maximum number of fare zones boundaries crossed for each survey respondent and the age of the respondent. For example, if the maximum number of fare zones crossed for a respondent was 2 and they are not eligible for a concession, it would be assumed that the respondent bought a 2-zone monthly pass at regular price.
- In addition to the conventional transit service, TransLink also operates a regional commuter rail service (West Coast Express) with an independent fare system. A separate fare calculation was applied to this transit mode.

Cycle-related costs

Based on data from the Victoria Transport Policy Institute, the per kilometre cost for cycling was found to be $0.08, and this value was multiplied by the total length of cycling trips that was recorded by the 2017 Trip Diary to understand the cost per trip.

Cost assumption summary

Mode	Fixed Costs	Variable Costs	
Public Transit *All trips taken after 6:30 pm paid either with cash or store value are a 1-Zone fare	Monthly Pass: $102.55 (1-Zone)* $137.10 (2-Zone) $185.20 (3-Zone) Concession: $58.60 (All)	Stored Value: $2.50 (1-Zone) * $3.65 (2-Zone) $4.70 (3-Zone) Concession: $2.05 (1 to 2-Zone) $4.15 (3-Zone)	Cash: $3.10 (1-Zone)* $4.45 (2-Zone) $6.06 (3-Zone) Concession: $2.05 (1-Zone) $3.05 (2-Zone) $4.15 (3-Zone)
West Coast Express	Monthly Pass: $166.15 (1 to 2-Zone) $217.70 (3-Zone) $262.65 (4-Zone) $358.70 (5-Zone) Concession: $101.55 (1 to 2-Zone) $134.45 (3-Zone) $165.60 (4-Zone) $231.55 (5-Zone)	Stored Value: $5.10 (1 to 2-Zone) $6.65 (3-Zone) $8.15 (4-Zone) $11.00 (5-Zone) Concession: $3.05 (1 to 2-Zone) $3.95 (3-Zone) $5.00 (4-Zone) $6.75r (5-Zone)	Cash: $6.05 (1 to 2-Zone) $7.85 (3-Zone) $9.65 (4-Zone) $13.10 (5-Zone) Concession: $3.65 (1 to 2-Zone) $4.65 (3-Zone) $6.00 (4-Zone) $8.00 (5-Zone)
Driving	Gasoline Car: $11,829.70/year Hybrid Car: $13,253.98/year Electric Car: $19,580.68/year	Gasoline: • Fuel Economy: 0.0681 L/KM • Fuel Cost: $1.809/L Hybrid: • Fuel Economy: 0.0447 L/KM • Fuel Cost: $1.809/L Electric: • Fuel Economy: 0.1740 kWh/KM • Fuel Cost: $ 0.1179/kWh	
Car share		Modo, Evo, and Car2Go: $7.90/day Zipcar: $12.40/day	
Parking		Parking costs varied by zone, with ranges for the following rates being: Two Hour Rate: Free - $16.18 Eight Hour Rate: Free - $13.95	
Taxi and Ridehailing		$3/km	
Biking		$0.08/km	

Annualization factors

As the 2017 Trip Diary relates to a typical weekday, estimating annual transportation costs requires an annualization factor to be applied. During the COVID-19 pandemic, many workplaces and educational institutions moved away from in-person attendance, and some of this change persists to today. As a result, the pre-pandemic travel patterns and habits may no longer apply in the current times. The Brookings Papers on Economic Activity conducted research on working from home patterns around the world and found that the average working from home days per week in British Columbia is at 2.02 (observed during late January to early February 2022).

In addition to new working from home patterns, the days where people are on holiday and took sick leave also need to be accounted for to formulate an appropriate annualization factor. Statistics Canada data on annual work absence in Canada in 2022 (excluding annual leave) presented that 16.7 days are lost per worker in the public sector and 10.9 days are lost per worker in the private sector. As a result, the average of both values, as well as the addition of annual leave and 10 statutory holidays, were removed from the assumed annual commuting days.

With these considerations, the following annualization factors were applied: 135 days for work-only trips, full time, 250 days for school-related trips, and 300 days for all remaining trips.

Limitations

There are several limitations of the study, and across all data sources, that should be acknowledged:

- This study was undertaken using available data, primarily the 2017 Trip Diary conducted by TransLink. The key limitations of this data source are that it was undertaken before the COVID-19 pandemic, and also its limited sample size.
- Given that the available data sources did not directly observe how much households spend on transportation each year, a range of assumptions were necessary to convert the surveyed trip making behaviour to annual transportation costs.
- There may be confounding factors that this study has not been able to consider. For example, household size and household composition are factors that could also influence transportation costs, but it was not possible to take them into account for this study.

Housing and Transportation Cost Burden Study

2025 UPDATE

Mark Seinen
Senior Planner, Regional Planning and Housing Services

Regional Planning Committee | September 11, 2025

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1

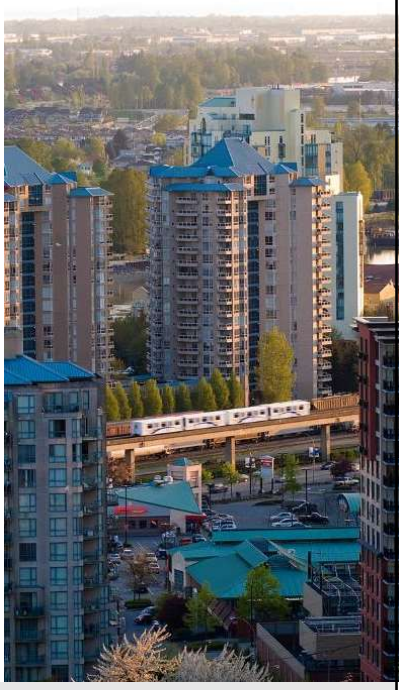
WHAT IS H+T COST BURDEN?

- Conversations about housing affordability emphasize shelter costs
- However, transportation costs also driven by housing location decisions
- Transportation costs can rival housing costs
- Combining “H+T” yields a better estimate of affordability patterns

2

BACKGROUND

- 2015 H+T study examined combined costs
- Much has changed (e.g. housing market, remote work, new transportation modes)
- 2025 H+T study uses updated data, refines methods, and answers new questions
- Findings can guide regional growth management and local planning policies



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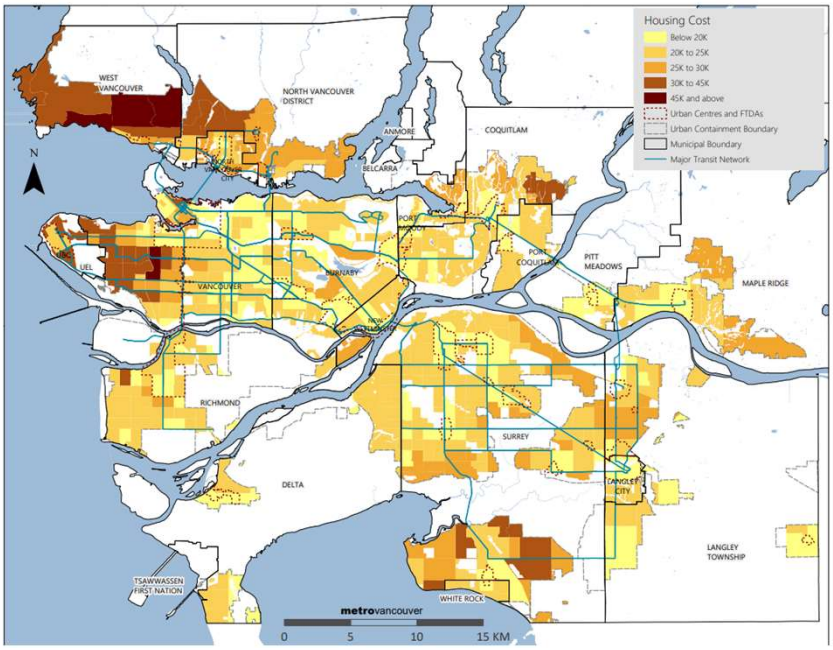
HOUSING COSTS

Metro Vancouver: $22k

North Shore: $28k
SoF West: $21k

Key factors:
- Housing tenure
- Unit size



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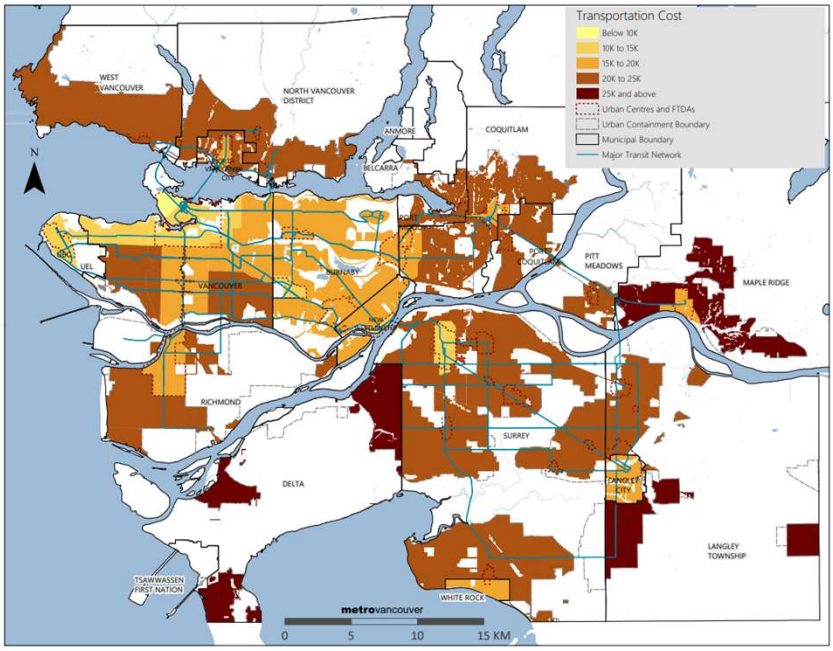
TRANSPORTATION COSTS

Metro Vancouver: $19k

Ridge Meadows: $25k
Burrard Peninsula: $16k

Key drivers:
- Vehicle ownership
- Commute distance
- Transit access



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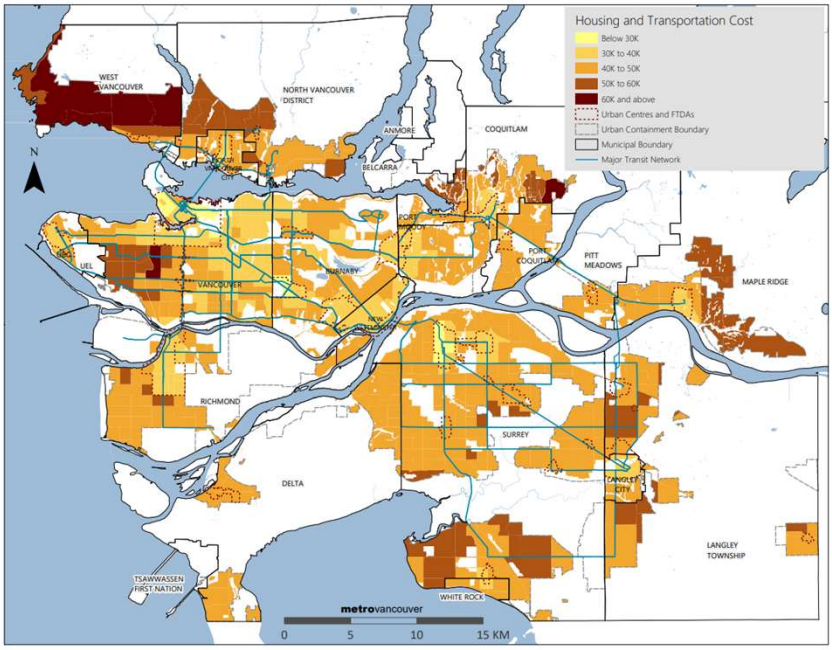
H+T COSTS

Metro Vancouver: $41k

North Shore: $49k
Burrard Peninsula: $38k

Key observations:
- Perimeter effect
- Centres & SkyTrain
- Role of rental housing



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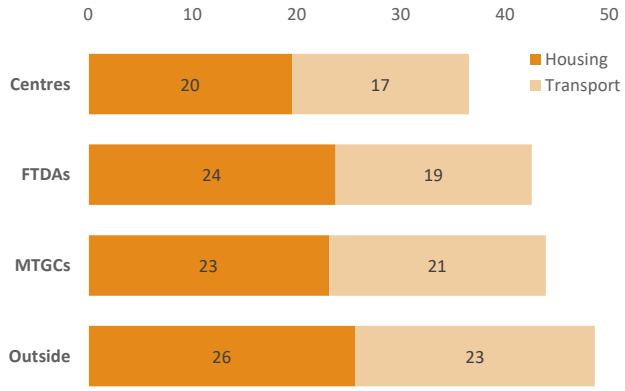
KEY FINDINGS

- Transportation costs can rival, and sometimes exceed, housing costs
- Centres and Corridors, especially along SkyTrain, have lower combined H+T costs;
- Rental tenure greatly scales affordability benefits of SkyTrain
- Population density alone does not materially affect H+T affordability



Average Annual Household H+T Cost by *Metro 2050* Priority Growth Area ($ Thousands)

Centres = Urban Centres
FTDAs = Frequent Transit Development Areas
MTGCs = Major Transit Growth Corridors
Outside = Not in a Priority Growth Area

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Thank you

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Together we make our region strong

8

8

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SERVICES AND SOLUTIONS FOR A LIVABLE REGION

To: Regional Planning Committee

From: Sinisa Vukicevic, Program Manager, Regional Planning Analytics and
Agatha Czekajlo, Senior Policy and Planning Analyst, Regional Planning and Housing Services

Date: August 19, 2025 Meeting Date: September 11, 2025

Subject: **Population Projections Update**

RECOMMENDATION

That the MVRD Board:

a) receive for information the report dated August 19, 2025, titled "Population Projections Update"; and
b) request that the Board Chair send a copy of the report dated August 19, 2025 titled "Population Projections Update" to member jurisdictions with an offer of a presentation including local demographic profiles to Council upon request.

EXECUTIVE SUMMARY

Metro Vancouver's average annual net population growth projection has been revised from 50,000 to approximately 40,500 residents per year, reflecting the impact of recent federal policy changes affecting immigration and non-permanent residents. These shifts have introduced increased volatility in population projections, causing both upward and downward swings in regional growth estimates over the past few years. Between 2025 and 2027, growth is expected to temporarily slow due to reduced immigration targets and fewer non-permanent residents, with a modest dip anticipated in 2026 before returning to more stable growth. Until federal policies stabilize, projections will remain more volatile and subject to change. Under the Medium Growth Scenario, Metro Vancouver's population is expected to reach 4 million by 2047 and 4.2 million by 2051.

Metro Vancouver updates population projections for the region annually to support long-range planning for housing, infrastructure, utilities, and transit. These projections are developed in collaboration with member jurisdictions and regional agencies, using the latest demographic data, economic indicators, and government policy inputs (Attachment 1). The projections inform capital planning across Metro Vancouver's utilities and guide coordinated regional growth strategies.

PURPOSE

To provide the Regional Planning Committee and MVRD Board with an update on Metro Vancouver's population projections.

BACKGROUND

Regional Planning conducts annual updates to regional population projections to ensure alignment with evolving demographic trends, policy changes, and planning needs. These projections support long-range infrastructure planning across housing, utilities, transit, and land use, and are developed in collaboration with member jurisdictions and regional agencies.

The 2025 Update reflects significant changes since the previous update in 2024, driven by new data inputs and shifting federal policies. In particular, the update incorporates the following:

- 2024 population estimates from Statistics Canada;
- The 2025–2027 Federal Immigration Levels Plan, which significantly reduces immigration targets (Reference 1); and
- New federal policies affecting non-permanent residents, resulting in further reductions to migration levels.

Updated projections have been prepared across all geographic levels, including the regional and sub-regional scales, municipal boundaries, and service areas such as sewerage districts, water supply catchments, and traffic zones.

PROJECTION METHODOLOGY

Metro Vancouver's population projections are developed using a hybrid top-down and bottom-up approach. This means that, in addition to analyzing the broader factors that drive growth, such as migration trends and demographic shifts, the projections also incorporate regional land capacity and select approved development plans to reflect local planning realities. The primary methodology used is the Cohort Component Population Projection Model, a widely accepted method for projecting population growth over time. This model estimates future population by age group, accounting for key demographic attributes and annual changes due to migration and natural growth.

To manage uncertainty, Regional Planning develops three growth scenarios: medium growth (MG), high growth (HG), and low growth (LG), which result from variations in the modelling. Immigration and fertility rates differ among the scenarios, with the low growth scenario assuming lower immigration and fertility rates, and the high growth scenario assuming higher immigration and fertility rates. Higher immigration rates typically result in a greater proportion of children and younger families in the region. The medium growth scenario is considered as the most likely future outcome, while other scenarios explore alternatives that result from different growth assumptions and variables.

MODELLING RESULTS

Under the 2025 Update Medium Growth Scenario, Metro Vancouver's population is projected to reach 4 million by 2047 and 4.2 million by 2051 (see Figure 1). Following a record-high annual growth rate of 4.5 per cent between 2023 and 2024, population growth is expected to slow between 2024 and 2027 due to recent federal immigration policy changes. As a result, regional population growth is expected to decline to -0.6 per cent in 2026, before rebounding to a more stable rate of approximately 1.0 per cent annually, depending on the growth scenario. Over the long term, growth rates are projected to return to levels more consistent with the historic average of 1.5 per cent per year (2002–2022).

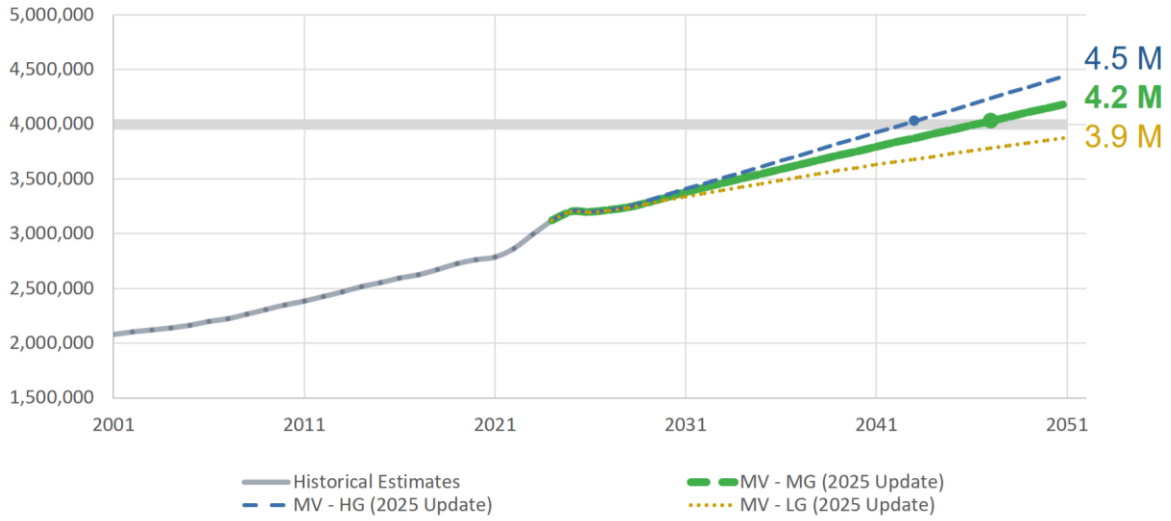

Figure 1: Population projections (2025 Update)

Immigration continues to be the key driver of population growth for the next 30 years. The updated Medium Growth Scenario projects that immigration will contribute an average of over 51,000 net new residents to the region each year from 2024 to 2054, representing 90 per cent of total population growth. Immigration and non-permanent levels will decrease in the short term, following federal policies; immigration is expected to revert to positive growth in the long term, while the long-term number of non-permanent residents will remain relatively stable.

Net inter-provincial (i.e., to/from other parts of Canada) is projected to remain relatively constant, similar to historical trends and contributing only a small amount to population growth. Intra-provincial migration (i.e., to/from other parts of BC) is expected to continue following its historic trend, continuing to be the primary component of projected population decrease over the next 30 years. The 30-year annual average of residents leaving the region to other parts of BC amounts to about a third of the new immigrants arriving each year.

Natural increase is expected to continue decreasing and is projected to fall below zero in the year 2036 with a greater number of deaths than births in the region. In 2024-2025, natural increase contributes nearly 9 per cent to the overall population, while in 2051-2052 it will negatively contribute with more deaths than births as our population ages. The working age population (18 to 64 years old) is projected to reach 2.8 million by 2051. However, the proportion of school-age children in the region is expected to shift from 12 per cent in 2024 to 10 per cent in 2051, and seniors represent 21 per cent of the 2051 projected total population. Comparing with the Statistics Canada estimate for 2024, the share of seniors increased from 16 per cent in 2024 to 21 per cent in 2051.

The region's two main regional centres, Vancouver and Surrey, will continue to be the main location of the region's population growth. By 2051, the City of Surrey will reach 1 million people, while the City of Vancouver will reach 937,000 people. The 2025 updated Medium Growth Scenario projects that Surrey's population will surpass Vancouver's in the year 2038.

ALTERNATIVES

1. That the MVRD Board:
   a) receive for information the report dated August 19, 2025, titled "Population Projections Update"; and
   b) request that the Board Chair send a copy of the report dated August 19, 2025 titled "Population Projections Update" to member jurisdictions with an offer of a presentation including local demographic profiles to Council upon request.

2. That the MVRD Board receive for information the report dated August 19, 2025, titled "Population Projections Update".

FINANCIAL IMPLICATIONS

There are no financial implications associated with this report.

CONCLUSION

The updated population projections reflect the impact of recent federal immigration and non-permanent resident policy changes, which have significantly influenced short-term population projections. Following a historic peak growth rate of 4.5 per cent in 2023–2024, the region is now experiencing a temporary slowdown in growth through the 2025–2027 period. These fluctuations underscore the importance of regular updates to Metro Vancouver's projections, particularly in response to evolving federal policy. Despite short-term volatility, long-term immigration trends remain more stable and continue to be the primary driver of regional population growth. Under the Medium Growth Scenario, Metro Vancouver is projected to reach 4 million residents by 2047 and 4.2 million by 2051. Over the next 30 years, immigration will account for the majority of growth, while natural increase and intra-provincial migration are expected to contribute less, and in some years, negatively. Demographic shifts will continue to shape the region's future. The senior population is projected to comprise 21 per cent of the total population by 2051, while the share of school-age children will decline. Metro Vancouver's annual projection updates remain a critical tool for adapting to changing conditions and ensuring coordinated, evidence-based planning across member jurisdictions and regional services.

ATTACHMENT

1. Population Projections Table (Low, Medium, and High Growth Scenarios).
2. Presentation re: Population Projections Update.

REFERENCES

1. Government of Canada. (2024). *2025–2027 Immigration Levels Plan*. https://www.canada.ca/en/immigration-refugees-citizenship/news/2024/10/20252027-immigration-levels-plan.html

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LOW GROWTH SCENARIO	2024	2031	2041	2051
Metro Vancouver Regional Total	3,124,079	3,338,830	3,629,507	3,879,516
BURRARD PENINSULA Sub-Region	1,184,016	1,257,549	1,353,307	1,444,125
City of Burnaby	298,986	311,468	333,016	352,195
City of New Westminster	92,433	103,948	117,310	128,248
City of Vancouver	757,849	795,468	841,470	887,454
Electoral Area A - UBC	30,941	36,723	43,421	49,942
Electoral Area A - UEL	3,807	9,942	18,090	26,286
NORTH SHORE Sub-Region	228,813	238,517	252,508	267,065
Bowen Island Municipality	4,677	5,213	5,801	6,215
City of North Vancouver	67,980	74,628	82,285	88,931
District of North Vancouver	102,284	104,738	109,187	113,969
District of West Vancouver	52,280	52,161	53,237	55,795
Village of Lions Bay	1,468	1,646	1,857	2,004
Electoral Area A - Howe Sound	124	131	141	151
NORTH EAST Sub-Region	285,953	303,806	328,409	352,120
City of Coquitlam	174,248	187,855	206,037	223,866
City of Port Coquitlam	69,371	72,122	76,028	79,138
City of Port Moody	38,942	40,231	42,538	45,113
Village of Anmore	2,568	2,737	2,939	3,110
Village of Belcarra	704	734	730	746
Electoral Area A - Indian Arm/Pitt Lake	120	127	137	147
RIDGE MEADOWS Sub-Region	128,181	140,733	155,302	166,813
City of Maple Ridge	106,489	117,438	130,192	140,290
City of Pitt Meadows	21,692	23,295	25,110	26,523
SOUTH OF FRASER – EAST Sub-Region	924,105	1,006,397	1,121,897	1,211,312
City of Langley	35,316	37,769	40,532	43,007
City of Surrey	700,602	759,371	846,265	911,698
City of White Rock	25,129	26,638	28,787	30,886
Township of Langley	162,926	182,480	206,164	225,562
Electoral Area A - Barnston Island	132	139	149	159
SOUTH OF FRASER – WEST Sub-Region	373,010	391,828	418,083	438,080
City of Delta	125,175	129,692	137,142	143,848
City of Richmond	242,966	255,069	270,757	282,107
sc̓əwaθən məsteyəxʷ (Tsawwassen First Nation)	4,869	7,067	10,184	12,125

1. Municipal totals, with exception of sc̓əwaθən məsteyəxʷ (Tsawwassen First Nation), include the estimates of Indian Reserves located within the respective municipal boundary.

MEDIUM GROWTH SCENARIO	2024	2031	2041	2051
Metro Vancouver Regional Total	3,124,079	3,378,163	3,794,667	4,188,211
BURRARD PENINSULA Sub-Region	1,184,016	1,272,505	1,413,782	1,554,377
City of Burnaby	298,986	315,946	351,395	385,629
City of New Westminster	92,433	105,004	121,758	137,118
City of Vancouver	757,849	804,529	877,593	952,660
Electoral Area A - UBC	30,941	37,014	44,677	52,234
Electoral Area A - UEL	3,807	10,012	18,359	26,736
NORTH SHORE Sub-Region	228,813	240,795	262,250	285,915
Bowen Island Municipality	4,677	5,233	5,891	6,404
City of North Vancouver	67,980	75,439	85,539	95,252
District of North Vancouver	102,284	105,640	113,098	121,533
District of West Vancouver	52,280	52,695	55,668	60,461
Village of Lions Bay	1,468	1,657	1,913	2,114
Electoral Area A - Howe Sound	124	131	141	151
NORTH EAST Sub-Region	285,953	306,759	341,232	378,130
City of Coquitlam	174,248	189,791	214,474	241,298
City of Port Coquitlam	69,371	72,742	78,642	84,170
City of Port Moody	38,942	40,610	44,217	48,456
Village of Anmore	2,568	2,752	3,016	3,278
Village of Belcarra	704	737	746	781
Electoral Area A - Indian Arm/Pitt Lake	120	127	137	147
RIDGE MEADOWS Sub-Region	128,181	141,701	159,551	175,535
City of Maple Ridge	106,489	118,248	133,731	147,552
City of Pitt Meadows	21,692	23,453	25,820	27,983
SOUTH OF FRASER – EAST Sub-Region	924,105	1,020,175	1,181,051	1,321,090
City of Langley	35,316	38,187	42,185	46,102
City of Surrey	700,602	771,149	896,936	1,004,530
City of White Rock	25,129	26,804	29,518	32,349
Township of Langley	162,926	183,896	212,263	237,950
Electoral Area A - Barnston Island	132	139	149	159
SOUTH OF FRASER – WEST Sub-Region	373,010	396,227	436,801	473,164
City of Delta	125,175	130,891	142,410	154,179
City of Richmond	242,966	258,260	284,164	306,760
scəwaθən məsteyəxʷ (Tsawwassen First Nation)	4,869	7,076	10,227	12,225

1. Municipal totals, with exception of scəwaθən məsteyəxʷ (Tsawwassen First Nation), include the estimates of Indian Reserves located within the respective municipal boundary.

HIGH GROWTH SCENARIO	2024	2031	2041	2051
Metro Vancouver Regional Total	3,124,079	3,408,193	3,925,426	4,449,150
BURRARD PENINSULA Sub-Region	1,184,016	1,283,896	1,462,415	1,649,960
City of Burnaby	298,986	319,305	365,879	413,948
City of New Westminster	92,433	105,838	125,360	144,740
City of Vancouver	757,849	811,461	906,858	1,009,735
Electoral Area A - UBC	30,941	37,230	45,762	54,456
Electoral Area A - UEL	3,807	10,062	18,556	27,081
NORTH SHORE Sub-Region	228,813	242,555	269,958	301,734
Bowen Island Municipality	4,677	5,249	5,966	6,566
City of North Vancouver	67,980	76,084	88,159	100,630
District of North Vancouver	102,284	106,338	116,193	127,877
District of West Vancouver	52,280	53,087	57,544	64,309
Village of Lions Bay	1,468	1,666	1,955	2,201
Electoral Area A - Howe Sound	124	131	141	151
NORTH EAST Sub-Region	285,953	309,057	351,382	399,862
City of Coquitlam	174,248	191,288	221,192	255,981
City of Port Coquitlam	69,371	73,233	80,698	88,328
City of Port Moody	38,942	40,905	45,520	51,182
Village of Anmore	2,568	2,765	3,078	3,417
Village of Belcarra	704	739	757	807
Electoral Area A - Indian Arm/Pitt Lake	120	127	137	147
RIDGE MEADOWS Sub-Region	128,181	142,496	162,931	182,722
City of Maple Ridge	106,489	118,914	136,551	153,545
City of Pitt Meadows	21,692	23,582	26,380	29,177
SOUTH OF FRASER – EAST Sub-Region	924,105	1,030,638	1,227,313	1,412,503
City of Langley	35,316	38,521	43,485	48,649
City of Surrey	700,602	779,989	936,434	1,081,860
City of White Rock	25,129	26,933	30,087	33,544
Township of Langley	162,926	185,056	217,158	248,291
Electoral Area A - Barnston Island	132	139	149	159
SOUTH OF FRASER – WEST Sub-Region	373,010	399,551	451,429	502,368
City of Delta	125,175	131,821	146,607	162,896
City of Richmond	242,966	260,644	294,558	327,163
sc̓əwaθən məsteyəxʷ (Tsawwassen First Nation)	4,869	7,086	10,264	12,309

1. Municipal totals, with exception of sc̓əwaθən məsteyəxʷ (Tsawwassen First Nation), include the estimates of Indian Reserves located within the respective municipal boundary.

Metro Vancouver Population Projections – 2025 Update

Sinisa Vukicevic, PhD
Program Manager, Planning Analytics
Regional Planning and Housing Services

Agatha Czekajlo, MSc
Senior Policy & Planning Analyst
Regional Planning and Housing Services

Regional Planning Committee, September 11, 2025

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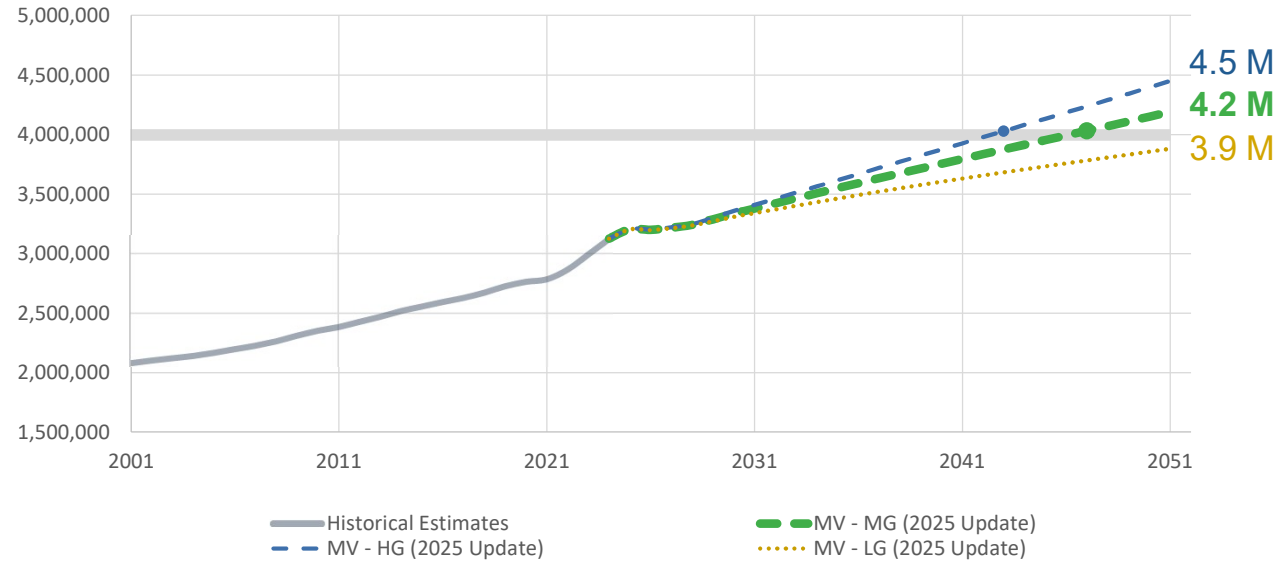
TOTAL POPULATION (2025 UPDATE)



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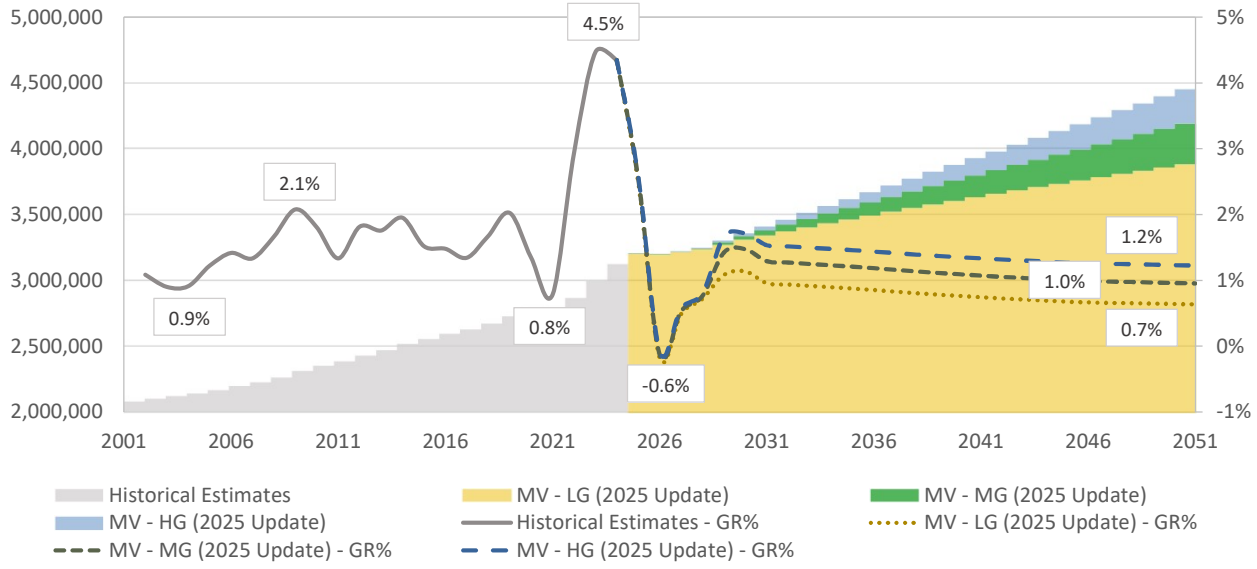
NEW INPUTS FOR 2025 UPDATE

- Incorporates 2024 population estimates from Statistics Canada
- Reflects the 2025–2027 Federal Immigration Levels Plan, which significantly reduces immigration targets
- Includes new federal policies on non-permanent residents, resulting in lower migration levels

3

TOTAL POPULATION – GROWTH RATES



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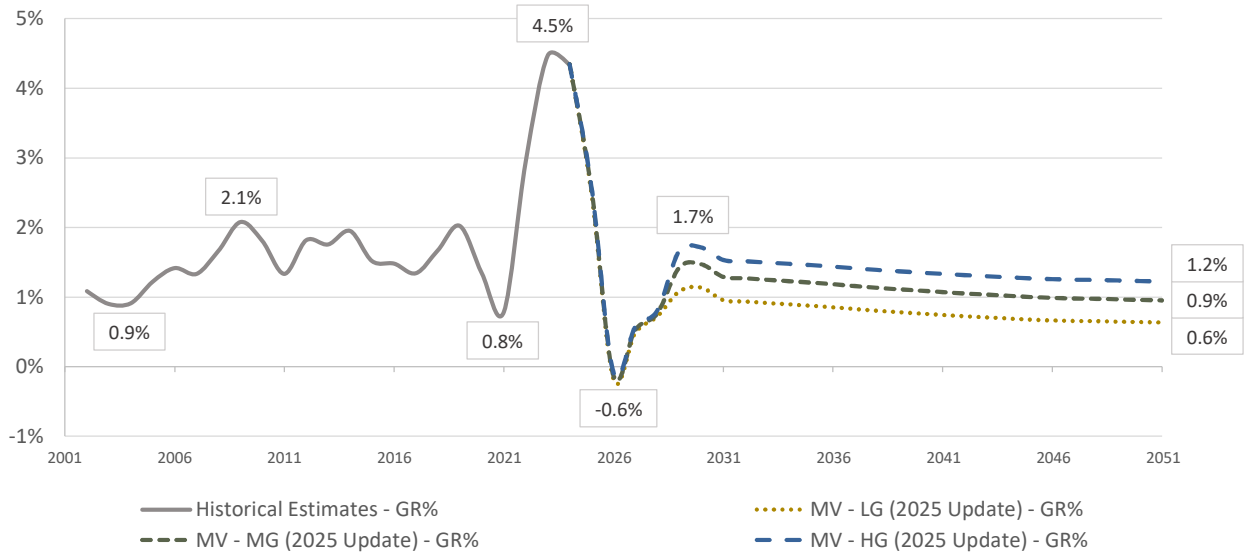
TOTAL POPULATION – GROWTH RATES



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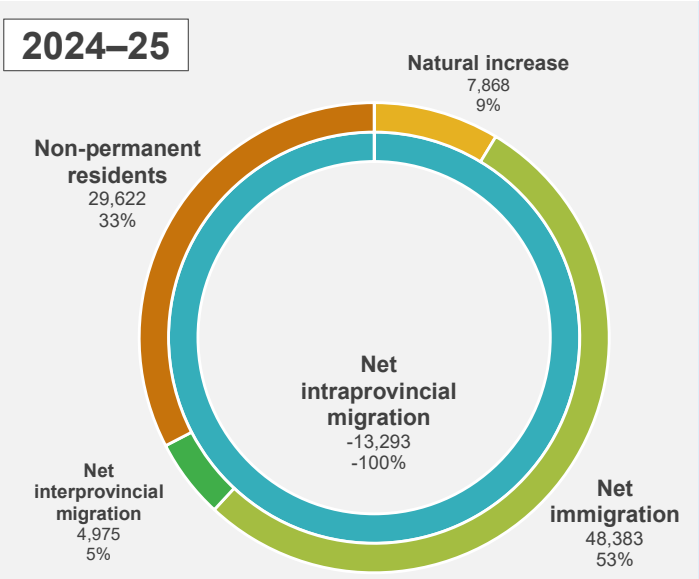
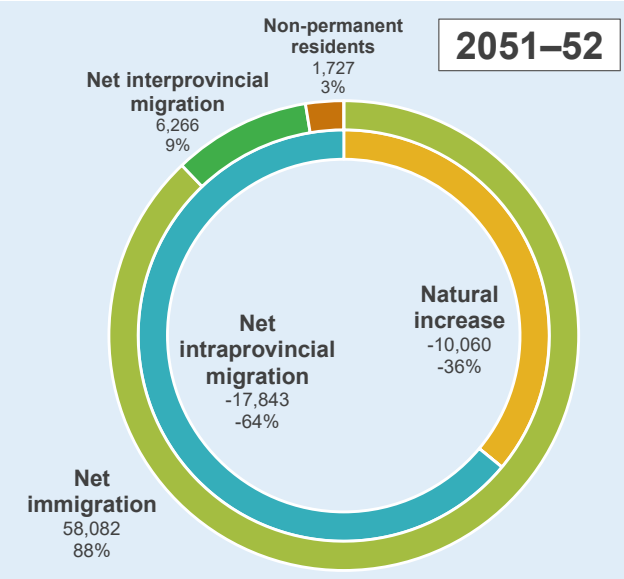
COMPONENTS OF GROWTH





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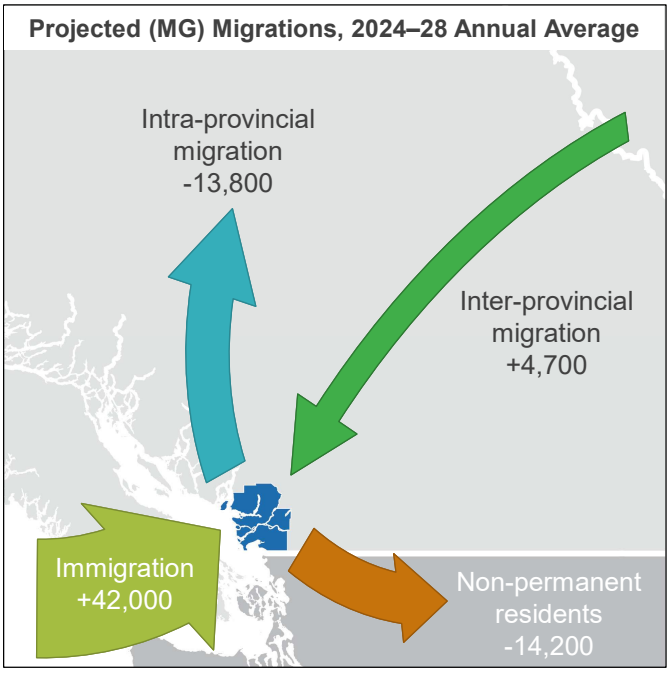
NET MIGRATION, SHORT-TERM

Between 2024 and 2028, immigrants are projected to contribute 78% of population growth

Decreased non-permanent resident levels and more intra-provincial out-migrations equally contribute to population reduction



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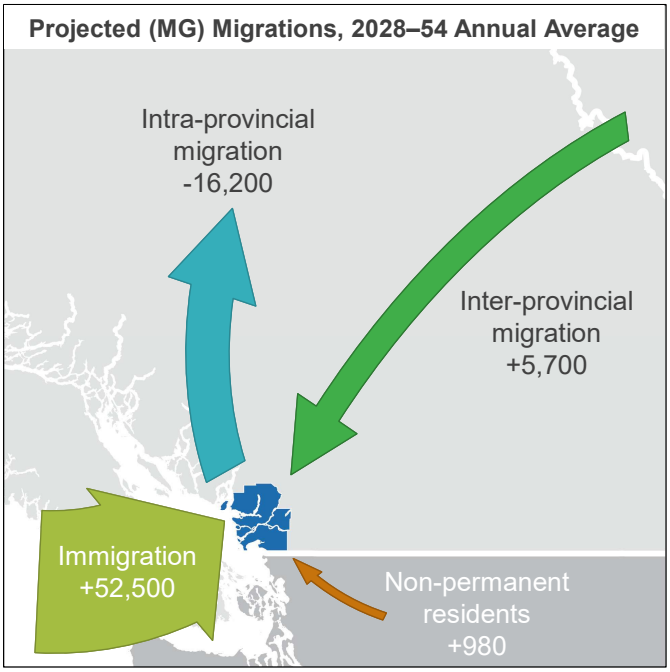
NET MIGRATION, 2028 TO 2054

After short-term immigration policies, immigration will increase while the level of non-permanent residents will stabilize

Inter- and intra-provincial migration will remain proportional to growing total population



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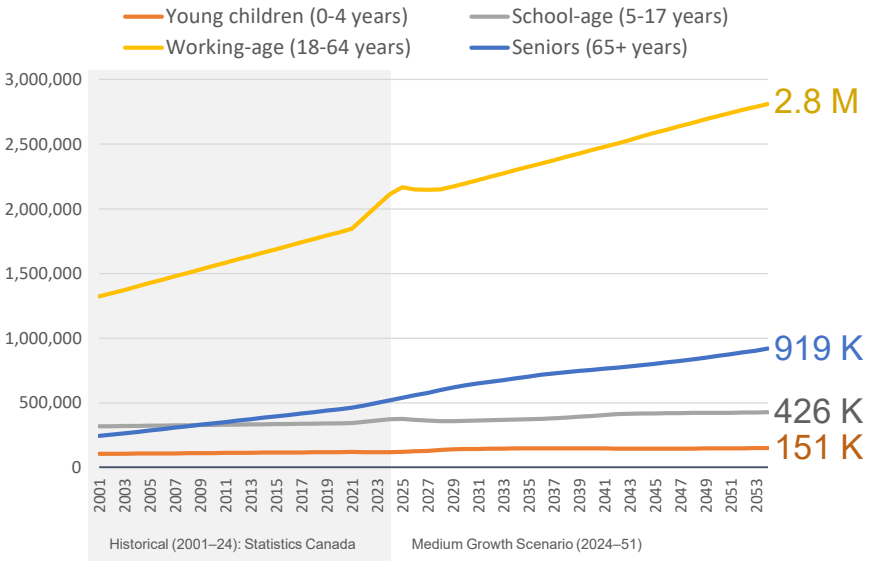
AGE DISTRIBUTION



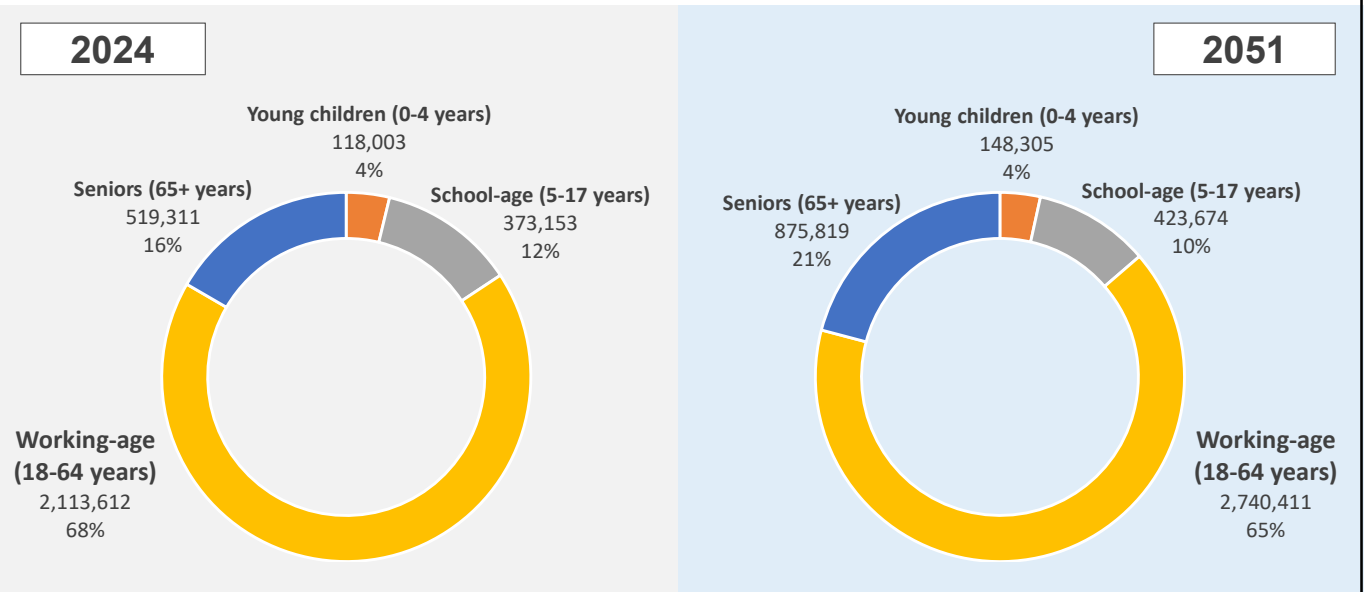
Working-age population (18–64 years old) projected (MG) to reach 2.8 M by 2051

Seniors to represent 21% of 2051 total population

Decreased proportions of school-age and young children

9

AGE DISTRIBUTION



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SUMMARY

- Average annual *net* growth revised from 50,000 to approximately 40,500 residents per year
- Short-term growth slowdown projected between 2025–2027 due to reduced immigration and non-permanent resident admissions
- Natural increase projected to turn negative by 2036, with more deaths than births
- Long-term growth rates return to historic average of 1.5% annually, driven primarily by immigration

Thank You

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SERVICES AND SOLUTIONS FOR A LIVABLE REGION

To: Regional Planning Committee

From: Marina Jozipovic, Senior Planner, Regional Planning and Housing Services

Date: August 18, 2025 Meeting Date: September 11, 2025

Subject: **Housing 2050: Affordable Housing Gap Analysis**

RECOMMENDATION

That the MVRD Board:

a) receive for information the report dated August 18, 2025, titled "Housing 2050: Affordable Housing Gap Analysis";
b) request that the Board Chair forward a copy of the report dated August 18, 2025, titled "Housing 2050: Affordable Housing Gap Analysis" to member jurisdictions; and
c) request that the Board Chair forward a copy of the report dated August 18, 2025, titled "Housing 2050: Affordable Housing Gap Analysis" to the Provincial Minister of Housing and Municipal Affairs and the Federal Minister of Housing, Infrastructure.

EXECUTIVE SUMMARY

There has been a significant increase in support for affordable housing in recent years, however, the scale of the current and projected need for non-market housing in the region far exceeds these efforts. Over the past five years, between 12,500 and 19,500 affordable rental housing units have been initiated across the region through a combination of federal, provincial, and local government programs, including approximately $1.2 billion in contributions from regular federal and provincial funding programs, and significant support from local governments through planning tools, incentives, and land contributions.

The Affordable Housing Gap Analysis identifies a need for between 29,250 and 54,500 affordable rental units over the next five years, requiring a $10.1 billion to $19.3 billion investment, inclusive of all government tools, to both address current underhoused need and to repair historic underinvestment in the sector. While this scale of investment is unattainable in the short term, all efforts to build on recent progress towards closing the gap are critical and will yield meaningful improvements in housing outcomes and community well-being.

Taking steps to address this gap requires coordinated action across all orders of government. The primary responsibility for funding rests with senior governments whose sustained and scaled investment is essential to meeting the region's affordable housing needs. And, local governments play a critical enabling role by implementing land use policies, streamlining development approvals, and offering financial and regulatory incentives that improve project viability.

PURPOSE

To present the findings of the Affordable Housing Gap Analysis and key areas of focus to inform and support discussion by the Committee and MVRD Board on preliminary policy directions for *Housing 2050*.

BACKGROUND

The adoption of *Metro 2050* introduced Goal 4 - Providing Diverse and Affordable Housing Choices, reinforcing the region's recognition that housing affordability is a critical challenge for the region. A key component of Goal 4 is the establishment of a regional target to deliver 15% of new rental housing in transit rich locations as affordable, which serves as a benchmark for collective action across all levels of government.

To support implementation of this goal, the MVRD Board approved the Scope of Work for *Housing 2050: A Roadmap to Implement Metro 2050's Housing Goal* at its April 5, 2024 meeting (Reference 1). *Housing 2050* will be an action-oriented roadmap and advocacy tool to guide regional efforts, align policies, and strengthen partnerships. It is a core initiative within the Board-approved Housing Policy and Planning budget and work plan, and it will help advance strategies to increase non-market housing supply, improve regional coordination, and advocate for senior government investment.

The Affordable Housing Gap Analysis quantifies the gap between affordable housing need in the region and current level of affordable housing delivery to support advocacy and coordination.

HOUSING 2050 OVERVIEW AND PROJECT STATUS

Housing 2050 is a multi-year initiative developed to support implementation of Goal 4 of *Metro 2050*. The project is designed to guide regional action, strengthen advocacy, and improve coordination across jurisdictions and levels of government.

The initiative is structured around four objectives:

- Increase the delivery of non-market and below-market rental housing;
- Strengthen advocacy for increased funding and support for affordable housing from senior governments;
- Enhance regional coordination through policy alignment, partnerships, use of public land, regulatory simplification, and supportive roles; and
- Advance the 15% regional affordable rental housing target outlined in *Metro 2050* policies 4.2.3 and 4.2.7(a).

The *Housing 2050* work plan is organized into sequential tasks, with completion targeted for early 2026. Figure 1 provides an overview of the project timeline and deliverables.

Figure 1. *Housing 2050 Work Plan*

AFFORDABLE HOUSING GAP CONTEXT

In recent years, all levels of government have taken meaningful steps to increase overall housing supply, resulting in a record number of new rental units across the region. However, despite this progress, housing affordability challenges remain, particularly for low to moderate income households who remain underserved by the private market. This report focuses on the persistent and growing gap in the delivery of below-market rental housing, recognizing that the cost of inaction has tangible impacts on individual well-being and community resilience.

Research from academic, government, and industry sources consistently highlights the broader consequences of inadequate affordable housing, including:

- Rising homelessness, as more individuals and families struggle to secure or maintain stable housing (Reference 2);
- Suppressed household formation, with people delaying independent living and instead residing in overcrowded or shared arrangements (Reference 3);
- Increased outmigration, as residents leave the region in search of more affordable housing elsewhere (Reference 4);
- Mental health decline, particularly among those facing housing or food insecurity (Reference 5); and
- Greater reliance on community supports, including food banks, health services, and emergency assistance programs (Reference 6).

These impacts underscore the urgency of addressing the affordable housing gap and the need for coordinated action across all levels of government. While local governments play a vital role in enabling non-market housing through planning tools, land use policies, and development incentives, the scale of investment required to close the gap necessitates a primary funding role from provincial and federal governments.

AFFORDABLE HOUSING GAP ANALYSIS KEY FINDINGS

Across the Metro Vancouver region, the stock of non-market rental housing remains inadequate, and the region is experiencing some of the most acute affordability challenges of any region in Canada. This report demonstrates the magnitude of the challenge of increasing the supply of affordable rental as well as achieving the depth and duration of affordability needed to support low to moderate income individuals and families in Metro Vancouver.

The following information summarizes the findings of the Affordable Housing Gap Analysis (Attachment 1) and presents a range of the number of housing units necessary to address the shortage of affordable rental housing for low to moderate income residents and families over a five-year period and the estimated investment, through policy changes or programs, required to support delivery of those units.

1. Affordable Rental Housing Need

Metro Vancouver's 2025 Regional Housing Needs Report (HNR) (Reference 7) consolidates the HNRs of member jurisdictions to provide a regional snapshot of short term (2022 to 2026) and long term (2022 to 2041) housing needs. (Table 1). The housing need estimate shown here includes the underlying unmet housing needs of existing households (A-C), anticipated housing needs of future households (D), and additional capacity needed to address pent-up demand (E, F).

Table 1 – *Total Housing Units Needed, Metro Vancouver, 20-Year Need*

Component of Housing Need	Units Needed	
	2022 to 2026 (5 years)	**2022 to 2041 (20 years)**
A. Extreme Core Housing Need	16,155	64,622
B. Homelessness	5,677	11,354
C. Suppressed Household Formation	9,110	36,440
D. Anticipated Household Growth	170,354	526,083
E. Rental Vacancy Rate	1,871	7,484
F. Demand Buffer	27,290	109,161
Metro Vancouver Total	**230,457**	**755,144**

A critical subset of Metro Vancouver's overall housing need is the demand for affordable rental housing for low to moderate income households. Based on 2023 Housing Income Limits (HILs), the estimated short-term need (2022–2026) ranges from 29,250 to 54,500 units. This range reflects two distinct approaches to estimating future household income distribution:

- The lower estimate assumes income trends will continue, with fewer low-income households over time. This aligns with provincial housing needs methods and reflects changes observed between 2001 and 2021.

- The higher estimate assumes future housing demand will match today's income distribution, assuming affordable options are available. This approach uses 2021 Census data and provides a more inclusive view of potential needs.

These estimates are intended as order-of-magnitude guidance to support planning, investment, and monitoring, based on best available information. It is also important to note that the need for affordable rental housing will continue beyond the five-year horizon, though longer-term projections are limited by uncertainty in future income distribution. This level of housing delivery represents an ideal state, one that fully addresses both current unmet needs and anticipated growth across the region. Achieving this scale of development in the short term is not attainable, however, building on recent progress toward closing the gap remains critical and will lead to meaningful improvements in the region's housing system. Table 2 illustrates a range of the estimated number of units needed by affordability level.

Table 2 *- Affordable Rental Housing Units Needed, Metro Vancouver, 5-Year Need**

Affordability Level	**Lower Range**	**Higher Range**
Under $45,000**	16,000	38,000
$45,000 to $58,000	7,000	10,000
$58,000 to $72,000	3,250	4,250
$72,000 to $86,000	2,000	1,500
$86,000 to $107,500	1,000	750
Total Affordable Rental Housing Need (5-Year Need)	**29,250**	**54,500**
Current delivery of affordable rental housing (recent 5-year period)	**12,500 to 19,500**	

**Figures have been rounded to the nearest 250 units.*
***Both lower and higher range includes a need of 5,500 shelter-rate units for people experiencing homelessness, including housing with supports.*

2. Investment Necessary to Address the Gap

Between 2018 and 2023, 98% of new affordable rental units in Metro Vancouver were delivered by the non-market housing sector, with limited private sector participation except where government requirements or incentives were in place (e.g., contributions to Affordable Housing Reserve Funds through density bonusing policies, inclusionary housing policies) (Reference 8). This underscores the critical role of government support in enabling affordability.

To make non-market housing projects viable, a combination of tools is typically required, including:

- Capital grants and contributions (primarily from federal and provincial governments);
- Low-cost financing and operating subsidies;
- Fee waivers, land contributions, and density bonuses; and
- Streamlined permitting and enabling policies.

While many of these supports are difficult to quantify, they are essential to project feasibility. For this analysis, a single per-unit investment value is used to represent the combined impact of financial contributions and local government supports.

Table 3 – *Affordable Rental Housing Investment Required to Achieve Necessary Affordability*

	Lower range	**Higher range**
Affordable rental housing units needed (5-year need) (see Table 1)	29,250	54,500
Per-unit investment required to achieve needed affordability	$346,000	$354,000
Total investment required to achieve needed affordability (5-year need)	$10.1 billion	$19.3 billion
Current federal and provincial investment in affordable rental housing (regular programs, recent 5-year period, excluding local government contributions)	$1.2 billion	

**The total investment required is based on the estimated 5-year affordable rental housing need due to the uncertainty of projecting household income, size, and composition beyond this period.*

Meeting the region's short-term affordable rental housing need would require $2 to $3.9 billion annually, far exceeding current funding levels (Table 3). These investment levels reflect both the depth and duration of affordability required and the historic underinvestment in the sector. Current tools and investment levels are inadequate to fully address the scale of need. While local governments play a vital enabling role, senior governments must lead on funding. Task 3 of *Housing 2050* will explore policy options to reduce this gap, including changes to federal, provincial, regional, and local programs. Ongoing investment beyond the five-year horizon will be essential to support households who cannot be served by the private market, such as seniors, people with disabilities, single-parent families, and other marginalized groups.

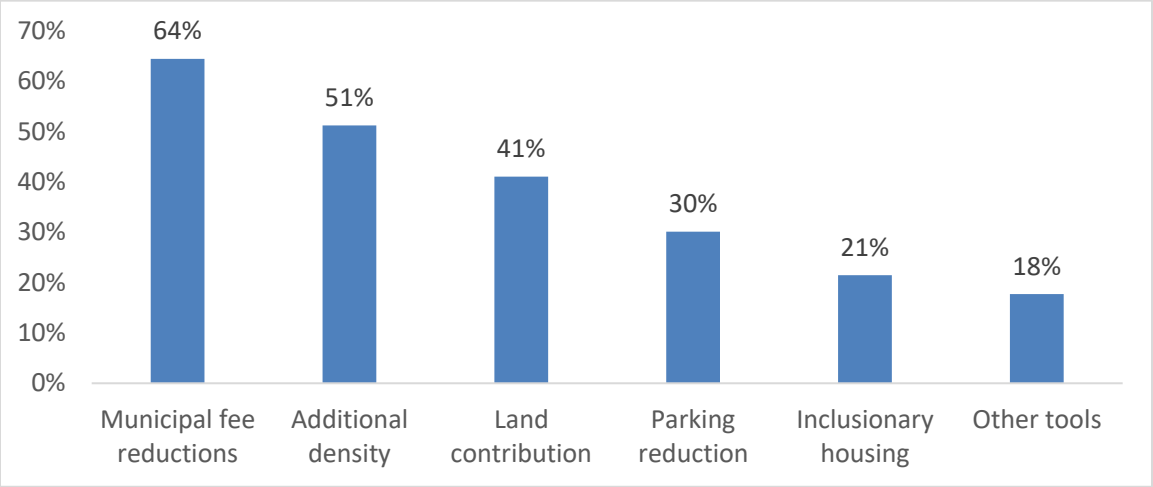
For context, the higher range investment shown in Table 3 ($19.3 billion over five years) is comparable in magnitude to five years' worth of the Canada Public Transit Fund (at $3 billion per year over 5 years) or to the total cost of the Site C Dam (roughly $16 billion), and would correspond to roughly 2% of the Metro Vancouver area GDP over the five-year period.

3. Role of Local Government

Local governments across Metro Vancouver use a range of planning tools and incentives to support affordable housing, with varying levels of uptake across jurisdictions. These tools, such as fee reductions, land contributions, density bonuses, and parking relaxations, play a critical role in improving project feasibility, especially for non-market housing. While it is difficult to quantify the full monetary value of these contributions, they are widely recognized as essential to enabling affordable housing delivery. Figure 2 summarizes the proportion of affordable housing starts that have used common local government tools.

There is significant potential to apply these tools more consistently across the region. When combined with substantial funding and program support from provincial and federal governments, local government actions can help move the needle toward closing the affordable housing gap identified in this report.

Figure 2 – *Proportion of Affordable Housing Starts Using Common Local Government Affordable Housing Policy Tools*



Source: Metro Vancouver Affordable Housing Gap Analysis Questionnaire, 2025.

ALTERNATIVES

1. That the MVRD Board:
   a) receive for information the report dated August 18, 2025, titled "Housing 2050: Affordable Housing Gap Analysis";
   b) forward a copy of the report dated August 18, 2025, titled "Housing 2050: Affordable Housing Gap Analysis" to member jurisdictions; and
   c) forward a copy of the report dated August 18, 2025, titled "Housing 2050: Affordable Housing Gap Analysis" to the Provincial Minister of Housing and Municipal Affairs and the Federal Minister of Housing and Infrastructure.

2. That the MVRD Board receive for information the report dated August 18, 2025, titled "Housing 2050: Affordable Housing Gap Analysis".

FINANCIAL IMPLICATIONS

This work is being carried out as part of the regular Housing Policy and Planning work program and is included within the approved departmental budget. Consultant support for the Affordable Housing Gap Analysis and related components of *Housing 2050* is aligned with existing resources and planning commitments.

OTHER IMPLICATIONS

The findings of the Affordable Housing Gap Analysis are connected to other related work underway at Metro Vancouver that collectively aim to address the region's affordability challenges. The recently completed Housing and Transportation Cost Burden Study Update highlights the critical role transportation plays in household affordability. The findings from this study reinforce the importance of aligning housing growth with transit infrastructure to maximize affordability outcomes.

In addition, Regional Planning is currently developing an Infrastructure Gap Report that will assess the adequacy of social infrastructure (such as schools and healthcare facilities), transportation infrastructure (including public transit), and other essential community infrastructure in relation to projected regional growth. This work will help identify where infrastructure investments are needed to support complete, livable communities.

Together, these initiatives, housing, transportation, and infrastructure are deeply interconnected. A comprehensive understanding of these systems is essential to developing effective regional strategies that address affordability in a comprehensive way.

CONCLUSION

This report presents the findings of the Affordable Housing Gap Analysis, highlighting the scale of unmet need for affordable rental housing across Metro Vancouver and the level of investment required to address it. While recent efforts have increased delivery, the gap remains significant and will require coordinated action across all levels of government.

Local governments play a vital enabling role through planning tools and incentives, but substantial and sustained funding from provincial and federal governments is essential to meet the region's affordability targets. These findings will inform the development of policy alternatives and advocacy strategies under *Housing 2050*, supporting implementation of *Metro 2050's* housing goal and advancing the region's commitment to inclusive and resilient communities.

ATTACHMENTS

1. "Metro Vancouver Affordable Housing Gap Analysis", dated August 2025.
2. Presentation re: *Housing 2050*: Affordable Housing Gap Analysis.

REFERENCES

1. Hayes, J. (2024). *Regional Affordable Housing Strategy Update (Housing 2050: A Roadmap to Implement* Metro 2050's *Housing Goal) – Scope of Work.* [Staff report to Regional Planning Committee meeting on 2024, April 5.] https://metrovancouver.org/boards/RegionalPlanning/RPL-2024-04-05-AGE.pdf#page=732.

2. Homelessness Services Association of BC. (2023). *2023 Homeless Count in Greater Vancouver.* Retrieved from https://hsa-bc.ca/_Library/2023_HC/2023_Homeless_Count_for_Greater_Vancouver.pdf.
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6. Food Banks BC. (2024). *Hunger Report 2024*. Retrieved from https://www.foodbanksbc.com/_files/ugd/535e9e_b59a33aaf9964993a5ef9433b12fc030.pdf.
7. Hayes, J. and Jozipovic, M. (2025). *Housing 2050: Regional Housing Needs Report.* [Staff report to MVRD Board meeting on 2025, April 25.] https://metrovancouver.org/boards/GVRD/RD-2025-04-25-AGE.pdf#page=36.
8. Jeliazkova, D. (2025). *Metro 2050 Regional Affordable Rental Housing Target – Baseline Data.* [Staff report to MVRD Board meeting on 2025, February 28.] https://metrovancouver.org/boards/GVRD/RD-2025-02-28-AGE.pdf#page=653.

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METRO VANCOUVER

AFFORDABLE HOUSING GAP ANALYSIS

SEPTEMBER 2025

urban matters

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HOUSING 2050
A Roadmap to Implement Metro 2050's Housing Goal

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APPENDICES

SUMMARY SHEET

Affordable Housing Gap Analysis

Across Canada, the stock of non-market housing remains low — currently representing approximately 3.5% of all housing, falling below the average of 7% in other high-income countries in the OECD (Organisation for Economic Co-operation and Development). Within Canada, Vancouver has seen some of the most acute affordability challenges of any region.

Housing affordability is a top priority across all levels of government and there has been a meaningful increase in investment in affordable rental housing in recent years. However, current investment levels and development trends remain insufficient to address the scale of the current and projected need for affordable rental housing for low- to moderate-income households in the region. The Metro Vancouver Affordable Housing Gap Analysis dives into this persistent and growing gap and marks a step forward in quantifying the additional effort needed to meet local needs.

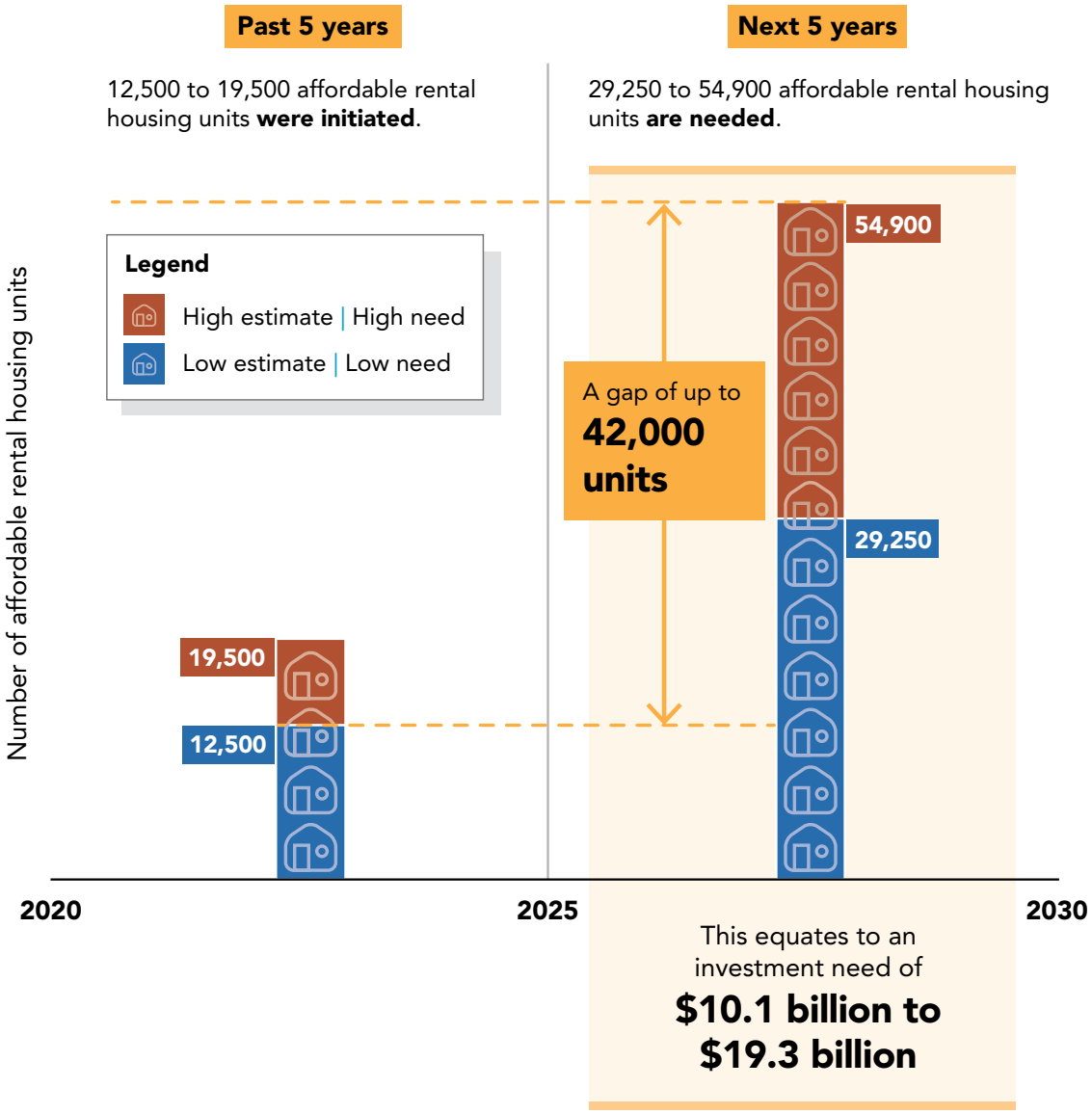
Best available data for the Metro Vancouver region indicates that:

- Over the past 5 years, between 12,500 and 19,500 affordable rental housing units were initiated across all government programs, made possible by $1.2 billion in contributions from federal and provincial funding programs, along with local government contributions and incentives.[1]
- Over the next 5 years, an estimated 29,250 to 54,500 affordable rental housing units are needed to address the unmet housing needs of low- to moderate-income households in Metro Vancouver.[2] An estimated $10.1 to $19.3 billion in investments (which could be made up of a combination of grant or contribution funding, low-cost financing, other policy changes, and local government contributions and incentives) will be required to deliver the quantity of units, at the depth and duration of affordability needed to address this unmet housing need.
- The pace of and investment levels in affordable rental housing delivery need to increase substantially to close the affordable rental housing gap in the region.

HOUSING 2050
A Roadmap to Implement Metro 2050's Housing Goal

1 The 12,500 to 19,500 range is constructed using data from CMHC, BC Housing, and a survey of Metro Vancouver member jurisdictions. The distance between these numbers reflects different degrees of overlap in the units reported by these different data sources (with 12,500 associated with a high degree of overlap, and 19,500 much less).

2 Affordable rental housing need is presented as a range to reflect uncertainty in trends in household income over time.


Past 5 years
Next 5 years
12,500 to 19,500 affordable rental housing units were initiated.
29,250 to 54,900 affordable rental housing units are needed.
Legend
High estimate | High need
Low estimate | Low need
Number of affordable rental housing units
54,900
29,250
19,500
12,500
A gap of up to 42,000 units
2020
2025
2030
This equates to an investment need of
$10.1 billion to $19.3 billion

While addressing the affordable housing need will require a significant increase in investment, the cost of inaction is also substantial. Research shows that broader impacts on communities include:

- Rising homelessness, as more individuals and families are unable to regain or maintain housing[i]
- Outmigration, where people leave the region in search of more affordable living[ii]
- Mental health decline among those affected by housing and food insecurity[iii]
- Household suppression, where people delay forming independent households due to elevated rents, often living with family or roommates[iv]
- Greater reliance on community supports, including food banks, health services, and emergency assistance programs[v,vi]
- Reduced economic resilience, as high shelter costs limit disposable income, affecting support for local businesses[vii]

The impacts and challenges are real, but so is the opportunity. Closing the affordable rental housing gap will require:

- **A mix of resources** — including senior government grants or capital contributions, low-cost financing, operating subsidies, and local government incentives or contributions
- **Capitalization of emerging opportunities** — such as increased capital contribution and low-cost financing through the proposed federal Liberal government's Build Canada Homes program as well as additional funding through the Building BC: Community Housing Fund
- **Regional collaboration** – across regional member jurisdictions to align efforts, share resources, and advocate with a stronger, unified voice
- **Improved data collection and evaluation mechanisms** – to collect robust and consistent data across multiple delivery partners and enhance evidence-based decision making
- **Reframing essential community infrastructure** – to integrate housing into broader community infrastructure, in recognition that housing contributes to overall well-being, livability, and economic resilience

With the best available data, the following report explores current and future affordable housing delivery in greater detail, offering a foundation for informed decision-making. It outlines how much affordable rental housing is required, how much is currently being built, and what kind of investment and coordinated effort will be needed to close it. Although the picture is not yet complete, this report supports coordinated work on a path forward.

With the right mix of resources and a commitment to strong regional collaboration, meaningful progress is within reach. Taking action today is essential — not only to meet current needs, but to shape a future where all residents have access to safe, stable, and affordable housing.

1.0 Definitions

This section provides key definitions and terminology used throughout the report to ensure clarity and consistency.

1.1 Affordable Rental Housing

For the purposes of this report, low-to moderate-income households are considered to be those earning below BC Housing's Housing Income Limits (HILs) for 2023. The HILs are based on unit size required for a given household size and composition, ranging from a maximum household income of $58,000 for one bedroom or less, up to $107,000 for a unit with four or more bedrooms.[3] This represents all affordability levels up to this maximum amount, from households on Income Assistance or Persons with Disabilities Assistance to households who earn moderate incomes. Affordable rents for these households is set as 30% of gross household income.

Affordable rental housing is also used more generally to refer to rental housing with a requirement to provide rents at levels below those provided by the private sector, typically secured through housing agreements. This report uses the term in a general way as data limitations prevent a stricter classification of units.

1.2 Need vs. Gap

In the context of this report, it is important to distinguish between the affordable housing "need" versus the affordable housing "gap".

- **Need** refers to the total housing required to meet the housing needs of a population
- **Gap** refers to the shortfall between what is needed and what is currently or expected to be delivered or funded

[3] BC Housing. (2023). *2023 Housing Income Limits (HILS)*. https://www.bchousing.org/sites/default/files/media/documents/2023-Housing-Income-Limits-HILS-Effective-January-1-2023.pdf. Updated HILs are expected to be released in 2025.

2.0 Introduction

This Affordable Housing Gap Analysis builds on the findings of the 2025 Regional Housing Needs Report by identifying the scale of the shortfall in affordable rental housing for the Metro Vancouver region over the next five years. It also outlines the level of investment and collaboration required to close that gap. By providing clear, evidence-based insights, this report aims to support informed decision-making and help align regional efforts and advocacy with the broader goal of delivering diverse and affordable housing choices for all residents.

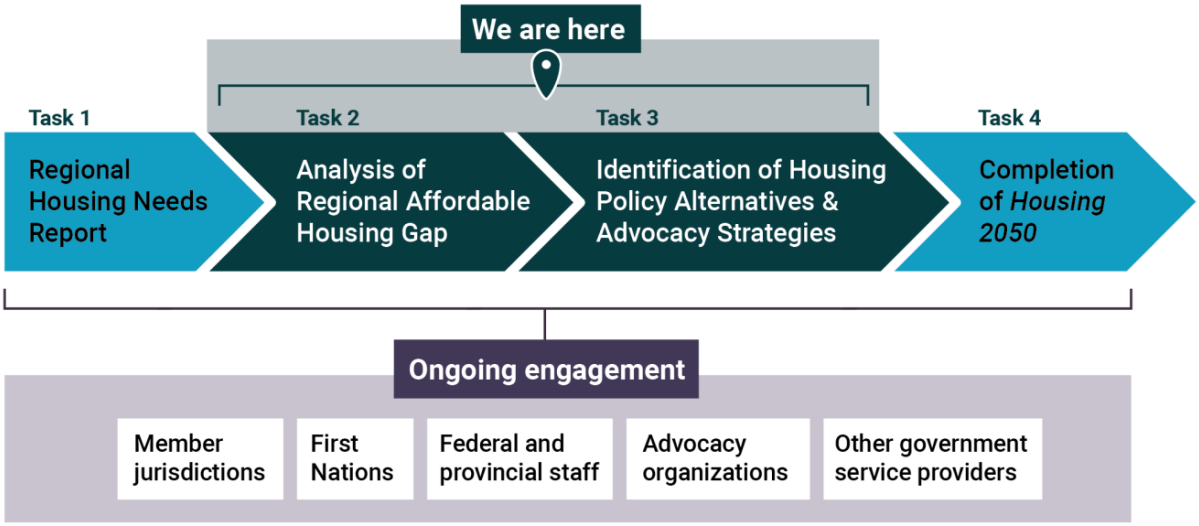
2.1 Policy Framework

Developed in 2023, the *Metro 2050: Regional Growth Strategy* sets out a collective vision for how it will shape long-term growth and development to support the creation of complete, connected, and resilient communities in the region. The strategy outlines five key goals, one of which is to provide diverse and affordable housing choices (Goal 4).

Work is underway on *Housing 2050: A Roadmap to Implement Metro 2050's Housing Goal.* The first milestone of this initiative was the *Regional Housing Needs Report* ("Regional HNR") (February 2025) which consolidates the results of each member jurisdiction's housing needs report (HNR) based on the provincially-mandated HNR Method. It provides a regional lens to housing needs, recognizing that housing pressures cross jurisdictional boundaries.

The Affordable Housing Gap Analysis is the second milestone. This report outlines the scale of the need, recent investments, the resulting affordable rental housing gap, and the level of investment needed to bridge that gap. Together, these insights provide a clearer understanding of where we are today and what it will take to meet the region's affordable housing goals.

Figure 1 - Housing 2050 Work Plan



2.2 Housing Partners and Investments

In addition to Metro Vancouver's ongoing work to provide diverse and affordable housing choices, all levels of government have taken significant steps in recent years to advance overall housing supply, particularly when it comes to enabling legislation and changes to local planning regulatory frameworks. Significant investment has also been made to fund and finance purpose-built rental and affordable rental housing.

The following graphic provides an overview of the key initiatives, policy tools, and investments introduced across levels of government to support housing supply and affordability across the country.

These collective efforts reflect a significant shift from previous decades and a refocusing, across all levels of government, on housing. Challenges persist, however, in addressing the needs of low- to moderate-income households who are not well served by the private sector. This report focuses on that persistent gap in the delivery of housing that is affordable for low- to moderate-income households in the region.

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3.0 Approach

3.1 Data Sources

This report relies on three available sources of information for the Metro Vancouver region:

- CMHC capital funding levels and number of units
- BC Housing capital funding levels and number of units
- A survey completed by Metro Vancouver member jurisdictions on starts and completions of affordable rental housing units (17 jurisdictions participated)[4]

These datasets are used to estimate, in broad terms, how many affordable rental housing units are likely to be built in the region through the most significant sources of government investment. Where possible, data on the delivery of long-term affordable rental housing for low- to moderate-income households was prioritized over programs with short-term affordability terms.

3.2 Limitations

Tracking affordable housing data is a complex and ongoing challenge. The delivery and preservation of affordable rental housing involves a broad network of partners, shifting funding sources, and evolving government regulations — all shaped by changing socio-economic trends.

To illustrate, there are several ways to deliver affordable rental housing. Non-profits can develop affordable rental units through several interconnected channels of support, including:

- **Private contributions**, such as donations and sponsorships
- **Local government support**, including policies that reduce development costs (like development cost charge waivers or reductions in parking requirements) or direct contributions like grant programs and land contributions.
- **Senior government funding**, which may include grants, loans, and operating subsidies from agencies such as BC Housing, the Canada Mortgage and Housing Corporation (CMHC), and the Federation of Canadian Municipalities (FCM)

[4] Surveys were completed by the following jurisdictions: City of Burnaby, City of Coquitlam, City of Delta, City of Langley, City of Maple Ridge, City of New Westminster, City of North Vancouver, City of Port Coquitlam, City of Port Moody, City of Richmond, City of Surrey, City of Vancouver, District of North Vancouver, District of West Vancouver, UBC (Electoral Area A), scəwaθən məsteyəxʷ (Tsawwassen First Nation), and Township of Langley.

In projects led by private developers, affordable units may be required by member jurisdictions through inclusionary zoning and tenant protection policies or contributed through density bonusing. When this happens, senior government financing can be utilized either by the developer or by a non-profit organization that takes ownership or manages the unit once it's built. In Metro Vancouver, affordable rental housing has also been delivered directly through Metro Vancouver Housing or by agencies created by member jurisdictions. In these cases, senior government funding is commonly accessed.

Given these complexities, below are some of the key data limitations that affect this report:

- Efforts were made to avoid double-counting units as many projects stack funding or incentives programs (i.e., one unit is an outcome of multiple programs). However, it is not possible to harmonize the datasets.
- Units delivered with no involvement from CMHC, BC Housing, and member jurisdictions are not captured through available datasets.
- The CMHC data used did not include units delivered with short-term affordability terms through CMHC financing programs, though these may be captured through the member jurisdiction survey if they also accessed local government incentives.
- Data on the level or duration of affordability or unit size is generally not reported.

Analysis in this report estimates the investment required to address housing need by calculating the per-unit investment required to cover the difference between the market rent price and the affordable rent price over 35 years. This method provides an estimate of the total investment need without requiring detailed knowledge of how housing units will be delivered. As a result, this report can only analyze the available data from a high level, acknowledging that the complexities of the system cannot yet be measured due to a lack of quality data. These are early indicators of investment need and should be updated as more detailed data becomes available.

Additionally, in practice, investment will not come as a lump sum at a single standardized cost. Instead, affordable housing will be delivered at varying per-unit costs and funded through a combination of sources including senior government funding (capital contributions and operational subsidies) and local government support.

Without more complete data, the ability to capture the true complexity of the systems that deliver affordable rental housing is restricted. Better data that captures the complexity of affordable rental housing delivery would significantly enhance this analysis. With more detailed and integrated tracking, such as information on funding sources and amounts, affordability levels, tenure types, and policy interventions, the analysis could more accurately reflect how affordable housing is planned, financed, and delivered across jurisdictions.

Currently, data collection is primarily done for the purposes of administration of programs and record keeping at the federal and provincial levels and is limited in its use for monitoring and

analysis. Coordination across funding bodies, or detailed data collection at relevant critical milestones (e.g., building permits), could support better data collection. Enhancements would enable more informed decision-making and help identify where progress is being made, which interventions are most effective, and where critical gaps remain.

A key component of this report is to identify these data limitations and make recommendations to support future monitoring of affordable housing delivery in the region. A more comprehensive discussion of the limitations of these data sources is found in **Appendix B.**

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4.0 Housing Need

4.1 Total Housing Units Needed

Metro Vancouver's 2025 Regional HNR brings together data from all member jurisdictions to estimate how many housing units are needed across the region, for all income groups. It looks at both short-term needs (2022–2026) and long-term needs (2022–2041), using the provincially-mandated HNR Method.

In total, the estimated housing need across the region is 230,457 units in the short term and 755,144 in the long term.[5] These figures are calculated by combining two key components:

- Underlying need (households currently living in the community who have unmet housing needs), and
- Future need (an estimate of additional households, through population growth, who will require housing at rents not currently being delivered by the private market).

Table 1 below breaks down the total estimated housing need in the region by the different components used in the HNR Method, providing a picture of the scale of housing needed to support a growing and diverse population.

Table 1 - Units Needed: Components of Regional Housing Need, Metro Vancouver, 2022 to 2041

Component of Housing Need	2022 to 2026 (5 years)	2022 to 2041 (20 years)
Component A: Extreme Core Housing Need	16,155	64,622
Component B: Homelessness	5,677	11,354
Component C: Suppressed Household Formation	9,110	36,440
Component D: Anticipated Household Growth	170,354	526,083
Component E: Rental Vacancy Rate	1,871	7,484
Component F: Demand Buffer	27,290	109,161
Metro Vancouver Total	**230,457**	**755,144**

[5] Between 2020 and 2024, CMHC recorded a total of 117,119 housing completions in Metro Vancouver. When compared to the estimated short-term (5-year) housing need of 230,457 units, this figure highlights a significant shortfall. If current development trends persist, or decline, the region will fall substantially short of meeting both its five-year and longer-term (20-year) housing need.

4.2 Affordable Rental Housing Need

A subset of the identified total housing need is affordable rental housing for those of low- to moderate-income households. There is no single definition of affordable rental housing, as it can range across jurisdictions and organizations based on the local context.

The Regional HNR estimated affordable rental housing need using BC Housing's 2023 Housing Income Limits (HILs) as an upper threshold. Recently built affordable rental housing units identified in this report may not always offer rents below the 2023 BC Housing HIL rates. This is due to varying affordability requirements set by different jurisdictions and funding organizations. BC Housing also updates HIL rates regularly, which can affect how affordability is defined over time.

Analysis shows that the amount of affordable rental housing needed in the short-term period (2022 to 2026) is between 29,250 and 54,500 units based on 2023 HIL rates. Two approaches are used to estimate the number of units needed within BC HILs levels:

- The lower estimate assumes that recent trends in the income distribution of future households will continue, with increasing higher-income households and decreasing lower-income households over time. This is based on the average annual changes in income distribution observed between 2001 and 2021. This approach is consistent with the methodology underpinning both the BC HNR Method and housing target guidelines.
- The higher estimate assumes the income distribution of future households will reflect the current household income distribution, assuming affordable rental housing options are available. This is based on the household income distribution observed in the 2021 census.

The higher estimate differs modestly from the figure reported in the Regional HNR due to a finer grain of household income analysis. These figures are order-of-magnitude estimates only. They are intended to serve as guidance to support planning and monitoring of affordable housing investment in the region overall and will need to be tested and validated over time.

Table 2 below shows a more detailed breakdown based on a short-term, five-year need as per the BC HNR Method. The need for affordable rental housing will continue beyond the five-year horizon, though longer-term projections are not provided due to the uncertainty of future income distribution.

*Table 2 - Affordable Housing Need, Metro Vancouver (2022 to 2026)**

Affordability Level	Lower Range	Higher Range
Under $45,000	16,000	38,000
$45,000 to $57,999	7,000	10,000
$58,000 to $71,999	3,250	4,250
$72,000 to $85,999	2,000	1,500
$86,000 to $107,500	1,000	750
Total Affordable Housing Need	**29,250**	**54,500**

**Figures have been rounded to the nearest 250 units.*

***Both lower and higher range includes a need of 5,500 shelter-rate units for people experiencing homelessness, including housing with supports.*

5.0 Recent Delivery of Affordable Rental Housing

In recent years, there has been a significant effort at all levels of government to increase the supply of affordable housing. This investment takes many forms:

- Capital grants or contribution funding, especially from senior governments
- Low-cost financing[6]
- Ongoing operating subsidies (e.g., from BC Housing)
- Other incentives, contributions, and abatements (e.g., land contributions, waiving or relaxing local government fees, density bonusing, etc.)

Both senior and local governments have access to powerful tools that can significantly support the delivery of affordable rental housing. While senior government programs provide essential funding and financing, local government policies and tools, such as land contributions and zoning can also have a major impact on project viability.

Findings show there is still room to better leverage local government policies and incentives, which remain underutilized in some areas. Strengthening the use of these tools across the region could play a key role in closing the affordable housing gap.

[6] While low-cost financing is an important mechanism, in this context a dollar of low-cost financing (a dollar of loans) is less impactful than a dollar of capital grants or contributions. The benefit of low-cost financing is in lower interest payments, but the principal still needs to be repaid.

5.2 By Housing Units

Over the recent five-year period, the number of initiated affordable units was likely between 12,500 and 19,500 units (or 2,500 to 3,900 per year), excluding programs that were temporary in nature from BC Housing.[7]

The initiated units described in this report differ from the newly completed affordable rental units estimated in the Regional HNR. The data used for the Affordable Housing Gap Analysis is based on custom data on funding levels and unit flows from CMHC, BC Housing, and member jurisdictions. The Regional HNR estimate of newly completed affordable rental units is based on CMHC data of recently built existing affordable rental units. These datasets are compiled for different purposes and use different affordability definitions, timeframes, and tracking mechanisms. They cannot be directly compared.

The survey of member jurisdictions asked participants to provide high-level estimates of the anticipated affordable rental housing development in each jurisdiction over the next 5 years. Respondents referenced a variety of sources, such as tracking local development approvals pipeline and estimates on the uptake of existing programs that support affordable rental housing development. Based on the 17 member jurisdictions that responded, approximately 17,500 affordable rental units are anticipated over the next 5 years, roughly consistent with trends over the past 5 years. This indicates that the affordable housing gap is expected to persist at a similar level for the foreseeable future. Predicting affordable rental housing development is challenging and respondents emphasized that actual delivery would depend on economic conditions, funding and financing availability, and sector capacity.

5.2.1 Key Findings

- The Burrard Peninsula saw more initiated units than other sub-regions on a relative basis, with local member jurisdictions having a larger contribution (purple bar) in Burrard Peninsula, Northeast, and South of Fraser West, as shown in Figure 3 below.
- On a per capita basis, the initiated units in South of Fraser East, South of Fraser West, and Ridge Meadows were lower than the regional average, as shown in Figure 4 below.
- The depth of affordability for these 12,500 to 19,500 units is unknown. It is expected that many of these units are not delivering the depth of affordability needed to address local needs.

[7] Differences in data sources limit the comparability of the data, as such "initiated" is used to encompass multiple concepts which generally relate to an early milestone in the delivery of housing. 2020 through 2024 was the intended 5-year period. Data from CMHC and local government survey responses correspond to this 2020 through 2024 period. The BC Housing data received covers fiscal years 2017/2018 through to the first half of fiscal year 2024/2025, but without the ability to identify units within each period in a fashion consistent with the CMHC and local-housing data. To address this, two-thirds of the units were included (to correspond to 5 of the 7-and-one-half-years).

Figure 2 – Metro Vancouver Member Jurisdictions by Sub-Regions, as Shown in Metro 2050

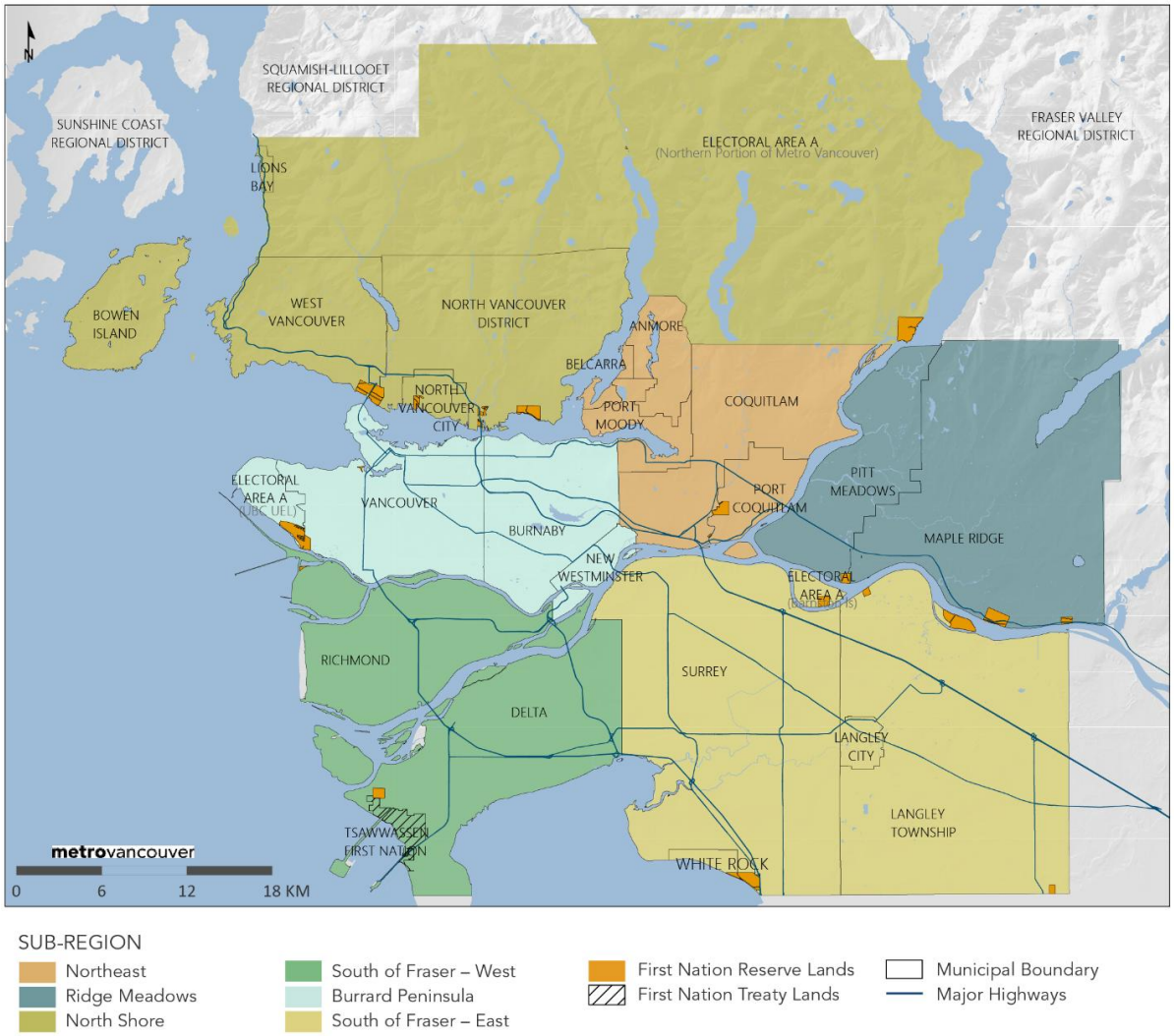


Figure 3 - 5-year investment of below-market units by source and sub-region[8]

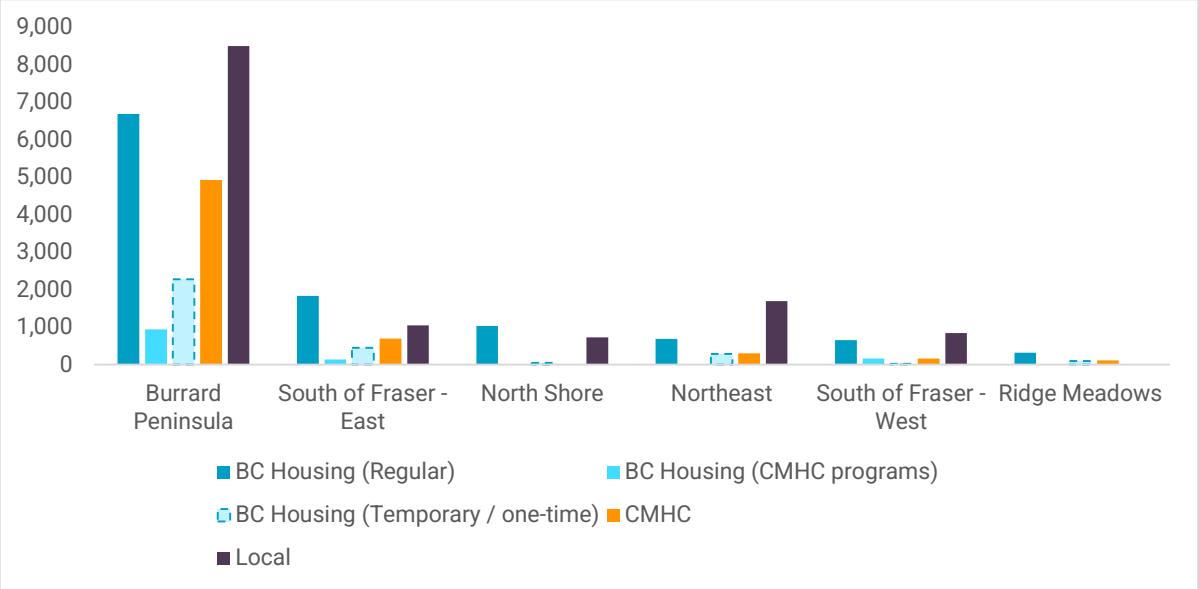
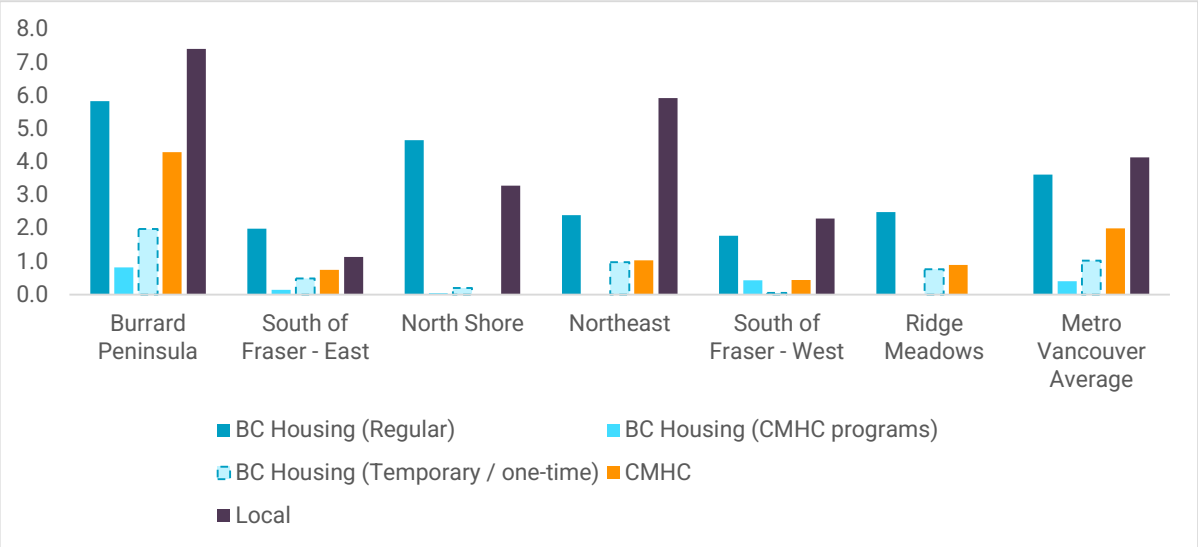


Figure 4 - 5-year units-per-1,000 people, by source and sub-region[9]



[8] BC Housing data covered a 7.5 year period and has been adjusted accordingly. Local government data is based on survey responses relating to affordable housing starts, but not all local jurisdictions responded to the survey. Further, the BC Housing (CMHC Programs) associated units are assumed to be overlapping with CMHC units.

[9] BC Housing data covered a 7.5 year period and has been adjusted accordingly. Local government data is based on survey responses relating to affordable housing starts, but not all local jurisdictions responded to the survey. Further, the BC Housing (CMHC Programs) associated units are assumed to be overlapping with CMHC units.

5.3 By Investment Dollars

This section outlines the individual and collective financial impact of federal and provincial government funding and local government tools.

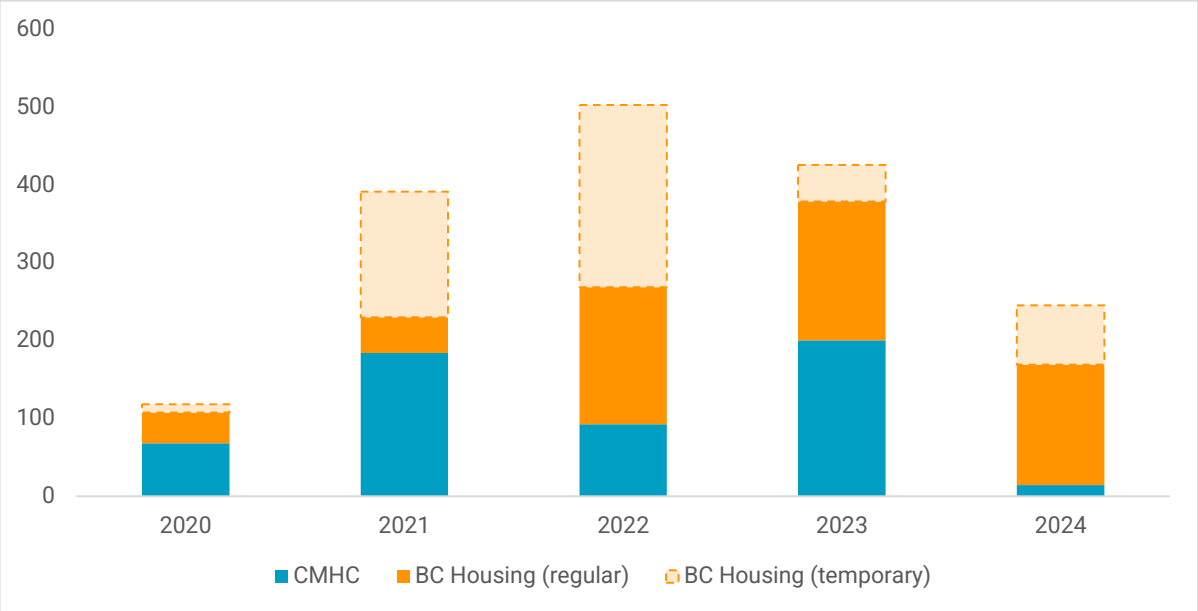
5.3.1 Key Findings

- Senior governments made an estimated $1.2 billion in capital contributions, or $59,000 to $92,000 per estimated affordable rental unit.
- Use of local government tools can lead to significant cost reductions, including as much as or even more than the value of capital contributions where high value contributions such as land, parking reductions, and fee waivers are offered. Data on the value of local government contributions is not collected systematically.
- The stacking of local government tools has a substantive impact on reducing development costs and improving the viability of affordable housing projects. Responses from the Metro Vancouver survey show that communities are using a variety of tools to support affordable housing and that expanding these tools could improve the viability of planned projects and speed up the delivery of new units.
- Senior government contributions and local government tools are commonly used in combination to achieve deeper levels of affordability.

5.3.2 Federal and Provincial Government Funding

Capital contributions from BC Housing and CMHC over the recent five-year period provide a partial picture of the investment context. Available data from BC Housing and CMHC shows substantial variation in contributions from 2020 to 2024, as shown in Figure 5. These levels of federal and provincial funding for affordable housing are relatively recent, and don't show a clear or consistent pattern over time, especially when considering sources independently. This limited history and data cannot support a meaningful projection of increase or decrease in the near future.

Figure 5 - Capital funding by year and source ($, millions)



In the aggregate, there was $1.2 billion in grant and contribution investment from BC Housing and CMHC over the recent 5-year period.[10] With the rough estimate of 12,500 to 19,500 units (2,500 to 3,900 per year), this $1.2 billion investment ($230 million per year) equates to $59,000 to $92,000 in capital contribution per unit.

5.3.3 Local Government Tools

The financial impacts of local government tools vary by site and by member jurisdiction, as physical site conditions, market dynamics, and fee rate structures are not uniform across Metro Vancouver.

One example of such variability in the value of a local government tool relates to parking waivers. The cost to build an underground parking stall can fluctuate widely, depending on things like soil and groundwater conditions, site access and adjacency issues, and the depth (i.e., number of levels) of the parking structure. As the costs vary, so too does the value of a local government intervention in the form of a parking waiver for any individual project.

A 2025 memo summarizing the Metro Vancouver Private Off-Street Parking Study indicated that, generally speaking, the cost to deliver an underground parking stall in the region ranged

[10] Funding arrangements can be complicated, and in some cases funding from CMHC (for example) may flow through BC Housing. We're unable to conclusively determine the extent of double-counting within the funding data across our two main sources. At maximum, it may represent approximately 1/3 of the regular (not temporary or one-off) BC Housing grant funding.

from $117,400 to $137,000, considering all construction and related costs.[11] This same report also indicated that developers cannot generally recover parking costs through revenues from the stalls. Given this, even a small parking requirement reduction constitutes a meaningful local government intervention, as it translates to substantial positive impacts on overall project economics.

Another instance of a local government tool is fee waivers. By way of example, annual reports on Development Cost Levies (DCLs) in the City of Vancouver show that between 2020 and 2024, the City exempted social housing projects – representing 4,096 units – from $76 million in DCLs ($18,600 per unit). They also exempted 5,195 secured market rental units (689 of which were below-market) from an additional $79 million in DCLs ($15,100 per unit).

To further illustrate the potential value of local government tools, a hypothetical six-storey wood-frame affordable rental building in the South of Fraser East subregion was analyzed using a development financial pro forma.

Table 3 – Potential impact of local government tools

Local government tool	Impact (per-unit)
Free land	$67,000
Reduced parking requirement (from 1.1 to 0.7 stalls per unit)	$28,000
Development Cost Charge (DCC) waiver	$26,000
Sum	**$121,000**

The impacts above are intended to be illustrative and will likely vary substantially from project to project.

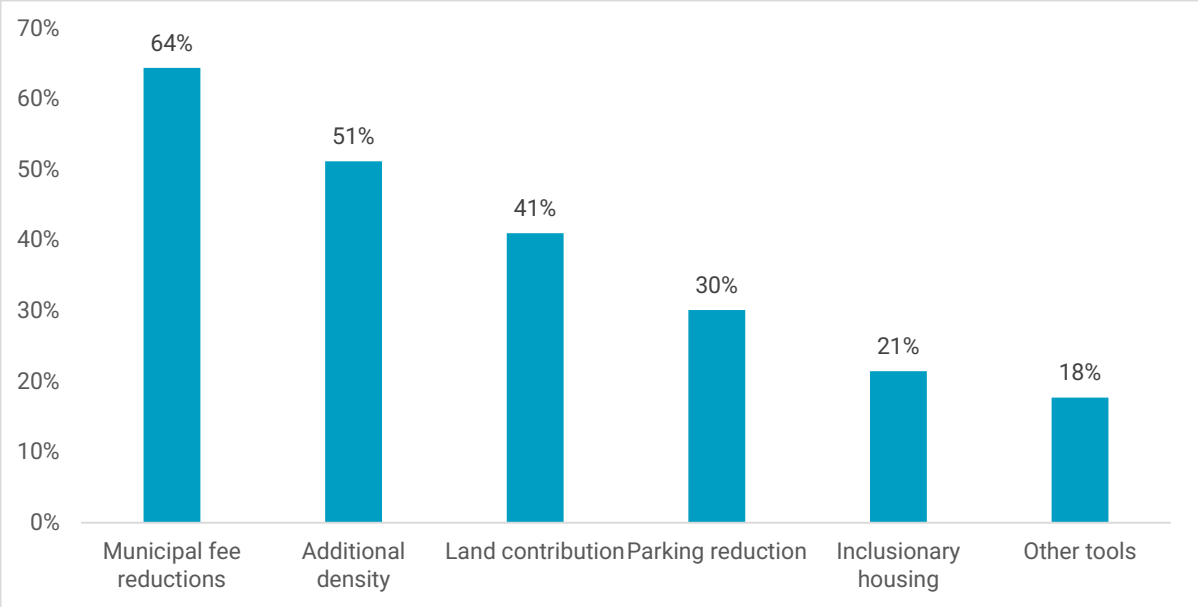
[11] Bunt & Associates. (2025). *Metro Vancouver private off-street parking study.* https://metrovancouver.org/boards/RegionalPlanning/RPL-2025-07-03-AGE.pdf

5.3.4 How Tools Are Applied Across Metro Vancouver

A survey of Metro Vancouver member jurisdictions provides some evidence regarding the most common application of various local government tools. The use of these tools varies depending on factors such as project type and location, affordability targets, market conditions, and land availability. Although comprehensive data on the total value of local government tools is lacking, the information provided indicates that there are opportunities to expand the use of these local government tools to address the investment needed for affordable housing.

Figure 6 shows how frequently each local government policy tool is used across affordable housing starts in communities with reported data. More than one policy tool is typically applied for each affordable housing project.

Figure 6 - Share of Affordable Housing Starts Supported by Tool, 2020-2024



While many communities are utilizing fee reductions and additional density, responses suggest that there is still significant room to expand the use of best practice policy tools for affordable housing across the region. Updates to Provincial legislation, including Bill 47 (Housing Statutes (Transit-Oriented Areas) Amendment Act, 2023), will also influence how these tools are applied. With Bill 47 removing off-street parking requirements, setting minimum allowable densities in transit-oriented areas, and restricting the use of density bonusing within minimum allowable densities, some communities may attempt to shift towards the use of new inclusionary zoning powers to meet their affordable housing goals.

Data on the degree of impact of each local government tool (an equivalent grant value, for example) is not captured systematically. The hypothetical development scenarios outlined above illustrate the positive impact that several policy and financial tools can have on reducing development costs. By improving project viability, these tools play a critical role that support affordable housing developments that operate within narrow financial margins.

Other tools, such as inclusionary housing policies, require that a certain number of affordable units be included in new developments.[12] While such policies do not enhance the financial viability of projects, they can play a role in ensuring that new housing supply includes affordable options to meet community needs.[13] Inclusionary housing policies tend to be most effective during periods of strong, stable market conditions, where the balance of development costs against achievable market unit revenues allows developers to deliver affordable units within an otherwise market development (often at well below their cost of construction), while still achieving a viable overall project.

Some tools, such as fee reductions and public land contributions, require direct financial investment or the use of valuable public assets like land. Given budget constraints that communities face, these tools may be most appropriately reserved for projects that deliver deeper levels of affordability, such as non-market or deeply subsidized housing.

In contrast, projects that offer more moderate levels of affordability may not require the same level of local government investment. These developments can often proceed with support from federal and provincial government financing programs (e.g., CMHC's Multi-Unit Mortgage Loan Insurance (MLI) Select and Apartment Construction Loan Program), combined with local measures such as increased density allowances, reduced parking requirements, or inclusionary housing.

[12] In some inclusionary housing policies, cash-in-lieu can be accepted in lieu of the developer creating the units themselves. This cash-in-lieu is often used by the local government to fund affordable housing projects.

[13] For inclusionary housing policies to be effective, they must be carefully calibrated to ensure they do not unduly impede the overall economic viability of a project. Otherwise, no units – market or below market – will be delivered.

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6.0 Understanding The Scale of Investment

For ease of understanding, this report presents the scale of investment needed as a single lump-sum amount, similar to a capital grant or contribution funding. In reality, however, funding may come from a variety of different sources or take different forms.

Table 4 below summarizes the level of investment—either directly or through policy changes and tools that have an equivalent value-- that would be needed to achieve the estimated number and affordability levels needed in the short-term (five-year period of the BC HNR Method), as well as an annual average. An estimated total investment of between $10.1 billion and $19.3 billion would be needed to address the scale of affordable rental housing need over the next 5 years at the depth of affordability required. This translates to an average annual investment of between $1.9 billion and $3.9 billion. This is inclusive of the value of all contributions, including low-cost financing, operating subsidies, the use of local government tools, or other types of policy changes that lead to reduced costs. It also includes any waivers or reductions for the cost of required infrastructure.

A per-unit investment of between $346,000 and $354,000 would be needed to achieve the affordability levels required to address the unmet housing needs of low- to moderate-income households in the region. The per-unit investment is the present value of the needed reduction in rents over the 35-year period (the affordability period under consideration).[14]

*Table 4 - Summary of unit and investment need**

	Lower range	Higher range
Affordable rental housing units needed (5-year need)	29,250	54,500
Average monthly market rent	$2,727	$2,697
Target reduction in monthly market rent to achieve affordability	$1,440	$1,470
Per-unit investment required to achieve needed affordability	$346,000	$354,000
Total investment required to achieve needed affordability (5-year need)	**$10.1 billion**	**$19.3 billion**

**As noted above, the level of investment needed is presented as a single lump-sum amount. In actuality, this investment can be provided through a combination of tools, including capital grants, operating subsidies, low-cost financing, reduction in fees, land contributions, etc.*

[14] The needed reduction in rents is the difference between market and affordable rents.

The $346,000 to $354,000 per-unit need is notably different from the estimated $59,000 to $92,000 estimate of per-unit grant or contribution funding from 2020 to 2024. The estimated historical per-unit values ($59,000 to $92,000) do not include low-cost financing, operating subsidies, or the use of local government tools. Furthermore, it may be the units identified by CMHC, BC Housing, or member jurisdictions a) were not as deeply affordable, and/or b) had shorter affordability periods (less than 35 years).

Over the past 5 years, federal and provincial capital contributions totaled $1.2 billion, or an average of $240 million per year. While it is not possible to quantify the value of other tools and contributions, this analysis indicates that a significant boost to capital contributions would be required to fully address the scale and depth of affordability needed to serve regional households.

For context, the higher range investment shown in Table 4 ($19.3 billion over five years) is comparable in magnitude to five years' worth of the Canada Public Transit Fund (at $3 billion per year over 5 years) or to the total cost of the Site C Dam (roughly $16 billion), and would correspond to roughly 2% of the Metro Vancouver area GDP over the five-year period.

See **Appendix A** for a discussion of the important simplifications necessary to enable this analysis.

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7.0 A Changing Investment Landscape

While the analysis of investment need looks at potential sources of that investment, anticipating the future market and funding landscape is challenging, especially in the current evolving economic context. This section outlines several anticipated changes or trends in the affordable housing investment landscape. It is not intended to be comprehensive, and many other changes may impact the affordable rental housing need, investment gap, and provision of affordable rental housing over the short and longer term.

7.1 The Liberal Government's Proposed "Build Canada Homes"

During the Spring election campaign, the Liberals presented a housing plan that included the creation of a new entity called Build Canada Homes. According to the plan, it would provide $10 billion in low-cost financing and capital for affordable home builders. Six billion dollars ($6B) of this is said to be for capital for "deeply affordable housing, supportive housing, Indigenous housing, and shelters." If this $6 billion in funding were to be allocated in proportion to recent historical growth, this would amount to roughly $600 million for the Metro Vancouver region.[viii] Given the relative magnitude of the affordability challenges in Vancouver as compared to other parts of the country, the Metro Vancouver region may receive a greater share of this funding.

7.2 Community Housing Fund – May 2025 Request for Proposals

The BC government opened applications for $775 million in total funding through the Building BC: Community Housing Fund. Again, if this funding were to be allocated in proportion to the population, this would amount to roughly $423 million in funding for the Metro Vancouver region.[ix,x] Uncertainty remains about future cycles of this and other BC Housing funding programs.

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7.3 The Changing Development Environment and Use of Local Government Tools

The Metro Vancouver region has seen historically high levels of new home development in recent years, with new construction reaching an all-time high in 2023 with 33,244 starts — 10,768 of these being rental. Persistently rising prices and rents have allowed developers to proceed with market projects while absorbing high (and rising) fees, and also delivering some below-market housing units.[15] The latter have typically been the result of government tools, most commonly an exchange of additional density for units at below-market rates.[16] Today, however, the private development sector faces a growing set of challenges, likely to result in at least a near-term drop in project starts across all member jurisdictions.[xi] These challenges include:

- Persistently high costs (including government fees)
- Stagnant or falling condo pricing, leading to a near evaporation of the pre-sale market (critical for obtaining construction financing)
- Falling market rents, partly a result of recent successes in bringing new rental products to market using CMHC-backed financing, and potentially reflecting changing policy relating to non-permanent residents

There is, at the time of writing, no sign that these challenges to market fundamentals are abating in the short term, particularly in light of broader uncertainties around Canada's economic outlook. This means that it will be even more challenging for private for-profit development to deliver units – market and non-market alike – in the coming years.

As for-profit developers take a step back, not-for-profit developers are left with a challenging task. Although not-for-profits do not have the same return expectation as for-profit developers, they still face many of the same market forces that make development difficult. For instance, not-for-profits must still contend with persistently high building costs, which include expenses for lumber, concrete, steel, building systems, and skilled trades. Additionally, they face high and rising costs of housing operations, such as ongoing building maintenance, management, insurance, and mortgage payments.

[15] According to CREA's MLS® Home Price Index, a composite, quality adjusted measure of home prices within Greater Vancouver (as defined by the Greater Vancouver Real Estate Board) increased by nearly 160% from 2006 to 2024. Average 2-bedroom rents increased by approximately 120% over the same period in the Vancouver CMA, according to CMHC's Rental Market Survey.

[16] Another version of this has been the exchange of additional density for cash-in-lieu of built affordable units, with that cash directed to a municipal affordable housing reserve fund, and used subsequently to fund the construction or acquisition of affordable units.

In sum, even not-for-profits need to consider overall project economics – of construction, of operation, and the link between the two – and have a functioning financial pro forma to move forward with a project. In a challenged economic context, not-for-profit builders and operators will need increasing local government support to bring costs down and deliver units to end-users that can be operated sustainably, at the affordability levels needed for low- to moderate-income households. As indicated in the Metro Vancouver member jurisdiction survey, it was reported that some members are already considering implementing more tools to support the development of affordable rental housing[17]. This is encouraging as different types of local government tools – waivers, abatements, grants, etc. – can help to reduce the cost of construction, and support affordable rents that cover costs.

[17] More detailed information on the changing use of local government tools based on the feedback to the Metro Vancouver survey is available in Appendix A.

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8.0 Conclusion

This report demonstrates the magnitude of the challenge ahead of the Metro Vancouver region when it comes to increasing the availability of affordable rental housing. Using the best available data, this analysis provides the clearest picture to date of how far current levels of effort fall short and what it might take to close the gap.

8.1 Key Findings

Several important findings have emerged from this analysis that help clarify the scale and complexity of that challenge:

- **Despite continued efforts, the affordable housing gap remains significant.** Approximately 16,750 to 42,000 (or 3,350 to 8,400 per year) affordable housing units would be needed over and above the recent historical pace of initiation (12,500 as a lower estimate).
- **The investments needed to address affordable rental housing need are significant.** $10.1 to $19.3 billion (or $2.0 to $3.9 billion per year) investment across capital contributions, low-cost financing, operating subsidies, and local government tools will be needed. This equates to an estimated $346,000 to $354,000 in support and contributions per unit. Federal and provincial capital contributions only amounted to approximately $1.2 billion over the last 5 years.
- **There is room to explore more extensive use of local government policies and incentives.** Some member jurisdictions make more extensive use of the range of local government tools than others. Further use of these tools across the region could play a key role in improving project viability and closing the affordable housing gap.
- **There is uncertainty in the development environment.** With ongoing economic uncertainty and the high costs of land, construction materials, and labour, there is significant financial uncertainty in the development sector at present. A deteriorating development environment would likely severely limit the effectiveness of some local government tools that rely on housing partnerships with for-profit housing providers.
- **While this report represents the most comprehensive analysis to date, better data and ongoing monitoring are still needed.** Data received from CMHC, BC Housing, and survey responses from local governments have important limitations and do not presently allow robust analysis of recent flows of affordable housing units and funding. More consistent and detailed reporting would allow for clearer comparisons and stronger evaluation. This may include enhancements such as:

- A standardized approach to identifying when units are considered started or completed
- Information on the level of affordability (e.g., rent levels or income targeting) and unit characteristics, such as the number of bedrooms
- A method for identifying and adjusting for duplicated unit counts due to stacked funding from multiple sources
- Improved tracking of project timelines, funding sources, and delivery outcomes across jurisdictions
- A well planned and concerted effort at the regional, but better yet provincial or national level, could be of immense value

While the magnitude of the investment gap is large, the human costs of not addressing housing need are also significant. Each missing unit of affordable rental housing represents individuals and families facing housing insecurity, longer commutes, or overcrowding — with social and economic impacts that extend beyond the household level.

In recognition of these impacts, it is important to consider two additional factors: the prevailing perceptions of housing and the importance of collaboration. Housing is an essential infrastructure, which requires matching levels of strategy and funding that reflect its critical role in community well-being. Despite significant funding contributions from governments over the past eight years, there is still a substantial shortfall in the number of affordable rental units being delivered relative to the need. This gap highlights the importance of scaling up efforts, improving coordination, and ensuring that future investments are aligned with the depth and type of affordability required across the region.

APPENDIX A

Quantifying Investment Need

The investment need is calculated per-unit as the present value of the differences between market and affordable rents over the affordability period.

$$PV_j = (r_j^{mkt} - r_j^{aff}) \frac{1-(1+i)^{-t}}{i}$$

$$PV = \sum_j^J n_j \times (r_j^{mkt} - r_j^{aff}) \frac{1-(1+i)^{-t}}{i}$$

Where j is each unique unit / affordability type, r^{mkt} and r^{aff} are market and affordable (annual) rents respectively, i is the interest rate, and t is the affordability period (in years).

The per-unit present value (PV_j) can be multiplied by the number of units of that type n_j and summed for the total investment need.

Assumptions

The period (t) is taken to be 35 years. This is based on the length of a typical loan for purpose-built rental. The interest rate (i) is taken to be 3.5%. This is a plausible real interest rate, which is appropriate for this analysis.

Deriving per-unit investment need

Two cases (defined by households with income categories and bedroom types) are considered:

Lower need - units needed by bedroom type and income range

Income limits ($)		Studio / One bedroom (under $58,000)	Two Bedroom (under $72,000)	Three+ Bedroom (under $107,500)	Total
Lower	Upper				
Homelessness		5,500	0	0	5,500
	44,999	8,250	1,250	1,000	10,500
45,000	57,999	4,000	1,500	1,500	7,000
58,000	71,999	0	1,750	1,500	3,250
72,000	85,999	0	0	2,000	2,000
86,000	107,500	0	0	1,000	1,000
Total		**17,750**	**4,500**	**7,000**	**29,250**

Higher need - units needed by bedroom type and income range

Income limits ($)		Studio / One bedroom (under $58,000)	Two Bedroom (under $72,000)	Three+ Bedroom (under $107,500)	Total
Lower	Upper				
Homelessness		5,500	0	0	5,500
	44,999	21,250	6,250	5,000	32,500
45,000	57,999	5,750	2,250	2,000	10,000
58,000	71,999	0	2,250	2,000	4,250
72,000	85,999	0	0	1,500	1,500
86,000	107,500	0	0	750	750
Total		**32,500**	**10,750**	**11,250**	**54,500**

Affordable and market rents are defined as follows, along with the difference between them.

Affordable rents, market rents, and differences by bedroom type and income range

Income limits ($)		Market rents:	1,957	3,135	4,418
Lower	Upper	Affordable rents	Studio / One bedroom (under $58,000)	Two Bedroom (under $72,000)	Three+ Bedroom (under $107,500)
			Difference (market rents minus affordable rents)		
Homelessness		500*	1,457		
	44,999	1,125	832	2,010	3,293
45,000	57,999	1,500	457	1,635	2,918
58,000	71,999	2,000		1,135	2,418
72,000	85,999	2,225			2,168
86,000	107,500	3,125			1,293

** This represents shelter rates.*

The per-unit investment need is therefore as follows:

Per-unit investment need by bedroom type and income range

Income limits ($)		Studio / One bedroom (under $58,000)	Two Bedroom (under $72,000)	Three+ Bedroom (under $107,500)
Lower	Upper			
Homelessness		349,692		
	44,999	199,693	482,422	790,352
45,000	57,999	109,690	392,419	700,349
58,000	71,999		272,415	580,345
72,000	85,999			520,343
86,000	107,500			310,336

Aggregation

Combining the unit table with the investment need per-unit results in an estimate of aggregate investment need between $10.1 billion and $19.3 billion.

Limitations

This analysis does not explore potentially lower or higher costs of non-profit housing delivery, such as reduced costs because of a lack of profit margin or higher costs due to funding application processes and additional policy requirements imposed on non-profit housing providers (e.g., improved energy efficiency, accessibility, and other requirements). Estimation of investment need requires simplifications to make the analysis workable. With these simplifications come the following important caveats for interpreting the results:

- The analysis does not account for potential added costs in the delivery of affordable housing as compared to market housing (e.g., applications, negotiations, etc.). These variables would be an added cost and would increase the investment need.
- A single affordability period of 35 years is considered. This is based on the typical length of mortgages held by non-market housing providers. A shorter affordability period would reduce the investment need, while longer periods would increase it.
- No consideration is given to changes in incomes (and thereby affordable rents) or market rents over time. If incomes were to increase more rapidly than market rents, the necessary investment need would be lower. In a similar way, increases in construction costs would be expected to put upward pressure on market rents, and would increase the necessary investment.

APPENDIX B

Data Summary

CMHC data

Program funding data was received from CMHC to cover the study period of 2020 to 2024, from programs with a capital contribution component.

Data was separated into 4 tables:

- Funding and units by year
- Funding and units by municipality
- Funding and units by program
- Funding and units by status (as of data compilation)

Columns included total funding, capital contribution funding, loan funding, total units, units under construction, units built, and units not started.

With 4 separate data tables, it's not possible to examine funding for a given municipality, for a given year, for example.

Definitions and the process by which data is collected and processed is unclear. The data is taken at face value for the purpose of this analysis. Of concern is the precipitous drop in contribution funding in 2024 (from $200M in 2023 to only $14M in 2024) – it's not clear if this is an artifact of data collection, processing, concepts and definitions, or a real-world decline in contribution funding.

A critical limitation of the data is the concept used for status of units. In this data set, status is based on status when the data was compiled into the data table.

BC Housing data

BC Housing data was received with data on units and grant funding by local area and by program. Grant funding data was available across periods, as was data on completed units by period of completion. However, non-completed units were not identified with any time dimension (by period of approval, for example).

The BC Housing data covers a larger period than the study period: fiscal years from the 2017-2018 year, to the 2024-2025 year (only to Q2 of the 2024-2025 fiscal year). Given the limitation of the unit data, this prevents a careful analysis of units within exclusively the study period.

Furthermore, the restriction of the unit data over time to only completed units hinders an effective trend analysis.

As with the CMHC data, definitions and the process by which data is collected and processed is unclear. An area of particular concern is the inclusion of programs seemingly related to federal funding programs. This analysis takes the approach of removing the unit counts from our summarizations of this data so as to avoid double counting of units between the CMHC and BC

Housing data sets. We have retained the grant funding data for these programs however, as our interpretation is that this is BC Housing funding delivered alongside of CMHC funding.

Metro Vancouver member jurisdictions were invited to complete a survey in February 2025 focused on affordable housing development. The survey explored:

- **Unit Tracking**: Respondents were asked to provide data on the number of affordable and non-market housing units started and completed in recent years, as well as projections for future development.
- **Local Government Support**: Respondents were asked to indicate the tools and incentives local governments use to support affordable housing development including land contributions, municipal fee reductions, parking reductions, density bonuses, and inclusionary housing policies.
- **Affordability Levels**: Respondents were asked about the various affordability levels of the units identified in the unit tracking.
- **Policy Triggers**: Respondents were asked to identify the conditions or events that prompt the implementation of affordable housing policies or incentives.
- **Levels of Government Support:** Respondents were asked to indicate whether affordable housing projects were supported by senior levels of government (provincial or federal).

Jurisdictions were also invited to share any other observations, challenges, or innovative practices related to affordable housing that may not have been captured in the structured questions.

The survey received responses from 17 member jurisdictions. Of these, 15 responded directly to the survey, while 2 provided input through interviews. In total, 17 out of 23 jurisdictions participated in the survey process

Key Findings

Unit Tracking

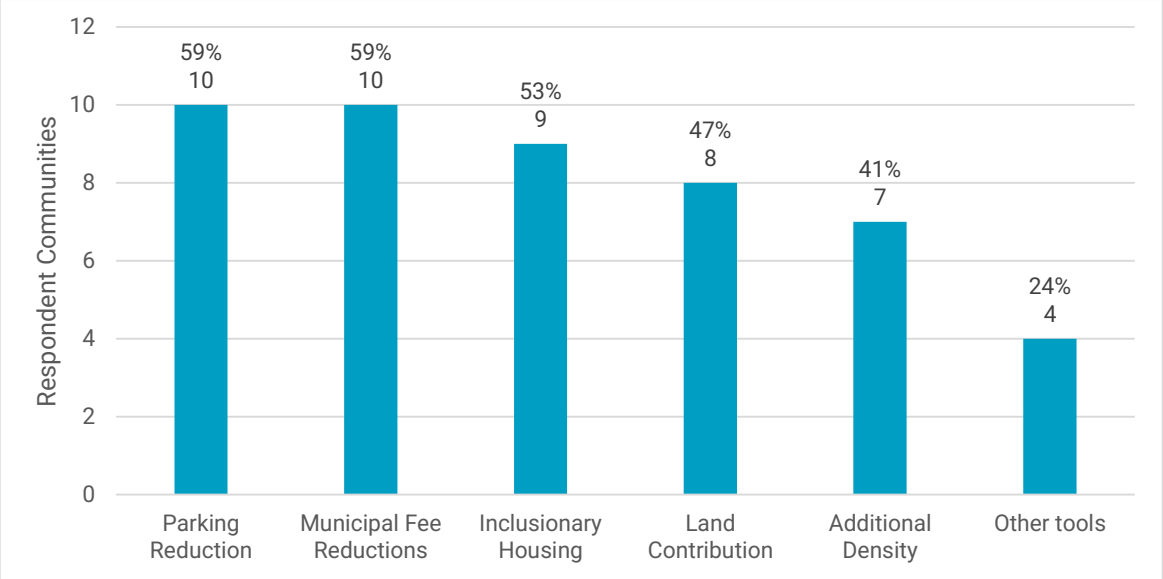
The responses recorded 12,815 affordable housing starts and 8,063 completions from 2020 to 2024. In total, the survey respondents also projected 17,449 affordable housing starts and 18,518 completions from 2025 to 2029, but this number should be used with extreme caution. Communities did not use a standardized methodology to calculate the number of projected units. Some respondents indicated that their projections were based on the number of units in the development pipeline. For many of the respondents without that information, general trends and targets were used to develop the projected number of affordable units.

Local Government Support and Policy Triggers

Respondents provided data on the tools and incentives local governments use to support affordable housing development including land contributions, municipal fee reductions, parking reductions, density bonuses, and inclusionary housing policies.

These tools were not applied evenly across all communities. From 2020 to 2024, the most commonly used tools were parking and municipal fee reductions, based on how many communities used them.

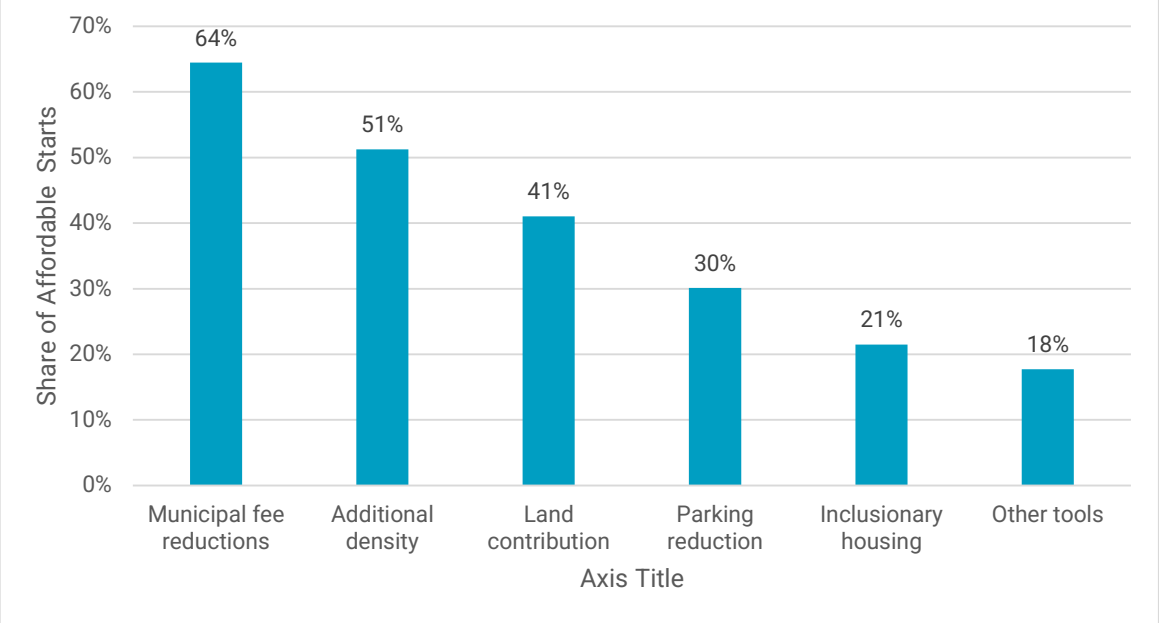
Figure 7 - Number of survey respondents using affordable housing incentives (2020-2024) [18]



During this same time period, municipal fee reductions and additional density were the most used tools on a per unit basis.

[18] The percentages are based on the 17 member jurisdictions that responded to this question.

Figure 8 - Share of affordable starts supported by tool (2020-2024)



Respondents indicated that use of various tools depended on the type of project, level of affordability, current market conditions, and available land contributions. Many respondents expect changes in how these tools are used in the future. These changes are likely to be influenced by updates to local affordable housing policies, new provincial legislation that reduces parking requirements in Transit-Oriented Areas, shifting market conditions that may reduce the effectiveness of density bonuses and inclusionary zoning, and the limited availability of municipally owned land for future contributions.

Participants were asked to estimate the use of tools to support affordable housing from 2025 to 2029. Among the 15 jurisdictions that responded to this question:

- 9 jurisdictions (60%) were looking to contribute land, including three communities that did not contribute land from 2020 to 2024;
- 8 jurisdictions (53%) were anticipating providing reduced parking requirements;
- 7 jurisdictions (47%) were anticipating securing units through inclusionary zoning;
- 6 jurisdictions (40%) were anticipating to support projects through additional density;
- 9 jurisdictions (60%) were looking to offer municipal fee reductions, including one that did not offer fee reductions from 2020 to 2024; and,
- 4 jurisdictions (27%) used other tools, including one that did not utilize other tools from 2020 to 2024.

Affordability Levels

Respondents were asked about the various affordability levels of the units identified in the unit tracking. There was no standard approach to defining the affordability of units. Respondents noted there are several ways they have defined affordability including setting rates at percentage level below current CMHC rental rates, setting rates tied to regional median incomes using the affordable housing definition from Metro 2050, rental replacement rates, or deferring to the affordability criteria from the CMHC or BC Housing funding programs that support the units.

Levels of Government Support

Respondents were asked to identify how many affordable units were being supported without senior government funding. Several respondents noted that all of their community's affordable projects were receiving senior government funding. For some of the larger communities, respondents noted that below-market units were coming online without senior government funding through density bonus, inclusionary zoning, or rental replacement policies including the City of Vancouver and the City of Burnaby. However, it was noted that in these instances non-profit operators of those units may still be receiving senior government to purchase and/or operate the units.

Limitations

While the local government survey data can help understand the use of various tools to support affordable housing, there are several limitations when integrating this data with CMHC and BC Housing unit counts and funding flows.

The reporting period and types of affordable units being tracked by local governments do not fully align with CMHC or BC Housing, which prevents comparison across data sets. In the survey responses, local governments also acknowledged they lack the capacity to track all units that receive support from senior governments. This is especially true for projects offering near-market rents that may qualify for senior government programs but not for local programs requiring deeper affordability.

Some developments may have received local incentives, such as density bonuses or parking reductions, while also benefiting from CMHC mortgage products or support through non-profit ownership or operations. These overlaps are not consistently tracked, making it hard to fully capture the role of senior government funding in local projects.

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[ii] Lauster, N., & von Bergmann, J. (2025). The new rules: housing shortage as an explanation for family and household change across large metro areas in Canada, 1981–2021. The History of the Family, 1–30. https://doi.org/10.1080/1081602X.2024.2448986

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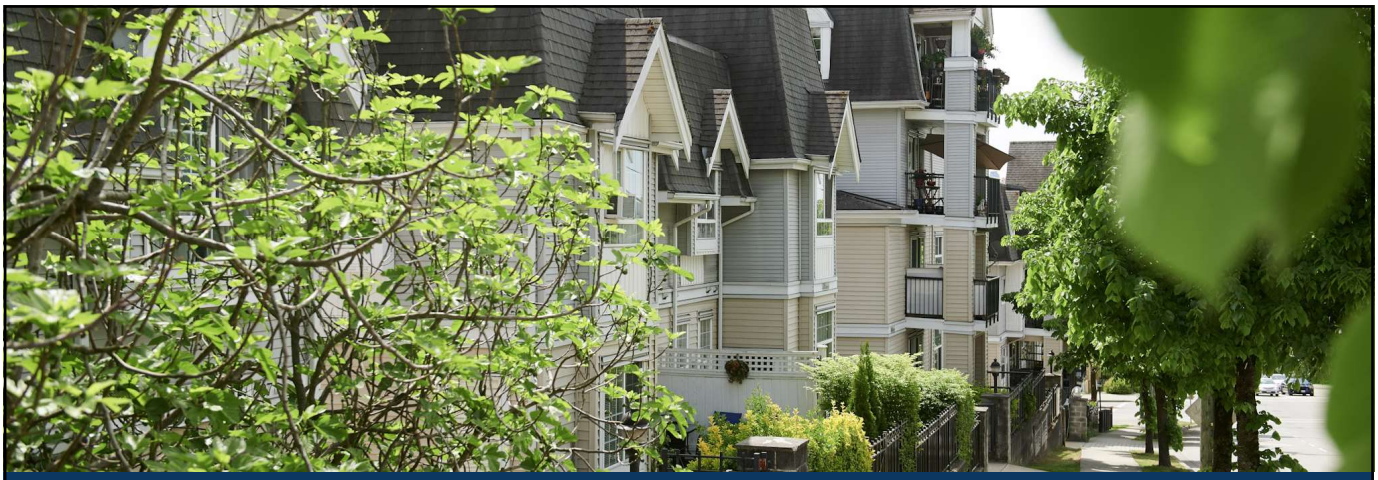
[viii] Statistics Canada. (2024). Population estimates, July 1, by census metropolitan area and census agglomeration, 2021 boundaries (Table 17-10-0148-01). https://www150.statcan.gc.ca/n1/pub/91-214-x/91-214-x2024001-eng.htm

[ix] Statistics Canada. (2024). Population estimates on July 1, by age and gender (Table 17-10-0005-01). https://www150.statcan.gc.ca/n1/en/catalogue/17100005

[x] Statistics Canada. (2024). Population estimates, July 1, by census metropolitan area and census agglomeration, 2021 boundaries (Table 17-10-0148-01). https://www150.statcan.gc.ca/n1/pub/91-214-x/91-214-x2024001-eng.htm

[xi] Canada Mortgage and Housing Corporation. (2025, June 10). Condominium apartment market risks in Toronto and Vancouver. https://www.cmhc-schl.gc.ca/observer/2025/condominium-apartment-market-risks-toronto-vancouver



Affordable Housing Gap Analysis

HOUSING 2050: A ROADMAP TO IMPLEMENT METRO 2050'S HOUSING GOAL

Marina Jozipovic
Senior Planner, Housing Policy and Planning

Regional Planning Committee – September 11, 2025
78584658

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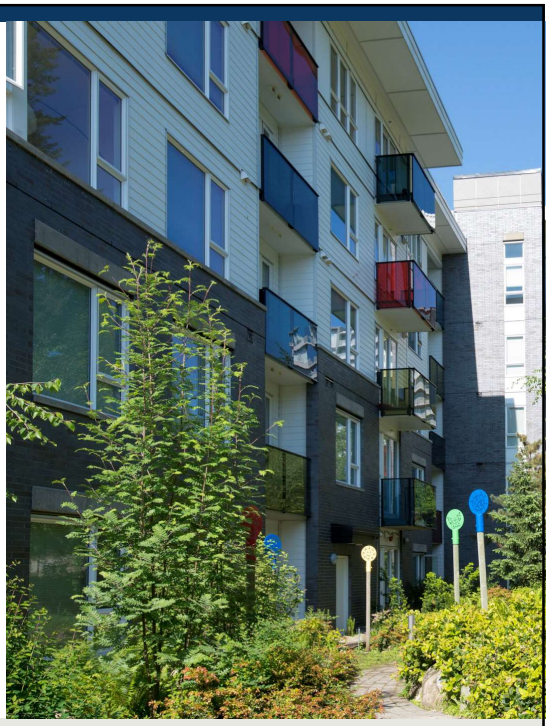
KEY FINDINGS

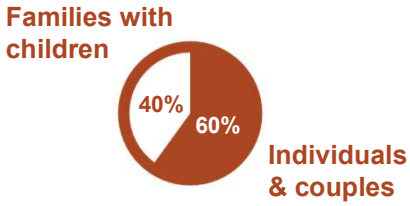
- Despite recent progress, the region faces a continued gap between affordable rental housing need and delivery
- Research confirms need for more federal and provincial investment to address regional need
- Local government contributions to affordable rental housing play an essential role



2

AFFORDABLE RENTAL HOUSING 5-YEAR NEED

Affordability Level	Lower Range	Higher Range
Under $45,000	16,000	38,000
Shelter-rate units for people experiencing homelessness	5,500	5,500
$45,000 to $58,000	7,000	10,000
$58,000 to $72,000	3,250	4,250
$72,000 to $86,000	2,000	1,500
$86,000 to $107,500	1,000	750
Total Affordable Rental Housing Need (5-Year Need)	**29,250**	**54,500**
Estimate of Recent 5-Year Flow	**12,500 to 19,500**	



- Diverse range of needs
- Low- to moderate-income working individuals and families
- Seniors on fixed income
- People receiving disability or income assistance

3

INVESTMENT NEED TO ADDRESS HOUSING GAP

	Lower Range	Higher Range
Affordable rental housing units needed (5-year need)	29,250	54,500
Per-unit investment required to achieve needed affordability	$346,000	$354,000
Total investment required to achieve needed affordability (5-year need), inclusive of all types of government support	**$10.1 billion**	**$19.3 billion**
Current federal and provincial investment in affordable rental housing (regular programs, recent 5-year period)	**$1.2 billion**	

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INVESTMENT TOOLS

Grant / capital contribution funding

Lump sum funding, typically from federal or provincial governments

Low-cost financing

Reduces financing costs through lower interest rates, typically delivered by CMHC

Operating subsidies

Ongoing subsidies for operating affordable housing with rents below costs, often delivered through BC Housing programs

Senior government tools

May include public land contributions, building code changes, and initiatives designed to lower construction costs

Local government tools

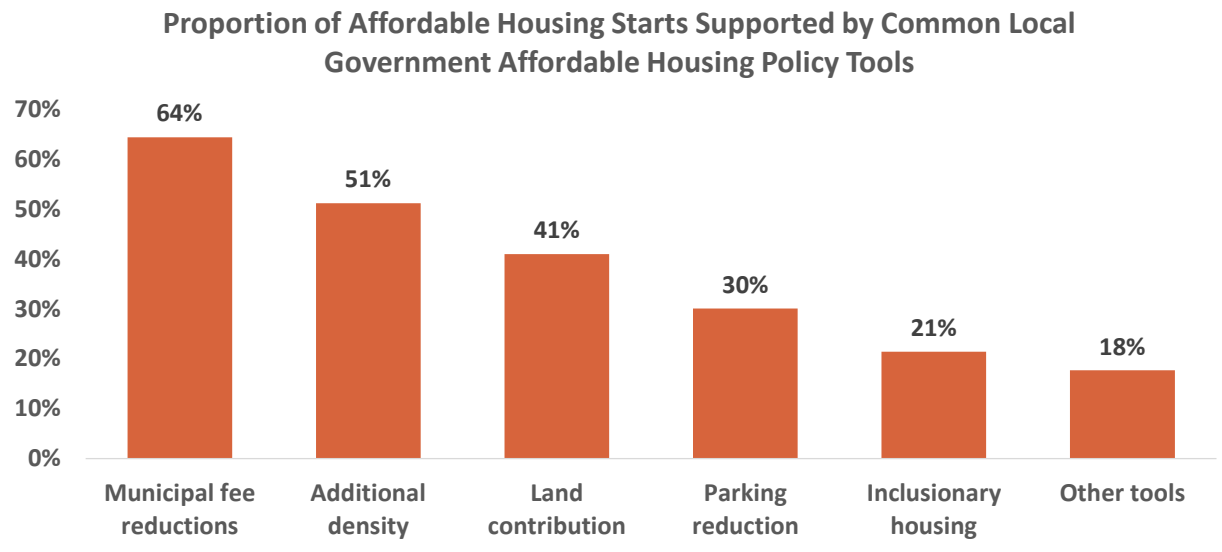
May include land or grant contributions, additional density, parking reductions, fee waivers, and other incentives

Key takeaway:

Investment can come in the form of grant or capital funding, low-cost financing, operating subsidies, and other senior or local government tools. Many affordable rental housing projects require some or all of these tools to achieve feasibility.

5

ROLE OF LOCAL GOVERNMENT



metrovancouver Source: Metro Vancouver Affordable Housing Gap Analysis Questionnaire 6

6


TOGETHER
WE MAKE OUR REGION
STRONG
Thank You!
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7

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SERVICES AND SOLUTIONS FOR A LIVABLE REGION

To: Regional Planning Committee

From: Sandy Young, Senior Engagement Specialist, External Relations
Marina Jozipovic, Senior Planner, Regional Planning and Housing Services

Date: August 15, 2025 Meeting Date: September 11, 2025

Subject: **Housing 2050 Engagement Update**

RECOMMENDATION
That the Regional Planning Committee receive for information the report dated August 15, 2025, titled "Housing 2050 Engagement Update".

EXECUTIVE SUMMARY
This report provides an update on the engagement for *Housing 2050* from January to August 2025. Engagement was focused on individuals and organizations directly involved in non-market housing policy, planning, and delivery, including municipalities, First Nations, senior governments, housing providers, and sectoral organizations. Engagement included 16 facilitated meetings, one workshop, and an online questionnaire with 79 participants. Over 750 comments were received. Participants shared insights on regional priorities, opportunities for alignment, and strategies to advance affordable housing outcomes.

Key themes included:

- Advocacy and funding: Calls for increased senior government investment, flexible financing, and access to land and supports;
- Collaboration and coordination: Emphasis on cross-sector partnerships and regional alignment;
- Policy and implementation: Input on optimizing delivery, protecting tenants, and addressing homelessness;
- Data and engagement: Interest in shared research tools and ongoing, responsive engagement; and
- First Nations priorities: Desire for continued dialogue and stronger relationships around housing policy.

This input will be used in developing potential policy alternatives and advocacy strategies that will be presented to engagement audiences at the next stage.

PURPOSE
The purpose of this report is to provide the Regional Planning Committee with an update on the engagement process for *Housing 2050: A Roadmap to Implement Metro 2050's Housing Goal*.

BACKGROUND

At its April 3, 2025, meeting, the Regional Planning Committee received the proposed engagement approach for *Housing 2050* in a report titled, "Housing 2050: A Roadmap to Implement Metro 2050's Housing Goal – Engagement Approach" (Reference 1). Staff have been delivering this engagement program to support the development of key project tasks for *Housing 2050*. *Housing 2050* is intended to be an action-oriented roadmap and to support collective advocacy for the implementation of Goal 4 of *Metro 2050* — to provide diverse and affordable housing choices. It is part of the Board-approved Housing Policy and Planning budget and work plan.

UPDATE ON THE ENGAGEMENT PROCESS

The engagement for *Housing 2050* focuses on hearing from those who have a role in advancing affordable housing in the region and on collecting input to inform recommendations in *Housing 2050*. Engagement to date has involved municipalities, First Nations, other governments, and organizations working in the affordable housing sector. Participants have had opportunities to provide input into the development of *Housing 2050* and discuss opportunities for regional alignment, collaboration, and advocacy around affordable housing. An interim summary of the engagement from January to August 2025 is provided as Attachment 1. A full summary report issued at the end of engagement will describe participation and how the input was applied in developing *Housing 2050.*

Engagement Promotion

Engagement opportunities were promoted through a variety of channels, including direct outreach to key audiences. BC Non-Profit Housing Association (BCNPHA) was engaged to promote an online questionnaire to their network. A dedicated project webpage was used to highlight information about the process and engagement to develop *Housing 2050*. Promotions were targeted to audiences who have a role in affordable housing policy and planning, and not to a broad public audience.

Engagement Participation

From May to August 2025, staff held seven one-on-one meetings with five local First Nations to introduce the project, hear about level of interest, and discuss priorities and engagement preferences around this work. First Nations expressed an interest in continuing these conversations with the project team and their respective staff teams. A workshop with 17 members of the Regional Planning Advisory Committee (RPAC) Housing Subcommittee on May 15, 2025, focused on opportunities for coordination, advocacy, and research and data to increase affordable housing supply, maintain existing supply, and protect tenants. Representatives from provincial and federal governments, government advocacy organizations, government services agencies (i.e., health authorities, TransLink, school districts), and housing umbrella organizations were engaged through nine individual or group meetings from May to July 2025. Discussions focused on priorities, areas of alignment, opportunities and barriers, advocacy, and engagement preferences regarding *Housing 2050*. An online questionnaire promoted by BCNPHA to their network and open from May 22 to June 13, 2025, resulted in 79 completions.

Engagement Input

Over 750 comments were received across all audiences and methods. The following areas of interest emerged throughout the engagement.

- Advocacy – advocating to senior government to highlight opportunities around funding, access to land, programs, and social supports
- Collaboration – working together across sectors to advance innovative tools and initiatives
- Data and research – filling data gaps and examining programs to develop shared resources and inform best practices
- First Nations priorities – engaging to learn about affordable housing priorities and strengthen relationships around regional housing policy
- Funding – improving the coordination and allocation of funds to ensure reliable and flexible funding and financing programs
- Infrastructure – ensuring community amenities and services to support growing communities
- Ongoing engagement – responding to audience preferences to encourage ongoing participation
- Policy design and implementation – understanding challenges and expanding on successes to optimize delivery
- Protecting tenants – increasing resources, capacity, and coordination to advance renter protections
- Regional coordination – coordinating efforts and aligning approaches to address shared challenges
- Supportive housing and homelessness – coordinating approaches and supports to address an increasing need

The detailed input will help to inform the development of potential policy alternatives and advocacy strategies that will be presented to engagement audiences for discussion in fall 2025.

ALTERNATIVES

As this is an information report, no alternatives are provided.

FINANCIAL IMPLICATIONS

The engagement program is resourced through project funding allocated to *Housing 2050* under the Board-approved 2025 Housing Policy and Planning budget.

CONCLUSION

The engagement to date has focused on collecting input from key audiences to inform the recommendations in *Housing 2050*. Ongoing engagement with municipalities, First Nations, other governments, and organizations working in affordable housing will continue to respond to their engagement preferences. Further opportunities to engage on *Housing 2050* will be provided as the project transitions to the next task to discuss potential policy alternatives and advocacy strategies. Staff intend to return to the Regional Planning Committee in early 2026 with a proposed draft of *Housing 2050*, including a full summary of engagement.

ATTACHMENTS

1. Housing 2050: A Roadmap to Implement Metro 2050's Housing Goal.

REFERENCES

1. Young, S. & Jozipovic, M. (2025). *Housing 2050: A Roadmap to Implement Metro 2050's Housing Goal – Engagement Approach* [Staff report to Regional Planning Committee meeting on 2025, April 3]. https://metrovancouver.org/boards/RegionalPlanning/RPL-2025-04-03-AGE.pdf#page=118

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Housing 2050:

A Roadmap to Implement Metro 2050's Housing Goal

INTERIM ENGAGEMENT SUMMARY

HOUSING 2050

JANUARY TO AUGUST 2025

Acknowledgements

Thank you to everyone who has participated in the engagement process to date for *Housing 2050: A Roadmap to Implement Metro 2050's Housing Goal*. Metro Vancouver embraces collaboration and innovation to provide sustainable regional services, contributing to a livable and resilient region and a healthy natural environment for current and future generations. The purpose of this engagement is to hear from those who have a role in advancing the region's affordable housing and collect input to inform the recommendations in *Housing 2050*. We appreciate your time as well as the insights and comments that you have shared with us so far. We invite you to stay involved in the engagement on *Housing 2050*.

About Metro Vancouver

Metro Vancouver is a diverse organization that plans for and delivers regional services, including water, sewers and wastewater treatment, and solid waste management. It also regulates air quality, plans for urban growth, manages a regional parks system, provides affordable housing, and serves as a regional federation.
The organization is a federation of 21 municipalities, one electoral area, and one treaty First Nation located in the region of the same name. The organization is governed by four Boards of Directors of elected officials, one for each legal entity making up Metro Vancouver with representation from member jurisdictions.

Metro Vancouver acknowledges that the region's residents live, work, and learn on the shared territories of many Indigenous peoples, including 10 local First Nations: q̓i̓ć̓əy̓ (Katzie), q̓ʷɑ:n̓ƛ̓ən̓ (Kwantlen), kʷikʷəƛ̓əm (Kwikwetlem), máthxwi (Matsqui), xʷməθkʷəy̓əm (Musqueam), qiqéyt (Qayqayt), Semiahmoo, Sḵwx̱wú7mesh Úxwumixw (Squamish), sc̓əẃaθən məsteyəxʷ (Tsawwassen), and səlilwətaɬ (Tsleil-Waututh).

Metro Vancouver respects the diverse and distinct histories, languages, and cultures of First Nations, Métis, and Inuit, which collectively enrich our lives and the region.

4515 Central Boulevard, Burnaby, BC, V5H 0C6

metrovancouver.org

August 2025

Contents

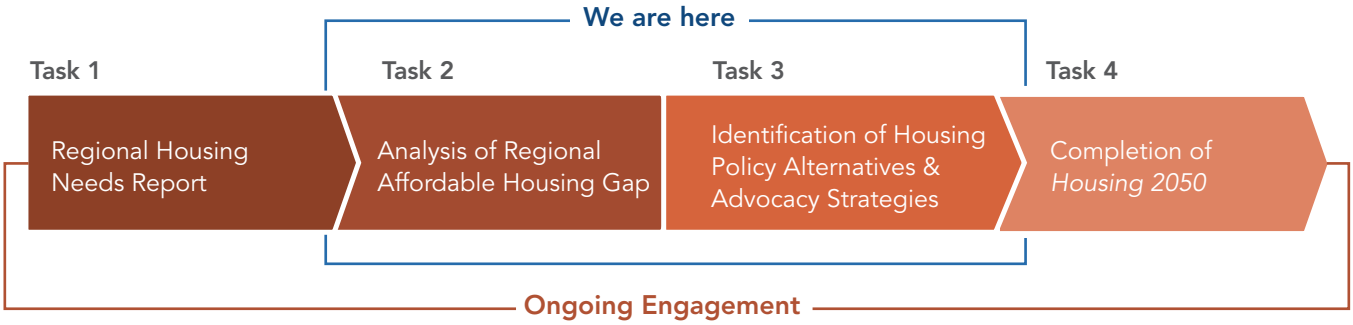
This report provides an interim summary of engagement from January to August 2025. It is provided to support a progress report prepared for decision makers. A full summary report will be issued at the end of engagement.

1. About Housing 2050: A Roadmap to Implement Metro 2050's Housing Goal

Metro Vancouver is developing *Housing 2050: A Roadmap to Implement Metro 2050's Housing Goal*. Housing 2050 will be an action-oriented roadmap to support the implementation of Goal 4 in *Metro 2050*, the regional growth strategy. There are four milestones that will contribute to the development of *Housing 2050: a Regional Housing Needs Report*, an Affordable Housing Gap Analysis, Policy Alternatives and Advocacy Strategies, and the confirmation of *Housing 2050* roadmap actions. *Housing 2050* will leverage Metro Vancouver's role in supporting affordable housing in this region, with an emphasis on regional policy, advocacy, and Metro Vancouver's role as a convener. The engagement program focuses on hearing input from municipalities, First Nations, other governments, and organizations working in the affordable housing sector. *Housing 2050* is expected to be completed by early 2026, with the intention to seek adoption by the Metro Vancouver Regional District Board (MVRD Board).

2. Executive Summary

Housing 2050 is intended to be an action-oriented roadmap to support diverse and affordable housing choices — Goal 4 in *Metro 2050*, the regional growth strategy. This interim engagement summary details engagement from January to August 2025 and is provided to support a progress report prepared for decision makers. The graphic below reflects the four milestones in developing *Housing 2050* and the ongoing engagement with key audiences throughout its development.



Engagement to date has focused on hearing from municipalities, First Nations, other governments, and organizations working in the affordable housing sector. Participants have been offered opportunities to provide input into the development of *Housing 2050* and discuss approaches to regional alignment, collaboration, and advocacy around affordable housing. Engagement methods have included 16 individual or group meetings, one workshop with Regional Planning Advisory Committee (RPAC) Housing Subcommittee, and an online questionnaire with 79 participants.

The following areas of interest have emerged throughout the engagement:

- Advocacy – advocating to senior government to highlight opportunities around funding, access to land, programs, and social supports
- Collaboration – working together across sectors to advance innovative tools and initiatives
- Data and research – filling data gaps and examining programs to develop shared resources and inform best practices
- First Nations priorities – engaging to learn about affordable housing priorities and strengthen relationships around regional housing policy
- Funding – improving the coordination and allocation of funds to ensure reliable and flexible funding and financing programs
- Infrastructure – ensuring community amenities and services to support growing communities
- Ongoing engagement – responding to audience preferences to encourage ongoing participation
- Policy design and implementation – understanding challenges and expanding on successes to optimize delivery
- Protecting tenants – increasing resources, capacity, and coordination to advance renter protections
- Regional coordination – coordinating efforts and aligning approaches to address shared challenges
- Supportive housing and homelessness – coordinating approaches and supports to address an increasing need

Input will be used in developing potential policy alternatives and advocacy strategies that will be presented to engagement audiences for discussion in fall 2025. An engagement summary report issued at the end of engagement will identify where input from key audiences is reflected in *Housing 2050. Housing 2050* is expected to be completed by early 2026, with the intention to seek adoption by the MVRD Board.

3. About the Engagement Process

Engagement for *Housing 2050* focuses on hearing from those who have a role in advancing affordable housing in the region and on collecting input to inform recommendations in *Housing 2050*.

Engagement to date, from January to August 2025, has involved municipalities, First Nations, other governments, and organizations working in the affordable housing sector. The engagement has provided participants with opportunities to contribute input into the development of *Housing 2050* and to discuss opportunities for regional alignment, collaboration, and advocacy around affordable housing.

The table below provides a summary of engagement activities including intended audience(s).

AUDIENCE	ENGAGEMENT METHOD/DESCRIPTION
Municipalities	Presentations, a workshop, and updates at key milestones for Regional Planning Committee, Housing Committee, RPAC, and RPAC Housing Subcommittee
First Nations	Project introduction letters and one-on-one meetings to introduce the project, understand level of interest, and discuss priorities and engagement preferences, as part of a separate, government-to-government process
Federal and provincial governments (i.e., Ministry of Housing, Infrastructure and Communities of Canada; Ministry of Housing and Municipal Affairs, Canada Mortgage and Housing Corporation, and BC Housing)	Project introduction letters and emails and individual engagement meetings to discuss priorities, areas of alignment, leveraging opportunities, and engagement preferences
Government advocacy organizations (i.e., Federation of Canadian Municipalities, Union of BC Municipalities)	Project introduction emails and a group engagement meeting to discuss priorities, areas of alignment, advocacy, and engagement preferences
Government service agencies (i.e., health authorities, TransLink, school districts)	Project introduction emails and a group engagement meeting to discuss priorities, areas of alignment, opportunities and barriers, and engagement preferences
Housing umbrella organizations (i.e., BC Non-Profit Housing Association (BCNPHA), Urban Development Institute, Aboriginal Housing Management Association)	Project introduction emails and a group engagement meeting and follow-up meeting to discuss priorities, areas of alignment, opportunities and barriers, and engagement preferences
BC Non-Profit Housing Association network	Online questionnaire promoted to the BCNPHA network at a sector conference (Lower Mainland RENT) and in an e-blast to their subscribers, open for three weeks
Metro Vancouver staff	Cross-departmental coordination meeting with internal staff whose work relates to affordable housing policy and planning

4. Engagement Promotion

The *Housing 2050* engagement was promoted through a variety of channels, including direct outreach to key audiences. Promotions were targeted to audiences who have a role in affordable housing policy and planning, and not to a broad public. The following section provides and overview of promotional activities.

Correspondence

The engagement opportunities were highlighted to key audiences through an initial correspondence with a supporting project fact sheet.

Website

A dedicated project web page was used to highlight information about the process and engagement to develop *Housing 2050*.

Online Questionnaire

ZenCity, an online engagement platform, was used to host an online questionnaire targeted to the BCNPHA network. The questionnaire was open from May 22 to June 13, 2025.

E-Blast

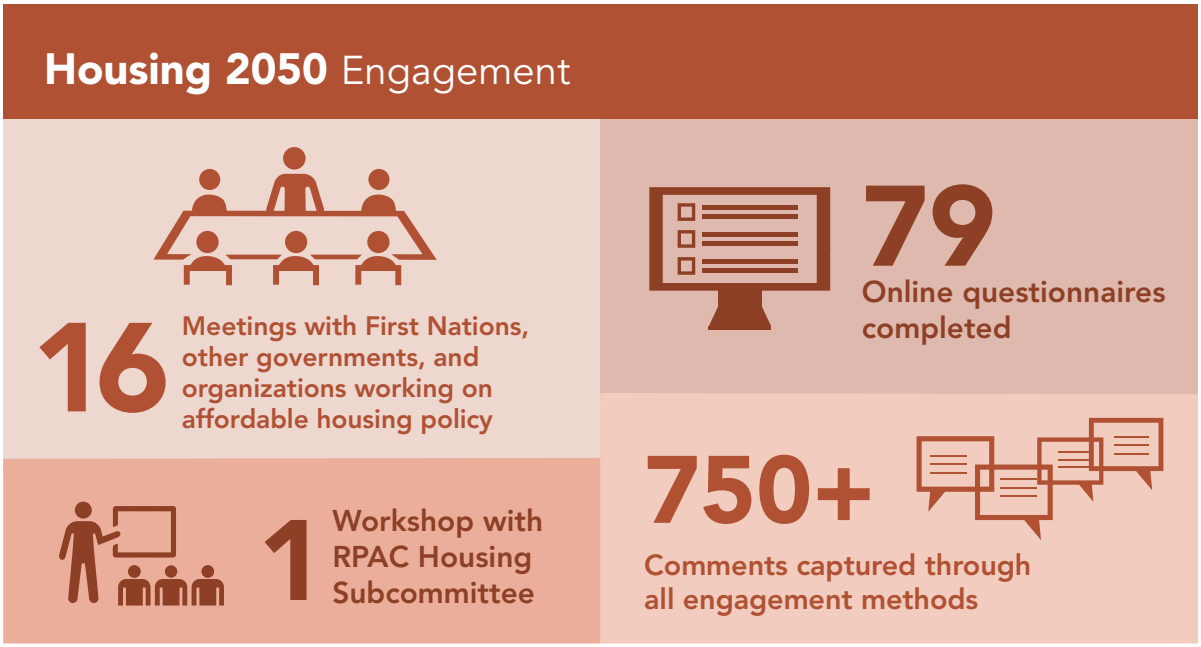
The online questionnaire was promoted by BCNPHA in an e-blast to their subscribers on May 30, 2025.

Sector Conference

A QR code to the online questionnaire was promoted on screen at a sector conference, Lower Mainland RENT, on May 22, 2025.

5. Engagement Participation

The infographic below and the table on the next page outline the level of participation in each of the engagement opportunities offered.



ENGAGEMENT METHOD	PARTICIPANTS	DATE
Individual meetings (seven) with First Nations	q̓ʷɑ:n̓ƛ̓ən̓ (Kwantlen First Nation) kʷikʷəƛ̓əm (Kwikwetlem First Nation) Sḵwx̱wú7mesh Úxwumixw (Squamish Nation) scəw̓aθən məsteyəxʷ (Tsawwassen First Nation) səlilwətaɬ (Tsleil-Waututh Nation)	May–August 2025
Workshop with RPAC Housing Subcommittee (and follow-up meeting or correspondence with four members)	City of Burnaby City of Delta City of Langley Township of Langley City of Maple Ridge City of New Westminster City of Pitt Meadows City of Port Coquitlam City of Port Moody City of Richmond City of Surrey scəw̓aθən məsteyəxʷ (Tsawwassen First Nation) City of Vancouver City of White Rock TransLink Urban Development Institute Vancouver Coastal Health	May 15, 2025
Individual meetings with federal and provincial governments	Ministry of Housing, Infrastructure and Communities of Canada Ministry of Housing and Municipal Affairs Canada Mortgage and Housing Corporation BC Housing	May–June 2025
Group meeting with government advocacy organizations	Federation of Canadian Municipalities Union of BC Municipalities	June 23, 2025
Group meeting with government service agencies	First Nations Health Authority Fraser Health Authority Richmond School District No. 38 Surrey Schools TransLink Vancouver Coastal Health Authority Vancouver School Board	June 24, 2025
Group meeting with housing umbrella organizations	BC Non-Profit Housing Association Urban Development Institute Aboriginal Housing Management Association (follow-up meeting)	June 25, 2025 July 7, 2025
Online questionnaire	79 participants	May 22–June 13, 2025

First Nations Meetings

Metro Vancouver has been engaging with First Nations in a separate, government-to-government process. In April 2025, staff sent letters to 10 local First Nations with an invitation to meet to introduce the project, hear about level of interest, and discuss priorities and engagement preferences around this work. From May to August 2025, the project team had seven one-on-one meetings with five First Nations: q̓ʷɑːn̓ƛ̓ən̓ (Kwantlen First Nation), kʷikʷəƛ̓əm (Kwikwetlem First Nation), Sḵwx̱wú7mesh Úxwumixw (Squamish Nation), scəẃaθən məsteyəxʷ (Tsawwassen First Nation), and səlilwətaɬ (Tsleil-Waututh Nation). Meetings were either dedicated project meetings or part of Metro Vancouver's Technical Working Group meetings with individual First Nations. Input from these meetings is described in the What We Heard and How We're Responding table (p.13). Metro Vancouver is committed to engaging with First Nations on Housing 2050 throughout its development.

RPAC Housing Subcommittee Workshop

At the RPAC Housing Subcommittee meeting on May 15, 2025, staff facilitated a workshop with 17 participants to identify potential directions for *Housing 2050* in three topic areas: increasing affordable housing supply, maintaining existing affordable housing supply, and protecting tenants. The discussion focused on what we can do together that we cannot do alone when it comes to advancing these topics and what needs to be done at the regional or sub-regional level or through collective action.

Facilitated Meetings

Representatives from federal and provincial government, government advocacy organizations, government service agencies (i.e., health authorities, TransLink, school districts), and housing umbrella organizations joined nine individual and group meetings scheduled from May to July 2025, to learn about *Housing 2050* and provide input. Meetings included discussion on priorities, areas of alignment, opportunities and barriers, advocacy, and engagement preferences around this work.

Online Questionnaire

Staff used ZenCity, an online engagement platform, to host a questionnaire that BC Non-Profit Housing Association promoted to their network. The questionnaire was open from May 22 to June 13, 2025, and a total of 79 questionnaires were received. Over three quarters of the questionnaire participants were from non-profit housing providers and non-profit service providers. Participants identified, from a list of choices, the top barriers they face as an organization in delivering the level of affordable housing they aspire to. The top barriers were: lack of capital funding (e.g., grants, equity, pre-development), access to land at reasonable cost, uncertainty in government policy or funding programs, high construction costs, limited operating subsidies/viability gap, and delays in municipal approvals and permitting. The questionnaire aimed to explore the highest impact initiatives to address the barriers and what a roadmap to affordable housing should consider when it comes to the capacity and constraints of non-profit housing providers.

6. What We Heard and How We're Responding

Below, in alphabetical order, are key interests that we heard throughout the engagement from all methods and audiences, along with Metro Vancouver's response to each area of interest, describing how the input will be considered in developing *Housing 2050*.

INTEREST: ADVOCACY	
WHAT WE HEARD	**HOW WE'RE RESPONDING**
Input consistently highlighted the need for advocacy to senior governments for funding. This included advocacy for long-term funding for social infrastructure. Participants suggested advocacy around leveraging public land and for more resources for land acquisition, as well as increasing financing flexibility and low-interest options for market development. There was an interest in advocacy for funding for rental protection and grants for improving existing buildings. A comment related to advocating for first-right-of-refusal for non-profits and BC Housing to purchase older rental stock. Input called for advocating for expanding government programs to suit First Nations communities. Participants suggested testing and advocating for prefabrication and modular methods, as well as promoting innovation, for example, mass timber, tiny homes, and infill development of existing rental properties. Input asserted value in cross-sectoral advocacy to address homelessness and unmet need for supportive services, as well as around deeply affordable housing. Comments highlighted a need for advocacy around supportive housing targets and requirements and enforcement of standards of maintenance bylaws. Input also suggested advocacy around measures for protecting tenants, for example, social supports and renter subsidies. Input called for advocacy around grounding policy in the needs of community members (i.e., family-size units, supportive services, etc.), rather than trying to maximize the number of units built. There was an interest in advocacy around considering administration and enforcement when designing programs.	Metro Vancouver is committed to advocating to federal and provincial governments for affordable housing, including for supportive and transitional housing. Better advocating for increased affordable housing funding and support for the region is a key objective of *Housing 2050*. Metro Vancouver is considering advocacy strategies to include in the draft *Housing 2050* roadmap, with inspiration from the insights and ideas provided through the engagement.

INTEREST: COLLABORATION	
WHAT WE HEARD	**HOW WE'RE RESPONDING**
Input included suggestions for continuing and strengthening collaboration around Digitally Accelerated Standardized Housing (DASH) between government and organizations with land. An interest in local governments collaborating with non-profit housing providers on best practices for inclusionary housing was shared, as was a desire for non-profits and First Nations to work together around acquiring land. Senior governments also highlighted their own programs that promote cross-sectoral collaboration and capacity building.	Metro Vancouver is uniquely positioned as a regional government to support cross-sector collaboration. As one example, Metro Vancouver has been collaborating on opportunities to integrate the DASH approach into pilot projects at two Metro Vancouver Housing sites. Metro Vancouver will apply this input in developing recommendations for the draft *Housing 2050* roadmap, including around enhancing opportunities for regional collaboration.

INTEREST: DATA AND RESEARCH	
WHAT WE HEARD	**HOW WE'RE RESPONDING**
Participants emphasized their own initiatives for this interest, for example, cross-sectoral research on social infrastructure to accompany housing and a lands mapping project for public land to identify DASH-friendly sites and readiness for redevelopment. Another participant indicated their research focus on cost structure. There was interest in sharing and discussing data related to senior government programs to understand which programs achieve the best outcomes, as well as health outcomes of affordable housing, as two examples. Participants suggested Metro Vancouver survey member jurisdictions to understand which policy tools are working and develop an affordable housing best practice guide. There was interest in simplifying design standards and creating standardized design guidelines. Input called for regional databases showing affordable housing supply and projections, which could help others, like schools, with planning. There were suggestions for identifying best practices around extending the life of older rental stock and for local governments supporting the use of the Rental Protection Fund, as well as looking into the impact of permissive tax exemptions. Comments called for tracking demolition and studying environmental impact of demolition. Input also included interest in studying secondary suites, addressing data gaps on congregate and informal housing, and evaluating policies around protecting tenants.	Metro Vancouver is committed to supporting member jurisdictions to develop and implement housing plans and policies by providing data and research. This is a key objective of *Housing 2050*. For example, Metro Vancouver produces What Works guides on affordable housing topics of regional interest, which may be expanded and updated through this process. Additionally, staff have met with both provincial staff and Canada Mortgage and Housing Corporation representatives to start the conversation on data gaps and challenges around affordable housing data and monitoring. Metro Vancouver will apply input from this engagement in developing recommendations for the draft *Housing 2050* roadmap, including around data and research.

INTEREST: FIRST NATIONS PRIORITIES	
WHAT WE HEARD	**HOW WE'RE RESPONDING**
Input emphasized the need for community amenities and support services to be expanded to match increased housing development and for advocacy to other levels of government to provide funding for amenities and support services. Input emphasized persistent housing need on reserve and an interest in bringing individuals home to connect with culture and community. Input called for ensuring options for Elders housing and safe housing in community. There was interest in discussing housing need and housing development and questions about how First Nations are included in Metro Vancouver's Regional Housing Needs Report. Input called for advocacy around expanding provincial and federal programs to suit First Nations communities. Input emphasized the uniqueness of each First Nation community with respect to their programs and policies for increasing housing, maintaining existing supply, and protecting rental options. Input described challenges with building affordable housing on leaseholder land. There was an interest in exploring strategies that other First Nations are using to deliver affordable housing as land runs out. Input called for making permitting easier and faster and for incentivizing First Nations developers and owners whose off-reserve housing also serves the public. Participants stressed that this work should reflect the diversity of housing needs in the community, including accessible housing and family-sized housing, and housing for those with low income or who are experiencing homelessness. Input emphasized the importance of a holistic, regional approach when considering homelessness, tenant displacement, and affordability of rents and its effects on people in the broader community, including urban Indigenous people. A comment stated that much of the Indigenous population in the region are not connected to a First Nation, creating challenges with a distinctions-based approach to providing support. Many First Nations expressed an interest in continuing the conversation between Metro Vancouver and their respective staff teams around this work.	Metro Vancouver is committed to meaningful engagement with First Nations and applying this input in the development of *Housing 2050*, where possible. As an example, Metro Vancouver has aimed to understand through the engagement how First Nations would like to have their housing needs reflected in future work to understand regional housing context. Engagement will continue to focus on strengthening relationships with First Nations and engaging according to their preferences. Input from First Nations will help to shape potential policy alternatives and advocacy strategies for the draft *Housing 2050* roadmap. Comments were also received about Metro Vancouver Housing development and operations, which are outside of the regional policy and advocacy scope of *Housing 2050*. These comments were shared with the appropriate staff team at Metro Vancouver.

INTEREST: FUNDING	
WHAT WE HEARD	**HOW WE'RE RESPONDING**
Funding was mentioned frequently across engagement discussions. Participants stressed the importance of funding being reliable and funding programs being flexible and not too prescriptive. Input emphasized advocating to the Province for funding, ensuring long-term funding for infrastructure and amenities, and moving quickly on projects through the DASH method to attract federal funding. Participants expressed an interest in supporting coordination to align and layer funding streams and in examining how effective funding programs are at addressing need, which some described as oversubscribed. There was a suggestion for Metro Vancouver and member jurisdictions to examine underutilized areas of funding. Some participants expressed that application processes for specific programs are, for some, not worth the work, while others find benefit. A comment related to challenges with the level of green building standards that some funding programs require. There was an interest in expanding information sharing around funding programs. Input also called for increasing funding for affordable rental and rental protection and more grants for improving existing buildings. One comment suggested tracking government funding and expressed concern with per capita distribution compared to immigration levels. Participants emphasized ensuring a funding model for supportive housing.	Metro Vancouver will apply this input in developing potential policy alternatives and advocacy strategies for the draft *Housing 2050* roadmap, including around allocation and coordination of funding.

INTEREST: INFRASTRUCTURE	
WHAT WE HEARD	**HOW WE'RE RESPONDING**
Input emphasized a need for social infrastructure, like community amenities and support services, to keep pace with housing development, including in First Nations communities. Input stressed the importance of ensuring other services and public infrastructure, such as schools, can accommodate increased density and development. Overall, school districts indicated intentions to dedicate land to schools, with few examples and minimal desire of co-locating affordable housing. There was a strong call for long-term solutions for funding infrastructure related to growth. One comment expressed concern with per capita funding related to immigration levels. Comments described ensuring active transportation and green infrastructure with affordable housing, with some municipalities having updated their Official Community Plans. Input called for protecting the environment while planning for density.	Metro Vancouver updates regional and municipal population projections on a regular basis to guide land use and infrastructure planning. The need for social infrastructure (e.g., schools, healthcare, childcare) to keep up with housing development has been expressed throughout this engagement and at Metro Vancouver member advisory committee tables. Staff have taken direction on work to estimate the social infrastructure need in relation to regional housing needs. Metro Vancouver will apply this input in developing potential policy alternatives and advocacy strategies for the draft *Housing 2050* roadmap, including around social infrastructure.

INTEREST: ONGOING ENGAGEMENT	
WHAT WE HEARD	**HOW WE'RE RESPONDING**
Under this interest, many participants highlighted their own strategies and initiatives underway and desire for engagement and alignment with key organizations, like Metro Vancouver and municipalities. There was interest from participants in hearing about the outcomes of engagement on *Housing 2050* to help inform their own work, and Metro Vancouver was encouraged to stay connected with senior government for this purpose. Participants largely expressed an interest in ongoing engagement and information sharing through dedicated engagement meetings and, for some participants, through Metro Vancouver advisory committees. The five First Nations engaged to date have all indicated an interest in continuing the conversation, depending on capacity.	Metro Vancouver is committed to ongoing engagement with municipalities, First Nations, other governments, and organizations with a role in housing, and incorporating input into project decisions. Staff will design and implement future engagement opportunities based on the engagement preferences shared by participants. Input received through this engagement under these key interest areas will be applied in the development of preliminary direction for *Housing 2050*.

INTEREST: POLICY DESIGN AND IMPLEMENTATION	
WHAT WE HEARD	**HOW WE'RE RESPONDING**
This interest included discussion about the effectiveness of current and impending senior government programs for unlocking affordable housing and filling gaps. There were suggestions for eliminating barriers for construction time, cost, and certainty by avoiding rezoning, encouraging municipalities to contribute land and pre-zone sites, and streamlining approval process. There was interest in the housing targets of municipalities. Participants were supportive of piloting DASH as one solution to challenges with cost and speed of delivery. Input called for more government support to offset development cost charges (DCCs) or waive them. Input suggested that there should be incentives for developers to alleviate prohibitive costs and that reducing fees for inclusionary zoning and affordable units would help. Participants also indicated that rising pricing and tariffs have created challenges around construction. Input called for considering how to address the labour shortage so that units that are funded get built. There was a suggestion to reduce or eliminate property taxes for affordable rental housing. Input described an effort to align design guidelines more closely with BC Building Code standards to reduce the burden on non-profits trying to meet multiple disparate requirements. There was discussion on programs like Housing Accelerator Fund, and on how programs like the Moderate Income Rental Program, Rental Protection Fund, and tax incentives are effective. Input suggested that sustainability requirements can create operational savings, making buildings viable for longer, while other input indicated that the requirements should be cost effective for operations, or funded. Input called for a guaranteed agreement for Metro Vancouver Housing to purchase inclusionary units (or advocate to BC Housing).	Metro Vancouver will apply this input in developing potential policy alternatives and advocacy strategies for the draft *Housing 2050* roadmap, including around housing delivery. Additionally, Metro Vancouver is committed to reviewing regional development fees and is currently revising its Development Cost Charges (DCC) and DCC waiver program to ensure it is responsive to social, political, and economic circumstances.

INTEREST: PROTECTING TENANTS	
WHAT WE HEARD	**HOW WE'RE RESPONDING**
Input suggested advocacy for social supports and renter subsidies and to explore the creation of a regional rent bank or regional funding of rent banks to ensure all communities have an adequately funded rent bank. Comments indicated a desire for supporting more capacity and resources at the Residential Tenancy Branch, training and capacity for regional tenant coordination, and less rigid application of the National Occupancy Standard. Input called for evaluating policies intended to protect tenants and reviewing the outcomes. Comments supported creating model standards of maintenance and tenant protection bylaws. There was a suggestion to create a database to enable swapping right-of-first-refusal entitlements with other eligible tenants. Input emphasized coordination around regional homelessness support and prevention services, for example, with health authorities, and coordination of transitional housing. Comments expressed concerns with gentrification and the displacement of tenants through redevelopment. Input suggested learning from lived experience data and knowledge around this topic.	Metro Vancouver will apply this input in developing potential policy alternatives and advocacy strategies for the draft *Housing 2050* roadmap, including around protecting tenants. This is an area of focus for *Housing 2050*. On June 23, 2025, Metro Vancouver hosted a workshop to share best practices for tenant protection bylaws, with the potential for more workshops depending on participant interest.

INTEREST: REGIONAL COORDINATION	
WHAT WE HEARD	**HOW WE'RE RESPONDING**
There was interest in regional coordination and alignment across discussions. Input suggested coordinating response to provincial legislation and pushing for consistency from municipalities around plans, permitting, incentives, fees, and regulations. There was discussion on access to land, unlocking public land, and ensuring land use planning works for housing policy objectives. A comment expressed interest in requesting priority application processing for non-profit developers. There were suggestions for coordination on zoning tools to protect existing rental housing and on providing tax exemptions for older buildings providing affordable housing. Input emphasized regional approaches to homelessness, recognizing some municipalities see themselves as taking on too much, while others feel they need more. Comments related to coordination on future actions as public land stock declines and for tax measures to disincentivize holding land. Comments encouraged Metro Vancouver to explore buying existing rentals and to consider overseeing tenant placement in affordable rental housing stock. Input included coordination for establishing rental replacement policies in appropriate markets and exploring standardized approaches to legal agreements. Input called for coordination around enforcing income requirements in new affordable units and creating a Tenant Rent Contribution certification program and centralized reporting. Participants suggested coordination measures around protection of tenants, for example, creating model bylaws. There was strong interest in having a consistent definition of "affordable". Participants confirmed the value of Metro Vancouver's role in regional coordination.	Metro Vancouver is committed to increasing regional policy coordination on affordable housing as one key objective of *Housing 2050*, for example, through member advisory committees, topical workshops, and best practice research. Metro Vancouver is developing potential policy alternatives and advocacy strategies for the draft *Housing 2050* roadmap, drawing ideas and inspiration from the engagement input.

INTEREST: SUPPORTIVE HOUSING AND HOMELESSNESS	
WHAT WE HEARD	**HOW WE'RE RESPONDING**
Input for this theme described the growing need for supportive housing observed by housing providers and a desire for advocacy around the challenge of ensuring funding for supportive housing. Participants raised obstacles with respect to moving people through the supportive housing ecosystem and best allocating resources. Suggestions were made for identifying supportive housing targets and for coordination on a regional supportive housing strategy with, for example, a dedicated working group. There was a suggestion that expiring operating agreements for subsidized housing can be renewed to protect affordable housing. Homelessness emerged as a shared concern and focus across many of the discussions. Comments expressed value in a holistic, regional approach and cross-sectoral advocacy to address homelessness and unmet need for supportive services, including with municipalities, and concern with overrepresentation of Indigenous people in homelessness. Participants expressed a desire for coordination on regional homelessness support and prevention services, including amongst health authorities.	Metro Vancouver has a role of convener in regional discussions with its member jurisdictions on supportive housing and homelessness. On June 19, 2025, staff delivered a workshop held jointly with the RPAC Housing Subcommittee and RPAC Social Issues Subcommittee to discuss challenges, successes, and areas for collective action around supportive housing. Metro Vancouver is considering potential policy alternatives and advocacy strategies for the draft *Housing 2050* roadmap around supportive housing, taking inspiration from the engagement discussions.

7. How Input Will Be Used

This input will help to inform the development of potential policy alternatives and advocacy strategies that will be presented to Metro Vancouver member advisory committees and other engagement audiences for discussion in fall 2025. Staff have considered participants' comments and will incorporate them in the draft directions for *Housing 2050*, where possible.

8. Next Steps

This interim engagement summary report will be presented to the Regional Planning Committee in fall 2025. Further opportunities to engage on *Housing 2050* will be available as the project transitions to the next task to discuss potential policy alternatives and advocacy strategies.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To: Regional Planning Committee

From: Sinisa Vukicevic, Program Manager, Planning Analytics and
Heidi Lam, Senior Policy and Planning Analyst, Regional Planning and Housing Services

Date: August 11, 2025 Meeting Date: September 11, 2025

Subject: **Metro 2050 – 2024 Annual Performance Monitoring Report**

RECOMMENDATION

That the MVRD Board:

a) receive for information the report dated August 11, 2025, titled "Metro 2050 – 2024 Annual Performance Monitoring Report"; and

b) direct staff to forward a copy of the report dated August 11, 2025, titled "Metro 2050 – 2024 Annual Performance Monitoring Report" to the Ministry of Municipal Affairs and the Ministry of Citizen's Services.

EXECUTIVE SUMMARY

The 2024 Annual Performance Monitoring Report provides the annual update on the 29 key performance indicators established in *Metro 2050*, the regional growth strategy. These indicators track progress across a range of policy areas and offer a comprehensive view of how the region is advancing toward its long-term vision. The *Metro 2050* Performance Monitoring Dashboard supports this report by offering detailed data, visualizations, and status updates for each measure. It serves as a transparent and accessible tool for the Metro Vancouver Board, member jurisdictions, TransLink, regional agencies, and the public to monitor implementation, evaluate outcomes, and inform collective decision-making (Reference 1).

Highlights include:

- 41% of dwelling unit growth (2016–2021) occurred in Urban Centres (target is 40%);
- Area inside the Urban Containment Boundary reduced by 391 ha, primarily due to the removal of Lions Bay;
- Vehicle km travelled by auto drivers declined from 43.6M km/day (2017) to 41.4M km/day (2023);
- Walking trips increased from 14.2% to 18.2% of all trips (2017–2023);
- Only 2.3% of newly completed units (2018–2023) in growth areas were affordable rentals (target: 15% by 2050);
- Office space in Urban Centres remained stable at 55M sq ft, despite a regional decline in total office space; and
- Five amendments to *Metro 2050* were approved in 2024, reflecting ongoing implementation and refinement of the regional growth strategy.

PURPOSE

To provide the Regional Planning Committee and MVRD Board the 2024 annual performance monitoring report of the region's performance towards the goals of *Metro 2050*. This report provides a highlight and status update on the 29 performance measures listed in Section G of *Metro 2050*.

BACKGROUND

Metro 2050 was adopted on February 24, 2023. It is the regional federation's collective vision for how growth will be managed to support the creation of complete, connected, and resilient communities, while protecting important lands and supporting the efficient provision of urban infrastructure like transit and utilities. *Metro 2050* has 29 performance measures that track progress toward the goals set out in the regional growth strategy.

Annual reporting on the regional growth strategy's progress is required by Subsection 452(1)(b) of the *Local Government Act* and Section 6.13.3 of *Metro 2050*. The *Metro 2050* Performance Monitoring Dashboard, along with this annual report, fulfill Metro Vancouver's legislative obligation. Additionally, it meets the priority action set out in Metro Vancouver's Board Strategic Plan 2022-2026 to" help the region monitor progress towards the targets of *Metro 2050* and create a central location for planners, decision makers, and the public to explore and use data from various regional data models, inventories, and projects".

METRO 2050 DASHBOARD (Reference 1)

The *Metro 2050* Performance Monitoring Dashboard is an interactive, publicly accessible webtool that details the 29 measures outlined in Section G: Performance Monitoring of *Metro 2050*. Metro Vancouver recognizes the vital role performance monitoring plays in the implementation of *Metro 2050* and in collective decision-making. The *Metro 2050* Performance Monitoring Dashboard provides information on each measure's vision, relevant data, and offers transparency on their status. It shares regional data with stakeholders on an interactive, dynamic, and user-friendly platform that can be updated in real-time as data becomes available. Through the dashboard, the MVRD Board can review and evaluate the state of growth management in the region, monitor progress, and address any emerging issues.

PERFORMANCE MONITORING

Metro 2050 identifies 29 key performance and context measures to assess the success of its goals, strategies and policy actions. These measures provide a framework for performance monitoring and enable an informed review of the regional growth strategy as needed. This annual performance monitoring report process supports the implementation of *Metro 2050* and tracks its progress toward achieving its goals.

Tables 1 to 6 highlight the 29 performance measures. Detailed information on each performance measures' vision, intent, progress, data source, methodology, and data files is available for viewing and download through the *Metro 2050* Performance Monitoring Dashboard.

Table 1. *Metro 2050* Performance Measures – Regional Land Use Designations

Measure	Performance
Total and cumulative change in hectares of land in each of the six regional land use designations	In 2024, the regional land use designation amendments affected a total of 1095.28 hectares, resulting in: • General Urban – net loss of 301.84 • Industrial – net gain of 11.42 ha • Employment – net gain of 1.1 ha • Agricultural – net loss of 12.97 ha • Rural – net gain of 1024.86 ha • Conservation and Recreation – net loss of 721.06 ha The regional land use amendments stem from five regional growth strategy amendments that affected lands in Electoral Area A, City of Maple Ridge, City of Pitt Meadows, City of Surrey, City of Vancouver, Township of Langley, and Village of Lions Bay. Since the adoption of *Metro 2040* in 2011 to 2024, 2487.4 hectares of land had amended regional land use designations. The cumulative changes are as follows: • General Urban – net loss of 863.61 ha • Industrial – net gain of 88.36 ha • Employment – net gain of 146.96 ha • Agricultural – net loss of 213.16 ha • Rural – net gain of 652.97 ha • Conservation and Recreation – net gain of 195.59 ha At the end of 2024, the regional land use designation breakdown are as follows: • General Urban 69,325 ha (24%) • Industrial 10,480 ha (4%) • Employment 3,537 ha (1%) • Agricultural 54,667 ha (19%) • Rural 9,126 ha (3%) • Conservation and Recreation 136,959 ha (48%) This performance measure is updated every year.

Table 2. *Metro 2050* Performance Measures – Goal 1: Create a Compact Urban Area

Measure	Performance
Total and cumulative change in hectares of land in the Urban Containment Boundary	In 2024, the area within the Urban Containment Boundary decreased by 390.71 hectares. The corresponding boundary changes stemmed from three regional growth strategy amendments affecting the City of Maple Ridge, Township of Langley, and Village of Lions Bay. Urban Containment Boundary area • 89,462 ha – 2011 (*Metro 2040* adoption), 31.6% of regional area • 89,853 ha - Feb 2023 (*Metro 2050* adoption), 31.7% of regional area • 89,477 ha – year end 2024, 31.6% of regional area Since the adoption of *Metro 2040* in 2011 to 2024 year end, the Urban Containment Boundary has expanded (net) by 15.58 hectares. This performance measure is updated every year.
Percent of regional dwelling unit growth located within the Urban Containment Boundary (regional target of 98%)	Between 2016 and 2021, 98% of Metro Vancouver's total dwelling unit growth occurred within the Urban Containment Boundary over this five-year Census period. 2016 Custom Census Data – Total Dwelling Units • 1,027,613 units in Metro Vancouver • 1,002,899 units in Urban Containment Boundary 2021 Custom Census Data – Total Dwelling Units • 1,104,532 units in Metro Vancouver • 1,078,132 units in Urban Containment Boundary This performance measure is updated every five years, following the release of custom census data.
Number and status of new regional sewerage service connection applications made for areas outside of Urban Containment Boundary to lands with an Agricultural, Rural, or Conservation and Recreation regional land use designation	In 2024, two new sanitary service connection applications were approved outside of the Urban Containment Boundary, both located in Township of Langley. This performance measure is updated every year.

Measure	Performance
Change in hectares of greenfield lands within the Urban Containment Boundary that have a General Urban regional land use designation	This performance measure tracks the development of greenfield lands across the region relative to the region's growth through infill and redevelopment in existing urban areas. In 2022, the Metro Vancouver region had approximately 4,015 hectares of greenfield lands within the UCB. This accounts for 5.8% of all lands with a General Urban regional land use designation at 69,627 hectares. Under this performance measure methodology, greenfield lands must have a general urban regional land use designation in *Metro 2050*, have an urban type Official Community Plan land use designation, be a contiguous area, be located within the Urban Containment Boundary, be without a servicing connection as of 2022 year end, and be verified visually using 2022 orthophotos. More details are available on the *Metro 2050* Performance Monitoring Dashboard. This performance measure is updated every three to five years.
Percent of regional dwelling unit growth located in Urban Centres, Frequent Transit Development Areas, and Major Transit Growth Corridors	Between 2016 and 2021, the total number of dwelling units increased by 31,635 in Urban Centres, by 5,315 in Frequent Transit Development Areas, and by 76,919 across the region. Hence, 41% of Metro Vancouver's total dwelling unit growth occurred within Urban Centres and 7% within Frequent Transit Development Areas over this five-year Census period. 2016 Custom Census Data – Total Dwelling Units • 1,027,613 units in Metro Vancouver • 283,795 units in Urban Centres • 18,280 units in Frequent Transit Development Areas 2021 Custom Census Data – Total Dwelling Units • 1,104,532 units in Metro Vancouver • 315,430 units in Urban Centres • 23,595 units in Frequent Transit Development Areas • 335,550 units in Major Transit Growth Corridors This performance measure is updated every five years, following the release of custom census data.
Change in "Activity Density" in Urban Centres, Frequent Transit Development Areas,	Activity Density is measured by people plus jobs per hectare. In 2021, the combined for all Urban Centres is 131 Jobs + People/ hectare; for Frequent Transit Development Areas is 80 Jobs +

Measure	Performance
and Major Transit Growth Corridors	People/ hectare; and for Major Transit Growth Corridors is 50 Jobs + People/ hectare. This is a new performance measure under *Metro 2050*. Historical data collection is currently underway. This performance measure is updated every five years, following the release of custom census data.
A walkability index composed of land use mix, commercial floor area ratio, intersection density, residential density, and sidewalk completeness	The latest 2021 Walkability Index was completed in September 2024. The study findings and index maps are now available for download and viewing on the *Metro 2050* Performance Monitoring Dashboard. The results are shown side by side with the previous 2016 Walkability Index for comparison. From 2016 to 2021, walkability improved across the majority of Metro Vancouver with more pronounced improvements in Urban Centres and Frequent Transit Development Areas. This performance measure is updated every five years.
Total and change in number of community services and amenities in Urban Centres and Frequent Transit Development Areas, including, but not limited to child care and green space	This is a newly introduced performance measure in *Metro 2050*. Metro Vancouver is currently collaborating with Simon Fraser University (SFU) through an internship program focused on researching and compiling regional datasets related to community services and amenities – including childcare facilities, as well as municipal, regional and provincial parks, and park features such as washrooms and play structures. The findings from this research will help inform and guide the development of a methodology for implementing this measure.

Table 3. *Metro 2050* Performance Measures – Goal 2: Support a Sustainable Economy

Measure	Performance
Percent of regional employment growth located in Urban Centres, Frequent Transit Development Areas, and Major Transit Growth Corridors	Between 2016 and 2021, the employed labour force grew by 4% from 1,111,450 jobs to 1,158,545 jobs across the region. Urban Centres and Frequent Transit Development Areas lost 60,870 and 3,560 jobs, respectively. 2016 Custom Census Data – Total Employed Labour Force • 1,111,450 jobs in Metro Vancouver • 445,955 jobs in Urban Centres • 33,460 jobs in Frequent Transit Development Areas 2021 Custom Census Data – Total Employed Labour Force • 1,158,545 jobs in Metro Vancouver

Measure	Performance
	• 385,085 jobs in Urban Centres • 29,900 jobs in Frequent Transit Development Areas • 310,845 jobs in Major Transit Growth Corridors It is important to note that the timing of the 2021 Census was during the COVID-19 pandemic, which had several impacts on employment levels, including heightened unemployment, business and site closures, and the relocation of certain employment to remote work. Since then, the Metro Vancouver region has shown a steady increase in average employment between 2021 and 2024, highlighting that the regional economy has remained in a state of continued growth and has a stable labour market. This performance measure is updated every five years, following the release of custom census data.
Total and change in employment by sector in Urban Centres, Frequent Transit Development Areas, and Major Transit Growth Corridors	Data collection is currently underway and the findings will be available in late 2025.
Change in office floor area within Urban Centres, Frequent Transit Development Areas, and Major Transit Growth Corridors	In 2022, the region had 78 million sq ft of office space across 1,338 buildings with 10,000 sq ft or more of office space. Of this total, 55 million sq ft (71%) of office space was located in Urban Centres. For office space within Urban Centres, 69% is located in the Metro Core, 16% in Regional City Centres, 9% in Municipal Town Centres, and 6% in the Surrey Metro Centre. By comparison, in 2018 the region had 80 million sq ft of office space across 1,392 buildings with 10,000 sq ft or more of office space. The amount of office space located in Urban Centres was also 55 million sq ft (same as 2022), representing 69% of the total. This performance measure is updated every five years.
Percent of land in ALR that is actively farmed	Metro Vancouver monitors the status of agricultural land, including the amount of actively farmed land, with the objective of promoting agricultural viability and food production in collaboration with the province and the Agricultural Land Commission.

Measure	Performance
	Metro Vancouver ALR Land Cover Overview (2016) • Activity farmed – 29,320 ha (51%) • Natural and Semi-natural – 17,178 ha (30%) • Anthropogenic (not farmed) – 9,675 ha (17%) • Inactively farmed – 953 ha (2%) Updated Agricultural Land Use Inventory data is currently under review and is expected to be publicly available in 2026. This performance measure is updated every five years.
Average number of km travelled for commute region-wide	This performance measure provides contextual information on how far employees travel for work and the changing nature of work across the region. Metro Vancouver (2017 and 2023) Average trip length to work by auto driver • Burnaby 11.6 km (2017), 11.6 km (2023) • Coquitlam 15.6 km (2017), 14.9 km (2023) • Delta 15.9 km (2017), 17.9 km (2023) • Electoral Area A UBC/UEL 11.3 km (2017), Not available (2023) • Langley City 15.3 km (2017), 15.4 km (2023) • Langley Township 19.0 km (2017), 15.1 km (2023) • Maple Ridge 19.4 km (2017), 18.7 km (2023) • New Westminster 14.9 km (2017), 12 km (2023) • North Vancouver City 10.4 km (2017), 11.4 km (2023) • North Vancouver District 12.5 km (2017), 11.9 km (2023) • Pitt Meadows 14.1 km (2017), 18.6 km (2023) • Port Coquitlam 14.6 km (2017), 17.4 km (2023) • Port Moody 17.7 km (2017), 15.6 km (2023) • Richmond 12.3 km (2017), 11 km (2023)

Measure	Performance
	• Surrey 16.2 km (2017), 15.7 km (2023) • Vancouver 10.2 km (2017), 9.9 km (2023) • West Vancouver 13.9 km (2017), 16.8 km (2023) • White Rock 23.5 km (2017), 18.2 km (2023) • Others 13.8 km (2017), 14.3 km (2023) • Metro Vancouver total 14.2 km (2017), 13.9 km (2023) Data breakdown by municipality and year is available for download and viewing on the *Metro 2050* Performance Monitoring Dashboard. This performance measure is updated every five to six years, following the update of TransLink's Regional Trip Diary.
Average number of minutes travelled for commute region-wide	This performance measure provides contextual information about how long it takes employees to travel for work and its destination. Metro Vancouver (2016 and 2021) Employed labour force with usual place of work or no fixed workplace address – commuting duration • < 15 mins 207,755 people (2016), 202,980 people (2021) • 15 to 29 mins 375,370 people (2016), 341,035 people (2021) • 30 to 44 mins 306,130 people (2016), 258,225 people (2021) • 45 to 59 mins 139,550 people (2016), 96,495 people (2021) • ≥ 60 mins 130,405 people (2016), 79,825 people (2021) Data breakdown by municipality is available for download and viewing on the *Metro 2050* Performance Monitoring Dashboard. This performance measure is updated every five years, following the release of census data.

Measure	Performance
Average trip length by transportation mode region-wide	This performance measure provides contextual information on employees' travel method and distance. Metro Vancouver (2017 and 2023) Average trip length by travel mode • Auto driver 14.2 km (2017), 13.9 km (2023) • Auto passenger 13.6 km (2017), 10.4 km (2023) • Transit 14.6 km (2017), 15.8 km (2023) • Bike 5.9 km (2017), 6.1 km (2023) • Walking 0.7 km (2017), 0.7km (2023) Data breakdown by municipality and year is available for download and viewing on the *Metro 2050* Performance Monitoring Dashboard. This performance measure is updated every five to six years, following the update of TransLink's Regional Trip Diary.
Total and cumulative change in hectares of land designated Industrial and Employment that is developed and vacant	Metro Vancouver monitors the ways in which industrial lands are used in the region. Between 2015 and 2020, the total area of land designated for industrial or employment use in the region decreased slightly from 10,335 hectares to 10,250 hectares, while the proportion of developed land rose from 79% to 83%, reflecting a continued shift toward industrial land utilization. 2020 Regional Industrial Lands Inventory • 10,250 ha of land with an industrial or employment regional land use designation ○ 83% developed, 17% vacant 2015 Regional Industrial Lands Inventory (unadjusted) • 10,335 ha of land with an industrial or employment regional land use designation ○ 79% developed, 21% vacant This performance measure is updated every five years.

Table 4. *Metro 2050* Performance Measures – Goal 3: Protect the Environment, Address Climate Change, and Respond to Natural Hazards

Measure	Performance
Change in hectares of land protected for nature across the region (40% to 50%)	The Regional Protected Natural Areas dataset is compiled by Metro Vancouver using various data sources to track the area of land protected for nature. In 2013, 40% of the region's land base is protected for nature. This includes federal, provincial, and municipal parks, terrestrial-based wildlife management areas, ecological reserves, regional parks, watersheds, the Lower Seymour Conservation Reserve, Buntzen Lake Recreation Area, University of British Columbia Malcolm Knapp and British Columbia Institute of Technology research forests. An update to the Regional Protected Natural Areas dataset is underway. This performance measure is updated every five to six years.
Change in percentage of regional total tree canopy cover within the Urban Containment Boundary (regional target from 32% to 40%)	Between 2014 and 2020, the regional tree canopy cover decreased from 32% to 31% within the Urban Containment Boundary. The next update to the Regional Tree Canopy Cover dataset is planned in 2027. This performance measure is updated every five to six years.
Change in hectares of land identified as Sensitive or Modified Ecosystem	Between 2014 and 2020, 335 ha of Sensitive Ecosystems and 566 ha of Modified Ecosystem were lost. In 2020, there are 149,617 ha of Sensitive Ecosystems and 26,812 ha of Modified Ecosystem. The next update to the Sensitive Ecosystem Inventory is planned in 2027. This performance measure is updated every five to six years.
Change in hectares of identified Sensitive and Modified Ecosystem rated high quality	Ecosystem quality changes will be included in the next update to the Sensitive Ecosystem Inventory in 2027.
Total and change in tonnes of GHG emissions related to land use, buildings, industry, agriculture, waste, transportation, and other emission sources in support of the regional target to reduce GHG emissions by 45% below 2010 levels by the year	The strategies and policy actions of *Metro 2050* encourage greenhouse gas emission (GHG) reduction across the region. This key performance measure has an ambitious target for the region to reduce GHGs by 45% by 2030 compared to the 2010 levels, and be carbon neutral by 2050. In 2022, the Metro Vancouver region's total annual regional GHG emissions were 17.2 million tonnes CO2e (carbon dioxide equivalent), up 9% from 2010 (15.8 million tonnes CO2e). These

Measure	Performance
2030 and to achieve a carbon neutral region by the year 2050	increases were driven by growth in emissions from industrial facilities, non-road engines (including construction and other equipment), and buildings. GHG emissions from on-road transportation and solid waste decreased during this period. In 2022, the total regional GHGs from buildings was 4.7 million tonnes of CO2e, and total regional GHG emissions from on-road vehicles was 6.5 million tonnes of CO2e. This performance measure is updated every year, following the update of GHG emissions inventory as part of the annual Climate 2050 Progress Report.
Tonnes of carbon storage in natural areas including lands with Rural, Conservation and Recreation, and Agricultural regional land use designations	The carbon storage dataset measures the tonnes of carbon storage in natural areas including lands with a Rural, Conservation and Recreation, and Agricultural regional land use designation. An update to the Regional Carbon Storage Dataset is planned for completion in 2026.

Table 5. *Metro 2050* Performance Measures – Goal 4: Provide Diverse and Affordable Housing Choices

Measure	Performance
Percentage of newly completed housing units built within Urban Centres, Frequent Transit Development Areas, and Major Transit Growth Corridors that are affordable rental housing units (regional target of 15% to the year 2050)	Between 2018 and 2023, 2.3% of newly completed housing units in Urban Centres, Frequent Transit Development Areas, and Major Transit Growth Corridors were affordable rental housing. Performance is being monitored at the regional scale for these areas combined. This performance measure is updated every one to two years.
Percentage of household income spent on housing and transportation expenses across the region and by tenure and income level	Based on data from 2017 to 2022, housing and transportation costs took up 39% of the pre-tax income of renter households and 33% of the pre-tax income of owner households. The 2025 Housing and Transportation Cost Burden study is currently under review. The data is expected to be publicly available in late 2025 and will be available for download and viewing on the *Metro* 2050 Performance Monitoring Dashboard. This performance measure is updated every five years.

Table 6. *Metro 2050* Performance Measures – Goal 5: Support Sustainable Transportation Choices

Measure	Performance
Total and change in trips by transportation mode	This performance measure provides contextual information about the overall change in residents' trips and trip length by transportation mode for all trip purposes (to home, work/ university, grade school, escorting, shopping/ personal business, and social/ recreation/ dining). Metro Vancouver (2017 and 2023) Percentage of all trips by travel mode • Auto driver 55.66% (2017), 50.5% (2023) • Auto passenger 17.52% (2017), 18.84% (2023) • Transit 10.91% (2017), 9.99% (2023) • Bike 1.67% (2017), 2.46% (2023) • Walk 14.24% (2017), 18.21% (2023) Number of all trips by travel mode (2017 and 2023) • Auto driver 4,464,300 trips (2017), 4,427,300 trips (2023) • Auto passenger 1,404,800 trips (2017), 1,651,600 trips (2023) • Transit 875,100 trips (2017), 876,000 trips (2023) • Bike 133,900 trips (2017), 215,500 trips (2023) • Walking 1,142,100 trips (2017), 1,596,400 trips (2023) A full data breakdown by municipality and year is available for download and viewing on the *Metro 2050* Performance Monitoring Dashboard. This performance measure is updated every five to six years, following the release of TransLink's Regional Trip Diary data.
Percent of residents within the Major Transit Growth Corridors	In 2021, 56% of Metro Vancouver residents lived in the region's priority growth areas (22% in Urban Centres, 2% in Frequent Transit Development Areas, and 32% in Major Transit Growth Corridors).

Measure	Performance
	This performance measure is updated every five years, following the release of census data.
Total and per-capita change in the number of actively insured vehicles	This performance measure provides contextual information about the change in personal vehicle ownership across the region and the change in vehicle ownership per capita. Using 2021 Census data, car ownership per capita was 0.8 in 2021. The population count is based on people aged 15 to 64. The 2024 car ownership per capita data will be available in late 2025. Based on the latest ICBC public database, there were 1,266,149 actively insured passenger vehicles in Metro Vancouver in 2024. A full data breakdown by municipality is available on the *Metro 2050* Performance Monitoring Dashboard. This performance measure is updated every year.
Total and per-capita change in vehicle km travelled	This contextual measure informs the change in auto drivers' travel behaviour by municipality and per capita. Metro Vancouver (2017 and 2023) All trips by auto driver – vehicle km travelled (VKT), VKT per capita • Burnaby 3,026,000 VKT (2017) 2,860,500 VKT (2023), 13.0 VKT/capita (2017) 10.4 VKT/capita (2023) • Coquitlam 2,735,800 VKT (2017) 2,449,500 VKT (2023), 20.0 VKT/ capita (2017) 14.7 VKT/capita (2023) • Delta 2,556,000 VKT (2017) 2,404,200 VKT (2023), 24.9 VKT/ capita (2017) 20.3 VKT/capita (2023) • Electoral Area A UBC/UEL 133,100 VKT (2017) 140,500 VKT (2023), 7.2 VKT/capita (2017) 7.0 VKT/capita (2023) • Langley City 676,900 VKT (2017) 708,800 VKT (2023), 26.0 VKT/capita (2017) 22.7 VKT/capita (2023) • Langley Township 3,901,200 VKT (2017) 3,430,300 VKT (2023), 33.7 VKT/capita (2017) 23.1 VKT/capita (2023)

Measure	Performance
	• Maple Ridge 2,571,100 VKT (2017) 2,435,300 VKT (2023), 31.1 VKT/capita (2017) 24.2 VKT/capita (2023) • New Westminster 1,163,800 VKT (2017) 1,138,100 VKT (2023), 16.4 VKT/capita (2017) 12.8 VKT/capita (2023) • North Vancouver City 795,000 VKT (2017) 759,400 VKT (2023), 14.9 VKT/capita (2017) 11.6 VKT/capita (2023) • North Vancouver District 1,740,100 VKT (2017) 1,508,300 VKT (2023), 20.5 VKT/capita (2017) 15.4 VKT/capita (2023) • Pitt Meadows 438,000 VKT (2017) 521,100 VKT (2023), 24.8 VKT/capita (2017) 24.6 VKT/capita (2023) • Port Coquitlam 1,360,700 VKT (2017) 1,396,500 VKT (2023), 23.2 VKT/capita (2017) 21.1 VKT/capita (2023) • Port Moody 888,800 VKT (2017) 570,100 VKT (2023), 26.1 VKT/capita (2017) 15.5 VKT/capita (2023) • Richmond 3,082,600 VKT (2017) 2,649,500 VKT (2023), 15.5 VKT/capita (2017) 11.3 VKT/capita (2023) • Surrey 10,704,300 VKT (2017) 10,823,400 VKT (2023), 20.8 VKT/capita (2017) 16.8 VKT/capita (2023) • Vancouver 6,347,100 VKT (2017) 5,928,900 VKT (2023), 10.0 VKT/capita (2017) 8.1 VKT/capita (2023) • West Vancouver 841,300 VKT (2017) 864,300 VKT (2023), 18.3 VKT/capita (2017) 17.3 VKT/capita (2023) • White Rock 529,800 VKT (2017) 494,800 VKT (2023), 27.5 VKT/capita (2017) 22.4 VKT/capita (2023) • Others 152,600 VKT (2017) 289,900 VKT (2023), 17.5 VKT/capita (2017) 21.1 VKT/capita (2023) Data breakdown by municipality and year is available for download and viewing on the *Metro 2050* Performance Monitoring Dashboard. This performance measure is updated

Measure	Performance
	every five to six years, following the release of TransLink's Regional Trip Diary data.

METRO 2050 AMENDMENTS IN 2024

From January 1, 2024, to December 31, 2024, there were five approved land use designation amendments to *Metro 2050*:

- Bylaw No. 1376, 2024 – A Type 3 regional land use designation amendment from General Urban and Agricultural to Industrial and Conservation and Recreation for 25.4 hectares of lands located at Yennadon Lands. These subject properties are located at 22913 127 Avenue, 22992 127 Avenue, 22870 127 Place, 22948 128 Avenue, 22990 128 Avenue, 23008 128 Avenue, 23154 128 Avenue, 12640 228 Street, 12639 232 Street, 12685 232 Street, 12759 232 Street, 12761 232 Street, and 12791 232 Street in City of Maple Ridge.
- Bylaw No. 1378, 2024 – A Type 2 regional land use designation amendment from Conservation to Rural for 742.2 hectares (73 parcels) and from Agricultural to Conservation and Recreation for 6.1 hectares (3 parcels). These parcels are located in the rural and remote portions of Electoral Area A.
- Bylaw No. 1379, 2024 – A Type 3 regional land use designation amendment from Rural to Conservation and Recreation for 10.1 hectares (15 parcels) and from no regional land use designation to Rural for a 1.5 hectares parcel of land. These parcels are located in the rural and remote portions of Electoral Area A.
- Bylaw No. 1380, 2024 – A Type 3 regional land use designation amendment that includes mapping revisions that stem from Board accepted regional context statements (Village of Lions Bay and City of Pitt Meadows), regional land use amendments made under the municipal flexibility clause (City of Vancouver), updates to *Metro 2050* reference maps based on new data (e.g. new sensitive ecosystem inventory map), and corrections to map text and designation boundaries (Township of Langley, City of New Westminster, and City of Richmond).
- Bylaw No. 1392, 2024 – A Type 3 regional land use designation amendment from Industrial to Employment for a 1.3 hectare parcel located at 7880 128 Street in City of Surrey.

ALTERNATIVES

1. That the MVRD Board:
   a) receive for information the report dated August 11, 2025, titled "Metro 2050 – 2024 Annual Performance Monitoring Report"; and
   b) direct staff to forward a copy of the report dated August 11, 2025, titled "Metro 2050 – 2024 Annual Performance Monitoring Report" to the Ministry of Municipal Affairs and the Ministry of Citizen's Services.

2. That the MVRD Board receive for information the report dated August 11, 2025, titled "Metro 2050 – 2024 Annual Performance Monitoring Report".

FINANCIAL IMPLICATIONS

Data acquisition and performance monitoring is a regular component of the annual Regional Planning budget.

CONCLUSION

The *Local Government Act* and *Metro 2050* require annual reporting on the regional growth strategy's progress. The 2024 Annual Performance Monitoring Report provides a summary of progress toward the 29 performance measures set out in *Metro 2050*. A complete profile of the performance measures with detailed data breakdown is available on the interactive *Metro 2050* Performance Monitoring Dashboard that is updated in real-time as data becomes available.

REFERENCES

1. Metro Vancouver. (2025). *Metro 2025 Performance Monitoring Dashboard*. https://metrovancouver.org/services/regional-planning/metro-2050-performance-monitoring

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SERVICES AND SOLUTIONS FOR A LIVABLE REGION

To: Regional Planning Committee

From: Jonathan Cote, Deputy General Manager, Regional Planning and Housing Development, Regional Planning and Housing Services

Date: August 19, 2025 Meeting Date: September 11, 2025

Subject: **Manager's Report**

RECOMMENDATION

That the Regional Planning Committee receive for information the report dated August 19, 2025, titled "Manager's Report".

REGIONAL PLANNING COMMITTEE 2025 WORK PLAN

The Regional Planning Committee's Work Plan for 2025 is attached to this report (Attachment 1). The status of work program elements is indicated as pending, in progress, or complete. The listing is updated as needed to include new issues that arise, items requested by the committee, and changes to the schedule.

PROPOSED METRO 2050 AMENDMENTS

At its July 25, 2025 regular meeting, the MVRD Board passed a resolution directing staff to initiate engagement with member jurisdictions as a precursor to a Type 1 *Metro 2050* amendment. This resolution responds to the joint requests from the mayors of Surrey, Langley Township, and Delta, which aim to increase flexibility in managing growth by updating the Urban Containment Boundary framework, streamlining the amendment process for certain UCB expansions, and enabling minor, site-specific boundary adjustments (Attachment 2). A staff report provided to the Board in July offered additional context on the proposed changes, including relevant legislative and policy considerations under the *Local Government Act* and *Metro 2050* (Attachment 3).

Staff are now developing possible amendment language for Board consideration this fall, ahead of formal engagement. This engagement with affected local governments is required before the Board can consider first reading of an amendment bylaw. Subsequently, if the Board chooses to give first, second and third reading to amendment bylaws, as required under *Metro 2050*, staff will engage all affected local governments and provide comments (or assent if a Type 1 amendment) from member Councils, TransLink Board, and Boards of adjacent regional districts to the MVRD Board prior to consideration of final reading.

MINISTER OF AGRICULTURE RESPONSE LETTER TO METRO VANCOUVER – REGIONAL FOOD SYSTEM STRATEGY

At its February 28, 2025 meeting, the MVRD Board discussed the update to the Regional Food System Strategy and how that work fits within the individual mandates of the Ministry of Agriculture and Food and Metro Vancouver. The MVRD Board subsequently passed the following resolution:

> *That the MVRD Board direct staff to discontinue work on the Regional Food System Strategy, and request that the Board Chair send a letter to the Ministry of Agriculture and Food to ask them to fulfill their obligations with regard to food systems in the region.*

Metro Vancouver sent a letter to Minister Popham, dated May 28, 2025 (Attachment 4) outlining Metro Vancouver's role, highlighting the critical issues facing the long-term viability of agriculture and food security in the region and asking for clarification on how the work conducted at the Ministry of Agriculture and Food, as well as the work conducted by the newly appointed Premier's Task Force on Agriculture and Food, can meet the region's needs.

On June 17, 2025, Minister Popham replied (Attachment 5) with a commitment for staff from the Ministry of Agriculture and Food to continue to work Metro Vancouver during the process to update the Regional Food System Strategy, to help identify areas that are under the purview of the Province and confirmed the need to continue to collaborate.

BC EVICTION MAPPING PROJECT BY FIRST UNITED

The BC Eviction Mapping project by First United aims to make tenant protections stronger in BC by gathering information on where evictions are happening in the province, who is affected by them, and what the impacts are. An interactive online map (Reference 1) with over 800 responses from across the province to date provides evidence of the outcomes of housing instability and associated impacts.

Some of the findings to date include:

- 17.5 per cent of displaced tenants report $500-$1000 rent increase per month
- 80 per cent face community displacement
- Displacement affects all household income levels
- Displacement can result in involuntary co-living, losing sense of community, job impacts, mental health impacts, family separation, and risk of homelessness

The Evictions Map is an ongoing project, with data continuing to be collected and updated monthly.

ATTACHMENTS

1. Regional Planning Committee 2025 Work Plan.
2. Incoming Letter from City of Surrey, Township of Langley, and City of Delta Mayors re: Urban Containment Boundary – Urgent Need for Policy Reform, dated June 19, 2025.
3. MVRD Board Report titled "Proposed Metro 2050 Amendments Next Steps in Response to City of Surrey, Township of Langley and City of Delta Mayors", dated July 11, 2025.
4. Outgoing Letter to Minister Popham re: Regional Food System Strategy – Engagement Update and Next Steps, dated May 28, 2025.
5. Incoming Letter from Minister Popham, re: Regional Food System Strategy – Engagement Update and Next Steps, dated July 17, 2025.

REFERENCES

1. First United. (2025). *First United BC Evictions Map.* https://firstunited.ca/evictions-map/.

Regional Planning Committee 2025 Work Plan

Report Date: August 19, 2025

1st Quarter	Status
Measures for Affordable and Diverse Housing Dashboard	Completed
Regional Parking Strategy – Update	Completed
Metro 2050 Climate Policy Enhancement Bylaw	Completed
Housing Databook - Update	Completed
Metro 2050 – Regional Affordable Rental Housing Target – Baseline Data	Completed
Regional Food Systems Strategy Engagement – Update Report	Completed
Housing 2050: A Roadmap to Implement Metro 2050's Housing Goal – Regional Housing Needs Report	Completed
Rental Housing Blueprint – Update	Completed
Regional Growth Strategy Amendments, Regional Context Statements, and Sewerage Area Amendments (as applicable)	Completed
2nd Quarter	**Status**
Regional Green Infrastructure Network Phase 2 - Update Report	In Progress
Housing 2050: A Roadmap to Implement Metro 2050's Housing Goal – Affordable Housing Gap Analysis	In Progress
Agricultural Awareness Grant Awards	Completed
Housing + Transportation Cost Burden Study Update – Final Report	In Progress
Regional Parking Study – Final Report	Completed
Best Management Practices for Invasive Species – Update and 3 New Guides	In Progress
Regional Growth Strategy Amendments, Regional Context Statements, and Sewerage Area Amendments (as applicable)	Ongoing
3rd Quarter	**Status**
Metro 2050 – Performance Measures Update	Completed
Housing 2050: A Roadmap to Implement Metro 2050's Housing Goal – Policy Alternatives Discussion Paper	Pending
Regional Projections Update – Population, Housing and Employment	In Progress
Industrial Lands Bring to Market Study – Final Report	Completed
Regional Growth Strategy Amendments, Regional Context Statements, and Sewerage Area Amendments (as applicable)	Ongoing
4th Quarter	**Status**
Urban Centres/FTDA Growth Target Update	Pending
Regional 3D/XR Modeling Platform	In Progress
Housing 2050: A Roadmap to Implement Metro 2050's Housing Goal	Pending
Enhancing Urban Forestry – Scope of Work	Pending
Industrial Lands Inventory - Update	In Progress
Agricultural Data Book - Update	Pending
Regional Growth Strategy Amendments, Regional Context Statements, and Sewerage Area Amendments (as applicable)	Ongoing

June 19, 2025

Via E-mail

Mayor Mike Hurley
Chair, Metro Vancouver Board of Directors
Metrotower III, 4515 Central Boulevard
Burnaby BC V5H 0C6

Dear Chair Hurley and Members of the Board:

Re: Urban Containment Boundary – Urgent Need for Policy Reform

The Mayors of Surrey, the Township of Langley, and Delta jointly write to advise the Metro Vancouver Regional District to express a unified concern over the Metro 2050 framework, as currently written and administered, is obstructing our collective ability to plan for and deliver the housing, employment land and critical services our rapidly growing South-of-the-Fraser communities require.

Our communities are facing increased challenges due to the current policies and administrative process governing the Urban Containment Boundary (UCB) as outlined in the Regional Growth Strategy (RGS).

Accordingly, we expect the Board to direct staff to draft amendments that will:

1. **Redefine and modernize the UCB**. Policy language must allow contiguous UCB extensions that:
   - are outside the Agricultural Land Reserve and ecologically sensitive areas;
   - can be serviced with existing or committed infrastructure; and
   - support compact, transit-oriented, complete communities.

2. **Re-classify qualifying UCB expansions as Type 3 amendments**. The process for expending or adjusting the UCB through a Type 2 or Type 3 amendment under the RGS is burdensome, time-consuming, and often lacks transparency or consistency in interpretation. The ambiguity surrounding what qualifies as a Type 2 versus Type 3 amendment has led to unnecessary delays and uncertainty for both the municipalities and the development community. Therefore, we propose extensions meeting the above criteria—or located within Special Study Areas—should proceed as Type 3 amendments, subject to a simple majority (50% + 1) weighted vote, rather than the current two-thirds super-majority required for Type 2 amendments.

3. **Introduce a streamlined "minor realignment" allowance**. The municipalities should be granted more authority to make UCB changes that are consistent with their Official Community Plans and that align with regional objectives. Including, Site-specific UCB adjustments that do not compromise regional objectives, with notification to Metro Vancouver in lieu of a full amendment process.

South-of-the-Fraser municipalities will accommodate the largest share of the region's future population and job growth—yet only a fraction of developable lands lie within the existing UCB. The status quo is untenable; persisting with it will deepen the region's housing shortage, constrain industrial expansion, and undermine transportation investments.

We recognize the importance of a coordinated regional approach and remain committed to working with Metro Vancouver and our regional partners. However, this commitment must be balanced with a system that is adaptive, equitable, and supports the practical realties of a fast-growing communities.

We call on Metro Vancouver to initiate a formal review of the UCB amendment process and the Regional Growth Strategy to address the concerns of the South of the Fraser municipalities. We are prepared to contribute staff expertise, data, and policy insights to assist in this necessary review.

We therefore request the following immediate actions:

Staff direction: That Metro Vancouver staff report back with draft text amendments and a revised amendment classification table by September 30 2025.

Committee delegation: That representatives of our four municipalities be invited to present the technical basis for these changes at the next meeting of the Regional Planning Committee.

Voting fairness: That the Board commit, in advance, to treating any qualifying UCB expansion as a Type 3 amendment, effective immediately.

Failure to address these issues promptly will compel our municipalities to explore every legislative and intergovernmental avenue available to secure the flexibility our residents and businesses deserve.

We look forward to your prompt confirmation that Metro Vancouver will proceed as outlined above.

Sincerely,

Mayor Brenda Locke,
City of Surrey

Mayor Eric Woodward,
Township of Langley

Mayor George V. Harvie,
City of Delta

cc: Mayor John McEwen, Vice-Chair, Metro Vancouver Board
Chief Administrative Officers – South of the Fraser Municipalities
Regional Planning Advisory Committee

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To: MVRD Board of Directors

From: Heather McNell, Deputy Chief Administrative Officer, Policy and Planning

Date: July 11, 2025 Meeting Date: July 25, 2025

Subject: **Proposed Metro 2050 Amendments: Next Steps in Response to City of Surrey, Township of Langley, and City of Delta Mayors**

RECOMMENDATION

That the MVRD Board receive for information the letter from City of Surrey, Township of Langley and City of Delta mayors dated June 19, 2025, titled "Urban Containment Boundary – Urgent Need for Policy Reform."

and select one of the following:

1. That the MVRD Board direct staff to engage with the City of Surrey, Township of Langley, and City of Delta to explore alternative, collaborative approaches to address the concerns raised, within the existing *Metro 2050* policy framework; ***or***
2. That the MVRD Board respond to the requests, asking the City of Surrey, Township of Langley, and City of Delta to submit a formal *Metro 2050* amendment application via Council resolution per the process laid out in the regional growth strategy; ***or***
3. That the MVRD Board direct staff to undertake engagement with member jurisdictions as a precursor to bringing forward for Board consideration a Type 1 *Metro 2050* amendment reflecting the City of Surrey, Township of Langley, and City of Delta mayors' requests.

EXECUTIVE SUMMARY

The mayors of the City of Surrey, Langley Township, and City of Delta have submitted a joint letter to the Chair of the MVRD Board requesting changes to *Metro 2050*'s Urban Containment Boundary (UCB) amendment process. The letter proposes three key changes: allowing targeted expansion of the UCB without regional involvement, reclassifying UCB amendments from Type 2 to Type 3 to enable simple majority approval, and introducing a minor realignment mechanism for site-specific adjustments. The South of the Fraser sub-region is an important and growing part of Metro Vancouver, experiencing significant growth pressures, and is an essential partner in the successful implementation of *Metro 2050*. The Board Chair has directed Metro Vancouver staff to prepare this report to the Board providing options regarding the requests in the letter. This report outlines the purpose and function of the UCB, summarizes the amendment process under *Metro 2050*, and provides context on past amendment activity. In response to the mayors' letter, the report presents three potential courses of action for Board consideration:

1. acknowledge the letter and direct staff to work collaboratively with the respective jurisdictions to explore interests and alternatives within the existing policy framework;
2. refer the request back to the municipalities to initiate a formal *Metro 2050* amendment application; or

3. direct staff to engage with member jurisdictions as a precursor to the Board initiating a Type 1 amendment to *Metro 2050* to revise the amendment classification framework.

Given the political nature of the request and its implications for the governance of *Metro 2050,* staff are not making a recommendation, and respectfully request that the MVRD Board carefully consider the alternatives outlined in this report.

PURPOSE

This report provides the MVRD Board with an overview of the letter received from the mayors of Surrey, Langley Township, and Delta regarding proposed changes to *Metro 2050* and to present options for next steps in response.

BACKGROUND

On June 19, 2025, the Board Chair received a joint letter (Attachment 1) from the mayors of Surrey, Langley Township, and Delta expressing concerns about *Metro 2050*. The letter outlines concerns related to *Metro 2050's* Urban Containment Boundary policies and amendment process. The Board Chair has directed Metro Vancouver staff to prepare this report to the Board providing options regarding the requests in the letter.

REQUESTED CHANGES TO THE URBAN CONTAINMENT BOUNDARY AMENDMENT PROCESS

In a recent letter addressed to the Metro Vancouver Board Chair, the mayors of Surrey, Langley Township, and Delta have outlined concerns regarding *Metro 2050*. The letter outlines the case that the existing framework is impeding the ability of South of the Fraser municipalities to meet the growing demand for housing, employment lands, and essential services. To address these concerns the mayors have outlined three policy changes they believe are important to better support growth and development:

1. Redefine the Urban Containment Boundary to allow for targeted expansion for sites that are contiguous extensions that are outside the Agricultural Land Reserve and ecologically sensitive areas, can be serviced with existing or committed infrastructure, and that support compact, transit-oriented complete communities;
2. Reclassify qualifying Urban Containment Boundary amendment requests from Type 2 (requires an amendment bylaw passed by a weighted two thirds vote of the Board) to Type 3 (requires an amendment bylaw passed by a weighted 50%+1 vote of the Board); and
3. Introduce a minor realignment mechanism to permit site specific Urban Containment Boundary adjustments that are consistent with local plans without requiring a full amendment.

AMENDING METRO 2050

The proposed changes to *Metro 2050* put forward by the mayors of Surrey, Langley Township, and Delta are all Type 1 amendments to the regional growth strategy – either determined by the *Local Government Act* (Section 437) or the *Metro 2050* bylaw (Figure 2). Type 1 amendments to *Metro 2050* require an amendment bylaw passed by the MVRD Board with a weighted 50%+1 vote and support from all affected local governments (resolutions from all member jurisdiction Councils, TransLink, and adjacent regional districts). It is the same process as adopting a regional growth strategy.

All types of amendments require an amendment bylaw and must be initiated by a resolution of the MVRD Board. The process to initiate amendments to *Metro 2050* is laid out in Section 6.4.1 of the regional growth strategy. It states:

> "*The process to initiate amendments to the Regional Growth Strategy is by resolution of the Metro Vancouver Regional District (MVRD) Board. Member jurisdictions may, by resolution, request amendments. The MVRD Board will not give first reading to an amendment bylaw which proposes to change a regional land use designation or the Urban Containment Boundary unless or until the member jurisdiction or jurisdictions in which the subject site is located have requested that amendment or have been given the opportunity to formally comment on the proposed amendment*."

As a result, proposed amendments require either a Council resolution if proposed by a member jurisdiction, or, if proposed by Metro Vancouver, engagement with affected local governments prior to the MVRD Board being able to consider the amendment.

In addition, all three communities have a regional context statement embedded in their Official Community Plan reflecting the Urban Containment Boundary and parcel based regional land use designations. Each community would need to amend its OCP and regional context statement to implement the requested changes. This too requires MVRD Board support.

URBAN CONTAINMENT BOUNDARY HISTORY AND CONTEXT

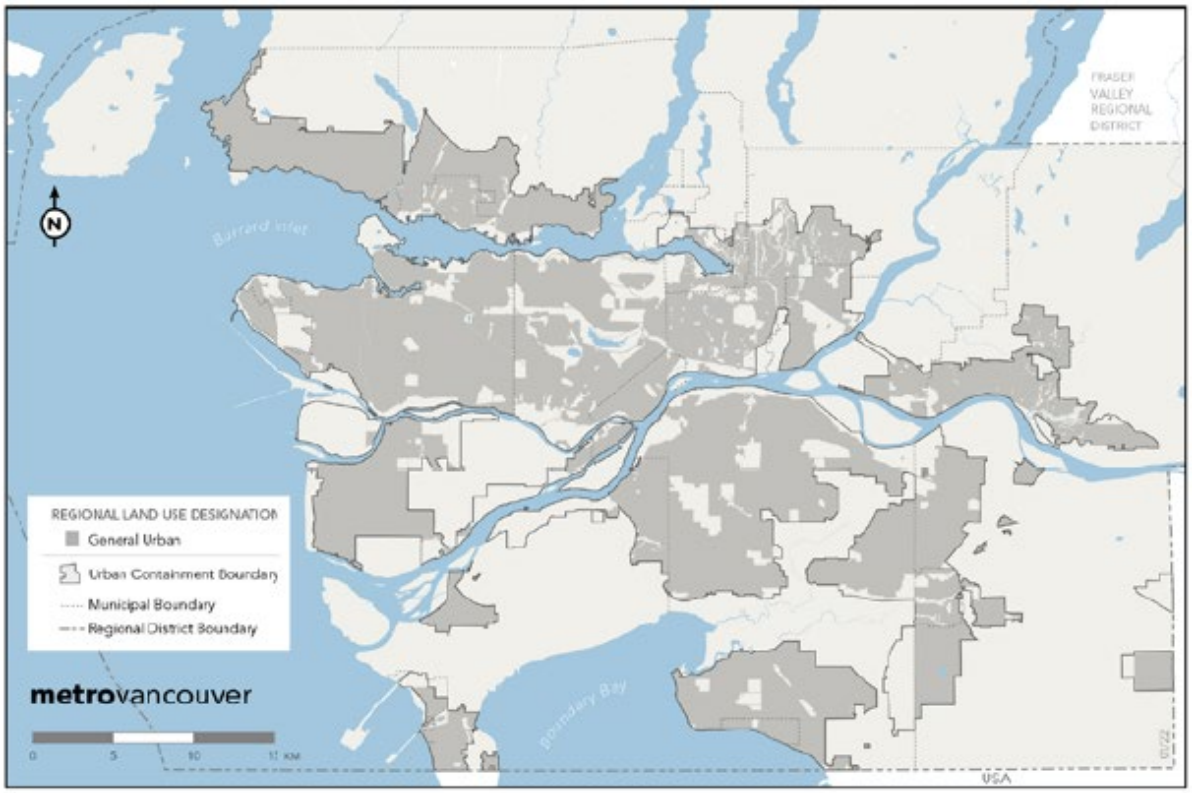
Containing urban development is a well-established best practice for sustainable growth management, and has been pivotal in shaping the Metro Vancouver region. The Urban Containment Boundary (Figure 1), was introduced in 1996 in the *Livable Region Strategic Plan* (LRSP), the first regional growth strategy for the Metro Vancouver region, to guide regional growth in a way that supports sustainable, efficient infrastructure provision, and protects non-urban lands. It establishes a stable, long-term regional boundary for urban development and has played a critical role in achieving the goals of the regional federation since its introduction. The UCB serves to:

- Limit urban sprawl by focusing growth within a defined area to reduce auto-oriented development, support complete communities with a range of housing and jobs, and support the efficient provision of urban infrastructure including utilities and transit;
- Protect Agricultural, Rural, and Conservation and Recreation lands from urban development; and
- Support compact, transit-oriented development that reduces greenhouse gas emissions and energy demand.

The first goal of *Metro 2050,* adopted by all member jurisdictions, TransLink, adjacent regional district Boards, and the MVRD Board, seeks to Create a Compact Urban Area, by achieving 98% of the region's growth within the UCB and directing that growth to a network of Urban Centres and along transit. The UCB has been highly effective in limiting sprawl in the region and the regional federation has met the targets for containing growth. Based on analysis conducted by Regional Planning in 2023, Official Community Plans can support a significant increase in dwelling units over the existing housing stock, indicating no immediate need to expand the Urban Containment Boundary**.** And,

it is absolutely acknowledged that the south of the Fraser communities as well as the eastern part of the region face the greatest pressure for growth and for expansion of the UCB.

Figure 1: Metro 2050 Urban Containment Boundary



In 2011, Metro Vancouver adopted *Metro Vancouver 2040: Shaping our Future*, which introduced six parcel-based regional land use designations, including the Rural designation. This designation, covering approximately 8,900 hectares, marked a contraction of the Urban Containment Boundary, and applied to areas not intended for urban-scale development requiring regional sewerage or transit service. During the development of *Metro 2040*, several municipalities wanted acknowledgement that certain areas in the Rural designation were intended for future land use change, but that full planning had not yet occurred. As a result, Special Study Areas were identified in the regional growth strategy to indicate this municipal intent, and a lower Metro Vancouver Board voting threshold was established for amendments involving Special Study Areas, including adjustments to the UCB. Unresolved Special Study Areas were ported into *Metro 2050* (Map 12).

Metro 2040 also contained a more flexible process for amendments to the regional growth strategy, in part to ensure that member jurisdictions had a clearer and less administratively challenging path for change than in the LRSP. This process was carried forward into *Metro 2050*. The amendment process for the regional growth strategy allows for a regional dialogue about the impacts of land use change as these changes can affect some or all member jurisdictions (e.g. necessitate regional infrastructure, expanded transit, or impact regional interests like agricultural or conservation and recreation lands and the regional benefits they provide). Amendments to *Metro 2050* fall into three

categories reflecting the scale of regional significance as well as requirements laid out in the *Local Government Act* (Section 437).

Figure 2: Regional Growth Strategy Implementation Framework

PRINCIPLES	EXAMPLES	PROCEDURES
Fundamental change to core goals or strategies	Amend the goals or strategies; delete an entire goal; change the amendment process	Type 1: 50% + 1 MVRD Board weighted vote and acceptance by all affected local governments
Region-wide significance for non-urban designations	Change Urban Containment Boundary or Agricultural designation	Type 2: 2/3 MVRD Board weighted vote
Region-wide significance for urban designations	Large scale Industrial area designation change	Type 3: 50% + 1 MVRD Board weighted vote
Small scale urban designation changes	Small scale Industrial land use designation change	As described under 6.2.7, Official Community Plan amendment and notification of Metro Vancouver in writing within 30 days after OCP adoption
Local planning matter with no regional significance	Rezoning consistent with Official Community Plan	Official Community Plan matters, no Regional Context Statement reference required

The amendment process reflects how the regional growth strategy is designed as a flexible document, one that can respond to evolving regional needs while upholding shared regional goals. Since the addition of the flexible amendment process in 2011, over 40 regional growth strategy amendment applications have been submitted. Over 80% of these applications have been adopted or deemed not necessary, demonstrating the region's willingness to accommodate change while maintaining a consistent and principled approach to regional planning.

NEXT STEPS

Although the requests from the mayors of the City of Surrey, Township of Langley, and City of Delta are not simple to grant, there are several paths forward for the Board to consider to acknowledge and address the concerns expressed by the South of the Fraser mayors. Staff have identified three options for the Board to consider. All the alternatives align with the requirements of the *Local Government Act* and *Metro 2050*.

Alternative 1. Receive the letter for information and direct staff to work with City of Surrey, Township of Langley and City of Delta Councils and staff to identify options to address concerns.

This option acknowledges the letter and the concerns expressed by the mayors, and proposes initiating a process to explore more collaborative solutions within the existing policy framework. Such an approach may help identify strategies that respond to local growth pressures while maintaining the integrity of regional planning objectives. A precedent for this approach exists: both the City of Surrey and the Township of Langley initially withheld support for *Metro 2050*, however after several meetings with both staff and elected officials, both communities retracted their lack of support, and signed on to the regional growth strategy. A similar process could be considered to constructively address the current concerns.

Alternative 2. Refer the requests back to the member jurisdictions to submit a formal *Metro 2050* amendment application via Council resolution as per the process outlined in the regional growth strategy.

This option would require the City of Surrey, Township of Langley, and City of Delta to submit a formal application via local Council resolution. This option would be consistent with established procedures and places the responsibility on the requesting jurisdictions to conduct their own analysis and develop proposed amendments. This option would give each respective member jurisdiction the opportunity to fully articulate their interest in pursuing the application and provide transparency in allowing the proposals to be debated openly within each community before advancing to the regional level.

Alternative 3. Direct staff to undertake engagement with member jurisdictions as a precursor to bringing forward a Type 1 *Metro 2050* amendment for Board consideration.

As noted above, the MVRD Board cannot initiate the amendment process or consider first reading of an amendment bylaw without first engaging with member jurisdictions that would be impacted by the amendment. In this case, given the fundamental changes to the UCB being proposed, all member jurisdictions abutting the UCB and with Rural lands would be provided opportunity for comment. This option demonstrates a willingness to respond to member jurisdiction concerns and provide a formal mechanism for evaluating the proposed policy changes. However, this approach would bypass the traditional local application process via Council resolution.

ALTERNATIVES

That the MVRD Board receive for information the letter from City of Surrey, Township of Langley and City of Delta mayors dated June 19, 2025, titled "Urban Containment Boundary – Urgent Need for Policy Reform."

and select one of the following:

1. That the MVRD Board direct staff to engage with the City of Surrey, Township of Langley, and City of Delta to explore alternative, collaborative approaches to address the concerns raised, within the existing *Metro 2050* policy framework; ***or***
2. That the MVRD Board respond to the requests, asking the City of Surrey, Township of Langley, and City of Delta to submit a formal *Metro 2050* amendment application via Council resolution per the process laid out in the regional growth strategy; ***or***
3. That the MVRD Board direct staff to undertake engagement with member jurisdictions as a precursor to bringing forward for Board consideration a Type 1 *Metro 2050* amendment reflecting the City of Surrey, Township of Langley, and City of Delta mayors' requests.

Given the political nature of the request and its implications for the governance of *Metro 2050,* staff are not making a recommendation and respectfully request that the MVRD Board carefully consider the alternatives outlined above.

FINANCIAL IMPLICATIONS

There are no financial implications associated with this report. Should the MVRD Board direct staff to undertake further work in response to the Surrey, Langley Township, and Delta mayors' letter, any related policy analysis or engagement activities would be carried out by Regional Planning staff and incorporated into the department's existing work program and resources.

CONCLUSION

The letter from the Surrey, Langley Township, and Delta mayors presents a request for changes to the Metro 2050 Urban Containment amendment process that warrants careful consideration by the Board. The proposed changes require a Type 1 amendment as per the *Local Government Act*, reflecting the significance of the request. In considering next steps, the MVRD Board is presented with three options. Each path carries distinct implications for governance, process, and regional cohesion.

ATTACHMENT

1. Letter from City of Surrey, Township of Langley, and City of Delta mayors titled, "Urban Containment Boundary – Urgent Need for Policy Reform", dated, June 19, 2025.

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SERVICES AND SOLUTIONS FOR A LIVABLE REGION

Office of the Chair
Tel. 604-432-6215 or via Email
CAOAdministration@metrovancouver.org

May 28, 2025

File: RD 2025 02 28
Ref: CR-12-01

The Honourable Lana Popham, M.L.A.
Minister of Agriculture and Food
PO Box 9043, Stn Prov Govt
Victoria, BC V8W 9E2
VIA EMAIL: AF.Minister@gov.bc.ca

Dear Minister Popham:

Regional Food Systems – Clarification of Provincial and Regional Roles

Metro Vancouver is a diverse organization that plans for and delivers regional utility services, including water, wastewater treatment, and solid waste management. It also regulates air quality, plans for urban growth, manages a regional parks system, provides non-market housing, and serves as a regional federation. These services and roles interact directly with the regional food system; however, local government's ability, and jurisdiction, to address significant food system challenges is limited.

Agriculture is an important sector of the region's economy and a critical component of the regional food system. *Metro 2050*, the regional growth strategy, includes strategies for Metro Vancouver and its member jurisdictions to protect and strengthen agricultural viability. Additionally, in our recent work updating the *Regional Food System Strategy*, several issues have been highlighted as critical to impacting the long-term viability of agriculture and food security in Metro Vancouver, including:

- The rising costs of agricultural land;
- The immediate and long-term affects of extreme weather events (e.g., droughts, heat domes, and atmospheric rivers) and the compounding problems they create for all components of the food system;
- The effects of pandemics, livestock disease (e.g., avian influenza), inflation, and international conflicts, which disrupt food supply chains and contribute to food price increases;
- The lack of liveable wage and entry level opportunities for food system employment creating high dependence on foreign labour; and
- Declining regional food infrastructure (e.g., storage and processing facilities) making it harder to support local production.

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The Ministry of Agriculture and Food highlights similar challenges and Metro Vancouver is encouraged that the Province's priorities include strengthening food systems at the regional level. We look forward to working with the Province to clarify the provincial and regional roles that support Metro Vancouver's regional food system and on working together on the complex issues facing the region.

Metro Vancouver welcomes the recent establishment of the Premier's Task Force on agriculture and food economy, and supports its aim to increase growth and competitiveness of BC products. The Task Force's formation marks an important first step in addressing the complex challenges facing the food sector in this province, including climate change impacts, external economic pressures, an aging workforce, rising input costs, inconsistent water supply, and labour shortages. To address these challenges, which have been highlighted in the Regional Planning Committee Report, titled "Regional Food System Strategy – Engagement Update and Next Steps" dated February 6, 2025 (enclosed), long-term change requires provincial-level collaboration and investment in agriculture. Such investment is essential to support policy implementation, program development, extension services, and innovation research.

A thriving agricultural sector and regional food system are priorities to Metro Vancouver, and we have been taking action to ensure they are strong, protected and viable. Nevertheless, as a regional district, fully addressing this challenge requires senior government intervention and funding support.

We look forward to hearing more about your plans to meet the region's agricultural and food system needs. If you have any questions, please contact Jonathan Cote, Deputy General Manager, Regional Planning and Housing Development by phone at 604-432-6391, or by email at jonathan.cote@metrovancouver.org.

Yours sincerely,

Mike Hurley
Chair, Metro Vancouver Board

MH/JC/cs

cc: Michelle Koski, Deputy Minister, Ministry of Agriculture and Food
Jerry W. Dobrovolny, Commissioner/Chief Administrative Officer, Metro Vancouver
Heather McNell, Deputy Chief Administrative Officer, Policy and Planning, Metro Vancouver

Encl: MVRD Board report dated February 6, 2025, titled "Regional Food System Strategy – Engagement Update and Next Steps" (pg. 671)

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BRITISH COLUMBIA

June 17, 2025

File: 0280-30
Ref: 204927

Mike Hurley, Chair
Metro Vancouver
4515 Central Blvd
Burnaby, BC V5H 0C6
Ruth.Teka@metrovancouver.org

Dear Chair Hurley and Metro Vancouver Board of Directors:

Thank you for your letter of May 28, 2025, where you highlighted Metro Vancouver's critical work on its *Regional Food Systems Strategy* and underlined the need for greater clarification of Ministry of Agriculture and Food (the Ministry) and Metro Vancouver's roles and responsibilities with regards to regional food systems and agriculture.

Firstly, I want to acknowledge the leadership of Metro Vancouver's board and staff in agriculture and food systems within British Columbia (B.C.). Metro Vancouver has consistently been a leading jurisdiction within B.C. in terms of taking a holistic and big picture approach to planning for agriculture and food systems, an example of which is the *Regional Food Systems Strategy* and the current engagements to update it. Increasingly, we are hearing from smaller regional districts in B.C. that are looking to emulate your work.

In terms of roles and responsibilities, the Ministry of Agriculture and Food provides regional agrologist and land use planning staff expertise to assist Metro Vancouver staff (as well as the staff of Metro Vancouver municipalities) in planning and development decision making processes that impact agriculture. Depending on the issue, the Ministry will provide other experts and supports to help unpack challenging land-use issues (for example, supporting farmers to address light and noise pollution).

.../2

Ministry of Agriculture and Food Office of the Minister
Mailing Address:
PO Box 9043 Stn Prov Govt
Victoria, BC V8W 9E2
Telephone: 250 387-1023
Facsimile: 250 387-1522
Web Address: http://gov.bc.ca/agri/

However, your engagement on the *Regional Food Systems Strategy* has – very rightly so – highlighted that regional planning for agriculture and food systems has become a more complicated endeavour in the age of climate change and greater geopolitical instability. Our Ministry is also adapting to this changing context, and the Premier has recently appointed a Premier's Task Force on Agriculture and the Food Economy to provide advice to many of the same questions but at a provincial scale. Some of the policy questions we are contemplating include:

- How do we ensure that Metro Vancouver residents have a reliable food supply?
- How will we ensure that there are sufficient industrial lands to keep food distribution systems local and support Metro Vancouver's growing food processing sector – now the second largest manufacturing sector in B.C.?
- How will we ensure that farmers in the region have a reliable supply of water in the face of climate change?
- How can we ensure that farming remains a viable career path for the next generation?

The answers to these questions require the collaboration of all levels of government and the private sector from across the Province to make progress. However, especially in this time of fiscal constraint, we need to ensure that collaboration does not equal duplication of efforts - there are distinct roles that both Metro Vancouver and the Ministry of Agriculture and Food play. To that end, Ministry staff, beyond our land use planning and regional agrologist representatives, are available to work with Metro Vancouver's to review the updated *Regional Food Systems Strategy* as it is finalized and help identify areas within the Strategy that fall within the responsibility of the Ministry, and look for opportunities to incorporate that feedback within our own work.

Once again – thank you for your leadership on planning for the region's food systems and we look forward to continuing to collaborate with you as the Strategy is finalized.

Sincerely,

Honourable Lana Popham
Minister