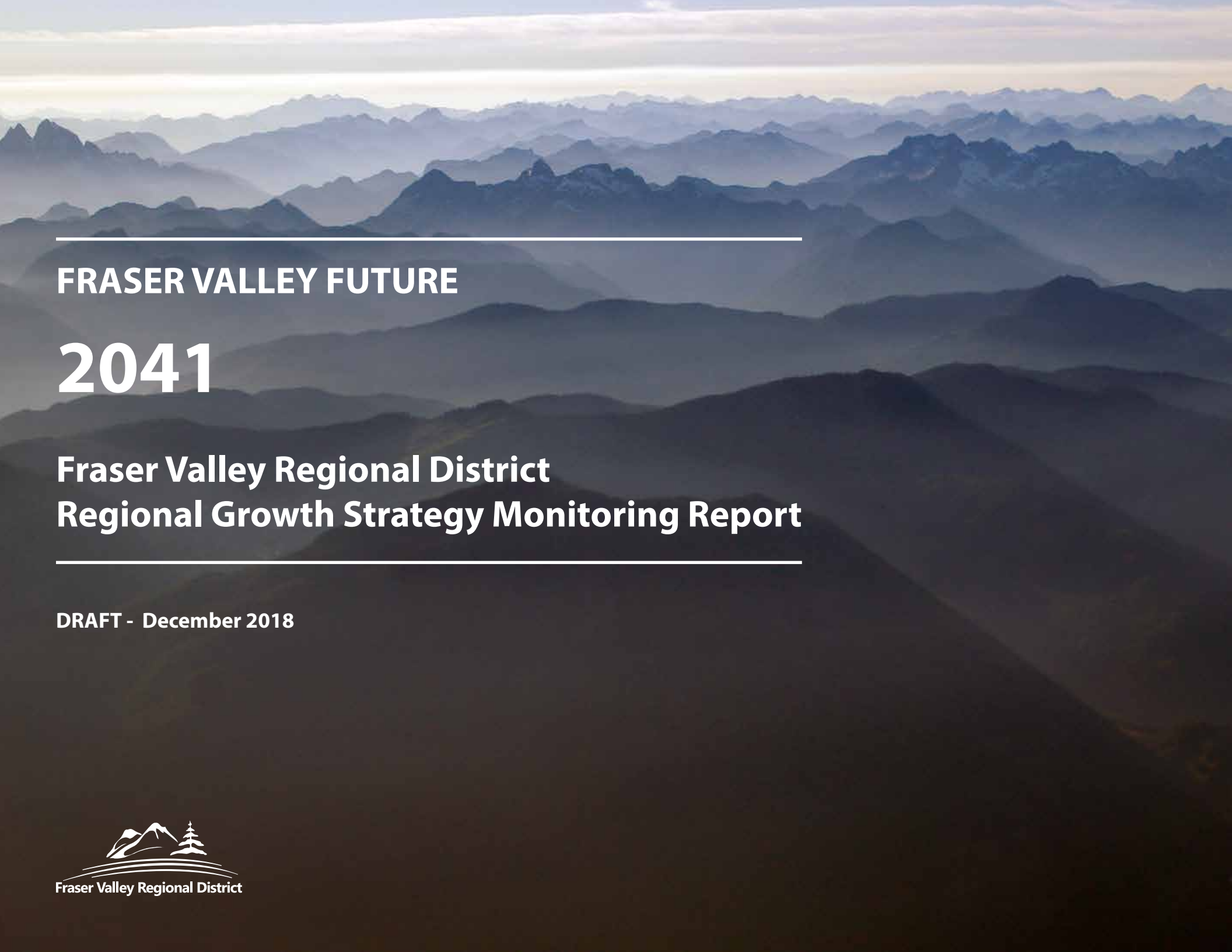


FRASER VALLEY FUTURE

2041

Fraser Valley Regional District
Regional Growth Strategy Monitoring Report

DRAFT - December 2018

Fraser Valley Regional District

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TABLE OF CONTENTS

Introduction 4
Regional Growth Strategy 5

1.0 Collaboration
Indigenous Relations 8
Regional District Services 9

2.0 Economic Strength & Resiliency
Unemployment Rate 12
Labour Force 13
Jobs 14
Business Count 15
Gross Farm Receipts 16
Agricultural Land Reserve Land Use 17
Room Revenue 18

3.0 Living Well
Household Income 20
Individual Income 21
Education 22

4.0 Community Building
Housing Valuations 24
Rental Vacancy 25
Senior's Housing 26
Housing Starts 27
Core Housing Need 28
Number of Homeless 29

5.0 Ecosystem Health
Parkland 32
Ground Level Ozone and PM 2.5 33

6.0 Transportation
Traffic Volume 36
Transit Ridership 37
Intraregional Travel 38
Bicycle and Pedestrian Mode Share 39
Completed Transportation Projects 40

7.0 Infrastructure & Services
Total Landfilled Waste and Diversion Rate 42

8.0 Energy & Climate Change
Community GHG Emissions 44
Electric Vehicles 45

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INTRODUCTION

The Local Government Act requires Regional Districts to establish a monitoring program for their Regional Growth Strategies.





What is this document?

Across British Columbia, Regional Districts have developed Regional Growth Strategies (RGS) to help them manage issues affecting more than one jurisdiction. The RGS considers transit, housing, parks, economic development and environmental issues from a regional perspective with the goal of creating healthy, sustainable communities. As a long range vision with a 20-30 year scope, it aims to ensure the region as a whole is working toward a common future.

The existing "*Choices for our Future*" RGS, adopted in 2004, is being updated. The proposed *Fraser Valley Future* Plan provides an opportunity to update the monitoring strategy. This report establishes a series of baselines which can monitor the implementation of the RGS. These baselines are based on RGS goals and will indicate how successful, or unsuccessful, the region is at meeting these goals, from a high-level perspective. This document will be updated and expanded to reflect the changing Region.

The current "*Choices for our Future*" RGS is the basis of the draft update therefore the indicators presented in this document are applicable to both the existing and draft strategies.

Why is it important to monitor the RGS?

The Local Government Act requires that Regional Districts establish a monitoring program for their growth strategies. Beyond this requirement, it is important to ensure both long-term and short-term decisions are being made based on the RGS vision, and resulting in trends consistent with the RGS goals.

Data included in this report comes from a wide range of sources. Census data, Canadian Mortgage and Housing Corporation data, ICBC statistics, and more are used to establish a range of baselines which align to RGS goals.

Prior to this report, RGS monitoring was conducted through a series of documents called "Regional Snapshots". The Snapshot Series was intended to provide a brief summary of the region's different areas of focus: Aging, Agriculture, Commuting, Health and Active Living, Housing, Employment, and Outdoor Recreation and Tourism. This document takes a more focused approach to regional data and is more closely aligned to RGS goals.

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Overview

Draft *"Fraser Valley Future"* RGS update

Much has changed since 2004 when the current RGS was adopted. The RGS update was undertaken to reassess and adjust the region's long-term vision and objectives in light of new legislation, new growth, and changing demographics.

The eight Goals of the draft Regional Growth Strategy are:

1.0 Collaboration
2.0 Economic Strength & Resiliency
3.0 Living Well
4.0 Community Building
5.0 Ecosystem Health
6.0 Transportation & Mobility
7.0 Infrastructure & Services
8.0 Energy and Climate Change

The Lower Mainland has long been recognized as one of the fastest growing regions in Canada and it is anticipated that it's population will reach 3.8 million by 2041. As of 2016, with an estimated population of 302,000, the FVRD makes up 12% of the Lower Mainland's population and is the third largest regional district in the province by population.

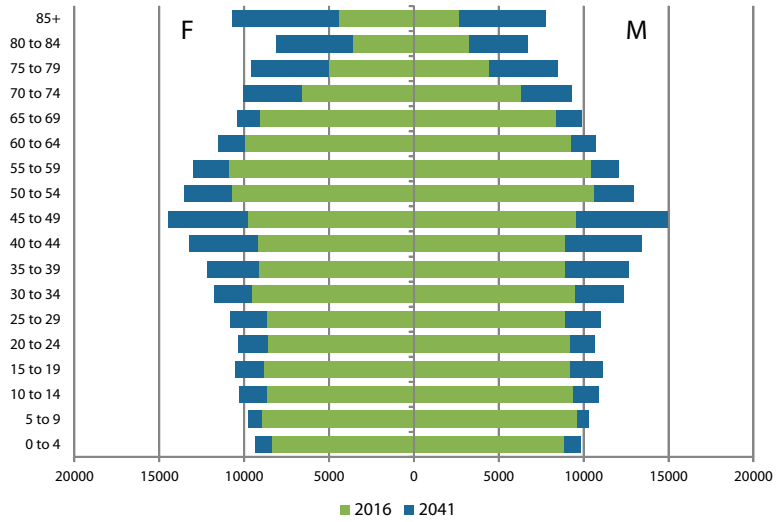
By 2041, the population of the Lower Mainland as a whole will create both challenges and opportunities for the FVRD. The region's unique relationship to Metro Vancouver offers advantages of being within easy reach of a large market, generating new potential in the tourism industry and creating opportunities for collaboration when addressing issues such as air quality, housing affordability and transit.

FVRD Population Growth Estimates 2011-2041

	2011	2016	2026	2041
Abbotsford	137,817	144,848	168,932	212,770
Chilliwack	79,673	85,702	100,396	126,511
Mission	37,347	39,508	45,227	56,845
Hope	5,985	6,194	6,520	8,119
Kent	5,947	6,195	6,492	8,080
Harrison	1,467	1,468	1,630	2,042
EA's	9,907	10,452	11,629	14,686
IR's	6,726	7,884	8,036	11,079
FVRD	284,869	302,251	349,743	440,131

High projection, adjusted for estimated Census undercount & including corrections facilities population estimates.

FVRD Population by Age and Gender 2016-2041



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SXTA C2C meeting



Hope transit service



Sts'ailes drummers - East Sector Lands opening ceremony

COLLABORATION

Goal: To achieve our common goals for the future of the region by encouraging collaboration between jurisdictions, cultures, and neighbours.

INDICATOR: INDIGENOUS RELATIONS

Tracking goal: Positive trend

Future monitoring reports will look for increasing collaboration with the region's First Nations communities

How are we doing?

The FVRD is actively working to build relationships with First Nations communities around the region.

There are 31 First Nations Bands in the FVRD. The Regional District collaborates with a number of local First Nations on a wide range of initiatives. These partnerships are enabled through a number of mechanisms, ranging from Memoranda of Understanding (MOU) and Protocol Agreements to more formal service agreements.

The FVRD has entered into agreements for the delivery of a number of services, including but not limited to: liquid waste management, water services, planning and building inspection services, regional transit, and fire protection.

Establishing and maintaining meaningful and collaborative relationships with First Nations is a key focus of the FVRD.

What's being measured?

This indicator measures the important goal of building relationships between the regional district and the more than 30 First Nations in the region. It is difficult to quantify relationships, but actions may include community-to-community forums, MOUs, servicing agreements, protocol agreements, partnerships and other initiatives.

Why measure it?

It is important for Local Government and First Nations leadership to find innovative and effective ways to meet the future needs of both the region and First Nations communities.

FVRD First Nations Relations Work Plan



INDICATOR: REGIONAL DISTRICT SERVICES

Tracking goal: Positive trend

Future monitoring reports will look for increasing and expanding the range of services provided

How are we doing?

The FVRD delivers **over 100** different services (2018)

In response to a growing region and local government requests, the FVRD has increased its offering of services throughout the region. The Region offers a broad range of regional, sub-regional and local services to our member municipalities and electoral areas. The FVRD also has agreements with several local First Nations for services ranging from transit to building permit and inspection services.

In recent years, the FVRD has introduced a number of new services including: animal control, regional transit, rural water systems, community trails, the Vedder River Campground and others. Most recently, the City of Abbotsford and FVRD have partnered to co-manage regional parks as a sub-regional service in Abbotsford.

What's being measured?

This indicator looks at services and programs added to the region within the municipalities and electoral areas.

Why measure it?

It is important to track the number of services provided overtime in order to demonstrate how the FVRD is meeting the increasing needs of a growing population and to offer an indication of performance in relation to the FVRD's strategic priorities.

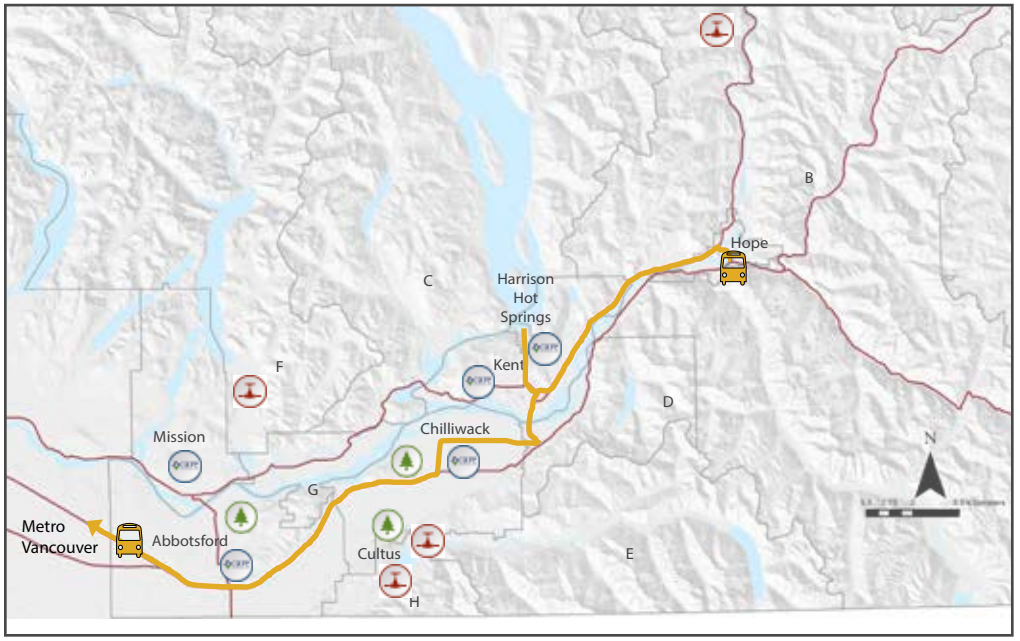
A snapshot of key FVRD services added and expanded 2013-2018

2018 City of Abbotsford & FVRD regional park partnership; 2018 introduced the Vedder River Campground.

2015 introduced the Fraser Valley Express. 2017 expanded transit service between Hope and Agassiz.

2017 new water system installed in Cultus Lake Park; 2018 new sewer system installed in Cultus Lake Park.

2013 introduced animal control services for Chilliwack, 2015 for Abbotsford and 2016 for Kent, Hope and Harrison.



Source: FVRD Annual Report 2015-2017

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ECONOMIC STRENGTH & RESILIENCY

Goal: To realize the region's economic potential by providing opportunities in employment and education that will grow the economy by building on the region's strengths

Tracking goal: Negative trend

Future monitoring reports will look for a decreasing unemployment rate

INDICATOR: UNEMPLOYMENT RATE

How are we doing?

6.7% of people unemployed in the FVRD (2016)

There was a **decrease** in the unemployment rate from the previous census year of 2011. Data from 2016 shows an unemployment rate in line with that of B.C. and lower than Canada as a whole. Within the region, trends are more difficult to discern. Data for Abbotsford-Mission Census Metropolitan Area (CMA) indicates a downward trend, with 2017 representing a nine year low. The Chilliwack CMA rates are quite volatile, approaching a five year high of 8.2% in 2015 and falling to 6.1% the following year. Data for Chilliwack is not available for 2017.

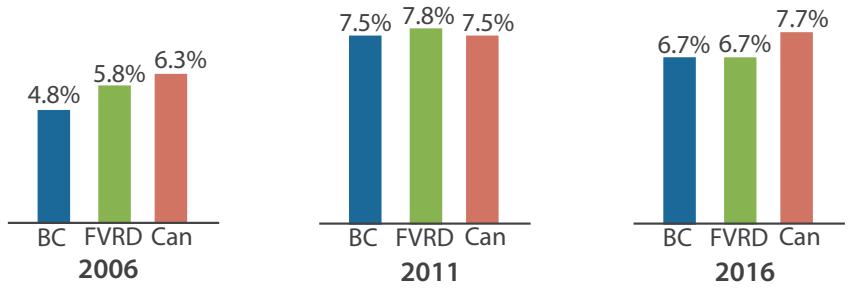
What's being measured?

This indicator measures the number of unemployed persons expressed as a percentage of the total labour force. This data is collected by Statistics Canada on an ongoing basis in different areas and at varying times. Rates are available on an annual basis for some areas within the Fraser Valley Regional District and can be compared across different time periods and geographies.

Why measure it?

The unemployment rate is an important indicator of the state of our regional economy.

Average Unemployment Rate Comparison, 2006 to 2016



Source: 2006, 2016 Census + 2011 National Household Survey

Unemployment Rate in Abbotsford CMA and Chilliwack CA, 2006-2017



Source: Stats Can CANSIM, 2018

INDICATOR: LABOUR FORCE

Tracking goal: Proportion

Future monitoring reports will track proportions of the labour force in each industry

How are we doing?

146,430 people in FVRD labour force (2016)

The employed labour force in the Fraser Valley Regional District has **increased** by 30,760 (27%) since 2001 for a total of 146,430. Most industries have experienced growth, or very minor declines. While the top ten industries have not changed since 2001, their rankings have. Retail trade has consistently been at or near the top but other industries such as manufacturing, construction and agriculture have shifted up and down over time. Since 2001, employment in the transportation and warehousing sector has steadily increased by 49%, moving from the 9th most common employment sector in 2001 to the 6th most common in 2016.

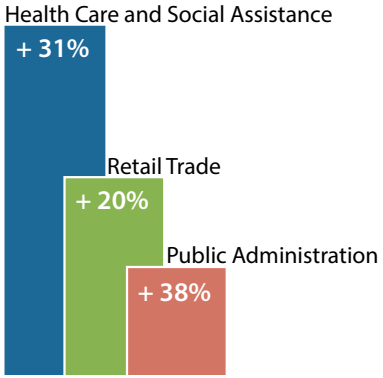
What's being measured?

This indicator looks at employment in the region and how various industries compare in terms of growth and total number of employees. Statistics Canada collects labour force data through the Census.

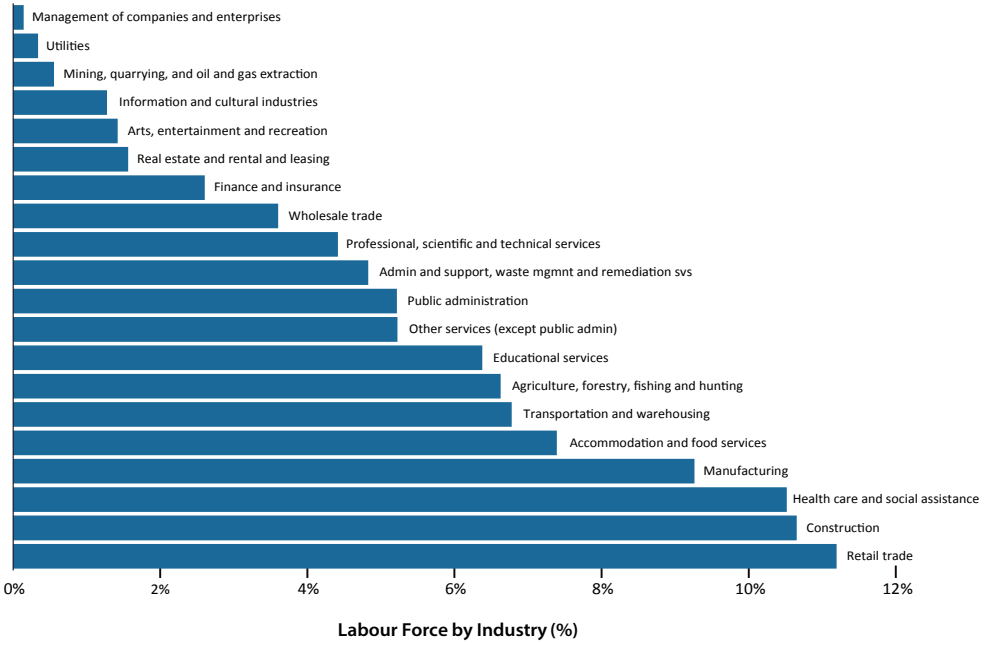
Why measure it?

By tracking the labour force and how many people are employed in each industry, we're able to more clearly understand the balance and health of the regional economy.

Top three FVRD industries by growth 2001-2016



FVRD Labour Force by Industry, 2016



Source: Stats Can, 2016 Census

INDICATOR: JOBS

Tracking goal: Positive trend

Future monitoring reports will look for increasing numbers of jobs in the region

How are we doing?

96,380 people have a usual work place in the FVRD or work from home (2016)

The number of people employed in the Fraser Valley Regional District at a usual workplace or from home has increased by 7,740 (9%) since 2006 for a total of 96,380. This represents 66% of the employed labourforce. While the number of people working at a regular location increased by 11%, the number of people working from home declined by approximately 5%. The number of people working at no usual workplaces increased by 24% to 24,450.

In 2016 approximately 24,255 Fraser Valley residents commuted into Metro Vancouver while 9,495 Metro Vancouver residents commuted into the FVRD for work. The net leakage of jobs into Metro Vancouver increased by 1,700 persons (13%) between

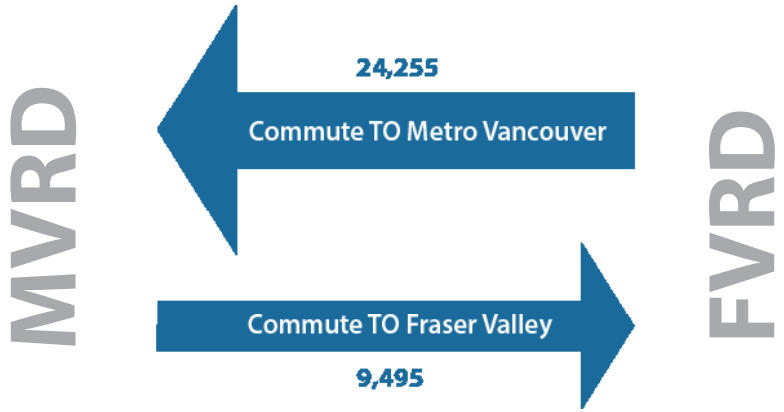
What's being measured?

This indicator measures the number of jobs with a defined location in the regional district derived from Place of Work Census data. These data include individuals who commute into the FVRD from Metro Vancouver. This indicator does not include workers who do not not go from home to the same workplace location every day, such as construction related contractors, independent truckers and the like.

Why measure it?

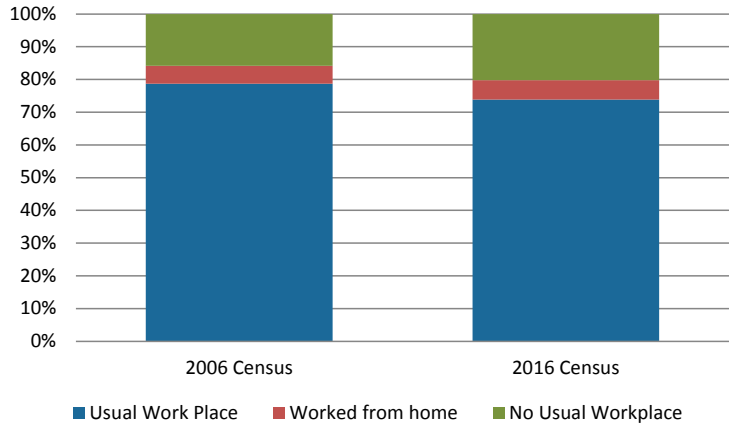
The number of jobs is an important indicator of the state of our regional economy.

Commuter Flows Between Metro Vancouver & Fraser Valley, 2016



Source: Statistics Canada,2016 Census

Nature of Employment in FVRD, 2006 and 2016



Source: Statistics Canada, 2006 & 2016 Census

INDICATOR: BUSINESS COUNTS

Tracking goal: Positive trend

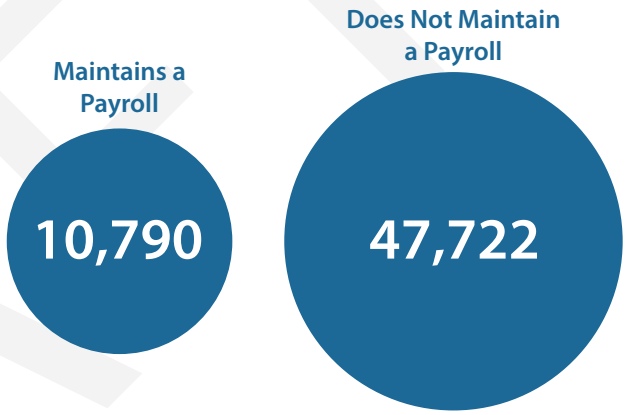
Future monitoring reports will look for increasing numbers of businesses in the region

How are we doing?

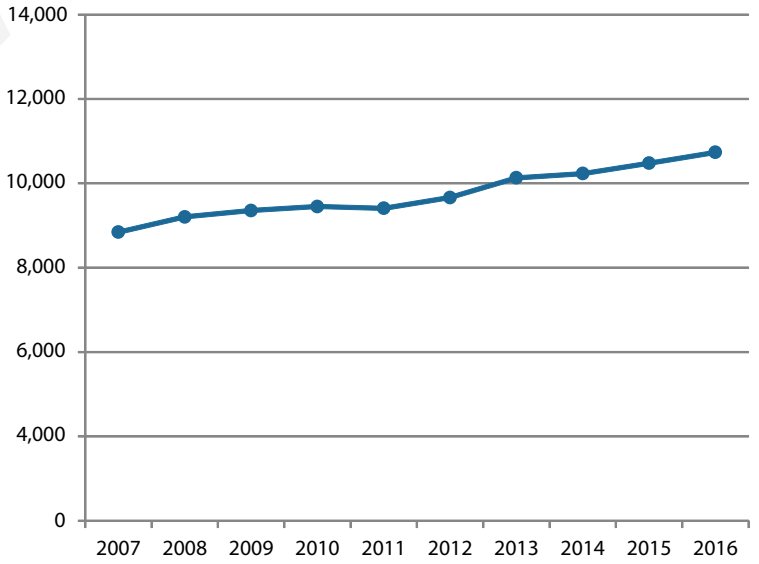
10,790 businesses with a payroll in the FVRD (2016)

Between 2007 and 2016, the total number of businesses with a payroll **increased** from 8,899 to 10,790 - a 21% gain. Most of these businesses are small, with fewer than 20 employees (90%). Some businesses do not maintain a payroll. These businesses may have a workforce that consists of family members, owners, or contractors. Most farms in the region likely fall into this category. Since 2012, the number of these businesses have grown from 38,771 to 47,722 in 2016, representing a 23% increase.

FVRD Businesses and Payroll, 2016



FVRD Total Business Establishments (with payroll) 2007-2016



Source: Statistics Canada, Business Register, Dec 2016

What's being measured?

This indicator measures the total number of businesses in the region which maintain a payroll. Given their variable nature, this measure does not include businesses which report no employees.

Why measure it?

A strong regional economy depends on businesses with employees living within the region. Understanding these businesses and their employment needs will provide us the support required to create additional opportunities for growth.

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Tracking goal: Positive trend

Future monitoring reports will look for increasing farm receipts

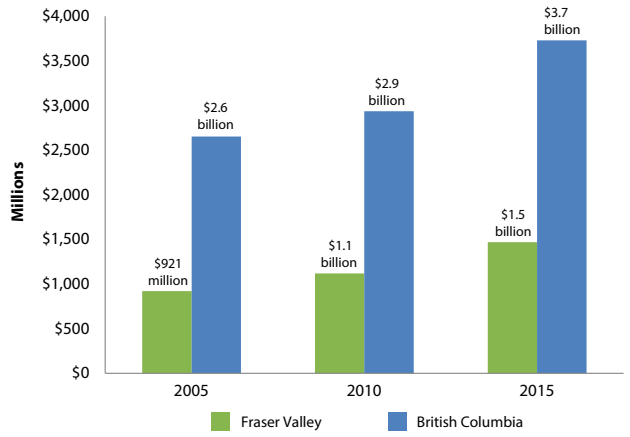
INDICATOR: GROSS FARM RECEIPTS

How are we doing?

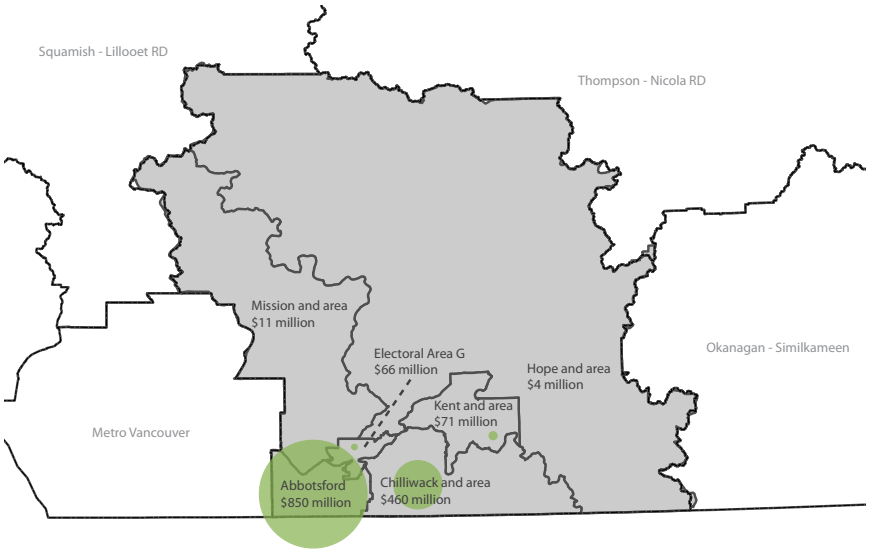
$1.4 billion total gross farm receipts generated in the FVRD (2015)

The FVRD generates 39% of the total provincial farm receipts, and gross receipts have **increased** by 59% between 2005 and 2015. The FVRD has also accounted for 50% of the total provincial increase in gross receipts between 2005 and 2015. Within the FVRD, Abbotsford and Chilliwack lead the region in sales, generating almost 90% of total gross farm receipts.

FVRD Gross Farm Receipts, 2005-2015



Farm receipts by area, 2015



Source: Statistics Canada Census of Agriculture,

What's being measured?

Gross farm receipts are a measure of farm income before expenses are deducted. The data is collected by Census Canada for the calendar year prior to each census.

Gross farm receipts include:

- receipts from all agriculture products sold; and,
- program payments and custom work receipts.

Gross farm receipts do not include:

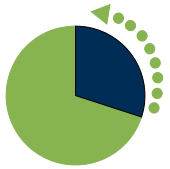
- sales of forestry products sold;
- sales of capital items; and,
- receipts from the sale of good purchased only for retail sales.

Why measure it?

Gross farm receipts provide an indication of the viability of farming in the region.

Tracking goal: Proportion

Future monitoring reports will track the proportion of actively farmed ALR land



INDICATOR: AGRICULTURAL LAND RESERVE USE

How are we doing?

37,669 hectares of the FVRD's Agricultural Land Reserve is actively farmed (2011)

In terms of total area, the FVRD actively farms 67% of its Agricultural Land Reserve, 17% more than Metro Vancouver. While farming is more of a focus in the Fraser Valley, the two region's agricultural sectors are closely tied and will need to work together in the future to ensure ALR land is used effectively.

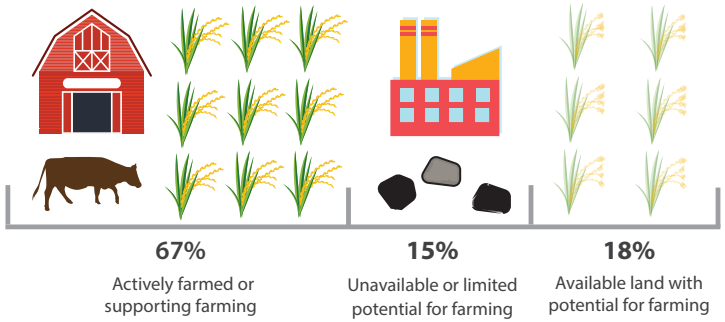
What's being measured?

This indicator measures how much of the region's Agricultural Land Reserve is actively farmed. This classification includes cultivated crops, farm infrastructure, greenhouses and barns. Land classified as available for farming refers to areas that could be farmed without displacing an existing use. Land which is unavailable or has limited potential for farming refers to land which is already used for another use, or has significant physical or operational constraints. This data comes from a comprehensive land use inventory conducted by the Ministry of Agriculture between 2011 and 2013.

Why measure it?

The Agricultural Land Reserve (ALR) is an important, controlled land-use zone where farming is a priority use and non-agriculture uses are restricted. Measuring how much of our land base within the ALR is actually used for farming indicates the viability of farming within the region.

Status of the effective ALR, 2011



Status of the Effective ALR by Local Government, 2011

Jurisdiction	Total ALR area (ha)	Farmed area (ha)	Anthropogenic area (ha)	Natural & Semi-natural (ha)
Abbotsford	25,858	17,380	2,832	5,646
Chilliwack	17,380	11,296	1,620	2,056
Area G	4,183	3,246	162	775
Kent	4,192	3,169	294	730
Area H	1,353	668	58	627
Area F	2,107	641	119	1,347
Mission	1,034	400	102	532
Area D	493	297	16	180
Area B	868	235	51	582
Hope	302	115	66	121
Area E	340	112	29	199
Area A	397	63	11	324
Area C	208	47	3	158
Harrison HS	129	X	<1	129
Total	56,436	37,669	5,363	13,404

Source: FVRD Agricultural Land Use Inventory, 2011-2013

INDICATOR: ROOM REVENUE

Tracking goal: Positive trend

Future monitoring reports will look for increasing room revenues

How are we doing?

$25 million generated in annual room revenue in Abbotsford-Chilliwack (2015)

In 2015, room revenue in Abbotsford-Chilliwack increased to over $25 million from $20 million in 2010. While tourism represents only a small percentage of the regional economy, it is a sector on the rise. As the population in the Lower Mainland continues to grow, our proximity and wealth of natural attractions means that the rise will continue.

The FVRD is currently studying outdoor recreation-related tourism in the region and its economic impact.

What's being measured?

Room revenue measures the total revenue generated through the accommodation of guests in hotels, bed & breakfasts, or other forms of temporary accommodation. This data is collected by BC Stats through municipal and regional tax data and does not include Airbnb or other similar tools. Data at the regional district level is not available, making it difficult to properly track and assess the tourism sector in the region as a whole. In addition, BC Stats combines Squamish and Harrison Hot Springs data despite the very significant spatial separation betwen the two communities.

Why measure it?

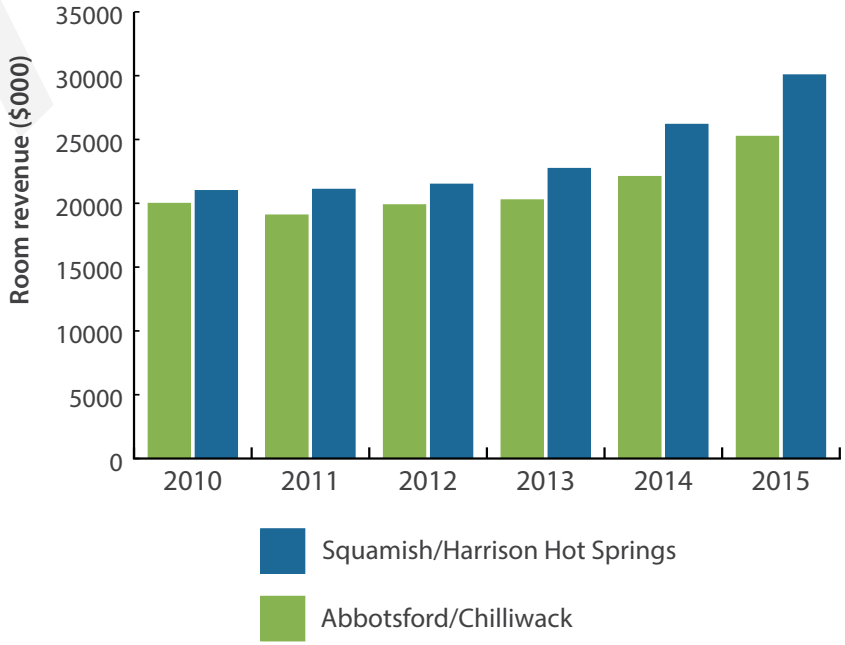
Room revenue is an indicator commonly used to assess the state of the tourism industry. While data beyond 2010 is only available at the municipal level, it still provides a indication of tourism success in the region.

Tourism in the whole province generates $7.7 Billion in GDP



The Fraser Valley and the Lower Mainland account for **40%** of total revenue

Room revenue for selected municipalities, 2015

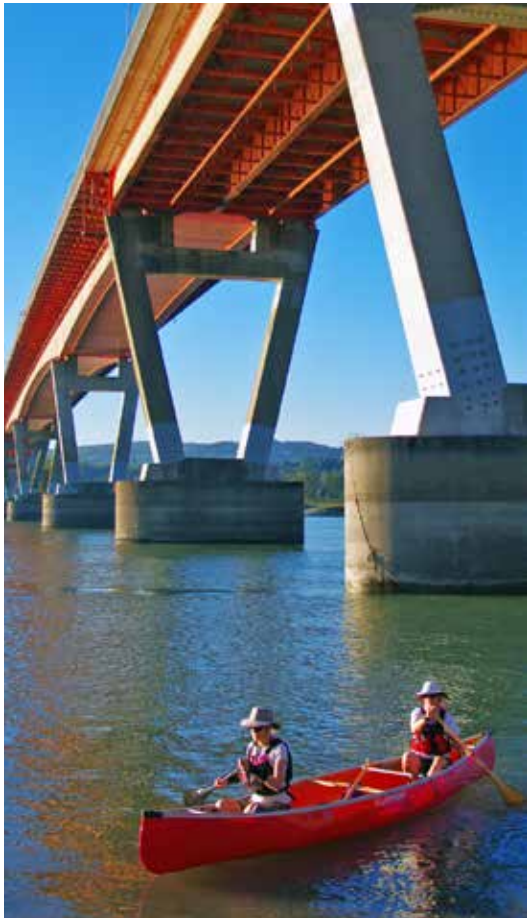


Source: BC Stats, 2015

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LIVING WELL

Goal: To ensure everyone is able to maintain a high quality of life, regardless of age, income, or ability

INDICATOR: HOUSEHOLD INCOME

Tracking goal: Positive trend

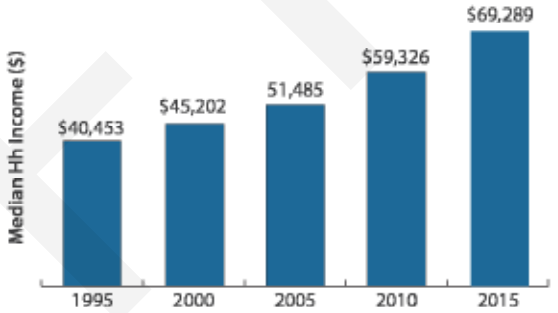
Future monitoring reports will look for increasing median household incomes

How are we doing?

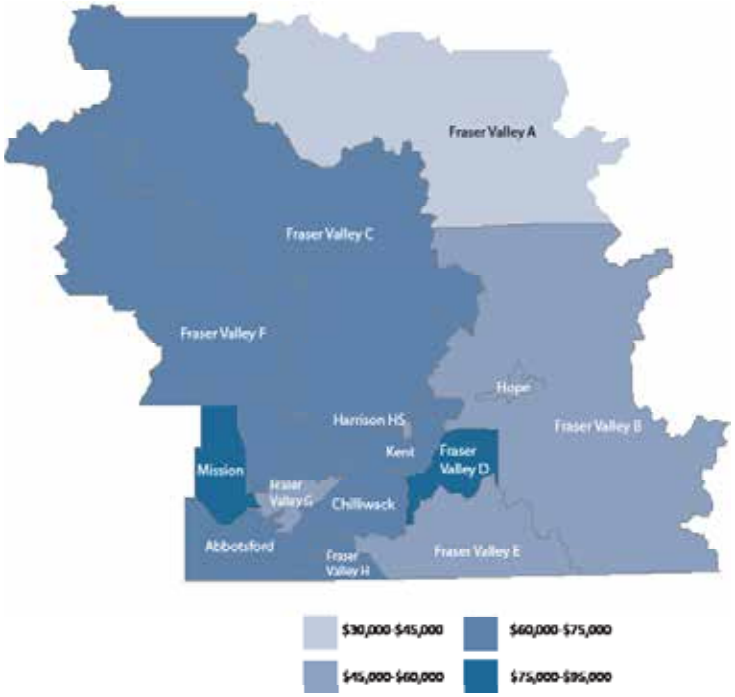
$69,289 median household income. **(2015)**

While the median income in the Fraser Valley Regional District is slightly lower than the 2015 provincial median household income of $69,995, it has increased 35% from $51,406 in 2005. The median income for Metro Vancouver in 2015 was higher, at $72,662.

FVRD Median Household (pre tax) Income, 1995-2015



FVRD Median Household Income by Area, 2015



Source: Statistics Canada, 2016 Census

What's being measured?

This indicator is a measure of the median individual income in the region. The median income expresses the "middle point" between the highest and lowest incomes in the region, and is more representative of the region's economic health than an averaged figure. Data from the National Household Survey (NHS) in 2011 is less reliable, but 2016 Census data will fill this gap using Canadian Revenue Agency (CRA) data.

Why measure it?

Median household income, when combined with other indicators like education or core housing need, provides a good indication of the social health of the region.

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Tracking goal: Positive trend

Future monitoring reports will look for increasing median incomes

INDICATOR: INDIVIDUAL INCOME

How are we doing?

$30,526 median individual income. (2015)

By 2015, the median individual income in the Fraser Valley Regional District had **increased** 25% to $30,526, up from $24,465 in 2005. The region's median income compares well with other regional districts throughout the province. For example, the median income for Metro Vancouver in 2015 was slightly higher at $32,612. The provincial median income was also slightly higher at $33,012. Some of the increase reflected in the 2016 Census may be the result of changing methodology where income data is now derived from Canadian Revenue Agency (CRA) data.

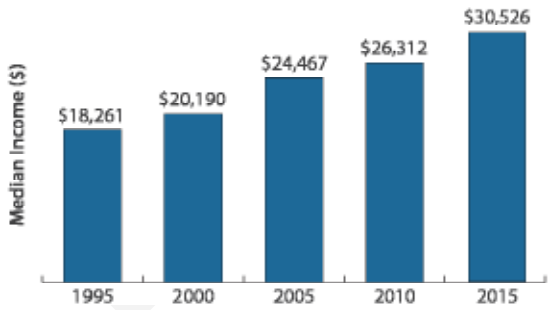
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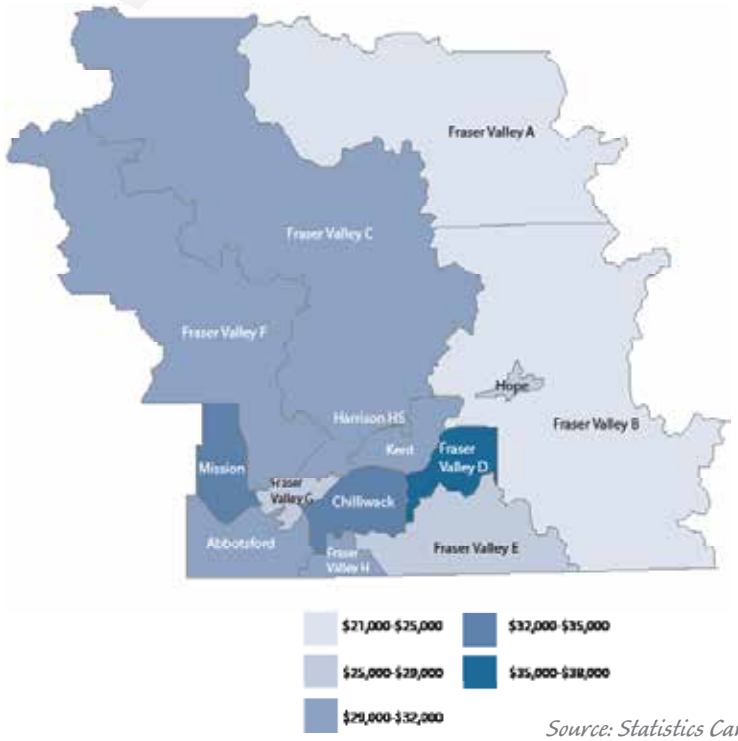
Why measure it?

Median individual income, when combined with other indicators like education or core housing need, provides a good indication of the social health of the region.

FVRD Median Income, 1995-2015



FVRD Median Individual Income by Area, 2015



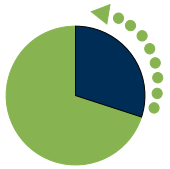
Source: Statistics Canada, 2016 Census

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INDICATOR: EDUCATION

Tracking goal: Proportion

Future monitoring reports will monitor the proportion of education rates



How are we doing?

More than half (55%) of FVRD residents had some form of post-secondary education. (2016)

While longer term trends show that the number of residents with post secondary credentials has been steadily **increasing** compared to the province as a whole, education levels in the regional district do not compare particularly well. In B.C as a whole, this figure is 64%. In Metro Vancouver, this number increases to 66%. By 2016, the share of residents between the age of 25 and 65 in the Fraser Valley Regional District with post secondary credentials has increased from 52% in 2006 to 55% - but more needs to be done. Increased educational opportunities provided through the University of the Fraser Valley and other institutions will play an an important role in improving this statistic.

What's being measured?

This indicator measures the level of education attained by residents of the region between the ages of 25 and 64. The data comes from the 2016 Census, and includes within the post-secondary classification university, colleges, and technical schools.

Why measure it?

Populations with higher education levels tend to have better physical and mental health. Additional benefits include a higher average income and longer life expectancy.

FVRD Top 3 Major Fields of Study, 2016

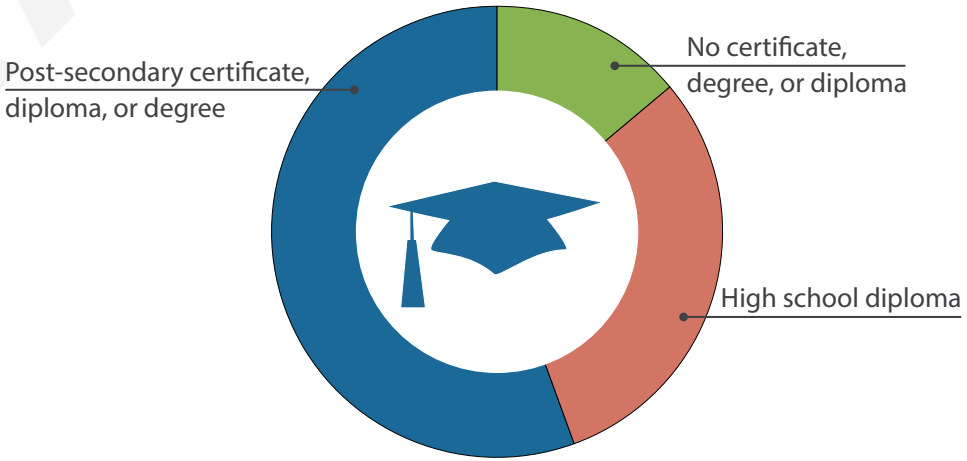


Architecture, engineering, and related technologies

Health and related fields

Business, management and public administration

FVRD Education, 2016



Source: Statistics Canada, 2016 Census

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COMMUNITY BUILDING

Goal: To create compact, complete communities that strengthen urban cores, maintain rural character and offer choice and affordability in housing

INDICATOR: HOUSING VALUATIONS

Tracking goal: Monitor

Future monitoring reports will look for moderation of housing price increases and improved affordability

How are we doing?

Housing prices are increasing at a high rate (2017)

By the second quarter of 2017, average sales prices of absorbed new units in Abbotsford-Mission CMA and Chilliwack CA had reached $1,082,129 and $723,086 respectively. This represents a staggering 91% **increase** in Abbotsford-Mission since 2011 ($566,000), and a 58% increase in Chilliwack since 2011 ($459,000). According to MLS data, sales prices have also increased in the broader market. The average residential sales price in the Fraser Valley Real Estate Board in 2016 were close to $700,000, while prices in the Chilliwack area were reaching $400,000.

What's being measured?

The purchase price of residential units, both new and resale. Consistent data for the regional district as a whole is an ongoing challenge. Although selected sales data for new units is reported by CMHC, it is not provided at the regional district or small community level, but it is available for Abbotsford-Mission CMA and Chilliwack CA (which includes Harrison Hot Springs, Kent, and EA D, E, H)

Why measure it?

Housing affordability is key to creating economically and socially sustainable communities. Official Communities Plans are specifically mandated by section 473 (2) of the Local Government Act to include policies related to affordable housing.

MLS Home Price Index: Five and Ten Year Price Change (2017 ytd)

	All		Detached		Townhouse		Apartment	
	5 yr	10 yr	5 yr	10 yr	5 yr	10 yr	5 yr	10 yr
Lower Mainland	52%	76%	59%	97%	46%	61%	46%	58%
Abbotsford	52%	51%	68%	70%	27%	24%	35%	31%
Mission	59%	52%	60%	54%	52%	45%	45%	37%

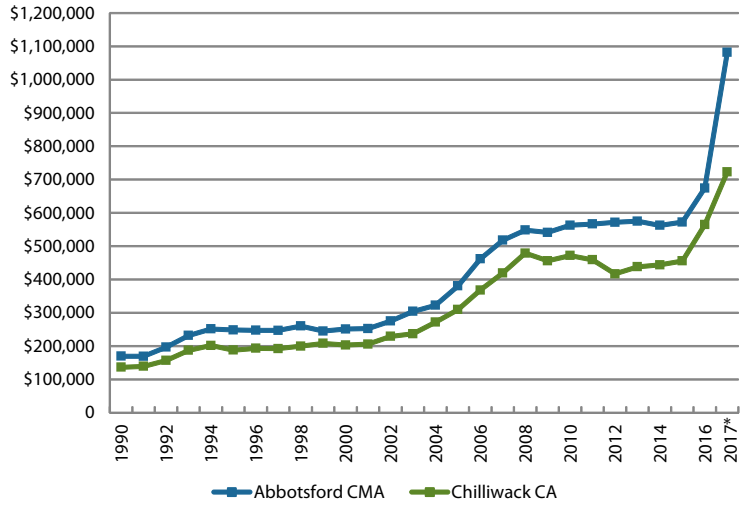
Source: Fraser Valley Real Estate Board, April 2017

MLS Avg Residential Price $ - Selected Real Estate Boards

	1981	1986	1991	1996	2001	2006	2011	2016
Chilliwack	84,941	61,659	105,607	146,611	148,120	296,695	296,695	397,911
Fraser Valley	120,297	87,640	166,689	217,785	215,681	393,047	502,562	676,946
Greater Vancouver	148,861	120,036	221,874	288,268	284,806	509,876	779,730	1,017,228

Source: BC Stats, Multiple Listing Statistics

Average Price of Absorbed New Units 1990-2017 ytd



Source: CMHC Market Absorption Survey data, April 2017

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Tracking goal: Positive trend

Future monitoring reports will look for an increasing vacancy rate

INDICATOR: RENTAL VACANCY

How are we doing?

Rental vacancy rates are declining (2016)

By October 2016, vacancy rates in Abbotsford-Mission CMA and Chilliwack CA had **dropped** to 0.7% and 1.5%, respectively. Vacancy rates in the region have been historically volatile, often reflecting the ebb and flow of the economy. While significant multi-family inventory came onto the market in 2007 and 2008 in both areas, these units have been absorbed and vacancy rates have decreased. The Abbotsford CMA vacancy rate of 0.7% is the lowest level in twenty years and anecdotal evidence suggests that Chilliwack's vacancy rates will be lower in 2017.

What's being measured?

The vacancy rate is a measure of the percentage of all potential rental units in an area which are considered vacant and available for immediate rent. This data is collected annually by the Canadian Mortgage and Housing Corporation (CMHC) but is not provided at the regional district or small community level.

Why measure it?

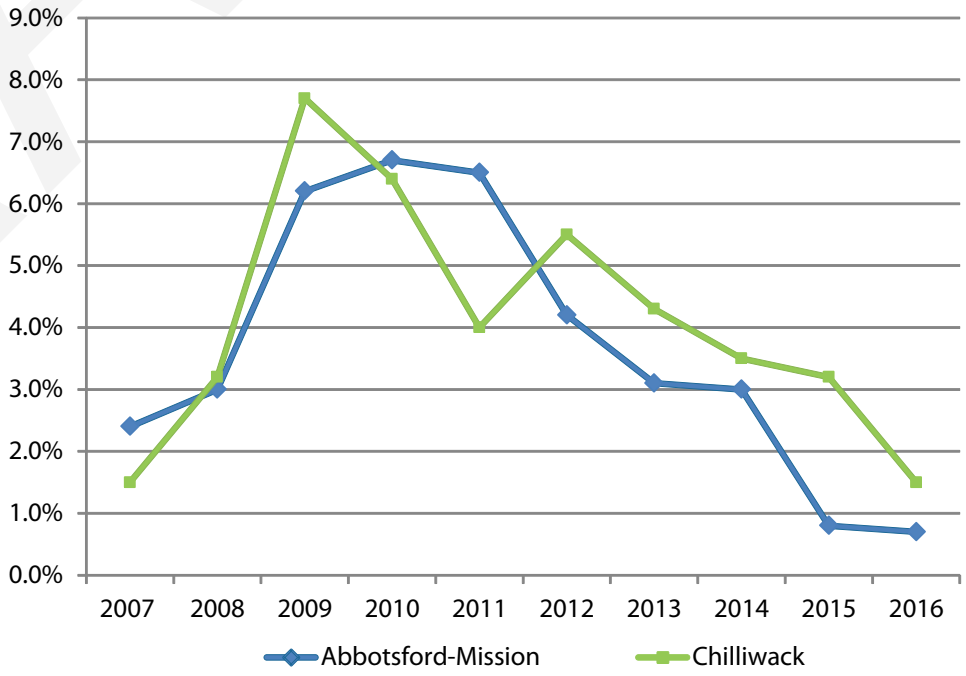
A low vacancy rate indicates that there are few rental units available and suggests a disconnect between local supply and demand. A lack of available rental units in an area can lead to increased rents and affordability issues.

Fall Vacancy Rates (CA, CSD) by Unit Type

	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom		Total	
	2011	2016	2011	2016	2011	2016	2011	2016	2011	2016
Abbotsford	7.4	0.0	7.0	0.6	5.4	0.4	0.0	0.0	6.1	0.5
Mission	13.3	0.0	14.9	1.8	4.2	-	-	-	12.0	1.2
Chilliwack CA	1.8	0.0	4.2	1.4	4.1	1.5	2.7	3.9	4.0	1.5

Source: CMHC Rental Market Report 2016

FVRD Fall Vacancy Rate (CA, CMA) 2007-2016



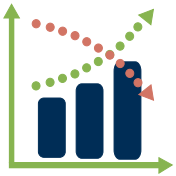
Source: CMHC Market Survey data

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INDICATOR: SENIOR'S HOUSING

Tracking goal: Monitor

Future monitoring reports will look both increasing and decreasing trends



How are we doing?

Rents are increasing and **Vacancy Rates** are declining for senior's housing (2017)

The average rents for both Heavy Care and Independent Living spaces have **increased** in the FVRD, to $5,541 and $2,502, respectively. Overall, average rents are higher in Metro Vancouver municipalities than in the FVRD. Vacancy rates throughout the region have **dropped** since 2013. Heavy Care space vacancy rates decreased from 5.1% in 2013 to 2.3% in 2017. Independent Living space vacancy rates in the FVRD decreased at a much higher rate, from 10.7% in 2013 to only 3.1% in 2017.

What's being measured?

Seniors housing includes both Independent Living (Standard) spaces, where residents receive less than 1.5hrs of care per day, and Heavy Care spaces, where residents receive 1.5hrs or more of care per day. CMHC completes yearly senior's housing market survey, and reports on numbers of spaces, average rents per month, and vacancy rates of seniors housing spaces (units).

Why measure it?

Housing affordability for seniors is key to creating economically and socially sustainable communities, especially as our population continues to age. A low vacancy rate indicates that there are few rental units available and suggests a disconnect between local supply and demand. A lack of available rental units in an area can lead to increased rents and affordability issues.

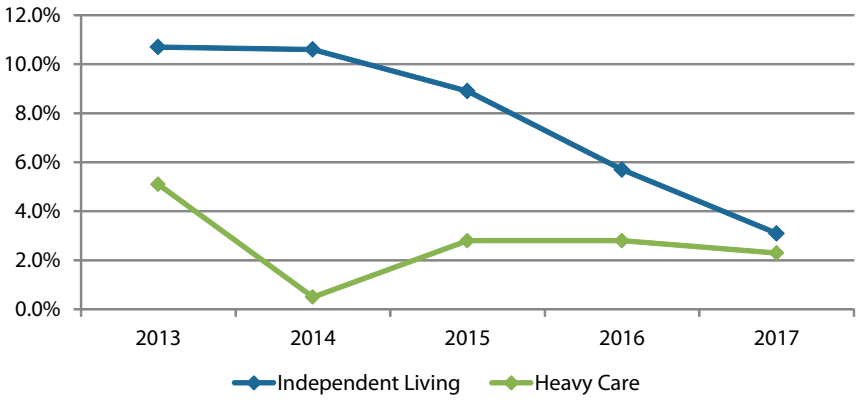
Average Rents ($) of Senior's Housing Spaces (all types)

Heavy Care	2013	2014	2015	2016	2017
Lower Mainland	5,930	6,075	6,051	6,194	6,852
Fraser East (FVRD)	4,963	5,199	**	5,022	5,541
Fraser South*	5,708	5,853	5,821	6,094	6,508
Independent Living	**2013**	**2014**	**2015**	**2016**	**2017**
Lower Mainland	**	3,051	3,143	3,239	3,314
Fraser East (FVRD)	**	2,354	2,382	2,459	2,502
Abbotsford-Mission CMA	**	2,448	2,447	2,573	2,597
Chilliwack CA	**	2,241	2,302	2,314	2,386
Fraser South*	**	3,011	3,033	3,001	3,131

*Fraser South: Langleys, Surrey, Delta and White Rock
**No data / data withheld for confidentiality

Source: CMHC Senior's Housing Report, 2014-2017

Vacancy Rates (%) of Senior's Housing Spaces



Source: CMHC Senior's Housing Report, 2014-2017

INDICATOR: HOUSING STARTS

Tracking goal: Monitor

Future monitoring reports will monitor housing stock for increased choice and densification

How are we doing?

1,905 housing starts in the last year (2016)

7,306 units were built in the region between 2011 and 2016. Of these, 46% were single detached and 54% multi-family. The majority of these units (56%) were located in Abbotsford-Mission, compared to 44% in Chilliwack CA. In addition, the amount of housing starts in 2016 was **almost double** the amount in 2011. Most people still live in single-detached homes in the FVRD as a whole, but the increase in multi-family housing starts may lead to an increase in the proportions of people living in these other dwelling types over the next few years.

FVRD Dwelling Types (2016)



58% Single Detached

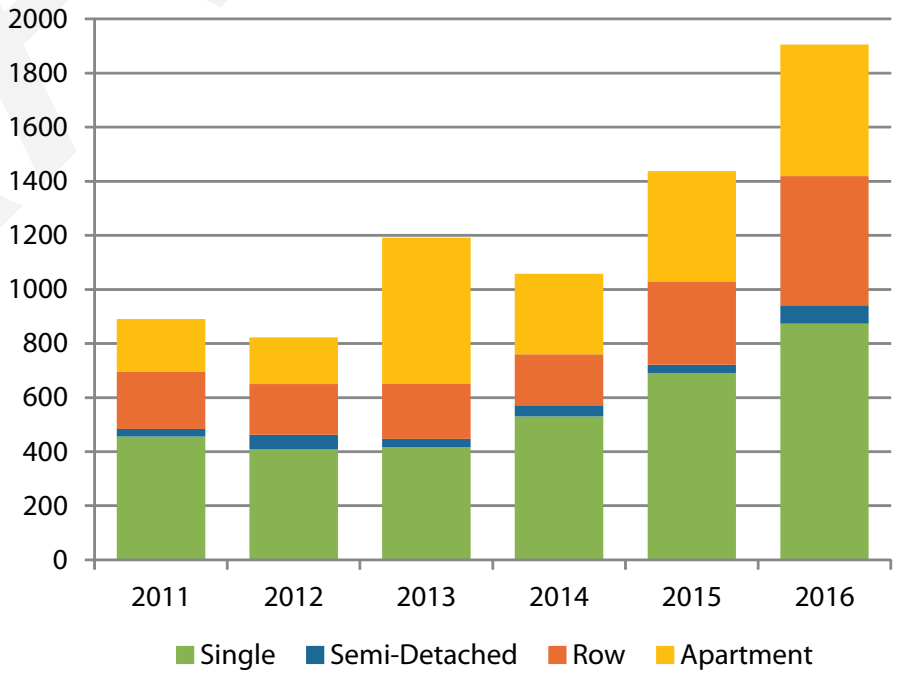
11% Row House / Semi-Detached

17% Duplex / Suite

13% Apartment

Source: Statistics Canada, 2016 Census

FVRD Housing Starts by Type (Abbotsford CMA & Chilliwack CA)



Source: CMHC., 2011-2016

What's being measured?

Housing starts are a measure of the number of dwelling units beginning construction during a particular period. CMHC data is not available at the regional district or small community level.

Why measure it?

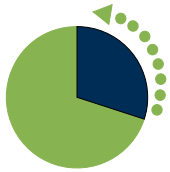
The number and type of housing starts in the region impacts affordability and housing choice in the region.

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INDICATOR: CORE HOUSING NEED

Tracking goal: Proportion

Future monitoring reports will monitor the proportion of households in core need



How are we doing?

13% of all FVRD households are in core need (2011)

In comparison with the province as a whole, the region's percentage of households in core housing need is slightly **below** the provincial rate of 15%. More than 30% of renters and 7% of property owners in the region are currently in core housing need. In communities throughout the province, rental households are facing affordability challenges. While the percentage of households in the region in core housing need has remained relatively stable between 2006 and 2011, the FVRD will closely monitor rising housing costs in Metro Vancouver for any potential impacts.

2016 data shows a modest improvement to 12.4% of households in the FVRD in core housing need from 13% in 2011. More detailed data related to tenure is not yet available.

What's being measured?

A household is said to be in core housing need if it falls below at least one of the housing adequacy, affordability, or suitability standards established by Census Canada, and would have to spend 30% or more of its income to pay the rent of alternative local housing that does meet those standards.

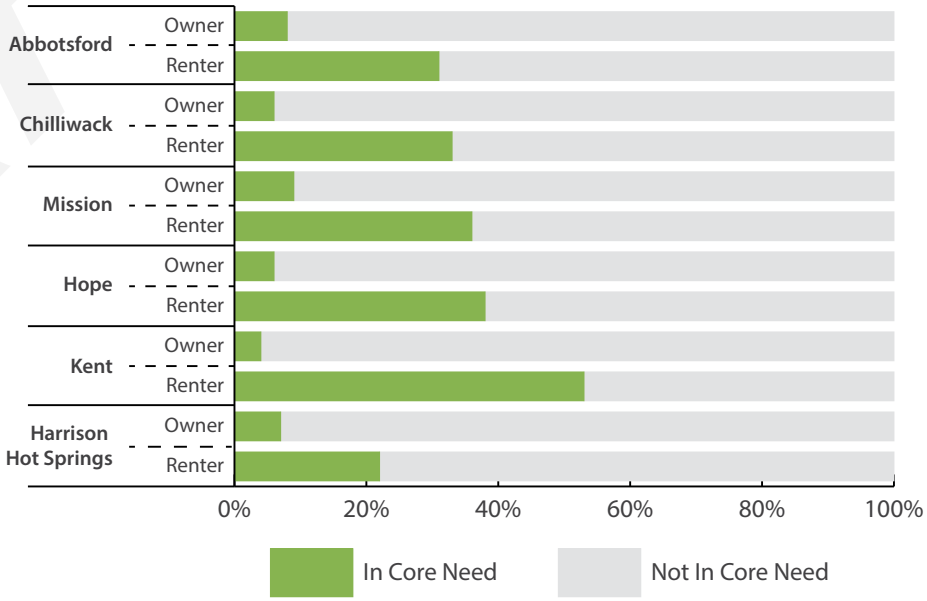
Why measure it?

The percentage of households in core housing need is a critical indicator of community health. Households in core need may lack funds for other basic needs such as food, clothing, medicine, or education, and may have a higher risk of homelessnes.

In 2011, one in three renters were in core housing need



2011 Households in Core Housing Need by Tenure

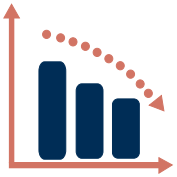


Source: Statistics Canada, 2011 Census & National Household Survey

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Tracking goal: Negative trend

Future monitoring reports will look for a decreasing number of observed homeless



INDICATOR: NUMBER OF HOMELESS

How are we doing?

606 homeless individuals in the FVRD (2017)

The 2017 Homeless Count has shown a significant **increase** in homeless individuals throughout the region since 2014, a 75% rise overall. Abbotsford continues to have the greatest number of homeless, but homeless counts in Chilliwack have increased the most since 2014, with a threefold rise over only three years. The majority of homeless individuals cite lack of affordability as their main reason for being homeless, followed by lack of suitable housing and living with addiction. Many report multiple health conditions. Analysis shows that Fraser Valley communities have the highest occurence of homeless individuals reporting two or more medical conditions in the Lower Mainland.

What's being measured?

The tri-annual regional homeless count is a 24-hour snapshot which provides an estimate of the number of homeless people at that point in time. Given the fluidity and clandestine nature of the population, it's likely that these figures represent an undercount and actual numbers may be higher.

Why measure it?

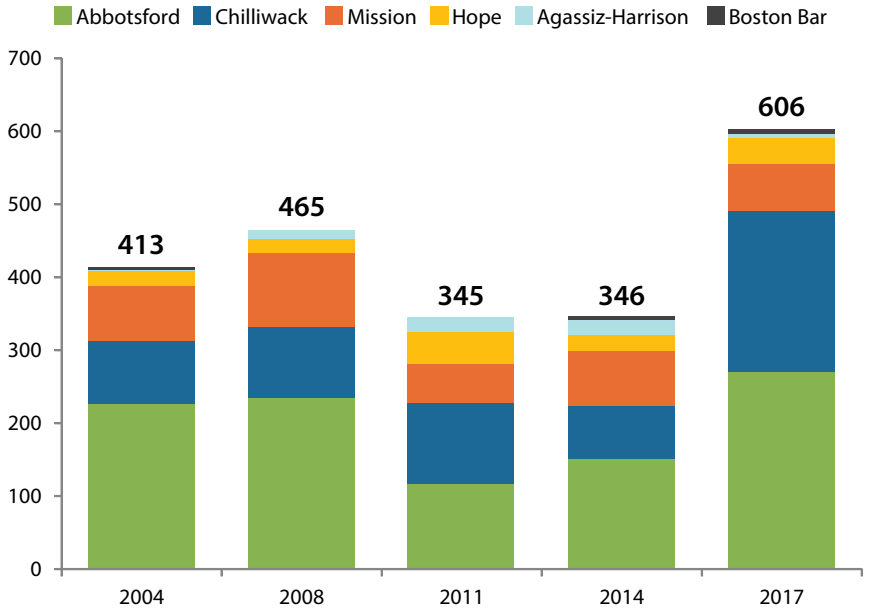
While homelessness is a strong indicator of unaffordable or inadequate housing within a region, it's also a broader measure of community health.

Multiple Health Conditions, 2017

	No Health Incidence		One Health Incidence		Two + Health Incidence		Total
Community	#	%	#	%	#	%	#
Abbotsford	42	17%	51	21%	150	62%	243
Chilliwack	9	7%	24	18%	103	76%	136
Mission	3	5%	8	14%	46	81%	57
Eastern Fraser Valley	3	7%	3	7%	40	87%	46

Source: 2017 Report on Homelessness in the Lower Mainland

Observed Homeless by Municipality, 2004-2017



Source: FVRD 2017 Homelessness Survey

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ECOSYSTEM HEALTH

Goal: To protect the air, water and biodiversity on which the region depends

INDICATOR: PROTECTED PARK LAND

Tracking goal: Positive trend

Future monitoring reports will look for increasing park area in the region

How are we doing?

4,755 acres of protected parkland (2017)

Since 2014, the FVRD has secured an **additional** 329 acres of regional parkland. With the addition of the Popkum Community Trail (2015), and the East Sector Lands Park (2016) in Harrison Hot Springs, there is now a regional park in each of our communities. The suspension bridge at Cascade Falls Regional Park and significant improvements to Island 22 facilties, including the new dog park, are driving increased awareness of our park system.

2017 was a year of extremes in terms of weather and fire hazard conditions. As a result, approximately 15% fewer visitors were recorded using FVRD Regional Parks, although provincial park visitations increased modestly.

What's being measured?

This indicator measures the total area (acres) of all regional parks within the Fraser Valley Regional District. It does not include provincially managed recreation areas, provincial or municipal parks, ecological reserves or any other protected areas, which account for an additional 726,240 acres of protected land within the FVRD.

Why measure it?

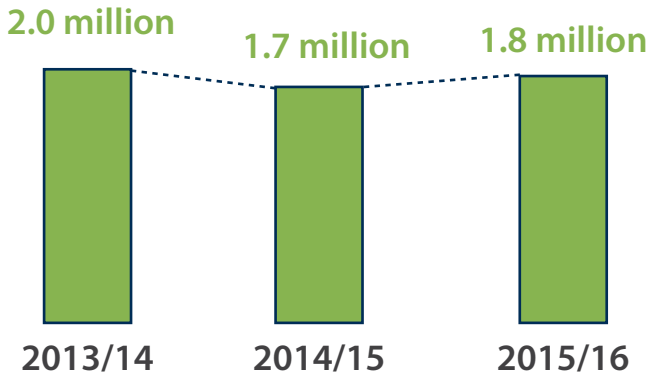
Parkland is highly valued by the region's residents for a number of reasons: easy access to nature, the wide variety of recreational opportunities it offers, the health benefits it provides, and the role it plays in protecting sensitive ecoysystems. Monitoring the total area of protected parkland within the region and the annual number of park visits will help guide land procurement and long-term strategic planning.

FVRD Regional Park Visitation (2015-2016)



Source: FVRD Parks Visitation Report

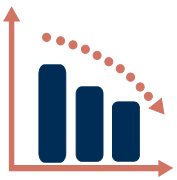
Visitation to BC Parks within the FVRD (person days)



Source: BC Parks Annual Statistics Reports

Tracking goal: Negative trend

Future monitoring reports will look for decreasing levels of ozone and particulate matter



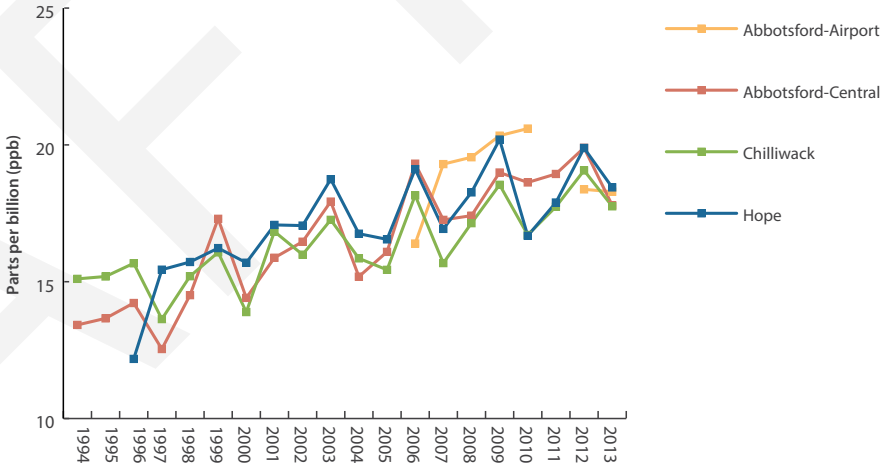
INDICATOR: GROUND LEVEL OZONE AND FINE PARTICULATE MATTER (PM 2.5)

How are we doing?

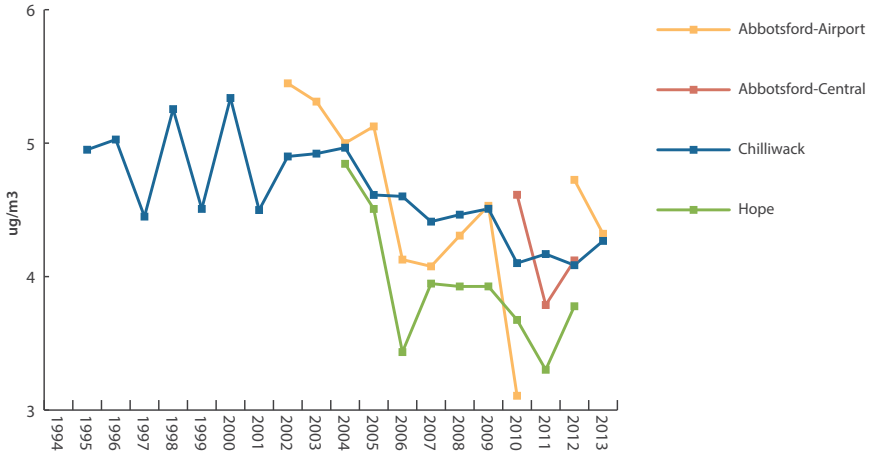
18 ppb of ozone and **4 ug/m^3** of $PM_{2.5}$ air pollution levels (2013)

Ozone concentrations have been **increasing** at all four FVRD monitoring stations over the past twenty years, indicating additional actions will be required to reduce ozone concentrations. $PM_{2.5}$ has been **decreasing** since 2002, and is currently below the provincial air quality objective of 8 ug/m^3.

Ozone Average Annual Concentrations



$PM_{2.5}$ Average Annual Concentrations



Source: FVRD Air Quality and Emissions Trends, 2013

Why measure it?

Both ozone and $PM_{2.5}$ can cause significant health concerns among many people. Exposure to increased levels of air pollution are associated with:

- increased respiratory and cardiovascular hospital admissions
- emergency department visits
- death

These two gasses combine to form smog, which appears as a haze visible on sunny days. These health impacts, and other economic impacts make tracking these indicators important.

What's being measured?

Ground-level ozone is a highly irritating gas that forms just above the earth's surface. It is produced by the interaction of two other gases reacting with sunlight. Fine particulate matter 2.5 ($PM_{2.5}$) are tiny particles in the air and generally come from vehicle exhaust and other operations that burn fuel such as wood.

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TRANSPORTATION & MOBILITY

Goal: To develop a safe and efficient transportation system that supports compact urban development, promotes transit, walking and cycling and minimizes impacts on air quality

INDICATOR: TRAFFIC VOLUME

Tracking goal: Negative trend

Future monitoring reports will look for decreasing traffic volumes as alternative modes become more popular

How are we doing?

Highway traffic is on the rise (2014)

The majority of the region's highways are experiencing **increasing** numbers of vehicles. The most recent data shows a significant increase in traffic on Highway 1 between Chilliwack and Abbotsford. At the same time, traffic on Highway 1 and the Fraser Highway at the Langley-Abbotsford border remained level, indicating substantial growth in the number of intra-regional trips and a decrease in traffic volumes travelling to Metro Vancouver.

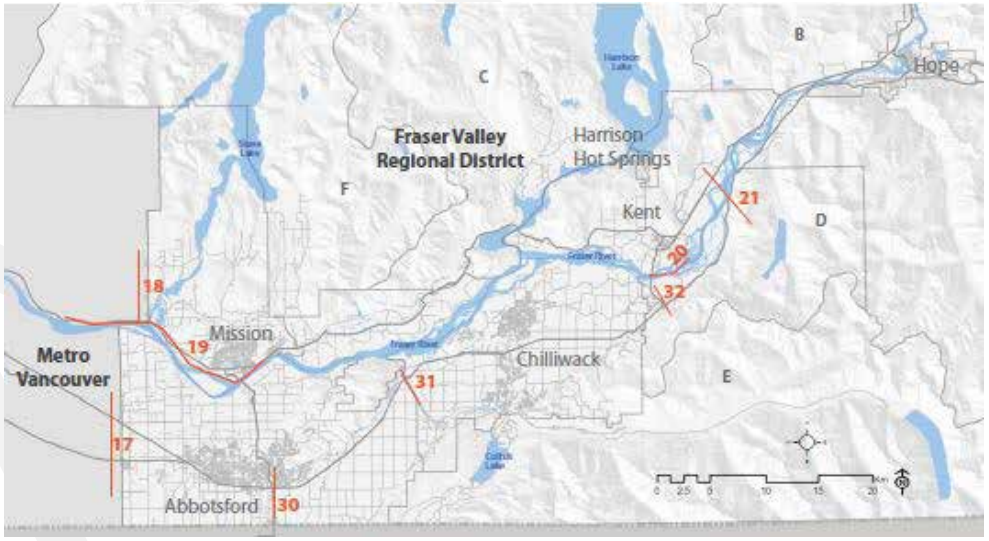
What's being measured?

This is an average measure of vehicles crossing "screenlines" in the region. A screenline is an imaginary line used to track vehicle volumes that cross between origin and destination.

Why measure it?

Traffic volume provides valuable information on travel patterns in the region and is an indicator of the health of the regional economy.

FVRD Screenlines



Average two-way traffic volumes in the FVRD, 2008-2011

Line #	Location	2008	2011	% Change
17	Hwy 1 - East of 264th St	72,000	72,000	0%
	Fraser Hwy – East of 276th St	20,500	20,500	0%
18	Dewdney Trunk Rd – East of 284th St	2,900	2,800	-4%
	Lougheed Hwy – East of 280th St	23,000	21,000	-10%
19	Hwy 11 at Mission Bridge	44,000	42,000	-5%
20	Hwy 9 – North of Old Yale Rd	10,000	10,000	-1%
21	Hwy 7 – West of Hwy 1	2,2000	2,450	12%
	Hwy 1 – West of Hope	11,500	10,500	-11%
30	Hwy 1 – East of Hwy 11	57,000	64,000	12%
31	Hwy 1 - Vedder Canal	45,000	51,000	14%
32	Hwy 1 - West of Hwy 9	20,000	24,000	18%

Source: TransLink Trip Diary, 2014

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INDICATOR: TRANSIT RIDERSHIP

Tracking goal: Positive trend

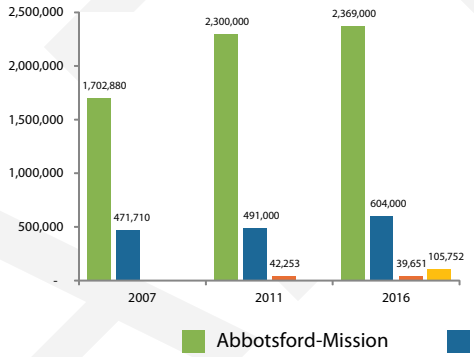
Future monitoring reports will look for increasing ridership

How are we doing?

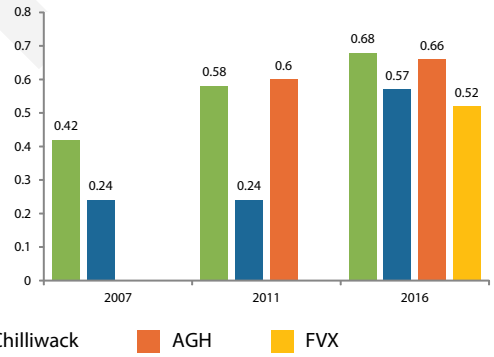
3,188,403 total annual transit ridership (2016)

Between 2007 and 2016, transit ridership in the region **increased** by 43%. With the introduction of the Fraser Valley Express (FVX), improved municipal system efficiencies, new buses/facilities and new regional routes, such as the Hope-Agassiz connector in 2017, it is reasonable to assume ridership will continue to grow. The FVX, running between Chilliwack and TransLink's facilities at Carvolth Exchange (Langley Township) since 2015, is experiencng considerable growth and is performing well beyond initial expectations.

Transit Ridership

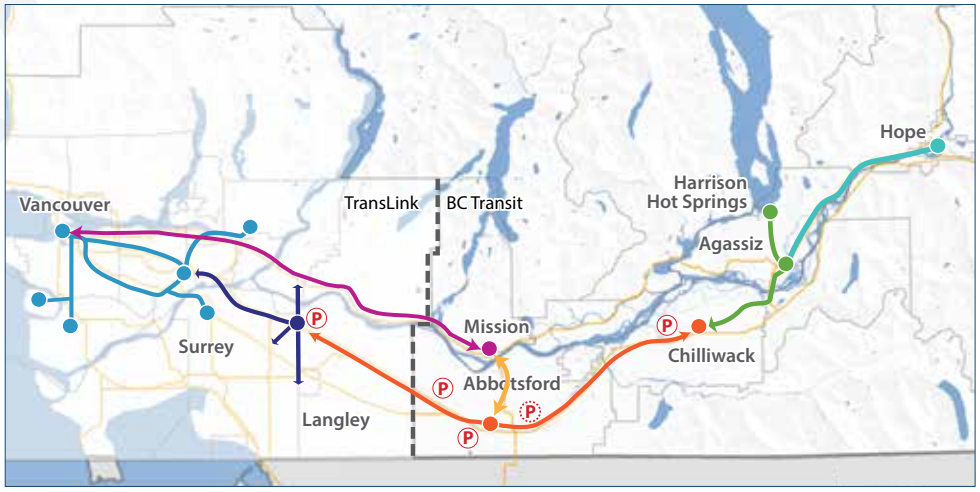


Transit Service Hours Per Capita



Source: BC Transit 2017

Regional Connections



What's being measured?

This indicator measures overall transit ridership for the year. Revenue and ridership data is provided each month by BC Transit. As of 2016, there were four separate transit services operating in the Region: Central Fraser Valley (Abbotsford-Mission), Chilliwack, Agassiz-Harrison (AGH) and the Fraser Valley Express (FVX).

Why measure it?

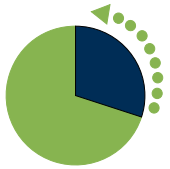
Transit ridership is one measure of a community's mobility and the affordability of transportation within the region. The data collected by BC Transit is a valuable long-range planning tool, and can inform strategic infrastructure investments.

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INDICATOR: INTRAREGIONAL TRIPS

Tracking goal: Proportion

Future monitoring reports will track the proportion of trips staying within the region

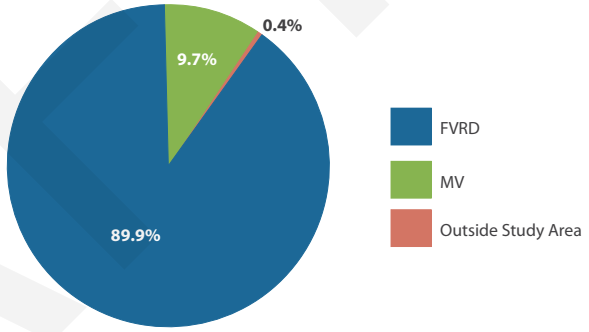


How are we doing?

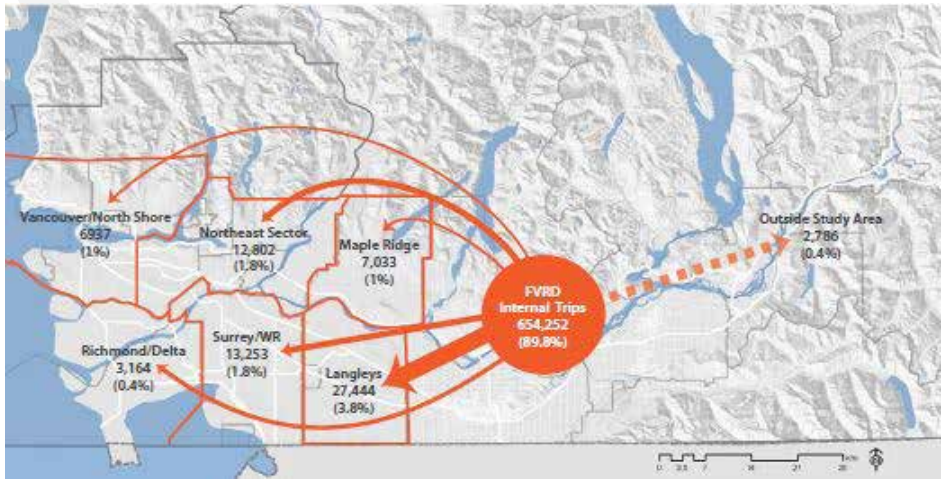
90% of all trips stay within the FVRD (2014)

The overwhelming majority of trips stayed **within** the region, challenging the notion of the FVRD as a bedroom community. Despite this, ties between Metro Vancouver and the FVRD remain strong, with 10% of all trips originating in the FVRD ending in Metro Vancouver.

Trips Originating in the FVRD



FVRD Trip Destination



Source: FVRD & TransLink Trip Diary, 2014

What's being measured?

This indicator tracks the proportion of daily trips originating in the Fraser Valley Regional District that stay within the region and those trips which cross regional boundaries into Metro Vancouver. Trip diary data provides a much broader picture of travel in the lower mainland than Census data and considers all types of trips by mode of travel.

Why measure it?

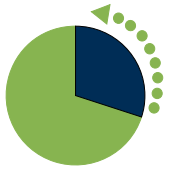
A large proportion of trips that begin and end within our regional boundary suggests more people living and working in the region. It's also an indicator of the health of the local economy and reflects the number of quality jobs within the region.

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INDICATOR: BICYCLE AND PEDESTRIAN MODE SHARE

Tracking goal: Proportion

Future monitoring reports will look for a greater proportion of active transportation trips



How are we doing?

6% of all trips taken in the FVRD were by bike or foot (2011)

Compared to other regional districts in the province, our active transportation mode share is small and has been in **decline** since 2004. While some factors, like distance between urban areas, are difficult to overcome, there is much that can be done to encourage and support active transportation. With recent investments in transit, cycling and pedestrian infrastructure and a focus on creating more compact, walkable communities the goal is to improve mode share going forward.

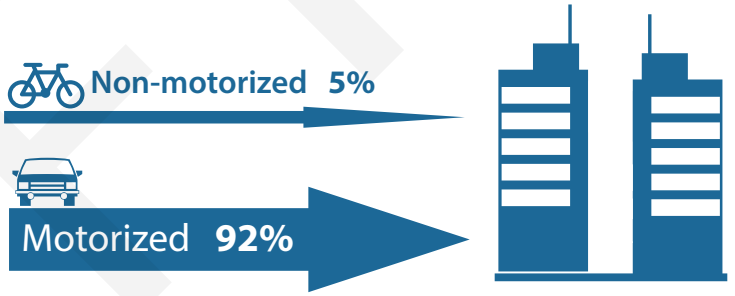
What's being measured?

This indicator expresses the percentage of all trips taken by non-motorized modes of transportation, such as walking or cycling.

Why measure it?

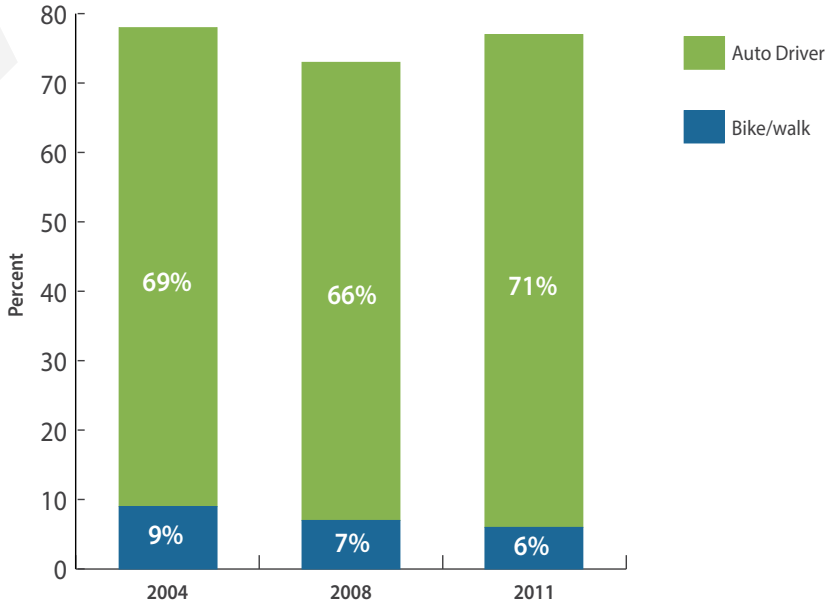
Active transportation has many benefits for individuals, communities and the region as a whole, ranging from individual health to improved air quality. By tracking active transportation mode shares, we can identify trends and implement supportive actions and long-term policies.

Mode Share of Trips to Work, 2016



Source: Statistics Canada, 2016 Census

All Trips by Auto Driver or Bike/Walk Mode, 2004-2011



Source: FVRD & TransLink Trip Diary, 2014

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INDICATOR: COMPLETED TRANSPORTATION PROJECTS

Tracking goal: Positive trend

Future monitoring reports will look for the completion of additional transportation infrastructure projects.



How are we doing?

10 projects or initiatives have been completed, implemented or are under construction (2018)

In 2014, the FVRD submitted a list of transportation priorities to the Ministry of Transportation and Infrastructure as part of the *BC on the Move* planning process. With 5 high priority transportation projects completed or implemented and 5 in progress in the Fall of 2017, the region is continuing to make progress towards a safer, more integrated transportation system.

This list comprises part of the Transportation and Mobility policies set out in the draft RGS. The FVRD will continue to work with the province and local partners towards the completion of additional improvements.

What's being measured?

This indicator measures the number of transportation infrastructure projects completed in the Fraser Valley Regional District as outlined in the Regional Growth Strategy.

Why measure it?

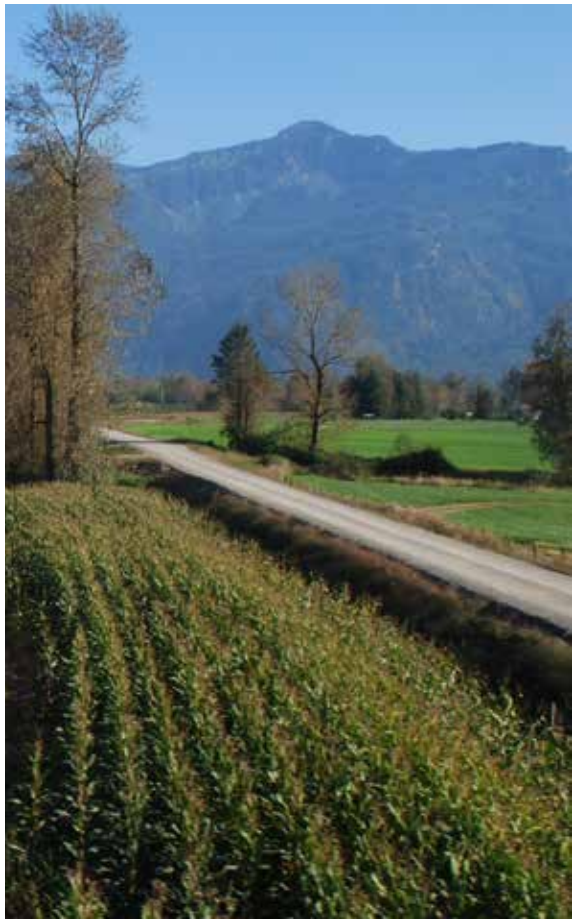
One of the RGS goals for transportation is to ensure a safe transportation system that reduces conflicts between transport modes and which ensures the efficient movement of goods and services throughout the region. The number of completed projects is an indication of progress towards that goal.

Transportation Priorities: Completed or In-progress Projects

High Priorities	Status	Estimated Completion
Fraser Valley Express (FVX)	Implemented	2015
16th Ave Corridor Study	Completed	2015
Carvolth Exchange Eastbound On-Ramp	In-progress	2019
Hope to Agassiz Transit Connection	Implemented	2017
Vedder Bridge to Cultus Lake	Completed	2017
Prest Road Interchange to Bailey	Completed	2017
Hwy. 1 Extension of HOV/Transit Lane	In-progress/ delayed	2020 - ?
Rosedale Bridge Upgrades	In-progress	2020
Mt Lehman Rd. Improvements to airport	In-progress	2020
Vye Road-Hwy 11 Improvements	In-progress	2020







INFRASTRUCTURE & SERVICES

Goal: To provide effecient, sustainable, and cost effective services that contribute to compact and sustainable growth

INDICATOR: LANDFILLED WASTE AND DIVERSION RATE

Tracking goal: Target

Future monitoring reports will look for disposal and diversion rates which approach targets

How are we doing?

425 kg of landfilled waste annually per person **(2015)**

The region's 2015 disposal rate is **below** the provincial average of 611 kg/person. This is the lowest it has been in over 25 years. In total, more than 125,000 tonnes of waste is sent to landfills located throughout the Fraser Valley Regional District, down from 138,000 in 2013. That being said, disposal rates will have to fall further in order to meet the long-term provincial goal of 350 kg/person. The Fraser Valley Regional District's Solid Waste Management Plan calls for a 2025 diversion target of 90%. Future monitoring reports will monitor our progress towards meeting these targets.

2013 Baseline Diversion Rate



51% diverted

49% landfill

2025 Target Diversion Rate



90% diverted

10% landfill

FVRD Disposal Rate Per Capita, 2006-2015



Source: Environmental Reporting BC, Municipal Solid Waste Disposal, 2017

What's being measured?

This indicator reports the estimated amount of solid waste each person disposes of in a given year. Conversely, the diversion rate is a measure of the amount of waste that is diverted from a landfill through recycling and composting.

Why measure it?

With the region's population certain to increase, it's important that we monitor the amount of waste directed to the landfill, as well as the diversion rate. Increased volumes of waste put more strain on the waste management system and increase costs for both residents and local government.

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ENERGY & CLIMATE CHANGE

Goal: To increase energy efficiency, lower energy costs, and reduce greenhouse gas emissions, in order to minimize the region's impact on climate change and to mitigate impacts of climate change on our region

INDICATOR: COMMUNITY GHG EMISSIONS

Tracking goal: Target

Future monitoring reports will look total emissions which approach targets set out in the RGS

How are we doing?

1,625,898 tonnes of GHG emitted annually (2010)

Between 2007 and 2010, our total GHG emissions **decreased** by 3%. While buildings and solid waste experienced a decrease in emissions, on-road transportation increased slightly. To achieve a 50% decrease in GHG emissions by 2050, the Fraser Valley Regional District will require a combination of efforts that reduce energy consumption, increase energy efficiency, and prioritize clean energy.

Since 2010 the FVRD and municipal members have been investing in transit and adopting OCP policies that support GHG reduction strategies.

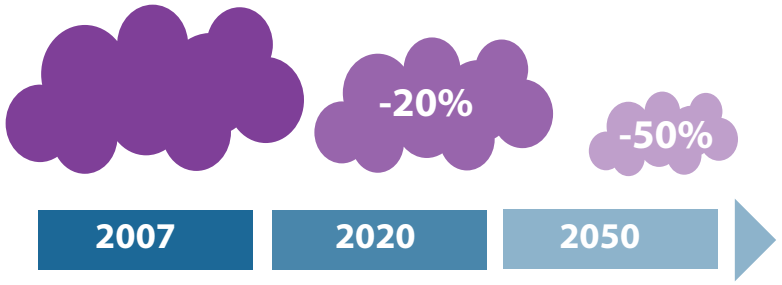
What's being measured?

The province, through the Community Energy and Emissions Inventory (CEEI), collects data to determine each community's energy consumption and greenhouse gas emissions. Monitored sources include on-road transportation, buildings, and solid waste. Local governments are awaiting more up to date CEEI data to determine performance since 2010.

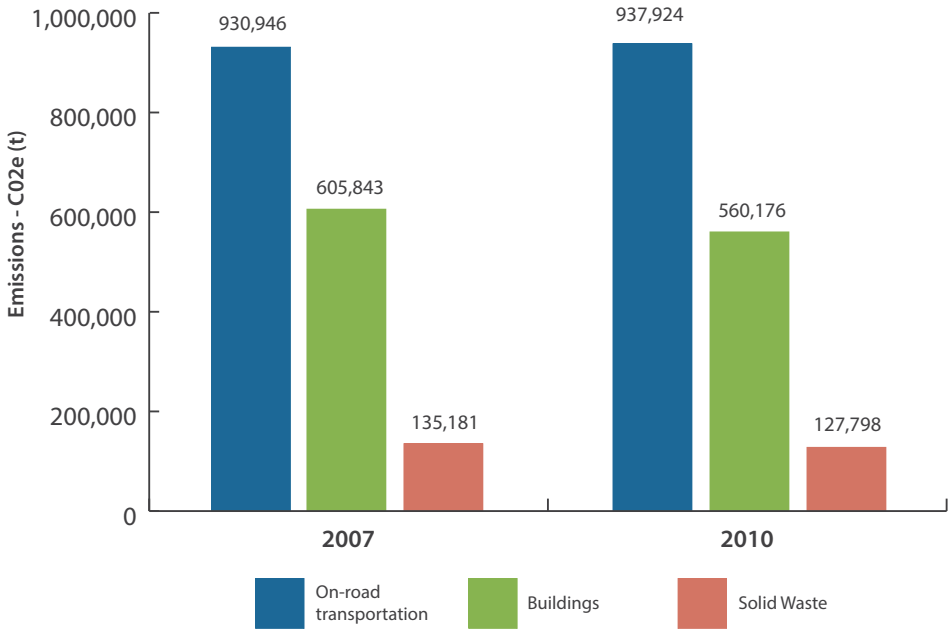
Why measure it?

Regional districts are required by the Local Government Act to monitor and report on Greenhouse Gas emissions (GHGs). GHGs are responsible for global climate change and a range of other health related issues. With our strong connection to a healthy natural environment, it is important to consider the ways climate change may impact our lives and take corresponding measures to minimize any future impacts.

Regional GHG Emissions Reduction Targets



GHG Emissions in the FVRD by Source



Source: CEEI, 2014

INDICATOR: ELECTRIC VEHICLE CHARGING STATIONS

Tracking goal: Positive trend

Future monitoring reports will look for increasing numbers of electric vehicle charging stations

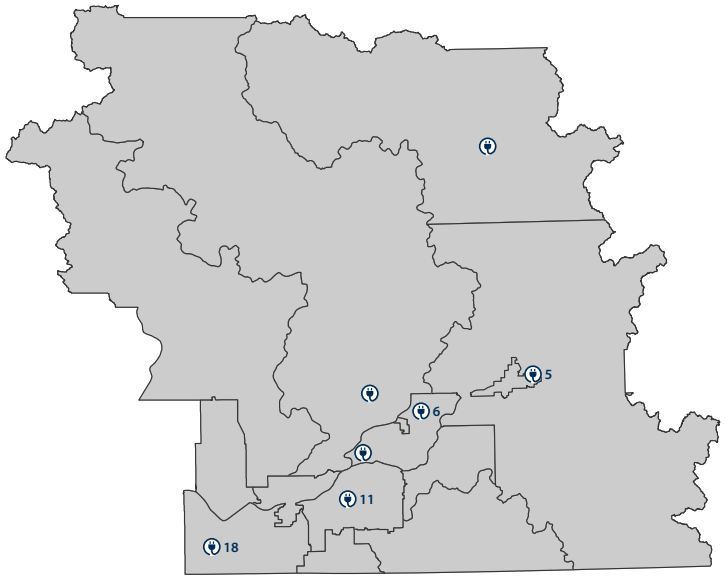
How are we doing?

41 electric vehicle charging stations located in the FVRD (2016)

With 41 publically accessible charging stations available currently, and several **more** coming online in 2017/18, the range of EV access throughout the FVRD is on the rise.

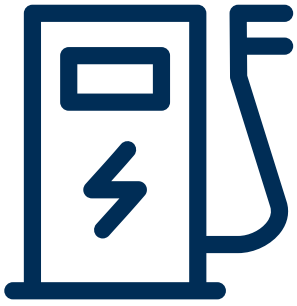
Increasing the availability of charging stations in the region will support efforts to reduce the consumption of energy, increase energy efficiency and reduce GHG emissions. This will help the region move closer to achieving its GHG reduction targets.

Electric Vehicle Charging Stations in the FVRD, 2016



Source: Plug in BC

Quick Stats: FVRD Headquarters Fast Charger, ytd (June 2017)



561 SESSIONS CHARGED

6,023 kWh CHARGED

5,352 kg OF CO_2 SAVED

2,283 LITRES OF GAS SAVED

What's being measured?

The number and type of electric vehicle charging stations throughout the Fraser Valley Regional District. This figure only includes those charging stations accessible to the general public.

Why measure it?

The number of electric vehicle charging stations in the FVRD is a measure of non-combustive energy consumption and reflects the region's committment to reducing GHG emissions.

Fraser Valley Future 2041

Fraser Valley Regional District
Regional Growth Strategy Monitoring Report

DRAFT - December 2018

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