

## REGULAR COUNCIL

TO: **Mayor & Council**

DATE: **July 3, 2024**

FROM: **General Manager, Planning & Development**  
**General Manager, Engineering**  
**General Manager, Parks, Recreation & Culture**

FILE: **6520-20**  
**(Scott Road Corridor)**

SUBJECT: **Imagine Scott Road Visioning Study**

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## RECOMMENDATION

The Planning & Development Department, Engineering Department, and Parks, Recreation & Culture Department recommend that Council:

1. Receive this report for information;
2. Endorse the Scott Road Visioning Study, attached as Appendix “I” and generally described in this report; and
3. Approve proposed amendments to *Surrey Zoning By-law, 1993, No. 12000*, as amended, to update Tier 2 Capital Project Community Amenity Contributions for the Scott Road Visioning Study Area, as documented in Appendix “II”, and authorize the City Clerk to introduce the necessary *Surrey Zoning By-law, 1993, No. 12000* amending bylaws for the required readings and to set a date for the related Public Hearing.

## INTENT

The intent of this report is to seek Council approval of the Imagine Scott Road Visioning Study, which presents a framework to guide the long-term planning of the Scott Road-72 Avenue Corridor. The report also seeks Council approval to adjust Capital Project Community Amenity Contribution rates to ensure rate parity along the Corridor.

## BACKGROUND

In April 2022, Council authorised staff to initiate preliminary planning along the Scott Road-72 Avenue Corridor (the “Corridor”) to support the planned R6 RapidBus (see Appendix “III”). With the introduction of RapidBus, a framework was needed to guide longer-term land use planning along the Corridor. The Imagine Scott Road Visioning Study (the “Study”) was developed as the first step in a comprehensive planning process for the Corridor.

### Study Area

The Study Area encompasses approximately 8.44 square kilometres at the northeast boundary of Surrey within the communities of Whalley and Newton. The Study Area extends approximately 800 metres from 120 Street (Scott Road) and 72 Avenue. It is roughly bounded by the South

Westminster Neighbourhood Concept Plan (“NCP”) area to the north (along River Road and 104 Avenue), 124 Street/the Newton Town Centre Plan (“TCP”) area to the east (along 134 Street), 68 Avenue to the south, and the City of Delta to the west.

## **Community Profile**

The Study Area is currently home to approximately 41,120 people, housed in 12,211 dwellings. Most residents live in single-family detached dwellings, including secondary suites. Approximately 41% of households are renters. Household sizes within the Study Area are typically larger than Surrey as a whole, with 43% of families consisting of four or more people.

Demographically, 64% of the Study Area’s population identifies as South Asian. With immigrants accounting for 55% of the population, the Corridor has become an important landing point for newcomers to Canada.

## **Policy and Legislative Framework**

The Study Area is identified as a “Major Transit Growth Corridor” in *Metro Vancouver Regional District Regional Growth Strategy* (“Metro 2050”) and is designated as part of the “Major Transit Network” in *Surrey Official Community Plan Bylaw, 2013, No. 18020* (“OCP”) and *Metro Vancouver Regional Transportation Strategy* (“Transport 2050”). These policy designations are reflective of the Corridor being one of the busiest transit corridors in the Metro Vancouver Region.

In November 2023, the provincial government introduced new legislation intended to increase the supply and affordability of housing. Two of the acts, Bill 44, the *Housing Statutes (Residential Development) Amendment Act* and Bill 47, the *Housing Statutes (Transit-Oriented Areas) Amendment Act*, directly impact development along the Corridor. These changes allow up-to six housing units on existing single-family zoned lots, within 400 metres of R6 RapidBus stops. The area around the Scottsdale Bus Exchange has also been designated as a Transit Oriented Area (“TOA”).

## **DISCUSSION**

The development of the Study was initiated in 2022. It was supported by a comprehensive planning process that included various background studies, technical analysis, and community engagement.

### **Background Studies**

#### *Environmental Assessment*

The City retained a consultant to conduct an environmental and watercourse classification assessment for the Study Area. The objective of this assessment was to evaluate wetland and aquatic habitat and to inventory natural assets protected and regulated under federal, provincial, and municipal regulations and bylaws. The outcomes of this assessment will inform staff of potential environmental sensitivities that must be considered through future land use planning.

#### *Market Demand Study*

The City participated in a joint, consultant-led market demand study with Metro Vancouver and the City of Delta. The intent of the study was to provide an understanding of the market

conditions along the Corridor and inform policy decisions. The market demand study included quantitative market analysis, interviews with the development industry, and development scenario testing.

The market demand study is attached for information as Appendix “IV”.

### Community Engagement

The planning process was supported by a public consultation program that informed over 29,000 residents and directly engaged with 817 residents. Engagement techniques that were used included social media posts, direct mailout postcards, interactive features on the project webpage, stakeholder meetings, a pop-up event at Kwantlen Polytechnic University – Newton Campus, and an online survey. In total, 561 residents participated in the survey.

Input received from the survey directly informed the development of the vision for the Study Area and will inform subsequent NCP processes. Results from the survey provided insights into what respondents currently value in the Corridor and how they may see the area grow in the future. Respondents also provided input on suitable locations for higher-density development in the future, as well as areas for future secondary land use planning.

A detailed summary of the consultation is included as Appendix “V”.

### **Planning Framework**

The primary component of the Study is a planning framework which outlines the objectives and principles for growth management, transportation, parks and open space, and engineering utilities for the Study Area. It provides a high-level vision and principles for the Corridor, and a framework that will guide future secondary planning processes.

Additional details on the planning framework are included in Appendix “I”.

### Future Secondary Land Use Planning Areas

The Study identifies three new NCP areas:

1. Townline (north);
2. Kennedy (central); and
3. Strawberry Hill (south).

The boundaries of these future neighbourhood plans are tentative and may be refined through individual planning processes.

Land use planning for each neighbourhood plan will be initiated in a sequential manner. It is anticipated that the first plan to be initiated will be the Strawberry Hill NCP, to support growth of the Scottsdale Bus Exchange TOA.

The Study does not amend existing land uses designations along the Corridor. Land use, transportation, parks, and community amenity considerations will be advanced with each subsequent NCP. Development that occurs prior to the establishment of NCPs are expected to align with the land uses and development parameters established in the OCP.

## Community Amenity Contributions

The Study Area falls within both the Whalley and Newton communities with respect to existing Community Amenity Contribution (“CAC”) considerations. These areas carry significantly different Capital Project CAC rates as established in Schedule G of *Surrey Zoning By-law, 1993, No. 12000* (“Zoning By-law”).

Adjustments to the community-based Capital Project CAC rates are proposed to create consistency along the Corridor. The Capital Project CAC for the Corridor is proposed at \$239.82 per square metre. This rate is a reduction from what is currently charged within the Whalley community, and an increase from the current rate charged within the Newton community. The proposed Capital Project CAC rate change is in keeping with market conditions for the Corridor. It is proposed that Schedule G of the Zoning By-law be amended to alter the existing rates of the Whalley and Newton communities.

The proposed amendments to Schedule G of the Zoning By-law are attached as Appendix "II".

## CONCLUSION

The Imagine Scott Road Visioning Study presents a framework that will guide growth along Scott Road and 72 Avenue. The Study has identified three future NCP areas in which more detailed planning work will occur, including the areas around the Scottsdale Bus Exchange TOA. Staff will report back to Council prior to the initiation of future NCPs along the Corridor.

*Original signed by*  
Don Luymes  
General Manager, Planning & Development

*Original signed by*  
Scott Neuman, P.Eng.  
General Manager, Engineering

*Original signed by*  
Laurie Cavan  
General Manager, Parks, Recreation & Culture

Appendix “I” Proposed Imagine Scott Road Visioning Study  
Appendix “II” Proposed Amendment to Surrey Zoning By-law, 1993, No. 12000  
Appendix “III” Corporate Report R071; 2022  
Appendix “IV” Supply and Demand Study for Scott Road R6 RapidBus Corridor  
Appendix “V” Imagine Scott Road Engagement Summary January 2023

# Imagine Scott Road **Visioning Study**

## Land Acknowledgment

Surrey is situated on the unceded and ancestral lands of the Coast Salish peoples, including the se'mya'me (Semiahmoo), q'icəy' (Katzie), and q'wɑ:n'łəh' (Kwantlen) land based First Nations.

It is on their lands that our communities now live, work, and play. They were the first peoples to reside in the area. They are and will continue to be active in shaping the future of the neighbourhood and the City of Surrey. We strive to forge new positive relations.

### Imagine Scott Road - Visioning Study

Planning and Development, Engineering,  
and Parks, Recreation and Culture

City of Surrey  
13450 104 Avenue  
Surrey, British Columbia V3T 1V8

Approved By Council \_\_\_\_\_.



**Community**  
Planning

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# Introduction

Imagine Scott Road (the "Study") is a preliminary framework for long-term land use planning along the Scott Road and 72 Avenue Corridor in Surrey (the "Corridor"). It was developed through community consultation with support from residents, stakeholders, external agencies and City staff.

TransLink, along with the City of Surrey and the City of Delta, began planning for a RapidBus route between Scott Road SkyTrain Station and Newton Town Centre in 2020. The R6 RapidBus began operating in January 2024. The R6 RapidBus has increased development pressures and supports the need to comprehensively plan for growth along the Corridor. Imagine Scott Road is the first step in comprehensive planning for the Corridor. The Study establishes a vision, planning principles, and overall framework that will guide long term transit-oriented growth along the Corridor.

The vision, themes and principles contained in this document will be used to guide the preparation of future secondary plans and foster new development within the Scott Road Corridor.

## 1.1 POLICY CONTEXT

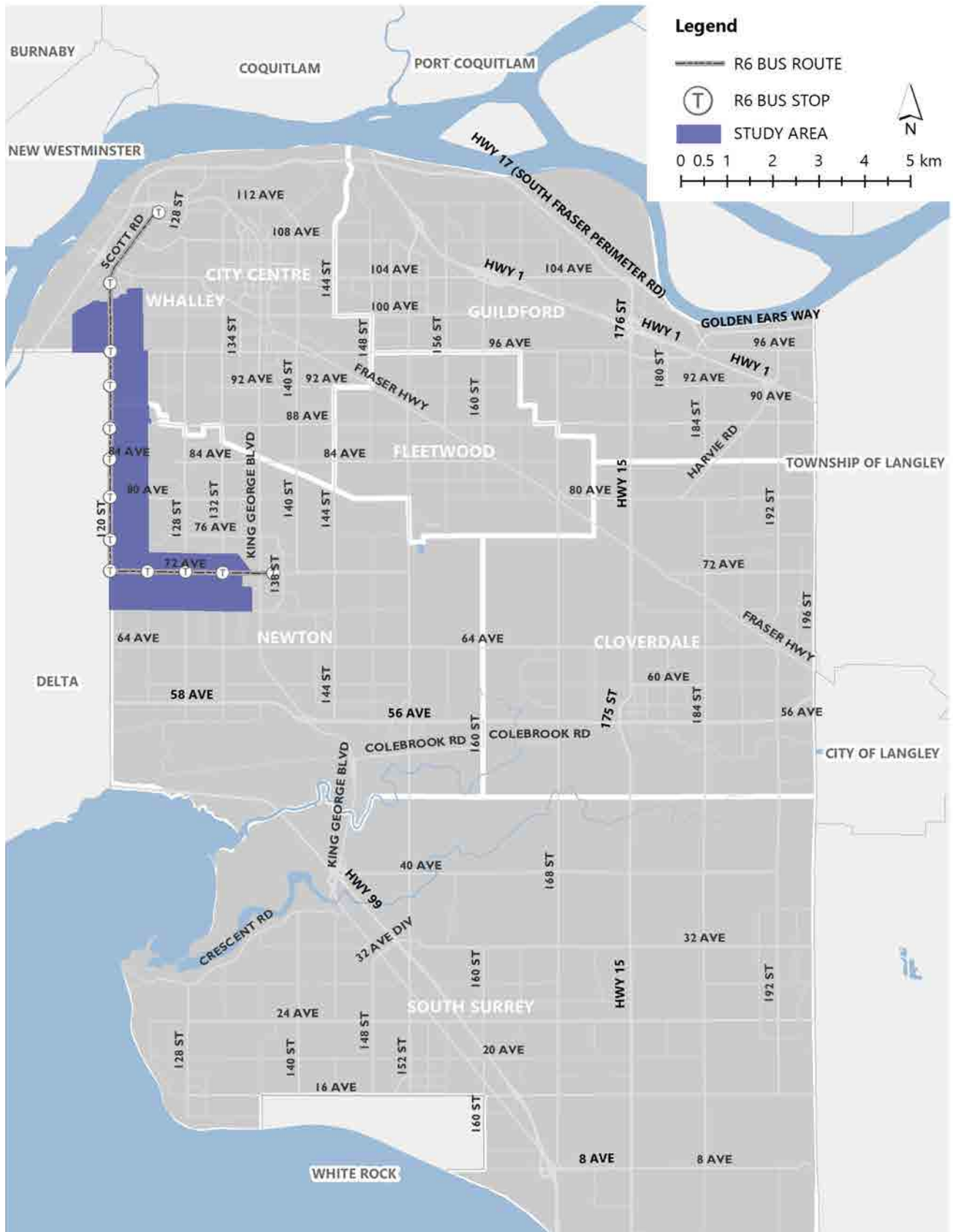
Planning and development in Surrey is guided by social, environmental, and economic contexts. The Official Community Plan (OCP) and Sustainability Charter, along with the City's climate targets and plans, provide the policy framework for sustainable growth. Together these City policies implement broader direction from Metro Vancouver's Regional Growth Strategy (Metro 2050). Other strategic plans, such as Surrey's Biodiversity Conservation Strategy (BCS); Climate Change Action Strategy (CCAS); Parks, Recreation, and Culture (PRC) Strategic Plan; and the Surrey Transportation Plan frame the provision of natural and built infrastructure and amenities.

The Study is informed by these higher order policies and acts as a framework document to provide high-level direction for the long-term redevelopment of the Corridor. It is a precursor to detailed secondary planning processes. It informs interim development under the general guidance and established policies of the OCP and outlines the vision and themes that will guide future secondary plan processes along the Corridor.





FIGURE 1: STUDY AREA IN SURREY CONTEXT



## 1.2 LEGISLATIVE CONTEXT

In November 2023, the Provincial government introduced a suite of legislative changes intended to increase the supply and affordability of housing. Bill 44 and Bill 47, in particular, will influence how the Study Area develops over time. Below is a summary of each housing bill and their impacts on the Study Area.

### **Bill 44 - Small-Scale Multi-Unit Housing**

Bill 44 is intended to increase the supply of missing middle housing. The Bill allows, as-of-right, up to three or four housing units on all existing lots zoned for single-family and duplex housing, depending on lot sizes. Lots within 400 metres of frequent bus stops, including the R6 RapidBus, may be developed with up to six housing units. Local Governments cannot restrict parking on lots within 400 metres of frequent bus stops.

Bill 44 will have the most influence on the Study Area. Affected areas include established single-family zoned lots that are designated Urban in the OCP.

### **Bill 47 – Transit Oriented Areas**

Bill 47 aims to encourage more housing around select transit nodes by requiring municipalities to designate Transit-Oriented Areas (“TOAs”), which are defined as the land within 800 metres of rapid transit stations (Skytrain) and within 400 metres of major bus exchanges. The Bill also prescribes minimum densities and building heights within TOAs.

Scottsdale Exchange is one of the major bus exchanges that the province designated as a TOA. Minimum allowable densities and heights within the Scottsdale Exchange TOA are as follows:



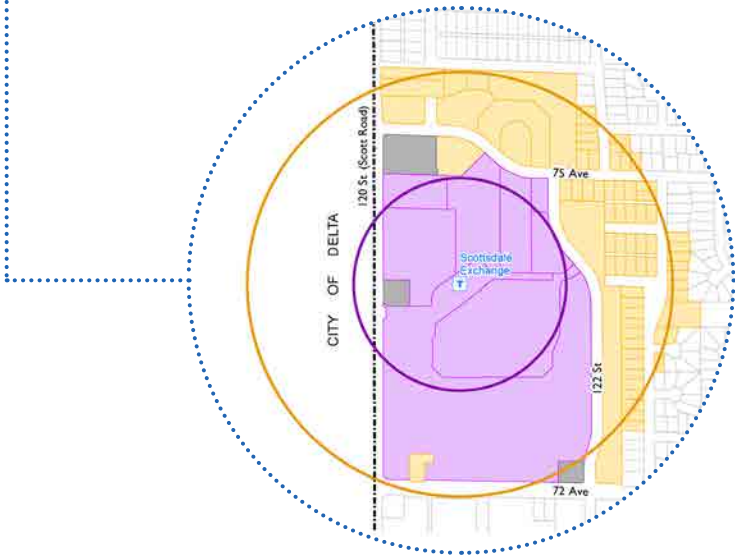
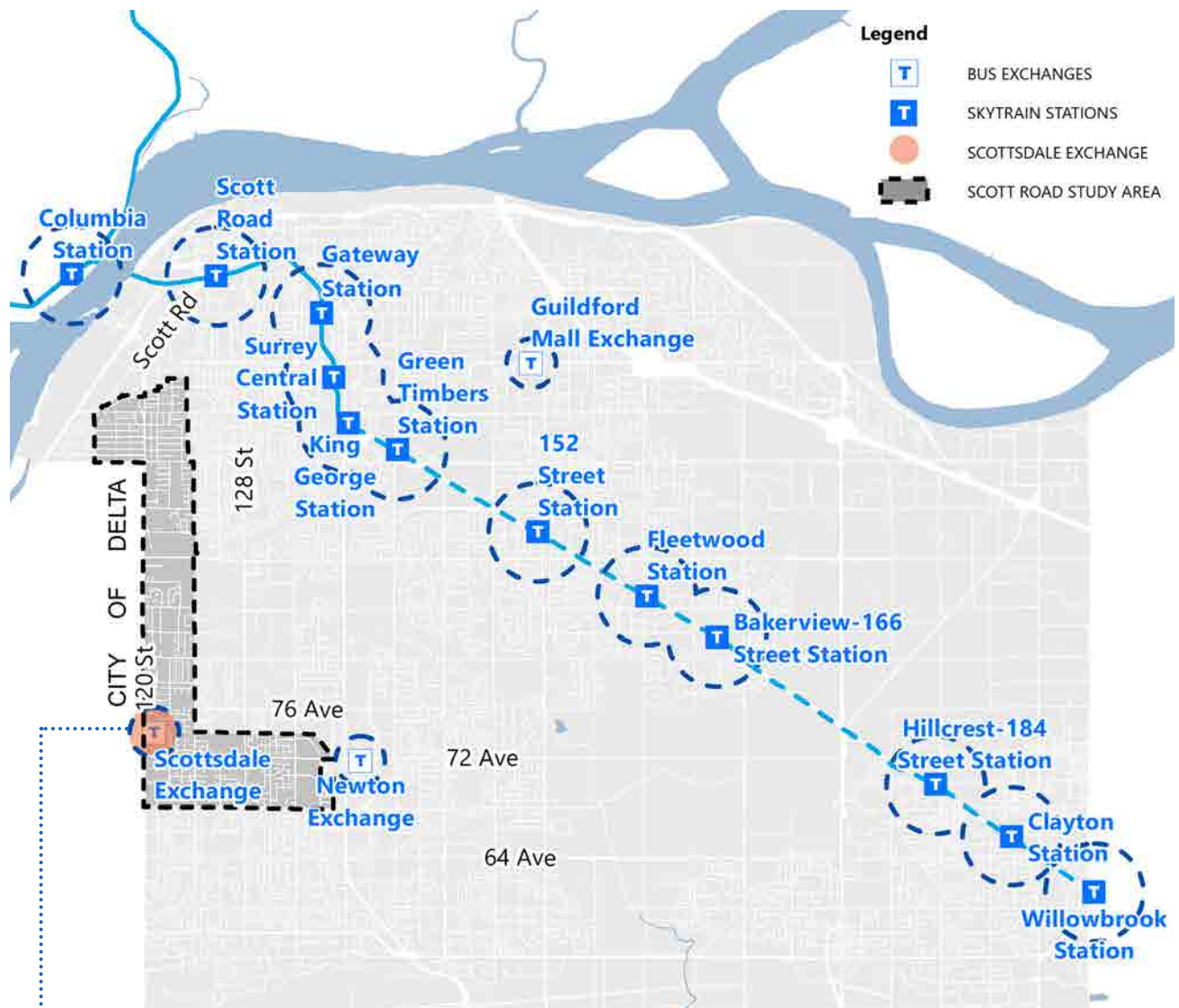
-  Within 200 metres of Scottsdale Exchange (Tier 4 TOA): 4.0 floor area ration (FAR) and 12 storeys in height.
-  Within 400 metres of Scottsdale Exchange (Tier 5 TOA): 3.0 FAR and eight storeys in heights.

FIGURE 2: SCOTTSDALE BUS EXCHANGE



Transit Oriented Area Tiers  
 — Tier 4 (within 200m)  
 — Tier 5 (within 201m-400m)

### 1.3 RAPID TRANSIT CONTEXT

The Scott Road Corridor is identified as a Major Transit Growth Corridor in Metro 2050 and as part of the Major Transit Network in the Regional Transportation Strategy (Transport 2050). Major Transit Growth Corridors are select areas where future Frequent Transit Development Areas (FTDAs) may be established, to support transit-oriented growth. Transport 2050: 10-Year Priorities identifies additional transportation investment in the Scott Road Corridor, with the long-term objective of upgrading the R6 RapidBus route into a fully traffic separated bus rapid transit line.

The R6 RapidBus was a significant upgrade to the regional and local transportation network along the Corridor and was a key deliverable of both Metro 2050 and Transport 2050. The future secondary land use planning outlined within this document will provide clear growth management policies to respond to the R6 RapidBus and provide appropriate transit-supportive densities within the Scott Road Corridor.

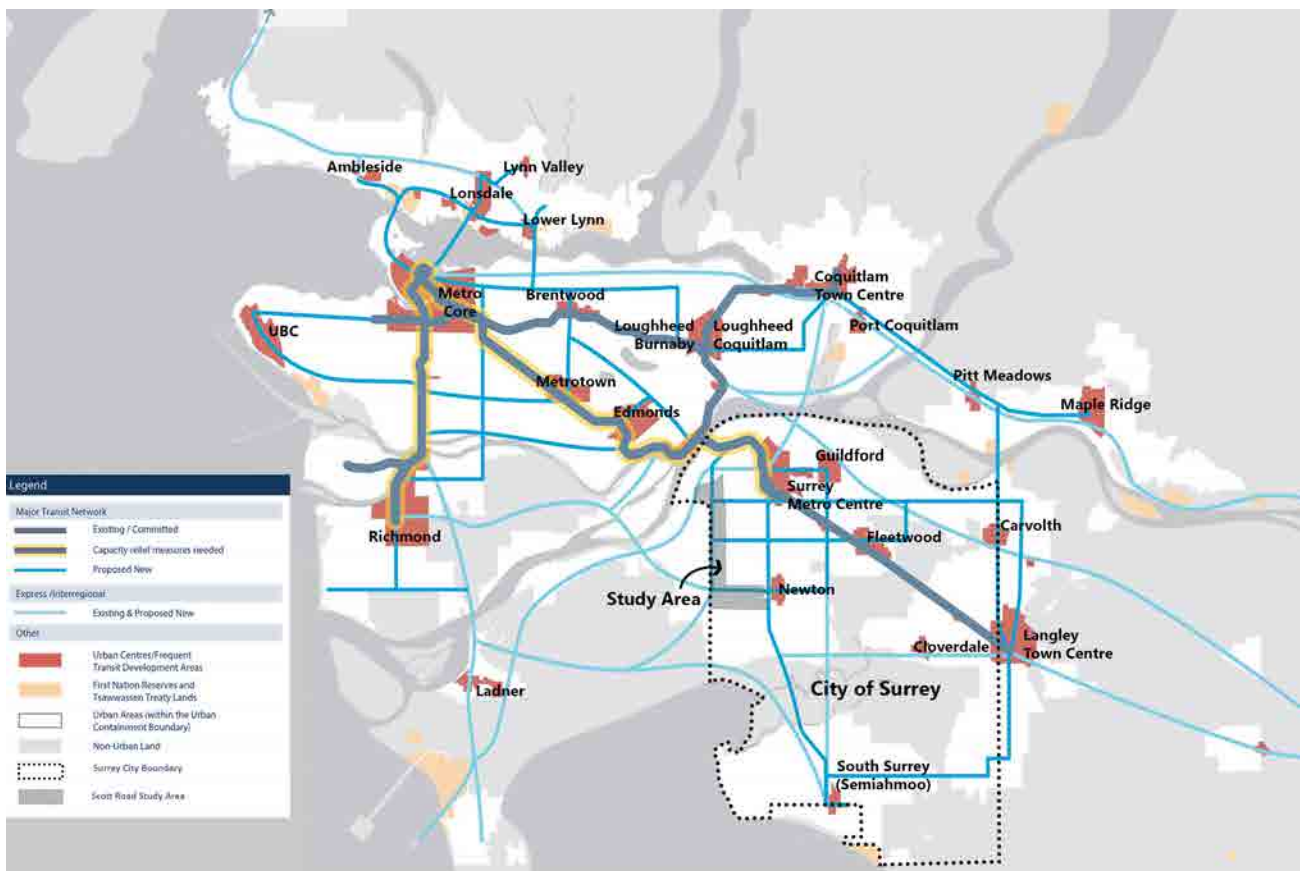


FIGURE 3: TRANSLINK'S TRANSPORT 2050 PLAN

Source: Transport 2050 Regional Transportation Strategy, TransLink

## 1.4 PLAN PROCESS

In 2022 a planning process was initiated for the Scott Road Corridor with the goal of supporting the anticipated R6 RapidBus service and establishing a framework to guide long term growth within the corridor. The Study Area was established to include lands within 800 metres of the proposed R6 RapidBus route.

The planning process included a series of background studies, such as demographic research, and environmental and market studies, as well as a community and stakeholder engagement. A heritage study (ongoing at the time of this Study's approval) will also be used to inform future secondary planning processes.

Feedback received from the engagement campaign and the findings from the background studies supported the development of the Imagine Scott Road vision, as well as its supporting themes, actions and principles. These components form the planning framework intended to guide future secondary planning processes along the Corridor. The information received through the community engagement campaign, in addition to the background studies, were also used to establish the general boundaries of the future secondary plan areas.

The Imagine Scott Road Visioning Study is intended as the first step of a multi-step approach for detailed neighbourhood planning for the Scott Road Corridor.



IMAGE OF THE R6 RAPIDBUS AT SCOTT ROAD SKYTRAIN STATION

## ► Engagement

Public engagement started in October 2022. The engagement campaign provided a variety of opportunities for people to provide feedback including an online survey, a number of interactive features on the project web page, and a pop-up event at Kwantlen Polytechnic University (KPU). Approximately 817 residents were engaged in the Scott Road Study, including 561 participants in the survey.





Approximately,

# 817

### Engaged Residents

*\*An engaged resident is defined as an individual or group that has contributed to the project website, attended a pop-up event, connected through phone or email, completed the survey or attended a stakeholder meeting.*

#### Ways Residents Were Engaged:

-  **611** Website Interactions\*  
*\*survey, questions, mapping, "Big Ideas"*
-  **150** Kwantlen Polytechnic University Pop up Event Interactions
-  **50** Email and Phone Calls
-  **6** Stakeholder Meetings

Approximately,

# 29,767

### Informed Residents

*\*An informed resident is defined as an individual or group that has made at least one single visit to the project website, received a postcard, or engaged in the project through social media.*

#### Ways Residents Were Informed:

-  **16,651** Mail Out Postcards to Plan Area Residents
-  **3,400** Website Page Views
-  **9,716** Social Media Engagements\*  
*\*Clicks, reactions, comments and shares*

► **Key takeaways**

The following themes emerged when survey respondents were asked how they envision the Scott Road - 72 Avenue Corridor in the next 25 years (verbatim responses in quotations).



**Higher Density Mixed Use Buildings**

“High density, transit orientated mixed-use neighbourhood of condos and retail services”  
 “High density area with employment uses, restaurants at grade and residential towers”



**Vibrant Community**

“Vibrant and fast and fun”  
 “Vibrant and bustling”



**Parks, Greenery and Community Facilities**

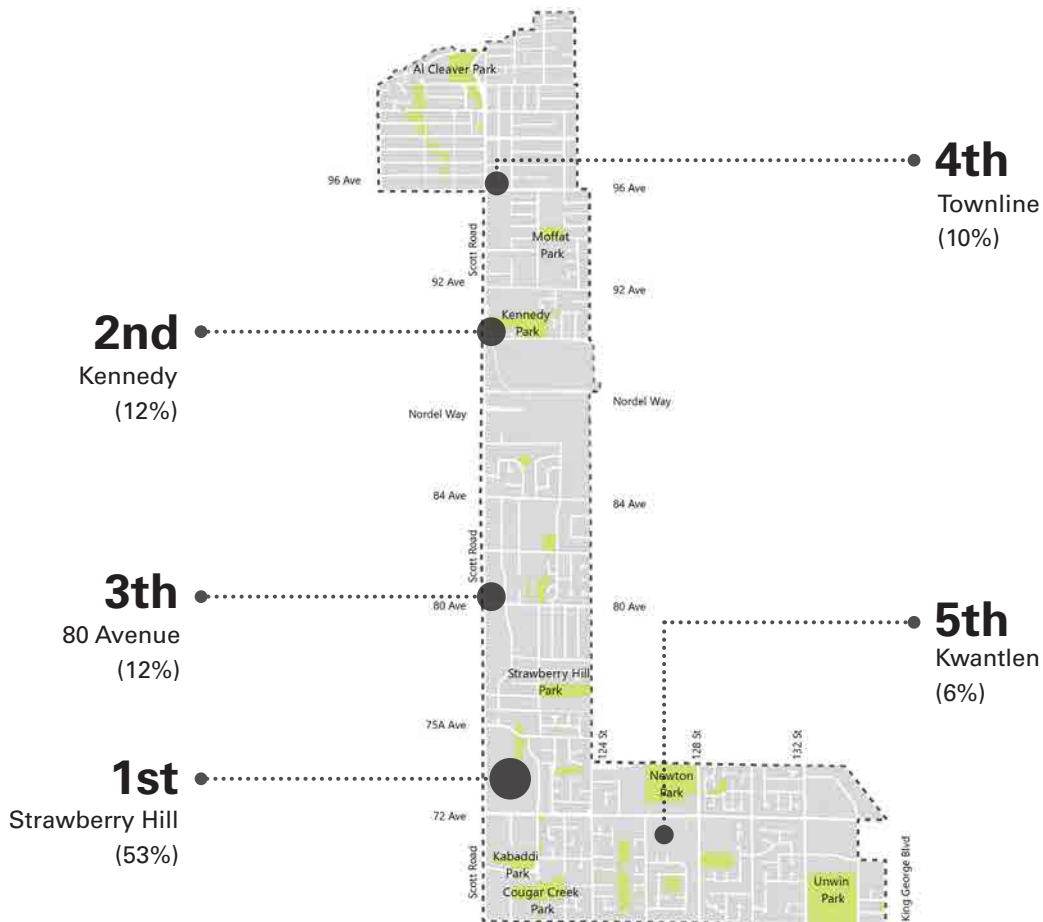
“Park and community area for local residents”  
 “More parks and community facilities”



**Transit Accessible**

“Lots of transit, few cars”  
 “More transit will help make the area more accessible”

We asked respondents to identify the heart of the Scott Road and 72 Avenue Corridor. Of those who participated in the survey, 53% identified Strawberry Hill as the heart of the Corridor.



# Background

## 2.1 STUDY AREA

The Imagine Scott Road Study Area encompasses over 844 hectares (2,085 acres) at the northeastern boundary of Surrey. The Study Area, as shown in Figure 4: Study Area, is centred on Scott Road and 72 Avenue. It is bordered by the City of Delta in the west, 102A Avenue in the north, 135 Street in the east, and 68 Avenue in the south. The Study Area was informed by the R6 RapidBus route and the guidelines for FTDA in Metro 2050.

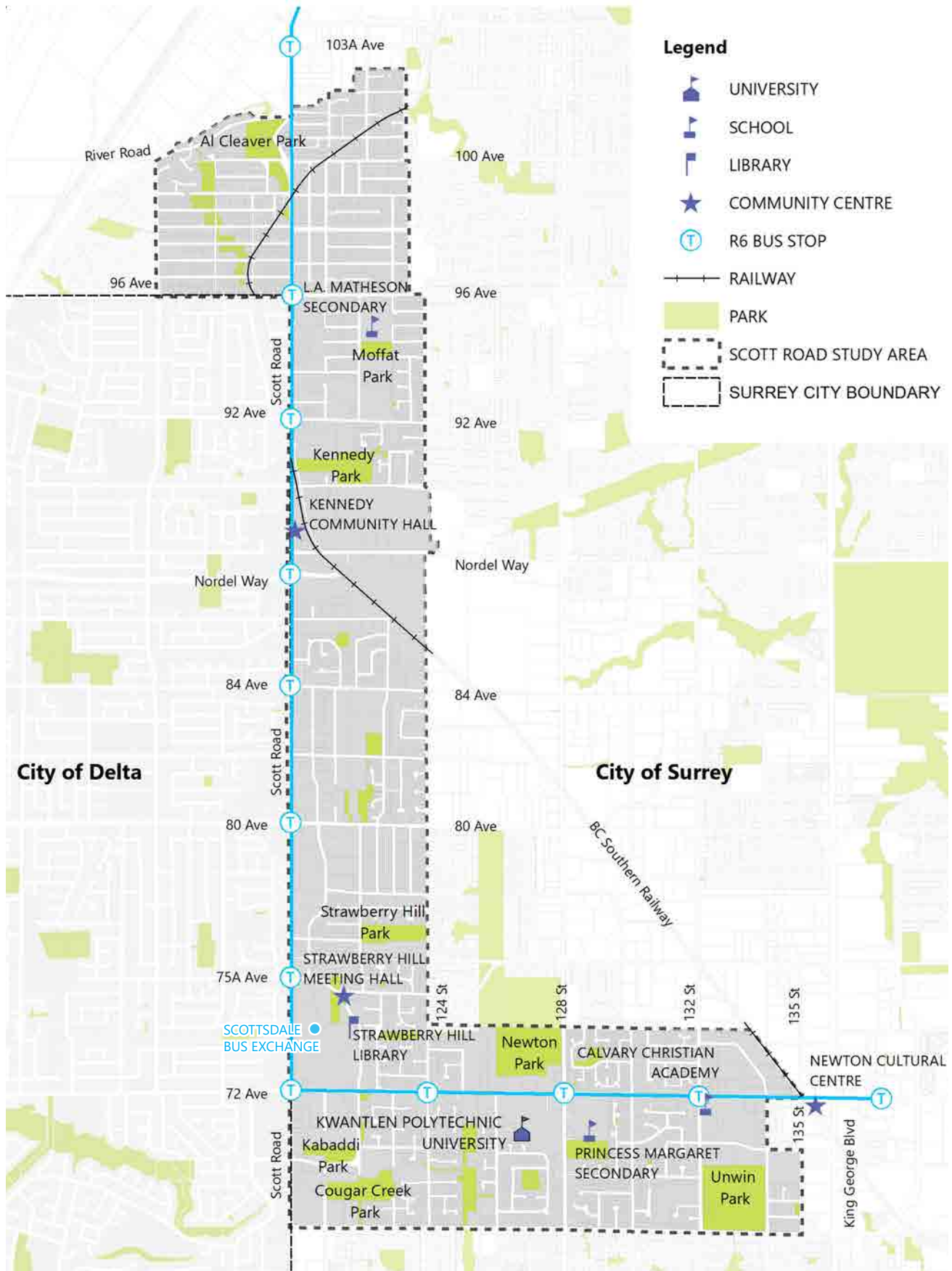
The Study Area is bookended by the South Westminster Neighbourhood Concept Plan (NCP) area to the north (approved in 2003) and the Newton Town Centre Plan to the southeast (approved in 2020). West of Scott Road is North Delta. North Delta is one of the City of Delta's three urban centres and is expected to see significant population growth and development. Delta's OCP permits heights between 6 and 32 storeys within 400 meters of Scott Road, with the tallest buildings centre around R6 RapidBus stops on Scott Road.



AERIAL IMAGE OF SCOTT ROAD LOOKING SOUTH



FIGURE 4: STUDY AREA

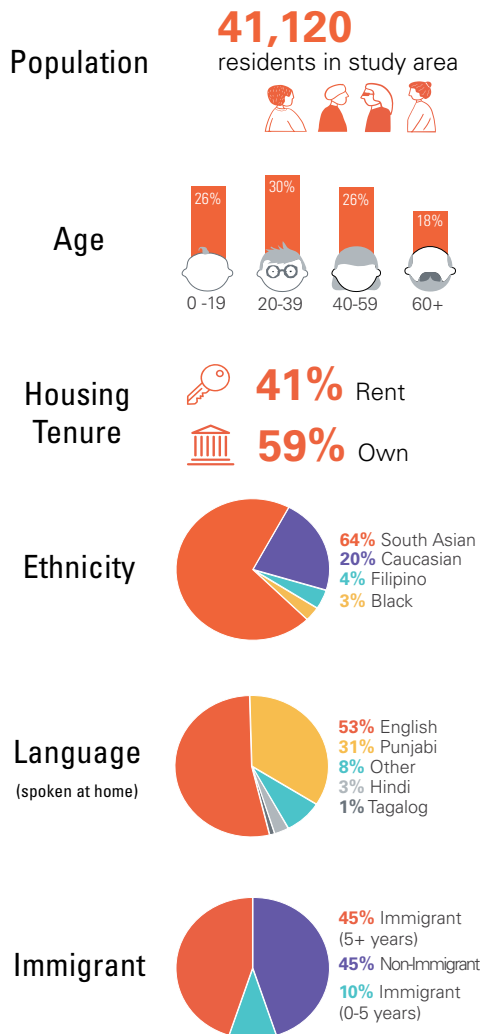


## 2.2 COMMUNITY PROFILE

Data was collected from 58 local Census 2021 dissemination areas to build a community demographic profile of the Study Area.

The Study Area is home to an estimated population of 41,120. The demographic profile of the area is highlighted by a notable proportion of people of South Asian descent and a high immigrant population. Of the people living in the Study area, 64% are of South Asian descent (compared to 33% citywide). As of 2016, 55% of the population are immigrants (compared to 43% citywide), 10% of which have immigrated within the past five years (compared to 7% citywide).

The population is skewed slightly younger than the Surrey average, with 56% of the population under 40 (compared to 52% citywide). The Study Area has a higher proportion of renters at 41% of the population compared to the rest of Surrey (29% citywide).



### South Asian Immigration to Canada

The first major South Asian migration to Canada occurred in 1897. Throughout the early twentieth century, South Asians were critical in the building of British Columbia, working as farmers, construction workers, millworkers, and bricklayers.

From 1951-1962, the Quota immigration system was in place. This system limited annual immigration to 150 Indian, 100 Pakistani, and 50 Ceylonese. When the Quota immigration system ended in 1962, almost all racial and national restrictions were removed. In 1967, the Points-Based Immigration System was introduced. The new system replaced the quota system and resulted in 12 times more immigration.

Throughout the later half of the twentieth century, South Asians became more represented in Canadian culture, activism, business, and government.

Today, Canada contains the world's eighth largest Indian diaspora. With just over 20% of the entire Indian Canadian community residing in the Lower Mainland, 33% of the City of Surrey is of South Asian descent.

## 2.3 EXISTING CONDITIONS

### ► Built form

The Study Area is predominantly characterized by car-oriented retail and office, and low-rise, urban residential uses. It is home to an estimated 41,120 residents housed within 12,211 existing dwellings. Most of the existing housing stock is in the form of single-detached dwellings (approximately 38%) and secondary suites (approximately 21%).

The Study Area also has a significant employment base supported by industrial and mixed employment lands within Kennedy at Nordel Way. There are an estimated 4,506 existing jobs in the Study Area, most of which are attributed to the industrial sector. Commercial and institutional employment make up the remaining jobs in the Study Area.

On the west side of Scott Road, within the City of Delta, new high-rise residential and high-rise mixed-use developments have been approved and constructed over the past decade. Within the City of Surrey, new development has been more limited, predominately taking the form of low-rise (3-4 storey) commercial buildings.



Commercial Activities Along Scott Road Corridor



New Office Building



Old Townhouses



Strip Mall Along Scott Road Corridor



New Townhouses

## ► Natural Assets

The Study Area is home to four major watercourses: Scott Creek, Delta Creek, Mahood Creek, and Cougar Creeks. Lands identified within the Biodiversity Conservation Strategy are limited to the southwest (Cougar Creek, and the BC Hydro corridor west of Kwantlen Polytechnic University) and northwest (Delta Creek, Scott Creek and the BC Southern Railway) of the Study Area. The Study Area has sparse tree canopy coverage, as reflected in the Urban Forest Management Study. Most of the Corridor's tree canopy is located within riparian areas and park space.

## ► Transportation

The Study Area features an auto-centric transportation network, with 30,000-35,000 average vehicles per day travelling the Corridor. Sidewalks along Scott Road are narrow in many places and there are no cycling facilities, limiting active transportation as a viable mode choice.

In addition to the high number of vehicle trips that occur in the Study Area, Scott Road is the busiest bus corridor in the South of Fraser area. In 2022 the 319 Scott Road/Newton Exchange bus route was the busiest bus route in Surrey and the fourth busiest bus route in Metro Vancouver, with over 18,000 daily weekday passenger boardings. Approximately 30% of trips along Scott Road are by public transit, yet buses along Scott Road only comprise 1 – 2% of all vehicle traffic.

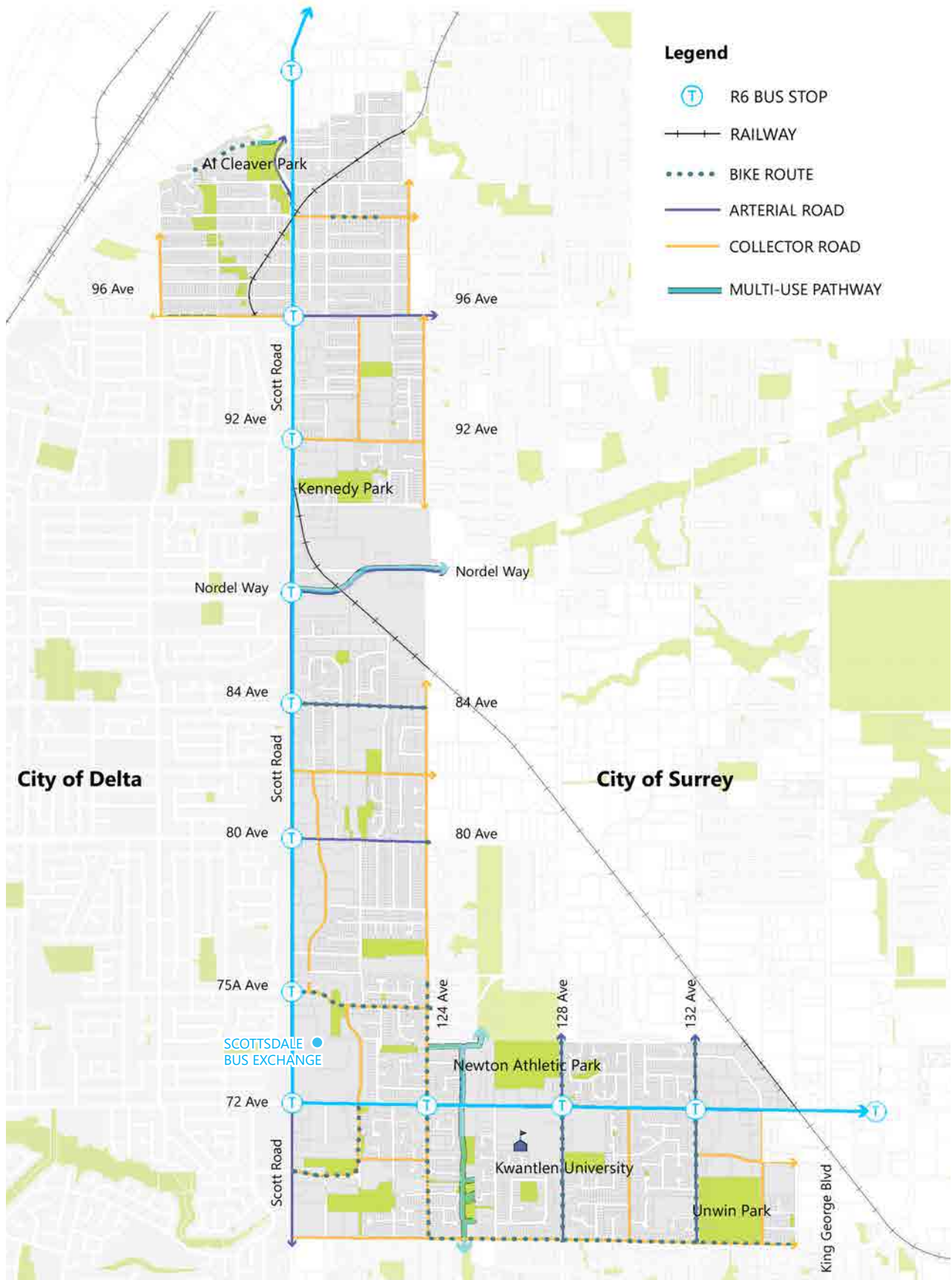
The Scottsdale Exchange is located within the Study Area, adjacent to the Strawberry Hill Shopping Centre. The Scottsdale Exchange is an important bus transfer point that provides access between Newton and neighbouring municipalities. The Scottsdale Exchange has been designated as a TOA in the 2023 provincial housing bills and provides access to 11 bus routes.

TransLink introduced the R6 RapidBus to provide additional service capacity along the corridor and to act as the primary bus route on the Corridor. Compared to Route 319, the R6 features high capacity articulated buses, more frequent service, and longer hours of operation. The R6 is also supported by transit priority measures to ensure buses are fast and reliable.



SCOTTSDALE EXCHANGE AT THE STRAWBERRY HILL SHOPPING CENTRE

FIGURE 5: EXISTING TRANSPORTATION NETWORK AND R6 ROUTE



# Planning Framework

This section outlines the objectives and principles for growth management, transportation, parks and open space and engineering utilities for the Study Area. It provides the framework that will guide future secondary planning processes.

## 3.1 VISION STATEMENT

The Vision Statement for the Imagine Scott Road Study Area is based on the themes that emerged through community and stakeholder consultation, supported by the City's growth and sustainability goals. The following vision statement describes the intended future state of the area:

"Scott Road is a diverse, well connected, and vibrant corridor serviced by reliable public transit. Surrounding neighbourhoods provide a range of housing options, a network of natural spaces, and high-quality public places. The area is celebrated for its cultural diversity, vibrant shops and restaurants, employment opportunities, and walkability."

## 3.2 THEMES AND ACTIONS

Building from the Vision, the Themes drive the strategic direction, policy framework, and implementation strategies that will shape growth. The following themes and actions will support transformation of the area over the next generation and provide a basis for future detailed land use planning.



### THEME 1

#### Resilient Green Spaces

##### Actions:

1. Protect, enhance, and expand parkland and natural spaces.
2. Enhance tree canopy coverage with street trees, on-site landscaping, and the retention and protection of established treed areas.
3. Ensure riparian setbacks, wetlands, and sensitive ecosystems are protected from development impacts in accordance with federal and provincial regulations and City policies.
4. Look for opportunities to restore and enhance ecosystems through redevelopment.



### THEME 2

#### Accessible Housing

##### Actions:

1. Designate land to facilitate the construction of a range of housing types.
2. Incentivize the construction of new rental housing.
3. Protect the existing purpose-built rental stock (as per the City of Surrey's Rental Housing Redevelopment Policy - Policy O-61).
4. Encourage family-oriented housing in multi-family residential developments.
5. Provide incentives and support for non-market housing development.



**THEME 3**  
**Mobility for All**

**Actions:**

1. Enhance the range of amenities within walking distance of residences.
2. Expand the cycling network and complete the sidewalk network to support the Surrey Transportation Plan target whereby 20% of all trips are made by walking or cycling.
3. Support transit investment and on-going service improvements through development of transit supportive uses, densities adjacent to RapidBus stops and the Scottsdale Bus Exchange.
4. Implement bus priority infrastructure to ensure transit services are fast and reliable.



**THEME 4**  
**Culture and Community**

**Actions:**

1. Explore funding community and cultural spaces through amenity contributions as part of future secondary plans.
2. Identify, protect, and enhance heritage features.
3. Enhance the area's sense of place through placemaking and public art.
4. Promote public safety and community cohesion.
5. Develop accessible and adaptable public plazas and community spaces that enhance social connection, well-being and support cultural diversity and expression.



**THEME 5**  
**Resilient Economy**

**Actions:**

1. Support thriving local businesses that advance a sense of community.
2. Increase the diversity of employment and business opportunities to meet the four strategic priorities outlined in the City of Surrey's Economic Strategy.
3. Encourage no net-loss of commercial floor area through redevelopment.
4. Protect existing industrial and mixed employment land supply.



**THEME 6**  
**Climate Action**

**Actions:**

1. Incentivize zero-carbon (non-polluting) buildings to reduce the operational greenhouse gas emissions associated with new development.
2. Encourage and explore incentivizing wood frame construction to lower the embodied carbon of new developments.
3. Improve access to electric vehicle charging in publicly accessible locations, workplaces, and multi-family buildings through City programs and partnerships.
4. Enhance shade trees and cooling features in parks and public spaces to help mitigate the urban heat island effect.
5. Implement green infrastructure (e.g. rain gardens, permeable pavement, street trees) on development sites and in the public realm for climate resilience, ecosystem and human health.

### 3.3 SECONDARY LAND USE PLANNING

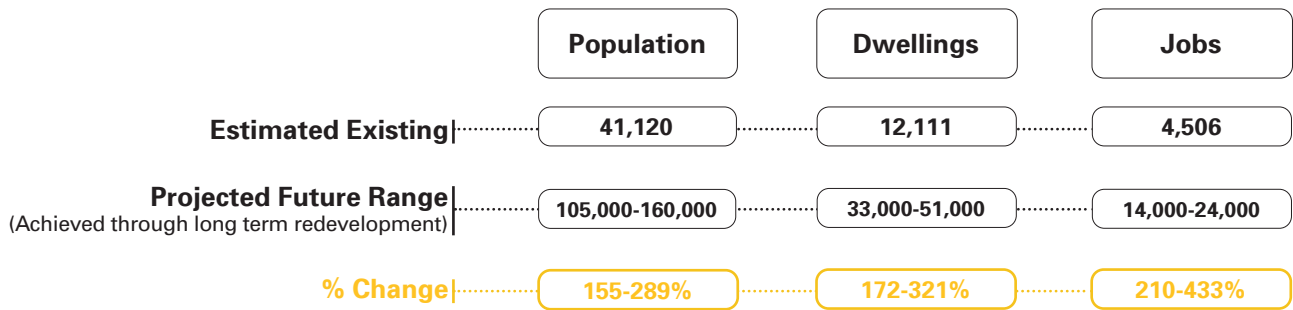
The Study Area is a long-term growth corridor. Growth will be phased over many decades and the area will redevelop as market conditions and policies evolve over time.

To support this growth, three areas have been identified for additional detailed secondary land use planning processes: **Townline, Kennedy, and Strawberry Hill**. New land use plans will identify appropriate densities, uses and building forms, as well as detailed transportation and community amenity concepts. Section 4.1 describes the secondary plans in further detail.

### 3.4 GROWTH PROJECTIONS

Based on preliminary forecasts, the Study Area has the potential to accommodate an estimated 60,000-140,000 new residents through the development and construction of 20,000-40,000 new dwelling units. This can be achieved predominately through increasing the availability and proportional housing mix of multi-family apartment-style units. Growth within this context would take many decades to occur and remains somewhat speculative in nature. Updated and more detailed growth forecasting will be completed with each future secondary plan.

Employment forecasting assumes the protection and intensification of existing industrial/mixed employment land supply, as well as the increase in mixed-use development. Focusing mixed-use redevelopment on underutilized commercial lands projects the greatest potential for job creation with a potential 3-7 times increase in commercial floor space. Through redevelopment, the Study Area has potential to accommodate between 10,000 and 20,000 new jobs.



*\*Growth projections will be refined throughout future secondary planning process.*



### 3.5 TRANSPORTATION

Further enhancements beyond the R6 RapidBus are required to produce a multi-modal transportation network and support the Study Area's transformation into vibrant urban neighbourhoods. Sidewalks will be upgraded through redevelopment and a network of protected cycling facilities will be built to deliver safe and sustainable transportation options for everyday trips. The future transportation network will provide opportunities to increase the tree canopy within the Study Area, which will mitigate the urban heat island effect and support the well-being of residents.

The following transportation principles guide and support the Study Area's transformation and provide a basis for future secondary planning. These principles are based on the Surrey Transportation Plan's foundational five pillars, consisting of:

- Grow the Transportation Network
- Prioritize Vision Zero Surrey
- Tackle the Climate Crisis
- Innovate through Technology and New Mobility
- Balance Equity

#### ► Transportation PRINCIPLES

1. Establish a robust, interconnected, multi-modal road network through the secondary planning processes.
2. Prioritize sustainable transportation facilities to support increased transportation choice.
3. Improve walkability and the pedestrian realm to provide safer mobility and support commercial uses.
4. Implement protected cycling infrastructure on parallel routes to Scott road and 72 Avenue, with connections to RapidBus stops and key destinations.

### 3.6 PARKS AND OPEN SPACES

Imagine Scott Road envisions improvements to the quality and quantity of parkland and open space throughout the Study Area. Parks and open spaces support a range of amenities and provide a platform for recreation, community and social uses. They also offer valuable ecosystem services, enhance biodiversity and support climate resiliency.

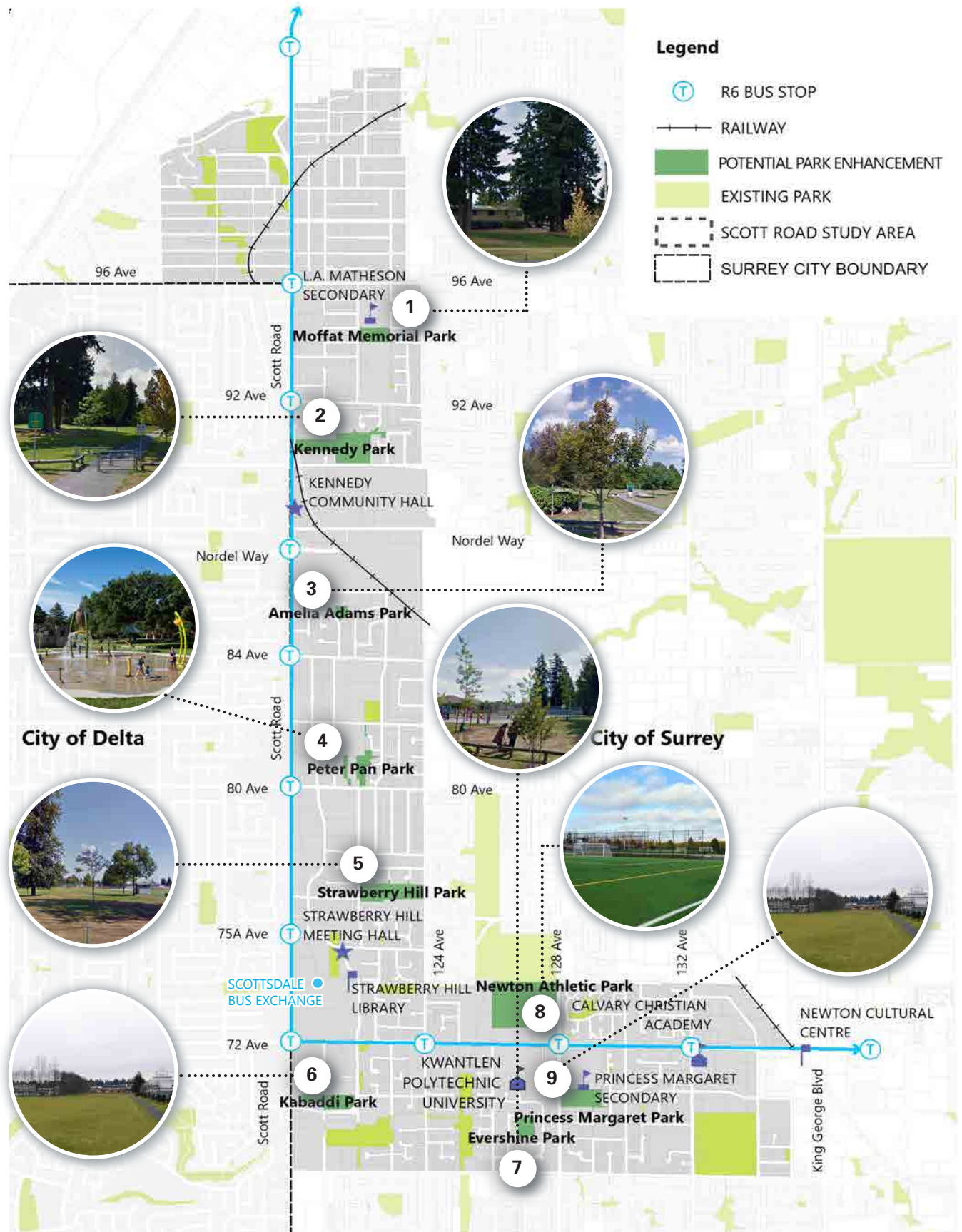
The Study Area is home to several community and neighbourhood parks that provide a range of amenities and natural areas for both local residents and the community at-large. Several existing parks within the Study Area will be considered for enhancements as part of future secondary planning. Figure 5 illustrates parks that will be considered for enhancements.

#### ► Parks and Open space Principles

The following parks planning principles outline an accessible and well-connected network of parks, natural areas and pathways that serve to support the health and wellbeing of residents. The following principles will be used to inform identification, funding and design of the parks and open space network of future secondary planning processes.

1. Parks are accessible and located within walking distance to all residents (10 minute walk).
2. Parks are generally located away from arterial streets to encourage pedestrian safety and to promote quieter spaces for recreation.
3. Park spaces accommodate a diversity of uses and offer a range of amenities.
4. Parks and Natural Areas are well connected through a network of pathways and corridors.
5. Tree canopy cover is protected, enhanced and expanded.
6. Parks and green spaces support biodiversity and climate resilience.
7. Green infrastructure, such as urban trees, rain gardens and native plant landscaping, is incorporated in public open spaces throughout the community, providing cooling and other ecosystem services.

FIGURE 6: EXISTING PARKS FOR ENHANCEMENT



## ► Future opportunities for Parks and Open space

The Study identifies the preliminary location of new neighbourhood and mini-parks in the Study Area. These preliminary park and open spaces will be refined and designated through future secondary land use planning. Secondary plans should ensure that parkland is provided within a 10-minute walkshed (500m) of all residents.

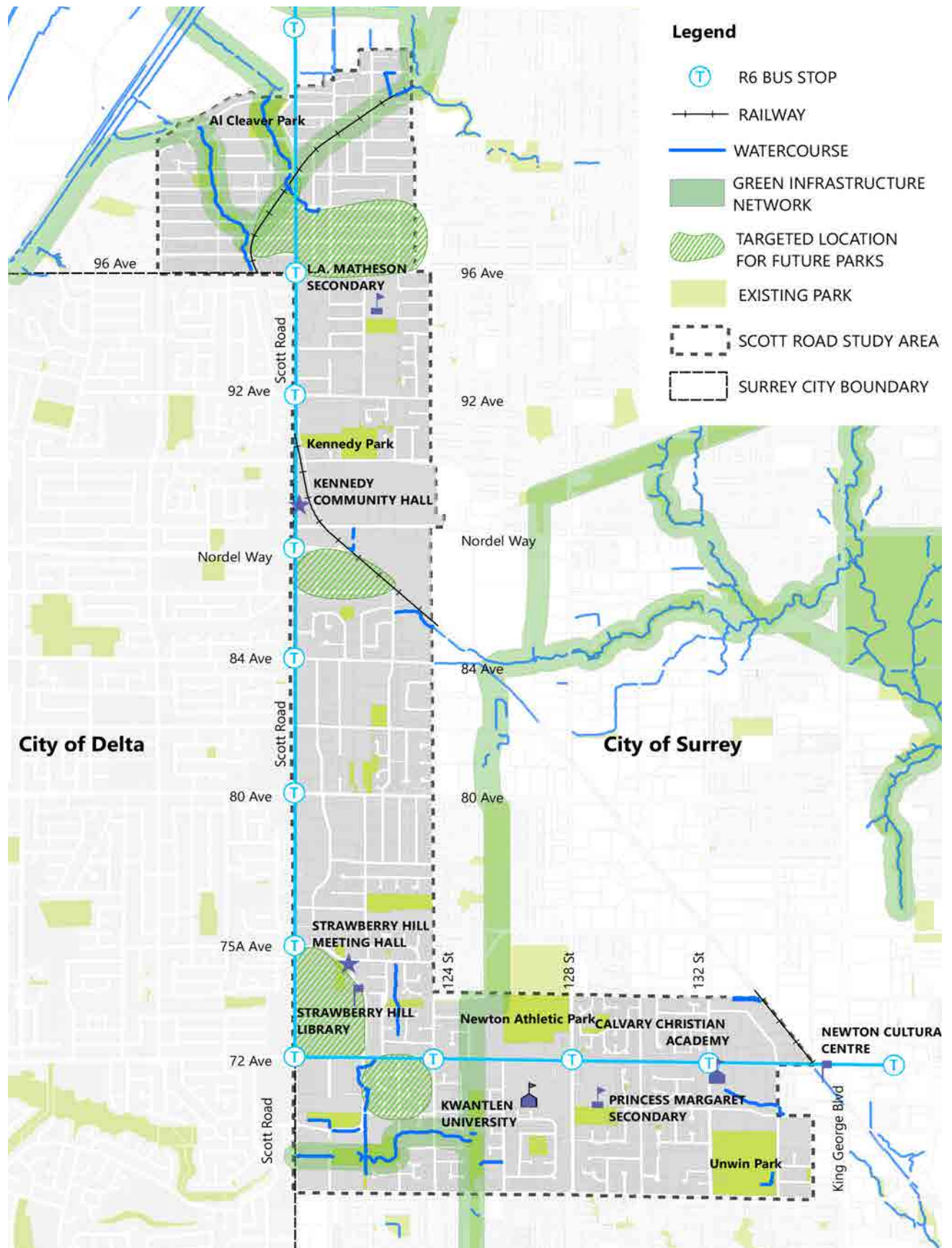
Neighbourhood parks serve local residents and feature amenities such as passive grass, playgrounds and natural areas. New neighbourhood parks of approximately 1.5- 2 acres in size should be prioritized in the following areas:

1. One in the area bounded by Scott Road, 96 Avenue, 123A Street, and 98 Avenue.
2. One in the area bounded by 124 Street, 72 Avenue, 70A Avenue, and the BC Hydro Corridor.

Mini-parks are intended for urban areas. They provide contemporary open space and realize the goal of providing parkland within walking distance of all residents. Mini-parks should be a minimum of 2,850 sq. meters (0.7 acres) in area.

1. One in the area west of Scott Road, north of 96 Avenue, and south of the BC Southern Railway within the future Townline Plan.
2. One in the area south of Nordel Way, east of 120 Street, and north of 86 Avenue within the future Kennedy Plan.
3. One within any subsequent redevelopment of the Strawberry Hill Shopping Centre as part of the future Strawberry Hill Plan.

FIGURE 7: PROPOSED LOCATIONS FOR FUTURE PARKS



## 3.7 UTILITIES

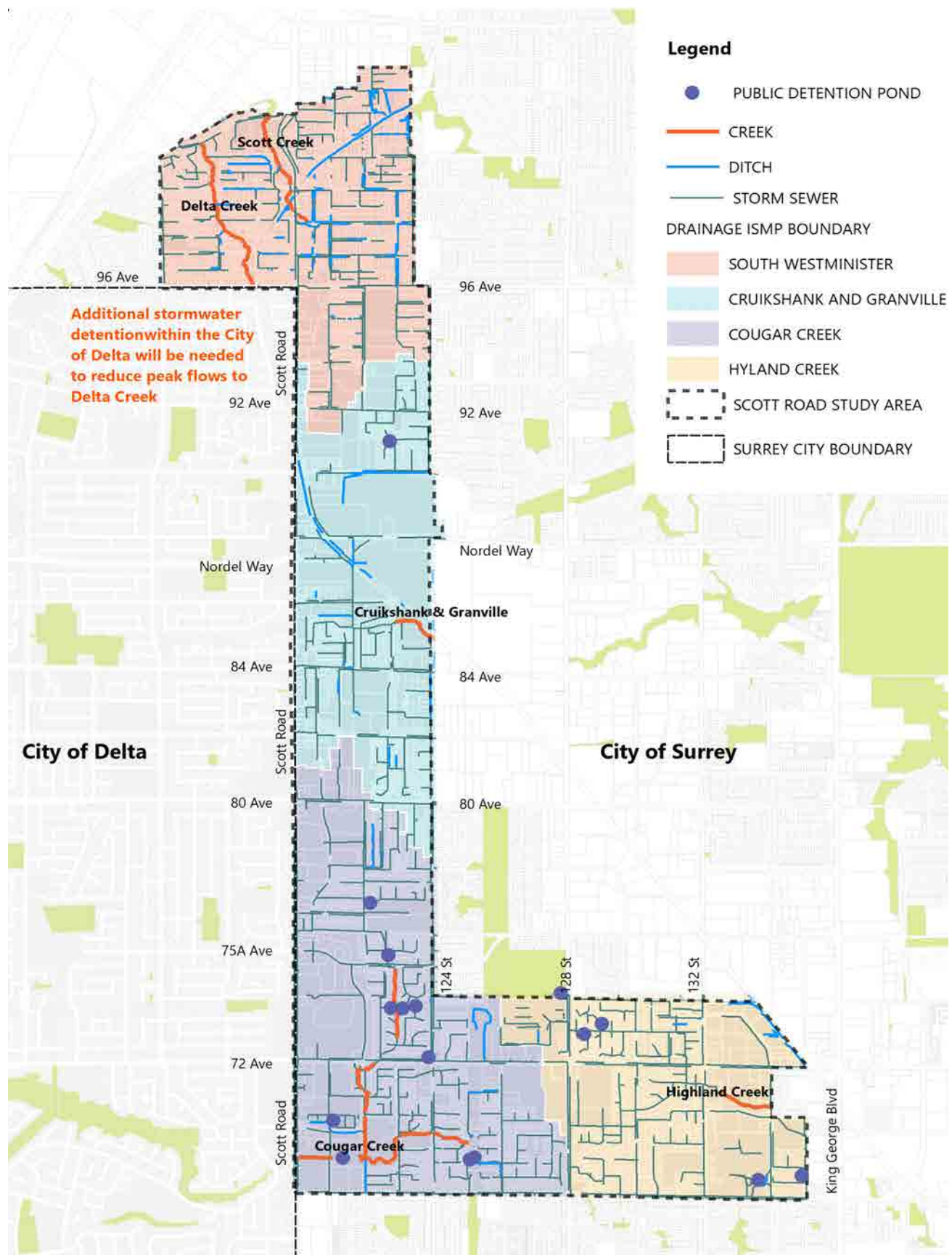
### ► Drainage

The Study Area is located within four distinct Integrated Stormwater Management Plan (ISMP) areas: South Westminster, Cruikshank and Grenville, Cougar Creek, and Hyland Creek. Existing drainage servicing is accomplished by an extensive network of storm sewers and open ditches that capture and convey flow to downstream watercourses. There are four major watercourses in the Study Area: Delta Creek, Scott Creek, Mahood Creek, and Cougar Creek. All four watercourses are identified as Class A in the Surrey's Zoning Bylaw.

Most of the existing storm sewers within the Study Area were installed in the 1970s and 1980s. This was a period when stormwater management focused on conveying rainwater off-site as quickly as possible. However, current practice emphasizes retaining rainwater onsite to better maintain the natural pre-development flow and quality of water in the receiving watercourse. The drainage infrastructure in this area is incomplete, undersized in some instances, and nearing the end of its design life, and may need to be replaced to accommodate future re-development of the Study Area.

In the northern portion of the Study Area, the City recently assessed high-flow diversion concepts to address ongoing erosion issues in Delta Creek (from 96 Avenue to River Road). A similar diversion system was constructed for Scott Creek in 2002. Approximately 85% of the area draining to Delta Creek is within the City of Delta. Aside from implementing a high-flow diversion system to divert peak flows away from Delta Creek, further stormwater detention will be required within the City of Delta to help stabilize the erosion issues along Delta Creek. The City has initiated discussions with the City of Delta on the erosion issues. In the southern portion of the Study Area, approximately 300ha of developed areas discharge into the City of Delta via the Cougar Creek watershed. To mitigate drainage impacts from existing development, the City constructed a series of detention ponds to control the release of runoff into Cougar Creek. To accommodate future redevelopment of the Study Area, it is recommended that tributary areas and performance of the existing detention ponds be assessed under future development conditions to determine achievable storage potential, release rates, water quality treatment, and potential pond modifications. Further coordination with the City of Delta will be required.

FIGURE 8: EXISTING DRAINAGE NETWORK



## ► Sanitary

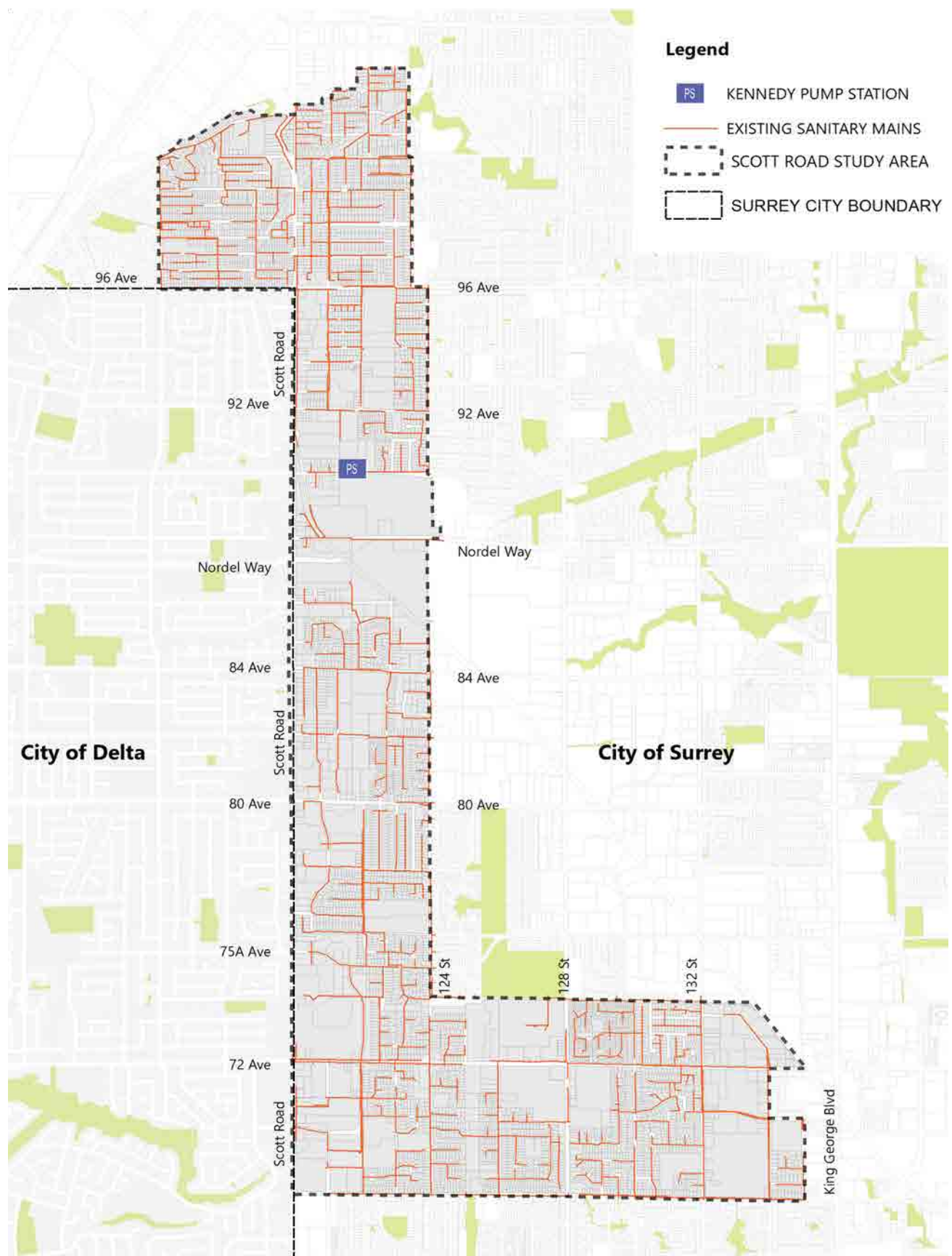
The Study Area generally splits into two main sanitary catchment areas. Areas north of 92nd Avenue are part of the North Surrey sewer catchment area and flow to the North Surrey Interceptor, while areas to the south of 92 Avenue flow to the South Surrey Interceptor.

The northern part of the Study Area, to be addressed through the future Townline Plan, typically has 200 mm and some 150 mm sanitary sewers. Local sewer upgrading to minimum pipe sizes will be required throughout this area, particularly where significant densification occurs. 121 Street and Scott Road north of the railway are key conveyance routes that will require capacity upgrades.

The central part of the Study Area, to be addressed through the future Kennedy Plan, generally flows towards the Bear Creek trunk sewer. The southernmost portion of the Study Area near 72 Avenue, to be addressed through the future Strawberry Hill Plan, flows west towards Delta or east into the Hyland Creek area. Some local sewer replacements are expected with more significant trunk sewer upgrading foreseen in the areas between 80 and 86 Avenues and near 72 Avenue. Additional capacity issues beyond the Study Area are foreseen.



FIGURE 9: EXISTING SANITARY NETWORK



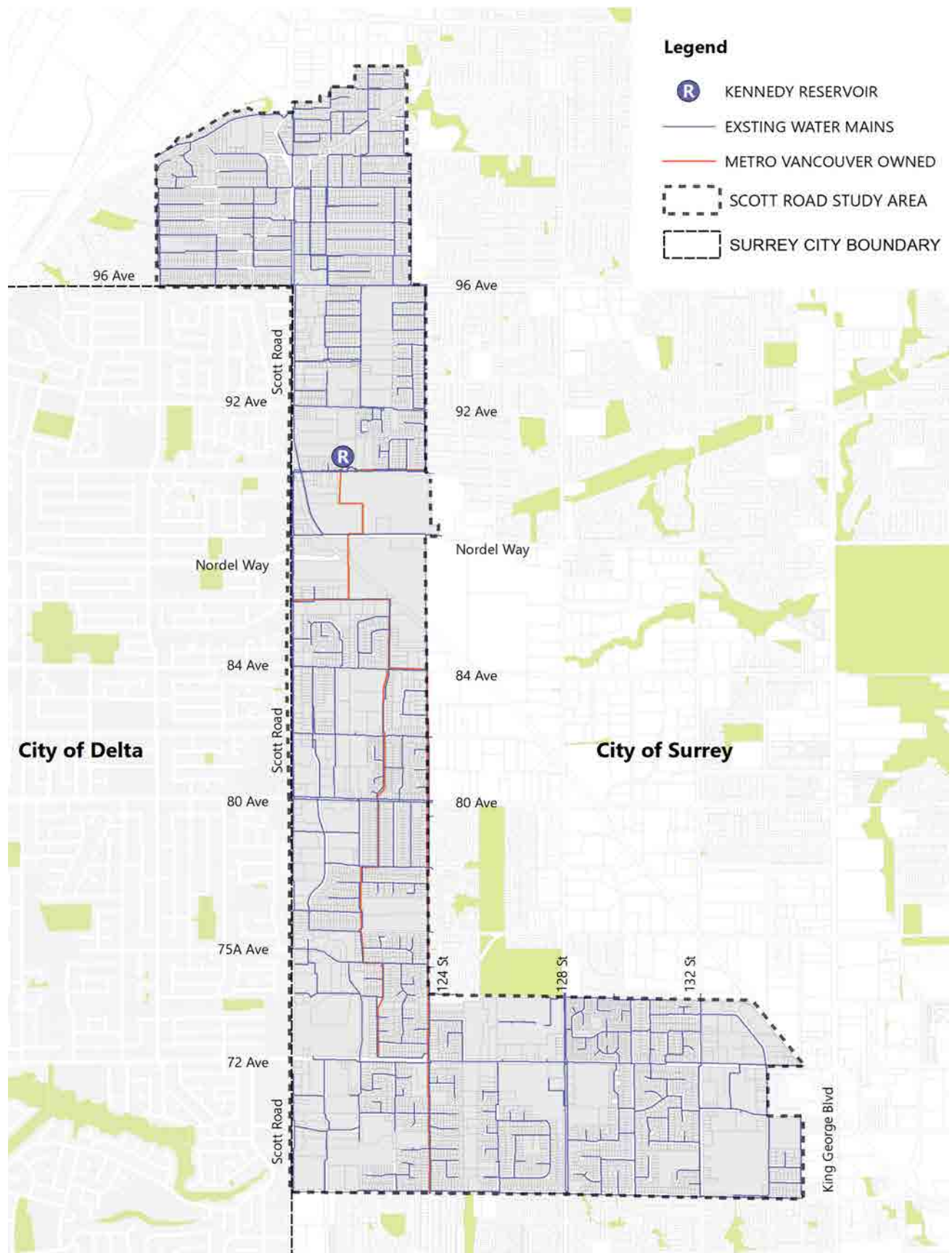
## ► Water

The majority of the Study Area is within the 135m Kennedy-Newton pressure zone, which is supplied by Kennedy and Newton Pump Stations. Properties within the Study Area are currently serviced by a combination of local and feeder mains ranging from 100mm to 1050mm.

Detailed assessments of the water system will be performed as part of the secondary planning process to determine watermain upgrades and additions required to supply adequate domestic and fire flows to future plan areas. Capacity upgrades to Kennedy and Newton Pump Stations may be required to support the additional demand caused by intensification and redevelopment. Requirements will be determined as part of the water system assessments.

Additionally, construction of the new Kennedy Newton (KNA) watermain (owned and operated by Metro Vancouver) is presently underway, with an anticipated completion date set for 2025. Completion of this watermain will provide additional bulk water supply capacity to the Study Area.

FIGURE 10: EXISTING WATER NETWORK



# Implementation

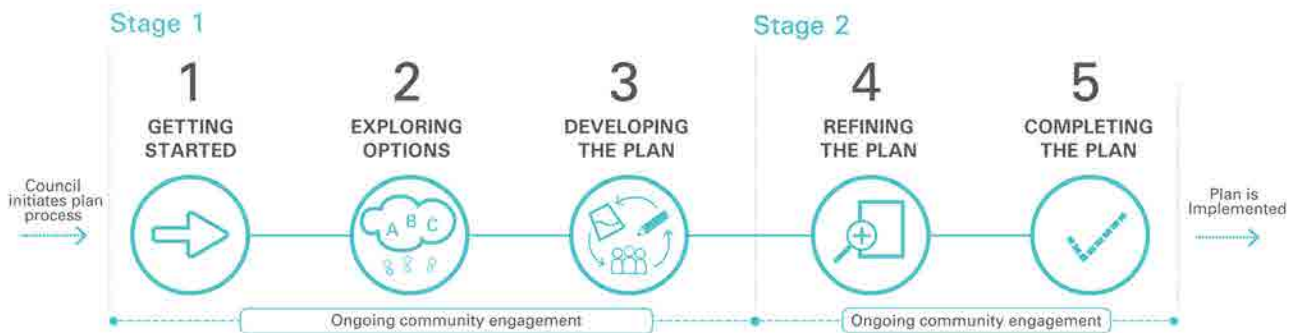
## 4.1. SECONDARY LAND USE PLANS

The Scott Road-72 Avenue Corridor is located on the unceded and ancestral lands of the Salish peoples, including the ƛiɕəy̓ (Katzie), ƛʷɑ:ɬʰəɬ (Kwantlen), and se'mya'me (Semiahmoo) Nations. The Imagine Scott Road Study recognizes the disruptive legacy of European settlement on the traditional territory and practices of these host First Nations. Through the ongoing process of Reconciliation, future secondary planning processes shall seek opportunities to work with host First Nations on developing a deeper understanding of their long-standing relationship to the land and respond to the impacts of colonialism.

Three future secondary plan areas have been identified within the Corridor (Figure 11). These secondary plan areas were identified through a review of existing land uses and densities, including ongoing development applications and growth areas identified in the City of Delta's planning framework. The secondary plans will be guided by the vision statement, themes, and principles discussed in Section 3. The three plan areas are described in detail below.

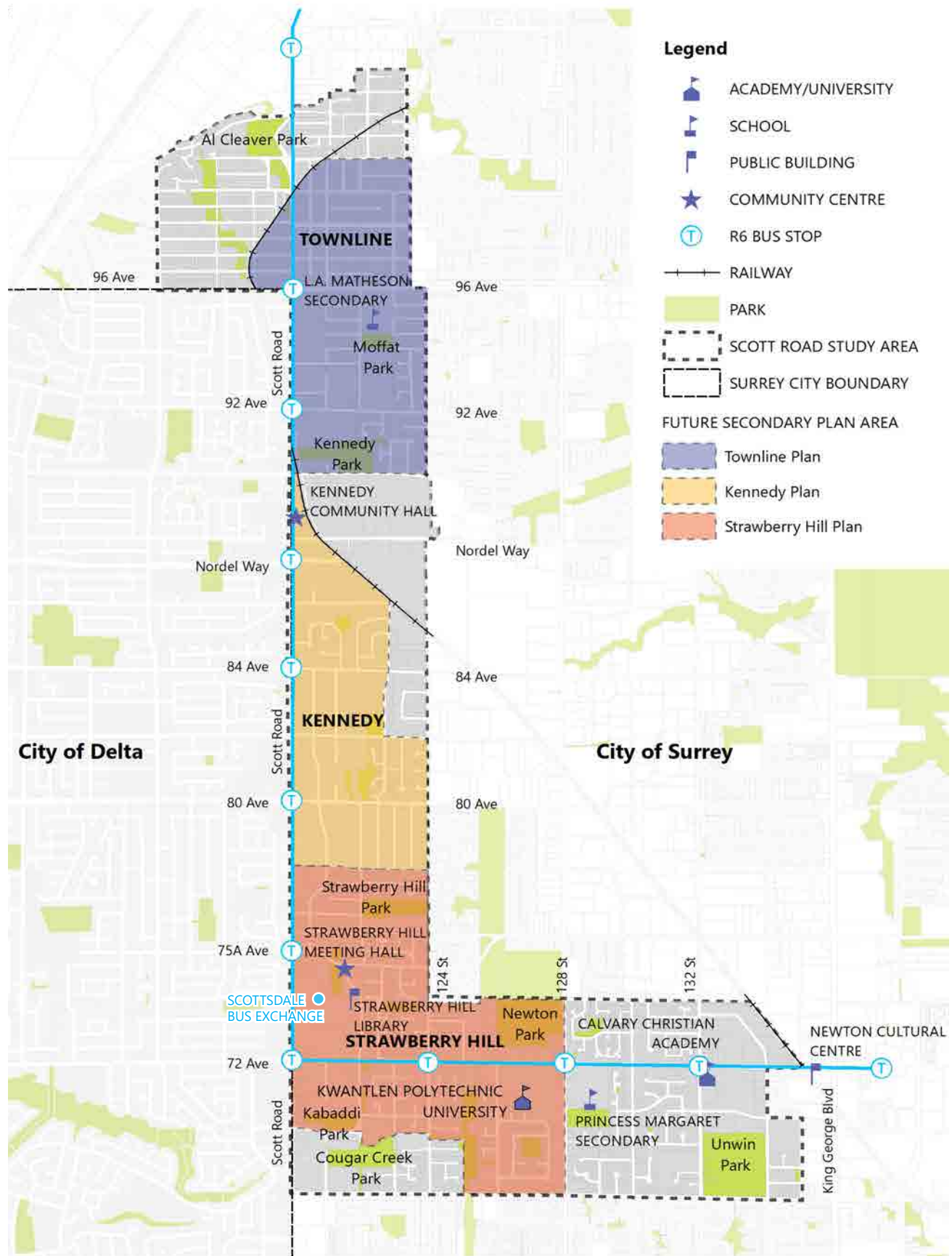
Future secondary land use planning processes will be supported by a combination of community engagement and technical planning and analysis to determine appropriate densities, uses and buildings forms. They will also include detailed strategies for transportation, parks and open spaces, heritage and culture, utilities, and urban design, including all relevant financial and development implementation considerations.

In addition to this document, future secondary land use planning will be supported by a market study completed in Spring 2024. As a collaboration between Metro Vancouver and the Cities of Surrey and Delta, the market study examined the supply and demand for commercial and residential development along the Corridor, with consideration given to the R6 RapidBus and changes to the provincial housing framework. By examining model proformas and growth demands, the market study will inform the phasing of secondary planning and detailed land use designations, ensuring that future land use plans are market responsive.



PROCESS FOR FUTURE SECONDARY PLANS

FIGURE 11: SECONDARY LAND USE PLAN AREAS



## ► Townline Plan

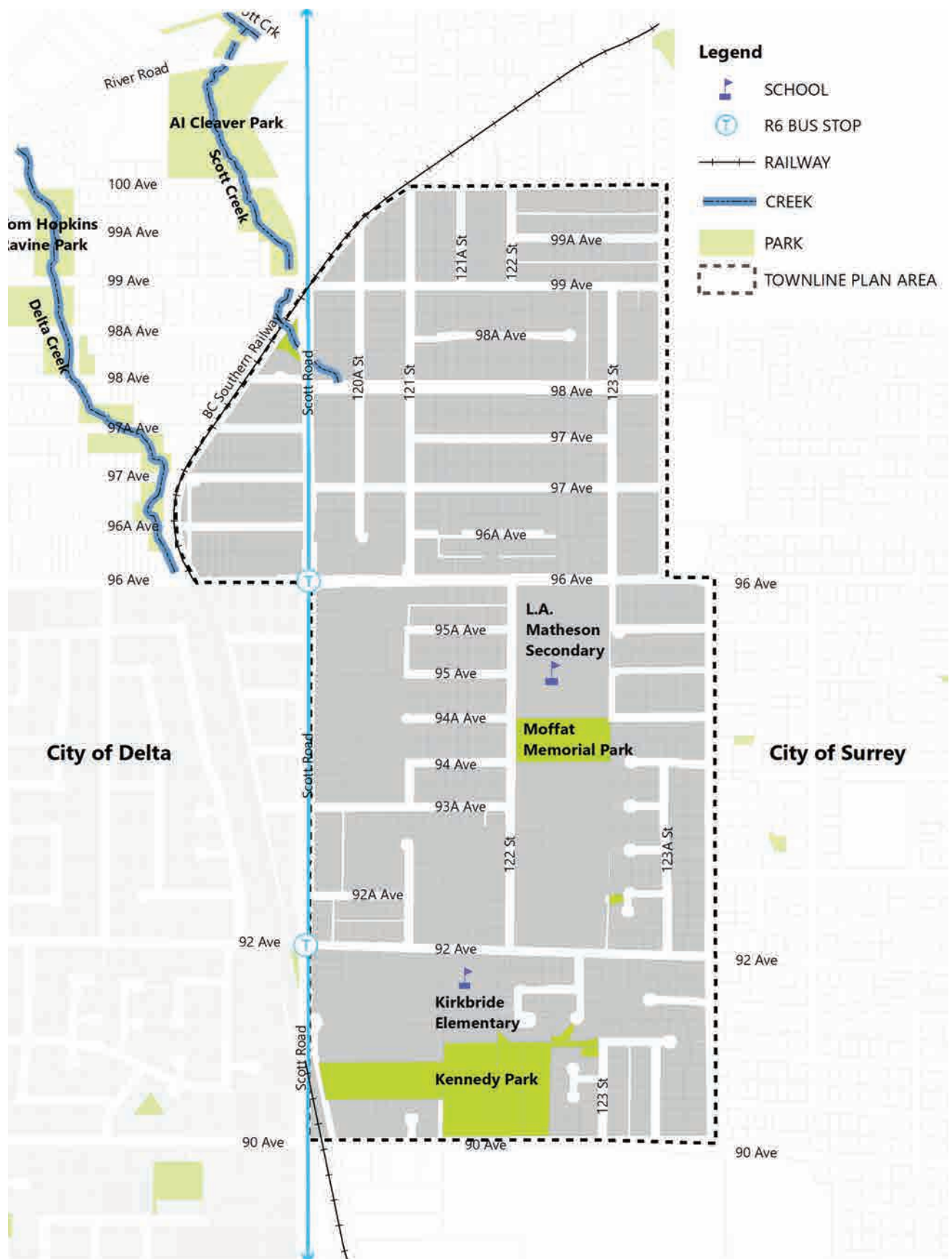
The future Townline Secondary Plan Area is bounded by the BC Southern Railway and Scott Road in the west, 100 Avenue in the north, 123A and 124 Street in the east, and 90 Avenue in the south.

Currently, low-rise commercial uses with large surface parking lots are the dominant land use along Scott Road within the Townline Plan Area. These areas are surrounded by single detached residential neighbourhoods. West of Scott Road, within the City of Delta, significant redevelopment has been envisioned. New high-rise developments are expected for the five-block triangular area within Delta between Scott Road and the BC Southern Railway corridor. The highest densities in this plan area are likely to be focused at the intersection of Scott Road and 96 Avenue and act as a northern gateway to the Corridor.

There are two RapidBus stops in the Townline Plan Area, located at 92 Avenue and 96 Avenue.



FIGURE 12: TOWNLINE SECONDARY PLAN AREA



## ► Kennedy Plan

The future Kennedy Secondary Plan Area will contain the lands between the Townline and Strawberry Hill Plan Areas. This area includes the lands between Scott Road and 123 Street/124 Street in the east, bounded by the BC Southern Railway (at approximately 90 Avenue) in the north and 78 Avenue in the south.

The Kennedy Plan Area contains the longest section of Scott Road and has more variety in existing built form, lot sizes and land uses compared to the other two preliminary plan areas. Notably, the only recent redevelopment to occur within the Study Area has occurred within the Kennedy Plan Area, largely in the form of three and four storey office development.

The area is flanked by industrial lands to the east at Nordel Way. These areas provide a significant regional employment and economic base. Existing industrial areas have been omitted from the preliminary Kennedy Plan area boundaries to main the integrity of the land's "Industrial" land use designation in the OCP and Metro 2050. These lands may be considered for inclusion in the Kennedy Plan Area to explore strategies for industrial land intensification.

The Delta Rise development located within the City of Delta, west of Scott Road at 80 Avenue, represents the first contemporary high-rise along the Scott Road Corridor. Additional high-density redevelopment is proposed at this location.

Future secondary planning will seek to complement the existing redevelopment in the City of Delta and get a deeper understanding on how to manage densities along this portion of Scott Road.

There are three RapidBus stops in the Kennedy Plan Area, located at 80 Avenue, 84 Avenue, and Nordel Way.





FIGURE 13: KENNEDY SECONDARY PLAN AREA



## ► Strawberry Hill Plan

The proposed Strawberry Hill Secondary Plan Area encompasses the area between Scott Road and 128 Street, bounded by 78 Avenue in the north, 70 Avenue, Cougar Creek, and 68 Avenue in the south. This area was identified by the residents as the heart of the Corridor and one of the most appropriate locations for future growth and redevelopment. This is emphasized by the designation of the Scottsdale Exchange as a TOA in the 2023 provincial housing bills.

Currently, the area is characterized by large format, multi-tenant, low-rise commercial buildings with large surface parking lots. Surrounding neighbourhoods consist of low-density multi-family (townhouse and apartment buildings) and single detached residential. Notable places in the the Strawberry Hill Plan Area include: Strawberry Hill Shopping Centre, Guru Nanak Sikh Gurdwara, Scottsdale Exchange, and Kwantlen Polytechnic University (KPU).

The existing large commercial sites between 75A Avenue and 72 Avenue provides significant long-term redevelopment opportunities. Future secondary planning will seek a deeper understanding of these sites' operational constraints, lease obligations, and long-term redevelopment feasibility. Within these areas, community/cultural amenities, public gathering spaces, and transportation and infrastructure upgrades are expected as part of redevelopment.

Kwantlen Polytechnic University is a significant landowner and education/employment hub within the future Strawberry Hill Plan Area. Future planning will seek to further the objectives of the KPU2050 Campus Master Plan by working closely with KPU stakeholders and the adjacent community.

There are four RapidBus stops located in the Strawberry Hill Plan Area, located on 120 Street (at 72 Avenue and 75 Avenue) and on 72 Avenue (at 124 Street and 128 Street).

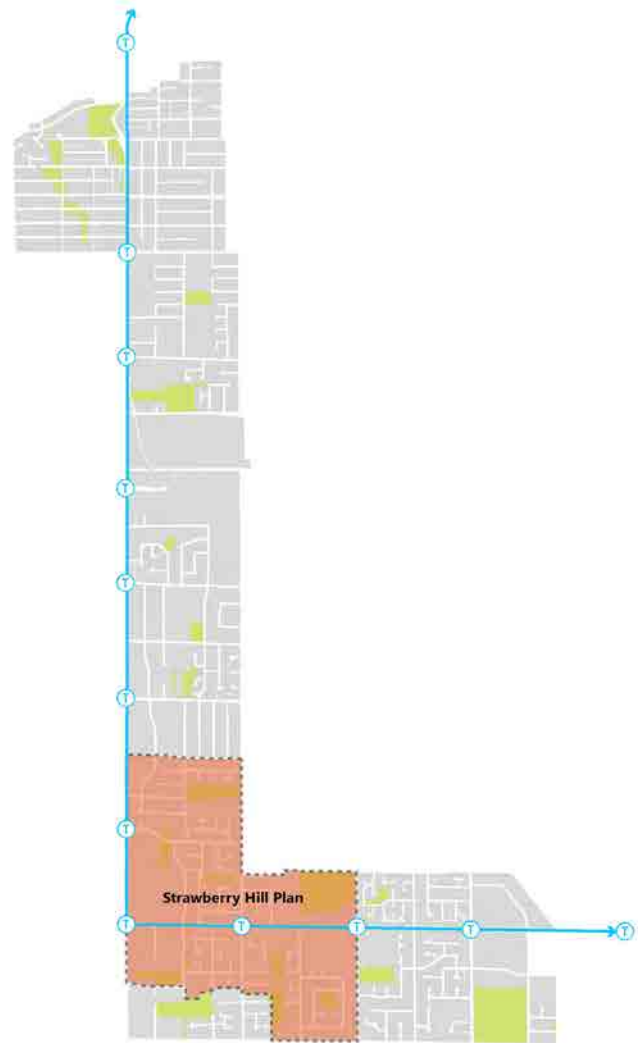
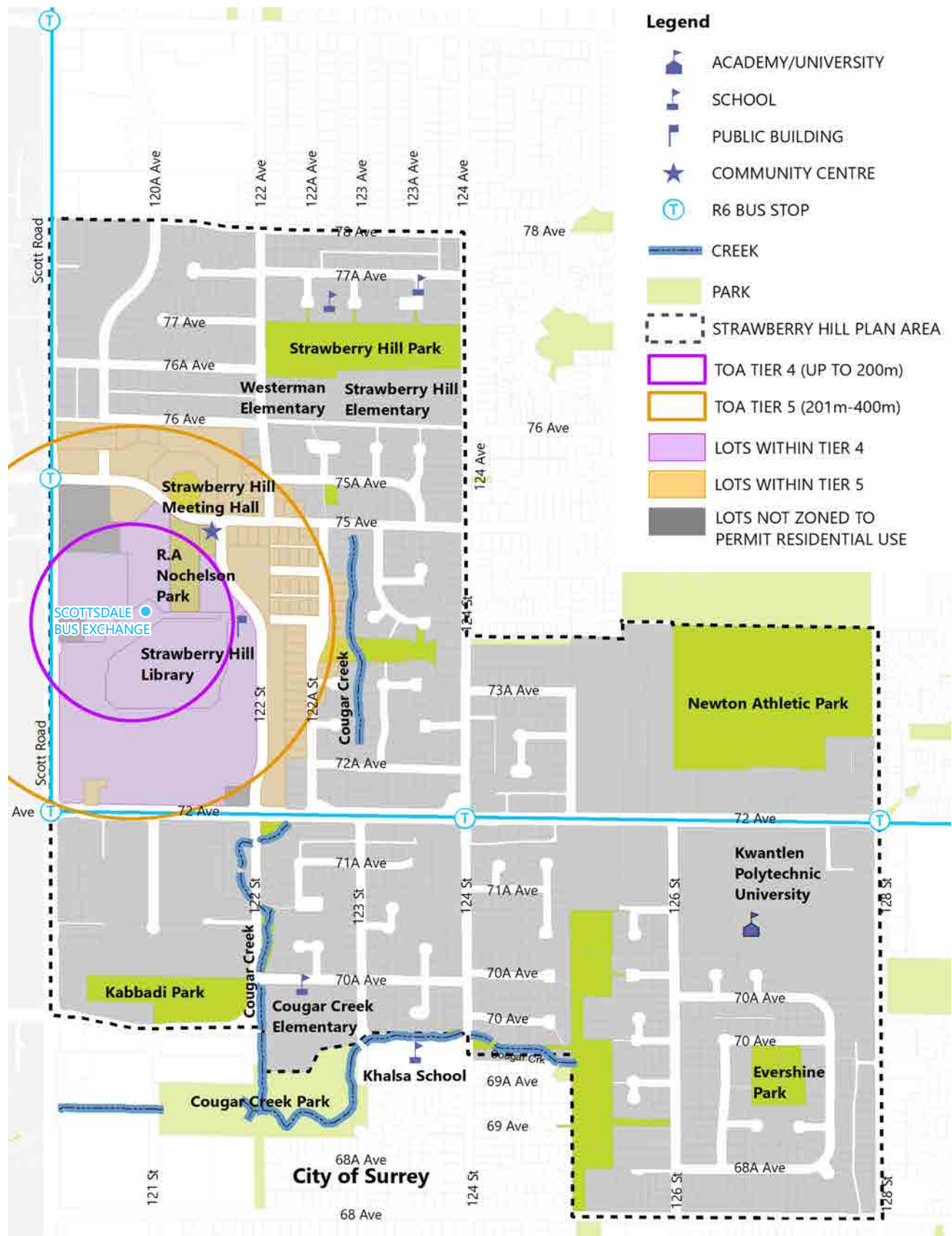


FIGURE 14: STRAWBERRY HILL SECONDARY PLAN AREA



## 4.2. DEVELOPMENT EXPECTATIONS

Secondary planning processes along the Corridor will be considered for initiation at the discretion of Surrey Council. To meet local growth demand, development within the Study Area may occur in advance of future secondary land use plans.

Development within the Study Area that occurs in advance of future secondary plans shall proceed under the guidance of the OCP. Generally, applications for rezoning within the Corridor that require an OCP amendment will not be considered while secondary planning is pending or underway. OCP land use designations found within the Study Area are as follows:

The “Commercial” designation is intended to support major commercial developments, including neighbourhood-serving and city-serving retail and office developments. Within the Study Area, the majority of Commercial designated properties are located along Scott Road. Multi-unit residential uses may also be permitted in mixed-use development provided that ground-level uses, with noted exceptions, are exclusively commercial.

\*Detailed requirements including Floor Area Ratio (FAR) and bonus density provisions are outlined in the OCP.

The “Multiple Residential” designation is intended to support higher-density residential development including local, neighbourhood-serving commercial and community uses. Within the Study Area, the majority of Multiple Residential designated properties are located abutting the commercial core along Scott Road, abutting Newton Town Centre, and within residential areas along 72 Avenue.

\*Detailed requirements including FAR and bonus density provisions are outlined in the OCP.

The “Urban” designation is intended to support low and medium density residential neighbourhoods. Residential uses within this designation may include a range of forms such as detached and semi-detached houses as well as ground-oriented attached housing including townhouses and row houses.

\*Detailed requirements including Units per Hectare (UPH) and bonus density provisions are outlined in the OCP.

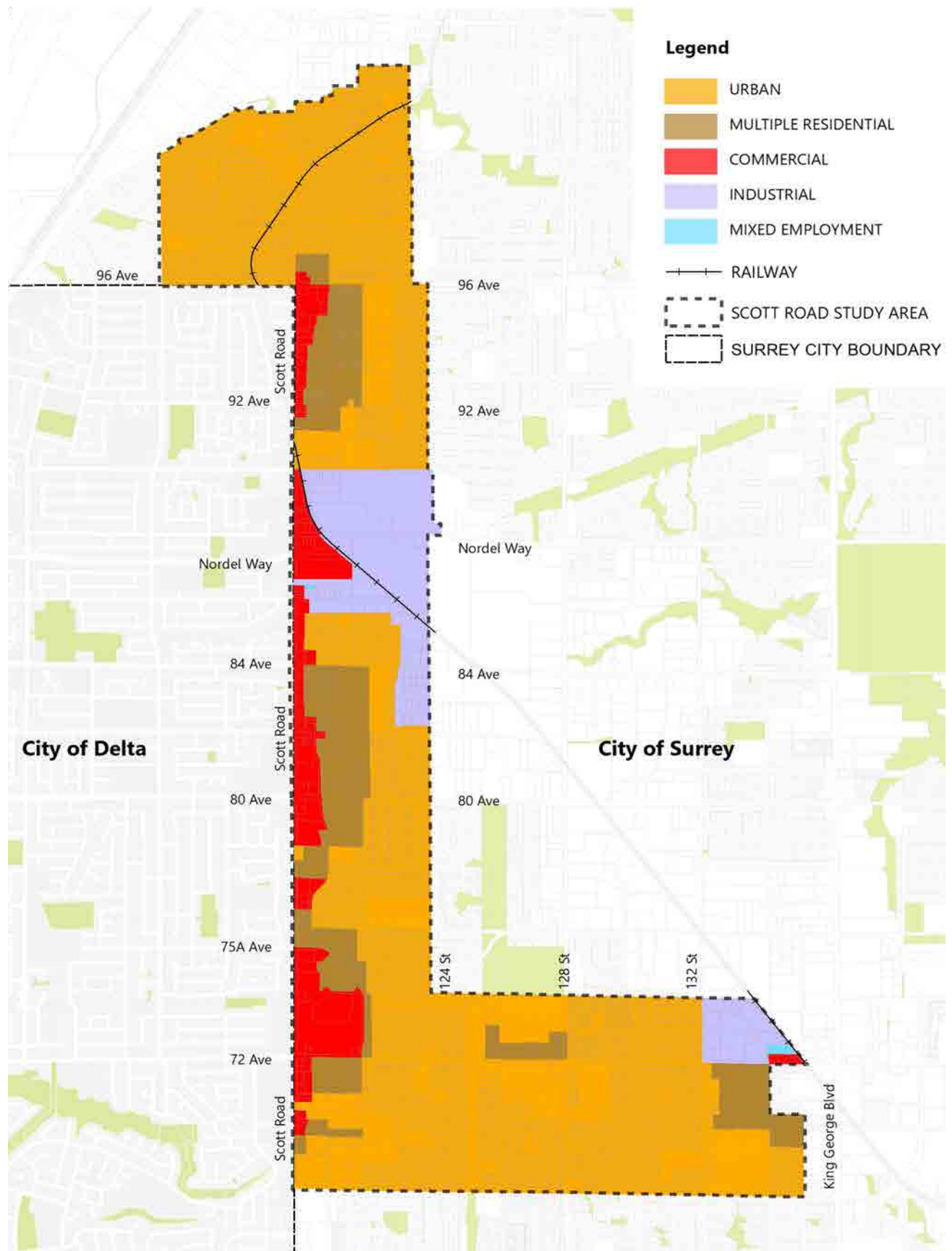
The “Mixed Employment” designation is intended to support a mix of industrial, commercial, business and office uses that are not suited for locations within Town Centres or commercial centres. Residential uses are not permitted in this land use classification except for accessory caretaker units.

\*Detailed requirements including FAR are outlined in the OCP.

The “Industrial” designation supports light and heavy industrial land uses, including manufacturing, warehouse, wholesale trade and equipment storage and repair.

\*Detailed requirements including FAR are outlined in the OCP.

FIGURE 15: OCP DESIGNATIONS



Interim development shall adhere to the following five policies. These interim policies will govern expectations for development advice (enquiries) and rezoning applications, until such a time that the future Scott Road Corridor plans are approved by Council. These policies may be replaced by subsequent interim development policies that are established by the future secondary planning processes for the Corridor.

**POLICY 1:** Where there is a rezoning application that is compliant and aligned with the OCP, the application may be considered by Council for final adoption.

**POLICY 2:** Prior to the initiation of a secondary plan, rezoning applications within an identified secondary plan area seeking an amendment to the OCP shall only be considered at the discretion of the General Manager of Planning and Development based upon the merits of the proposed application and the community amenity considerations proposed through that application. Examples of suitable community amenity considerations include: the provision of social and supportive housing, community care facilities, below market housing, or student housing associated with an education institution.

**POLICY 3:** Once a secondary plan process has been initiated, rezoning applications proposing a major OCP amendment shall not generally be considered.

**POLICY 4:** Where, at the time of approval date of Imagine Scott Road, there is an active rezoning application that has received conditional approval or where a recent application for rezoning advice has been received, and the applicant has received a written response from the City stating that a rezoning application would be considered by Council (within the past three years), the application may be considered.

**POLICY 5:** Applications which seek relief from any of the terms of these interim development policy may be considered on a case-by case bases under exceptional circumstances or where it would be prudent, once reported to Council for direction, at the discretion of the General Manager of Planning and Development

In addition to rezoning, Development Permits Areas (“DPA”) for Form and Character will apply to all future multiple residential, mixed-use, commercial, and industrial buildings, as directed by the OCP. Development Permits for Sensitive Ecosystems, and Hazardous Slopes may also be applicable in Sensitive Ecosystem and Hazard DPA areas outlined in the OCP. Development applications falling within a DPA shall adhere to the Development Permit Guidelines of the OCP.

## 4.3. FUNDING

### Community Amenity Contributions

Residential development projects that require rezoning within the Scott Road Corridor will contribute to the provision of community amenities to help offset the impacts of growth. This is typically done in the form of a monetary payment at rates established in Schedule G of Surrey's Zoning Bylaw. There are four categories of Community Amenity Contributions (CACs) that may be applicable to developments within the Plan Area:

- 1 Universal Citywide CACs for affordable housing and public art.
- 2 Area specific secondary plan CACs.
- 3 "Tier 1" Capital Projects CACs for projects (or portions thereof) that are consistent with OCP or secondary plan densities.
- 4 "Tier 2" Capital Projects CACs for the portions of projects that exceed OCP or secondary plan densities.

Universal and Tier 1 Capital Project CACs are generally applicable to residential developments seeking rezoning. Area specific secondary plan CACs will be established and applicable through future secondary planning processes along the Corridor to reflect the specific amenity requirements and unique market conditions of the community. Tier 2 Capital Project CACs are applicable where development applications exceed the OCP or future Secondary Plans.

Tier 2 Capital Project CAC rates are assigned by specific 'Community Areas' within the City of Surrey and outlined in Schedule G of the Zoning Bylaw. Previously, the Study Area was located in both the Whalley and Newton 'Community Areas', which have significantly different Tier 2 contribution rates. To establish parity within the Study Area, a new Tier 2 CAC 'Community Area' rate is proposed for the Study Area. This new rate is reflective of existing land use designations, market conditions, and the R6 RapidBus alignment. The new Tier 2 CAC rate for the Scott Road Sub-Area will be outlined within Schedule G of the Zoning By-Law and will be subject to re-examination through future secondary planning.

Projected CAC Revenue will be determined as part of the secondary plan process.

### Development Cost Charges

New and upgraded infrastructure is required to support development of the Plan Area. This infrastructure is funded through Development Cost Charges (DCCs), whose rates are established by Bylaw and are paid through development. Growth projects, eligible costs and projected DCC revenue will be established as part of future secondary plan processes.

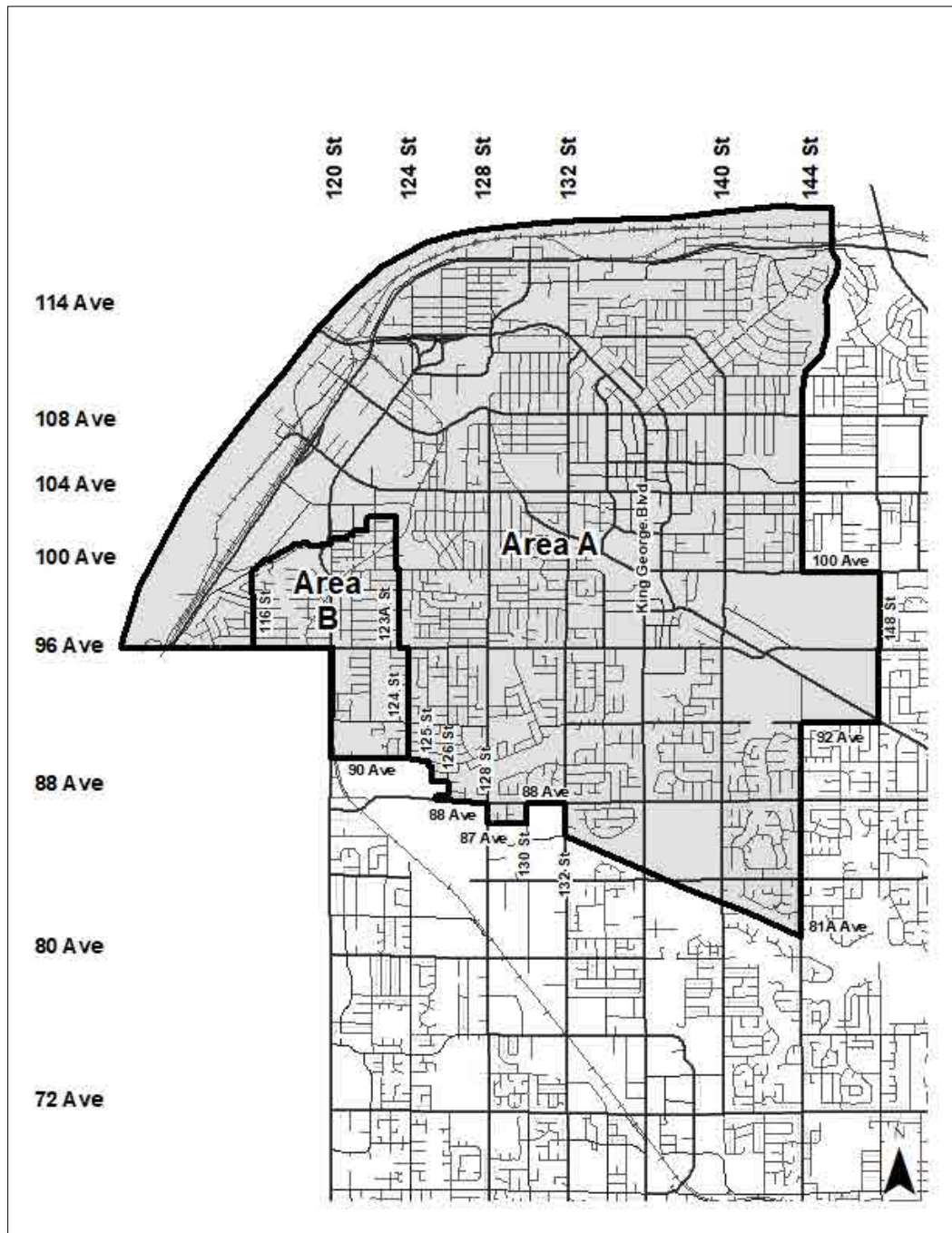




Proposed Amendments to Schedule G of  
Surrey Zoning By-law, 1993, No. 12000, as amended

The following amendments are proposed to Schedule G, Community Amenity Contributions, of Surrey Zoning By-law, 1993, No. 12000, as amended:

1. Sub-section C.9(a), by deleting the existing "Whalley Community Area" map and replacing with the following map:

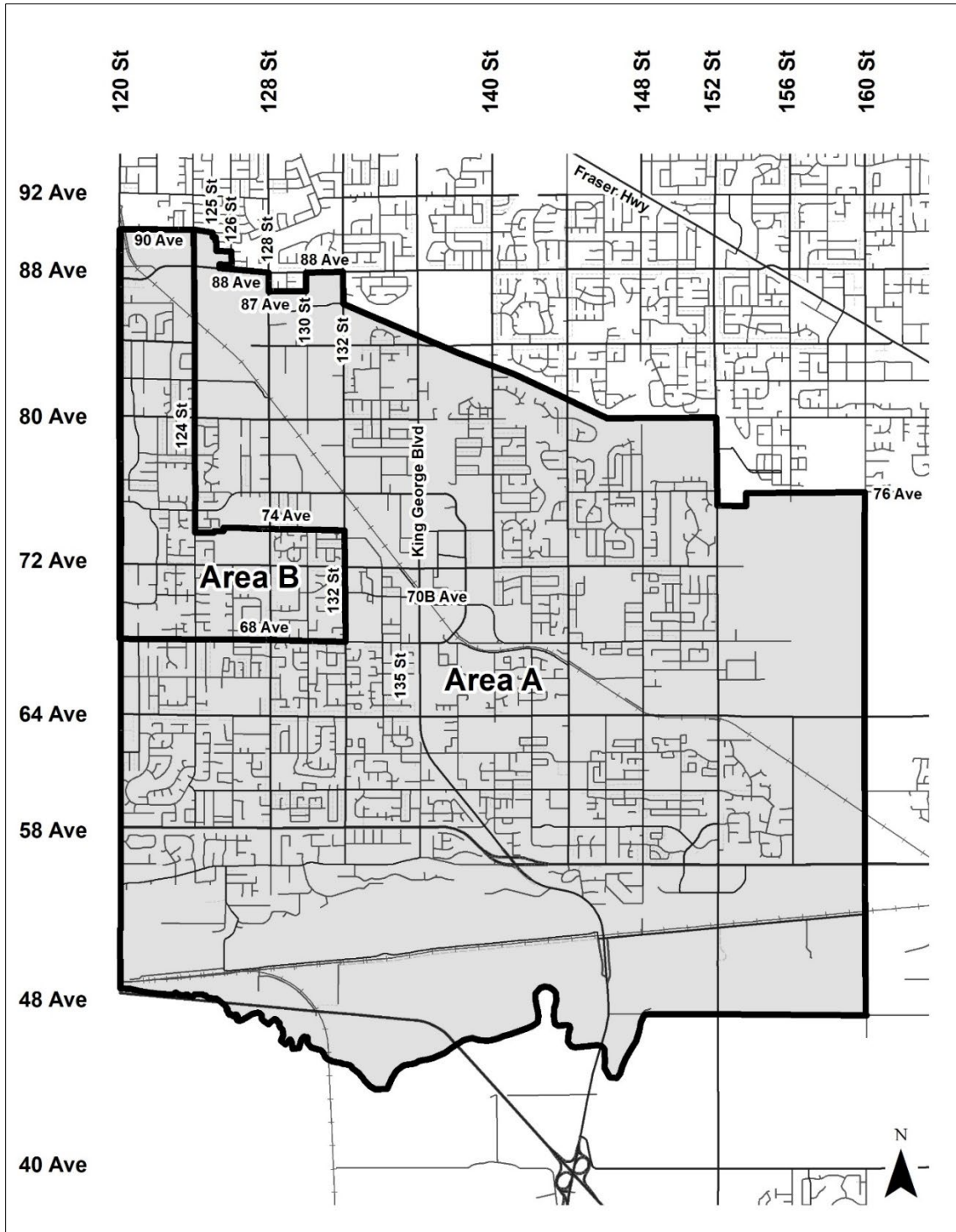


2. Sub-section C.9(b), by deleting the existing “Amenity Contributions” table and replacing with the following table:

<b>Use</b>	<b>Amenity Contributions<sup>1</sup></b>
Apartment (Area A)	\$479.62 per sq. m (\$44.56 per sq. ft.)
Apartment (Area B)	\$239.82 per sq. m (\$22.28 per sq. ft.)
Townhouse or <i>Single Family Dwelling</i> (Area A and Area B)	\$16,078.86 per <i>dwelling unit</i>

<sup>1</sup> Amenity Contributions listed in this Section only apply to that portion of increased *density* that is above the maximum *density* indicated in an approved Secondary Plan or the *OCP*.

3. Sub-section C.12(a), by deleting the existing "Newton Community Area" map and replacing with the following map:



4. Sub-section C.12(b), by deleting the existing “Amenity Contributions” table and replacing with the following table:

<b>Use</b>	<b>Amenity Contributions<sup>1</sup></b>
Apartment (Area A)	\$119.90 per sq. m (\$11.14 per sq. ft.)
Apartment (Area B)	\$239.82 per sq. m (\$22.28 per sq. ft.)
Townhouse or <i>Single Family Dwelling</i> (Area A and Area B)	\$16,078.86 per <i>dwelling unit</i>

<sup>1</sup> Amenity Contributions listed in this Section only apply to that portion of increased *density* that is above the maximum *density* indicated in an approved Secondary Plan or the *OCP*.

## CORPORATE REPORT

NO: R071

COUNCIL DATE: April 11, 2022

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### REGULAR COUNCIL

TO: **Mayor & Council** DATE: **April 7, 2022**

FROM: **Acting General Manager, Planning & Development** FILE: **6520-20 (City Centre)**  
**General Manager, Engineering**  
**General Manager, Parks, Recreation & Culture**

SUBJECT: **Initiation of Background Studies for the Scott Road Corridor and South Westminster Neighbourhood Concept Plan Update**

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### RECOMMENDATION

The Planning & Development, Engineering, and Parks, Recreation, & Culture Departments recommend that Council:

1. Receive this report for information; and
2. Authorize staff to commence a planning review along the Scott Road Corridor, including all preliminary planning and background studies to support secondary land use plan processes, as described in this report and documented in Appendix "I".

### INTENT

The intent of this report is to seek Council authorization to initiate a planning review of the Scott Road - 72 Avenue Corridor (the "Corridor"), including an update to the existing South Westminster Neighbourhood Concept Plan ("NCP"), as illustrated in Appendix "I". This work will form the basis for the development of transit supportive secondary land use plans along the planned R6 RapidBus Corridor.

### BACKGROUND

#### Neighbourhood Concept Plan Scheduling Update

On March 28, 2022, Council endorsed the current land use planning work program as part of Corporate Report No. Ro61;2022, attached as Appendix "II". The report provided an update on current planning work underway, as well as proposed future land use plans for consideration, including the South Westminster NCP and the Corridor plan detailed within this report.

As part of consideration of the above noted report, Council requested that staff consider refinements to the proposed land use planning work program to advance the initiation of the Grandview Area 5 NCP. Staff will now advance consideration for Grandview Area 5 NCP to Q3, 2022. To accommodate this, the timeline for planning work along the Corridor has been extended. Similarly, the initiation of new NCP planning work along the Corridor has been moved from Q3 of 2023 to Q1 of 2024, following the Corridor study. The timeline for the South Westminster NCP update remains unchanged. The following chart provides an updated timeline of the work program.

PLANS	2020				2021				2022				2023				2024				2025				2026			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>SkyTrain Supportive Plans</b>																												
Fleetwood	Stage 1								Stage 2																			
Clayton Update									Plan(s) Update																			
East Cloverdale													Stage 1				Stage 2											
<b>Urban Centre Plans</b>																												
Guildford - 104 Avenue	Stage 2																											
Surrey City Centre					Plan Update																							
<b>Supportive Transit Corridors</b>																												
Newton - King George	Stage 1				Stage 2																							
Scott Road - R6 Corridor									Corridor Study								→											
Nordel - 96 Ave (north)													→				Stage 1				Stage 2							
Strawberry Hill (south)																	→				Stage 1							
<b>Employment Focused Plans</b>																												
South Campbell Heights	Stage 1								Stage 2																			
South Westminster									Stage 1				Stage 2															
<b>New Growth Area Plans</b>																												
Grandview Area 5									←				Stage 1				Stage 2											

Current

The proposed initiation and scheduling of the South Westminster NCP and the Corridor plan, as detailed in this report, has considered these overall work plan adjustments.

### Scott Road-72 Avenue Corridor

The Corridor is part of TransLink’s Frequent Transit Network (“FTN”) and is designated as such within Surrey’s Official Community Plan (“OCP”). The FTN is a network of major corridors throughout Metro Vancouver where transit service runs at least every 15 minutes in both directions throughout the day and into the evening, every day of the week. The Corridor is currently serviced by several bus routes, including the 319 (Scott Road/72 Avenue), which is the FTN service route. The 319 is the busiest bus route south of the Fraser River and service on this route will be upgraded to the planned R6 RapidBus route detailed below.

The OCP outlines objectives and policies to encourage transit-oriented development along FTN corridors, including the intent to undertake transit-supportive secondary land use plans. The intent focuses on creating compact, complete urban neighbourhoods with higher density mixed uses that align with and support frequent transit service. This helps to reduce greenhouse gas emissions by supporting active and public transportation choices and relieves congestion on busy streets by reducing reliance on the automobile.

Currently, development along most of the Corridor takes place without the framework of a secondary land use plan. The existing South Westminster NCP, at the north of the Corridor's extent, was approved in 2003 and requires updating to reflect current market conditions and changes in servicing needs. Despite this, the Corridor is subject to ongoing population, employment, and institutional growth. This growth, along with the existing FTN designation and the OCP's supportive policies, emphasize the need for a land use planning review along the Corridor. This will support continued growth in areas that will directly benefit from the extension of transportation infrastructure, including the planned R6 RapidBus which is scheduled to begin service in 2023.

### **RapidBus, Major Transit Network, and Major Transit Growth Corridors**

In 2019, TransLink established the RapidBus program as a replacement for the B-Line service. The RapidBus program includes increased service levels (especially during peak periods), upgraded stops with real-time passenger information, and transit priority measures to improve speed and reliability. There are currently five RapidBus lines across Metro Vancouver. In Surrey, the 96 B-line was rebranded as the R1 – King George Boulevard/104 Avenue RapidBus which, prior to the COVID-19 pandemic, was the second busiest bus route in Surrey and 12<sup>th</sup> busiest in the region. The R6 RapidBus will be the sixth RapidBus line in the region.

RapidBus will help build ridership and lay the foundation for future rapid transit. The Corridor has been identified for future rapid transit, as part of the Major Transit Network ("MTN"). The MTN is included in TransLink's updated Regional Transportation Strategy ("Transport 2050") which is part of the Reliable and Fast Transit Network concept. To support the MTN, Metro Vancouver's draft Regional Growth Strategy ("Metro 2050") has identified several corridors throughout the region as Major Transit Growth Corridors to support and encourage transit-oriented development along the MTN.

## **DISCUSSION**

To support the planned R6 RapidBus service, and ongoing population and employment growth, land use planning for the Corridor will commence immediately, pending Council endorsement of this report. The proposed planning area for the Corridor is approximately 11.3 km long and extends from the existing Scott Road SkyTrain Station south to 72 Avenue, then east along 72 Avenue to Newton Town Centre, as illustrated in Appendix "I".

The Corridor already contains a diverse mix of employment and residential uses within several established neighbourhoods, as well as business park and industrial uses within the South Westminster area. The Corridor also includes a range of sensitive environmental areas, including Robson, Cougar, Delta and Scott Creeks, as well as several lowland drainage systems and the Fraser River waterfront within South Westminster.

### **Background Studies**

The initial planning phase will involve the preparation of various background studies and analytics, as is typical with all City land use planning processes. This planning stage will provide the context and analysis necessary to develop and update detailed land use plans strategically and efficiently along the Corridor.

The following background studies will be initiated to support land use planning along the Corridor:

#### Market Assessment

A market assessment of the Corridor will include a review of land availability, development opportunity and projected absorption rates. The assessment will provide analysis of market demand for residential and commercial/employment land uses along the Corridor, with a focus on areas adjacent to future RapidBus stops. It will also provide an assessment of conditions to maximize Community Amenity Contributions.

#### Environmental Study

An environmental study will include an assessment and inventory of riparian, aquatic and terrestrial habitats along the Corridor, as well as vegetation and significant tree survey assessments. The study will consider and incorporate the Biodiversity Conservation Strategy and species at risk. This will advise staff on areas of environmental sensitivity that should be considered in land use planning. Given the unique environmental and drainage considerations, a separate environmental study may be undertaken for the South Westminster Plan Area.

#### Heritage Review

A heritage review of the South Westminster Plan Area will be completed, with a focus on the Fraser River waterfront. This will include an Indigenous cultural heritage review. The outcomes of this study will inform the development of the South Westminster NCP.

#### Lot Consolidation Review

Many of the lots created in the South Westminster area were done in the early 1900's and are smaller lots originally intended for residential uses. These small and fragmented lots with varied lot ownership can present challenges for consolidation and redevelopment. This is particularly the case in the South Westminster area where pre-loading and raising lot elevations are a key consideration for development. A lot consolidation review will identify areas with development challenges for further consideration within planning processes. It will also inform related work regarding pre-loading lots to achieve Flood Construction Levels ("FCL") within the South Westminster Plan Area.

#### Flood Risk Assessment

Portions of the Corridor within the South Westminster Plan Area are prone to flooding, which has implications on potential long-term development. A flood risk assessment will identify specific at-risk areas, as well as potential mitigation strategies for consideration within the land use planning process. A review of the FCL within the South Westminster Plan Area will also be undertaken to ensure current policy aligns with long-term flood risk associated with sea level rise, Fraser River freshet and seasonal weather events.



### Road Elevation Study

This study is specific to the South Westminster Plan Area where frequent road flooding results in reoccurring issues, including access and mobility limitations, building interface issues, and emergency services response. A road elevation study will examine the feasibility and challenges associated with raising existing roads in the area, as well as the elevation of planned roads associated with secondary planning. The study will examine the interfaces between road elevations and adjacent property elevations (both constructed and planned), as well as geotechnical and civil engineering considerations related to the impacts of road raising on existing underground utilities.

### Growth and Demographic Review

An assessment of existing population and demographics will be derived from 2021 Census data for consideration in land use planning and public engagement. This information, along with the City's building model, will also be used to develop preliminary population and employment forecasts for utility servicing and community amenity considerations.

### Case Study Review

Staff will undertake a case study review of developments around the world with similar conditions as the South Westminster Plan Area, with particular focus on public/private interfaces and transitions, as well as innovative approaches to drainage servicing/drainage corridors, etc.

### **Future Land Use Planning**

The development of new and updated land use plans is required along the Corridor. The existing South Westminster NCP is out of date and requires updating. New land use plans will need to be established for the Scott Road portions of the Corridor, as well as potentially the area around Kwantlen Polytechnic University along 72 Avenue. A General Land Use Plan ("GLUP") will be developed initially to inform and guide currently unplanned areas of the Corridor. Staff will also coordinate with the City of Delta to ensure the alignment of long-term plans and priorities including but not limited to the City of Delta's Mayor's Housing Task Force for Scott Road Recommendations Report.

### South Westminster NCP

The South Westminster NCP was approved by Council in 2003. It presented a vision intended to transform under-utilized industrial areas into business districts, public spaces, and special residential communities. The plan area extends from the Scott Road SkyTrain Station to the Surrey Fraser Docks (Port of Vancouver) and is bordered by the Fraser River to the West, King George Boulevard to the North, and 96 Avenue in the South (see Appendix "I").

Despite some success, the plan has not realized its vision of intensified industrial uses or comprehensive transit-oriented development. The plan area faces several development constraints that were not fully considered within the 2003 plan, including adverse geotechnical conditions, increasing flood levels and risk, site contamination, and small lot consolidation challenges.

An update of the plan will ensure that current challenges and development conditions are considered, and that transit-oriented development principles are incorporated around the Scott Road SkyTrain Station and along the alignment of the planned R6 RapidBus and future MTN corridor. Further transportation analysis will be conducted with the plan update to assess current conditions and support road network planning. Increased network granularity is anticipated to support higher densities and promote active transportation. This will be done in conjunction with the commitments made with the Ministry of Transportation and Infrastructure, as part of the Pattullo Bridge Replacement Project agreement.

### Scott Road - 72 Avenue General Land Use Plan

Except for the South Westminster and Newton Town Centre areas, there are no secondary land use plans guiding growth along the Corridor. A new GLUP will be developed for the remainder of the Corridor. Drawing from background studies, a review of land use plans in the City of Delta, and preliminary planning and engagement, it will present an overall vision and general land uses for the Corridor. It will also identify future plan areas for the development of a series of NCPs along the Corridor, which will guide more detailed neighbourhood planning in the future.

Potential areas for future NCP consideration include:

- 96 Avenue (96 Avenue and 120 Street);
- Nordel (Nordel Way and 120 Street);
- 80 Avenue (80 Avenue and 120 Street);
- Strawberry Hill (72 Avenue and 120 Street); and
- Kwantlen Polytechnic University (72 Avenue and 126 Street).

### **Estimated Timeline**

The development and update of these land use plans will involve a comprehensive strategy and phased approach supported by technical and engineering studies. Consultation will include residents as well as stakeholders, including businesses, industry groups and associations, Community Associations, utility agencies, and intergovernmental organizations such as TransLink, Metro Vancouver, City of Delta, Ministry of Transportation and Infrastructure, First Nations, and the Port of Vancouver.

Subject to the approval of this report, staff will immediately begin background studies. The South Westminster NCP update and Scott Road - 72 Avenue GLUP planning processes will also initiate concurrently, supported by the background studies.

The Scott Road - 72 Avenue GLUP will be structured into a single phase which will include background studies, technical analysis, and public consultation. It will commence immediately and completed by Q4 of 2023. The development of NCPs along Scott Road and 72 Avenue will follow Council approval of the Scott Road - 72 Avenue GLUP. This will enable the efficient allocation of staff and consultant resources and the efficient preparation and implementation of a series of public and stakeholder engagement processes.

The South Westminster NCP update will be structured into the following two stages:

- Stage 1 (winter 2022 – winter 2023): Background studies, land use, transportation, drainage, and parks and open space concepts, along with a preliminary servicing strategy. A draft (Stage 1) plan will be brought forward for Council consideration prior to Stage 2 work commencing.
- Stage 2 (spring 2023 – summer 2024): Engineering servicing strategies, design guidelines, financial strategy, and the development of supportive policies. A final (Stage 2) plan is anticipated for Council consideration in summer 2024.

Staff will report to Council on the progress of the above-noted planning processes at key planning milestones.

### **Consideration of Rezoning Applications During Plan Processes**

Staff will continue to receive and process development applications within these plan areas (see Appendix “I”) provided that any such application is consistent with approved secondary land use plans or the OCP. Applications that propose amendments to approved secondary land use plans or the OCP can advance concurrently with planning work, and not proceed to final approval until the completion of planning work as outlined within this report.

### **SUSTAINABILITY CONSIDERATIONS**

The work proposed as part of the Scott Road Corridor Planning Review supports the objectives of the City’s Sustainability Charter 2.0. In particular, this plan update supports the Sustainability Charter 2.0 themes of Built Environment and Neighbourhoods, Economic Prosperity and Livelihoods, Ecosystems, and Infrastructure. Specifically, this plan supports the following Desired Outcomes (“DO”):

- Neighbourhoods and Urban Design DO2: Surrey is well-connected within the City and to the rest of the region by fast and efficient public transit and active all-ages-and-abilities transportation infrastructure;
- Neighbourhoods and Urban Design DO4: Surrey’s neighbourhoods are safe, accessible, well-connected, walkable and bike friendly;
- Jobs and Skills Training DO1: Diverse and meaningful employment and business opportunities are available close to where people live, and provide incomes that can support a high quality of life;
- Economy DO6: Efficient land use and well-managed transportation infrastructure are in place to attract businesses and support a thriving economy;
- Water, Air and Soil DO11: Surrey’s Green Infrastructure Network is an essential and integrated component of the City’s infrastructure, providing essential ecosystem services as well as places for recreation, conservation and rejuvenation; and
- Energy and Climate DO6: The City anticipates changing weather patterns and sea level rise as a result of climate change, and implements appropriate infrastructure, land use planning and emergency response solutions that will be resilient over the long term.

## CONCLUSION

Based on the above discussion it is recommended that Council authorize staff to commence a planning review along the Scott Road Corridor, including all preliminary planning and background studies to support secondary land use plan processes as described in this report and documented in Appendix "I".



Jeff Arason, P.Eng.  
Acting General Manager,  
Planning & Development



Scott Neuman, P.Eng.  
General Manager,  
Engineering Department



Laurie Cavan  
General Manager,  
Parks, Recreation & Culture Department

PK/cc

Appendix "I" – Map of R6 RapidBus Corridor – Planning Areas

**\*Appendix Available Upon Request\***

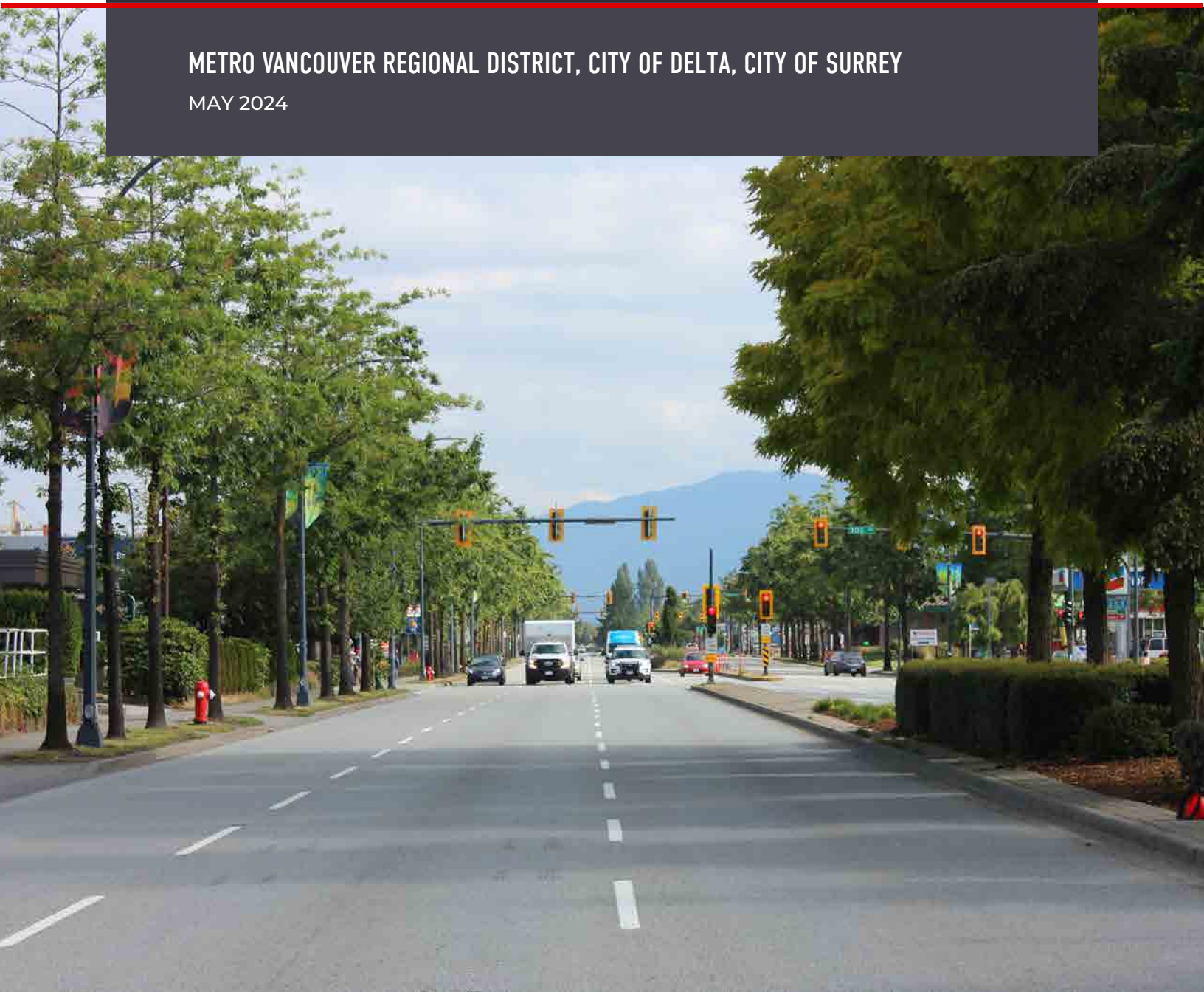
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# SUPPLY AND DEMAND STUDY FOR SCOTT ROAD

R6 RAPIDBUS CORRIDOR

METRO VANCOUVER REGIONAL DISTRICT, CITY OF DELTA, CITY OF SURREY

MAY 2024



**PREPARED FOR**

Metro Vancouver Regional District  
City of Delta  
City of Surrey

**PREPARED BY**

Urban Systems Ltd.  
1090 Homer St #550,  
Vancouver, BC V6B 2W9

**David Bell, RPP, MCIP**

E: [dbell@urbansystems.ca](mailto:dbell@urbansystems.ca) | T: 778-370-7232

DATE: MAY 28, 2024

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## **EXECUTIVE SUMMARY**

Implementation of the R6 RapidBus service has enhanced both the walkability and market appeal of the Scott Road corridor. With increased transit accessibility, there emerges promising potential for redevelopment opportunities along this key north-south thoroughfare. This market-driven report underscores the identification of strategic opportunities for Delta and Surrey to align their planning objectives, particularly within key priority nodes, including timing considerations.

The following are key takeaways from the analysis:

- The Scott Road corridor presents itself as an opportunity to accommodate a broader range of housing types and densities, which has the potential in turn to better support increased transit ridership, and from a market perspective, to provide developers with greater flexibility to meet housing demand as it evolves.
- Population and dwelling projections are presented in "low growth" and "high growth" scenarios to provide an estimated range of future market demand. There are uncertainties surrounding the timing of redevelopment for large sites, which could create market absorption challenges from a developer's standpoint. These larger sites are also likely to be developed in phases, and developers tend to adjust to market conditions based on lessons learned from earlier project phases.
- Presently, levels of development activity are notably higher on the Delta side, indicating opportunities for Delta and Surrey to complement each other's planning initiatives at key density nodes. Under current market conditions, the most viable development typologies along the Scott Road corridor are 6-storey wood frame apartments (including potential for at-grade commercial uses) and concrete towers.
  - This study assesses the development potential in the categories of "Up to 12 Storeys" and "More than 12 Storeys" areas in order to account for the long term evolution of advanced building technologies, approaches, and materials of hybrid construction materials which may enable the development of 7 to 12 storey buildings.
  - Major density nodes are anticipated to emerge at intersections such as 72nd Avenue, 80th Avenue, 88th Avenue, and 92nd Avenue along Scott Road. These intersections with Scott Road exhibit varying levels of improvement to total assessment ratios, along with surrounding land use context indicating potential for mixed-use redevelopment or further development triggered by recent redevelopment activities.

- Other intersections with R6 RapidBus stops, including 96th Avenue, 84th Avenue, and 75th Avenue, may not show large areas with low improvement to total assessment ratios but still harbor smaller sites with high redevelopment potential. These sites are expected to accommodate medium nodes of density due to existing built form.
- Despite assuming a high growth scenario for retail-trade evaluation purposes, the anticipated incremental opportunity for the Scott Road study area from a retail-commercial perspective is expected to be modest. While the study area presents significant opportunities for redevelopment intensification and integration of higher-density residential uses, developers are more inclined to pursue development plans that either maintain current commercial footprints or, in some cases, rationalize current commercial space into a slightly more modest amount of new commercial floorspace. This is in part due with more focused reinvestment in major comparison retail centres and clusters outside the study area, coupled with current area business needs to increase annual revenues to maintain parity with cost-side escalation.
- Although development fees, including development cost charges and community amenity contributions, do not exert a significant influence on development attractiveness on either side of the corridor, there exists a pressing need for balance in land use plans and policies, particularly concerning future consideration of any market rental or below-market rental housing requirements.
- Due to the high levels of development activity observed on the Delta side, the report recommends prioritizing the area around Kennedy Plan for development first. Subsequently, the formulation of the Strawberry Hill Plan can be undertaken, followed by the Townline Plan, which will be contingent upon a comprehensive review of market conditions and current land use patterns.

## 1.0 INTRODUCTION

### 1.1 PURPOSE

Metro Vancouver in partnership with the City of Delta and the City of Surrey commissioned this Scott Road market study to support planning efforts being undertaken for the Scott Road corridor given the introduction of R6 RapidBus transit service, which launched in January 2024. The objective of this report is to provide insights related to market-supportable development typologies along the Scott Road Corridor given historical trends, developer experience and sentiment, the extent of competitive residential and retail nodes located outside the study area (e.g. SkyTrain-oriented locations) and its expanded role as a high frequency transit corridor.

This report is intended to provide market commentary intended to support the City of Delta, City of Surrey, and Metro Vancouver in making land use policy and planning decisions. Through this report, the authors have provided:

- Historical residential development trends and forecast likely demand for residential units given anticipated population growth pressures along the Scott Road Corridor over the next 10-20+ years;
- Anticipated retail-commercial demand along the Scott Road Corridor, driven by a clear understanding of potential population growth and related residential intensification;

This report is intended to:

- Inform updates to the Official Community Plan, including designation of the Scott Road Corridor as a Frequent Transit Development Area;
  - Inform future Surrey policy decisions through the identification of high priority density nodes and to support related sub-area planning initiative; and
  - Advance key goals of the Metro Vancouver’s regional growth Strategy, *Metro 2050*.

### 1.2 APPROACH

This study integrates population projections, market data, analysis of local government development fees, and interview findings with development industry stakeholders to provide a broad picture of potential commercial and residential development opportunities along Scott Road corridor over the short vs. medium to longer terms. Planning timeframes referred to throughout this report are defined as:

- **Short term:** 2024 to 2029
- **Medium term:** 2029 to 2034

- **Long term:** 2034 to 2051

Market data is collected to reflect the economic reality, including challenges and opportunities that the development industry is experiencing in Delta and Surrey through the last quarter of 2023. The slowdown in the development industry is not limited to these two markets as higher interest rates and construction costs have impacted the development industry across the nation and the Metro Vancouver region.

A total of nine (9) interviews were conducted between November 2023 through to the end of January 2024. This outreach included a cross-section of development industry stakeholders on either side of Scott Road and other relevant development and property organizations who are not currently active along the corridor.

### **1.3 LIMITATIONS TO THIS STUDY**

As with any projections work, the forecasting is subject to further uncertainty, such as new policies or unexpected changes in socio-economic conditions, as the time horizon expands. This makes the estimates for longer time horizons generally less reliable and therefore related implications must be considered with some caution. As such, the projections are presented in this report for the time horizons highlighted below:

- Population and household projections are from 2024 to 2051
- Dwelling projections are from 2024 to 2034
- Commercial-retail projections are from 2024 to 2041

This study does not provide estimates of the financial performance of possible future urban redevelopment projects, as this level of site-specific feasibility testing is beyond the scope of this study.

This section outlines the data sources and limitations to each data source.

- **BC Statistics Population Projection:** The BC Stats population projections at the municipal level (i.e. City of Surrey and City of Delta) are used as the basis to determine overall growth in each municipality, and two sets of shares of the future population based on possible demand scenarios (Low Growth scenario, and High Growth scenario) on each side of the Scott Road corridor relative to the municipal population are then applied to derive the future population growth in the study area.

As noted by BC Stats, the population projections are based on existing immigration policies and observed historical trends assuming that the population dynamics will return to pre-COVID19 pandemic trend lines, changes in immigration policies and unobserved long-term impacts from the pandemic have not been captured in the projection and could have significant impacts on future population growth.

- **Environics:** Environics data is used to inform the estimated 2018 and 2021 census population and dwelling structural type data for the study area. These are determined through a custom-defined geographical area extracted by Enrich tool at the Dissemination Area (DA) level. Out of the 28 DAs, eight had areas outside of the study area. In these occurrences, the Enrich tool calculates households falling within geographic boundaries and then apportions all the Census variables based on known household numbers at the DA level
- **Retail:** Urban Systems has assessed the retail spending potential (and thus market support for commercial floor area) for the Scott Road corridor based on trade area population growth and spending by category as quantified in its proprietary retail demand model. This model adapts provincial level retail sales data by North American Industry Classification System (NAICS) category to local geographies (i.e., local trade areas) by extrapolating relationships between income levels and spending by category, and deriving the market supportable area by assessing potential on-site spending based on trade-area-specific market shares and market-supportable floor area. This demand model has proven reliable in assessing potential for both site-specific and study area development and redevelopment opportunities.

## **1.4 DISCLAIMER**

This document contains estimates and forecasts of future growth and urban development prospects and opinions regarding likelihood of approval of development projects. All such estimates, forecasts, opinions, and recommendations are based in part on forecasts and assumptions regarding economic growth, policy, market conditions, development costs and other variables. The assumptions, estimates, forecasts and opinions are based on interpreting trends, gauging current conditions, and making judgements about the future. As with all judgements concerning future trends and events, there is significant uncertainty and risk that conditions change or unanticipated changes occur such that actual events materialize differently than anticipated in this document.

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## **2.0 PLANNING CONTEXT**

### **2.1 STUDY AREA**

Figure 1 below shows the extent of the study area. The study area encompasses two jurisdictions – the City of Delta to the west side of Scott Road/120<sup>th</sup> Street<sup>1</sup> and the City of Surrey to the east side. There are no rapid transit stations (e.g., Skytrain) in the study area except for the Scottsdale Exchange, which is a bus exchange station located at 74<sup>th</sup> Avenue and Scott Road.

The existing uses of the Scott Road corridor comprise a mix of commercial-retail and light industrial uses (e.g., autobody shops), with some higher intensity residential uses in the form of townhouses and apartments. This residential use transitions into lower density single-detached dwellings on either side of the corridor with the occasional clustering of townhouses on the Surrey side.

The commercial-retail use is a mix of mostly older retail strip malls, Class B and C office space, and a couple of large shopping strip malls with big box stores including Canadian Tire, the Real Canadian Superstore, Home Depot, Homesense, Cineplex Cinemas, and Save-on-Foods, among others. A few of the anchor restaurants include Cactus Club, the Keg, Boston Pizza, IHOP, Tasty Indian Bistro, Tandoori Flame, and Denny's. Many of the retail uses, especially in the mid- to north-end of the Scott Road corridor are operated by small local businesses. A more detailed description of Scott Road Corridor shopping centres along Scott Road corridor is provided in Section 5, which evaluates retail-commercial supply and demand conditions.

### **2.2 EXISTING LAND USE PLANS**

This section outlines the land use plans currently in place for the Scott Road corridor.

#### **2.2.1 METRO VANCOUVER**

Metro Vancouver adopted Metro 2050 as the Regional Growth Strategy on February 24, 2023. Metro 2050 outlines the region's vision for growth over the next 25 years while accounting for projected trends in population, housing, employment, and considers Translink's Transport 2050. The Regional Growth Strategy applies to the Scott Road corridor.

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<sup>1</sup> Although the City of Delta and City of Surrey use different names for the corridor (i.e., Scott Road on the Delta side / 120<sup>th</sup> Street on the Surrey side), for consistency and simplicity, "Scott Road" refers to 120<sup>th</sup> Street throughout this report.



## **2.2.2 CITY OF DELTA**

The City of Delta adopted a North Delta Area Plan in 2014 which provides a land use framework for future development along Scott Road corridor, focused on three main districts:

- Townline Innovation District
- Central District
- Garden District

Delta is currently finalizing an update to the Official Community Plan, which will see the North Delta Area Plan removed and replaced with City-wide policies and a height map for the Scott Road Corridor.

## **2.2.3 CITY OF SURREY**

The City of Surrey's Official Community Plan designates the Scott Road corridor as a mix of Commercial, Urban, and Multiple Residential uses. There are no secondary plan areas covering the Scott Road corridor. The City of Surrey is undertaking an Imagine Scott Road Visioning Study for the Scott Road study area. The Visioning Study is intended to identify key infrastructure and community projects, to set development fees, and to identify smaller areas that require focused neighbourhood plans.

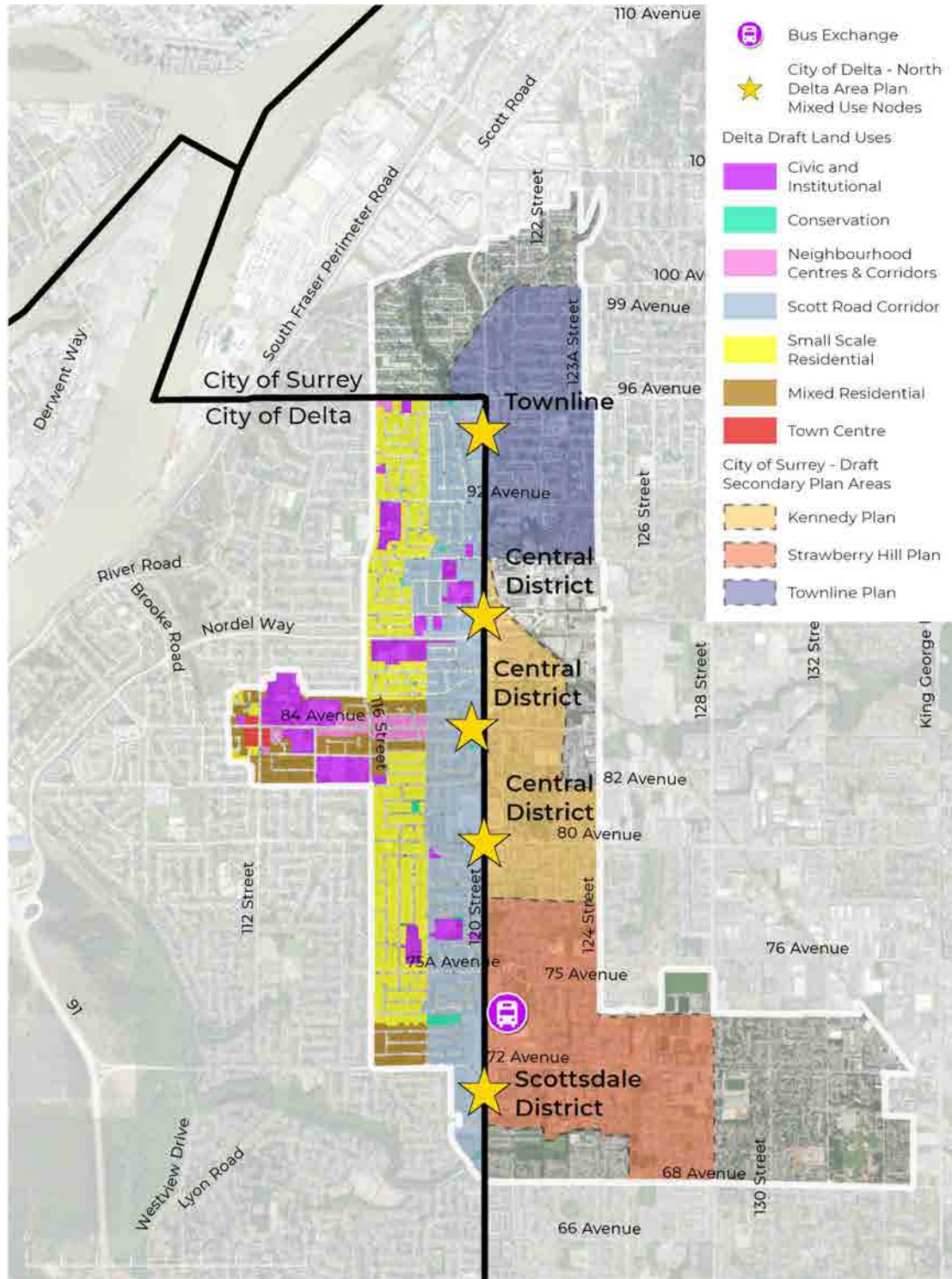
As the City of Surrey begins planning the corridor, it is considering three potential secondary plan areas defined as follows:

- Townline Plan
- Kennedy Plan
- Strawberry Hill Plan

The plan areas identified by Delta, including the draft Scott Road Official Community Plan designations, and Surrey are shown in **Figure 1** below.

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 SUPPLY AND DEMAND STUDY FOR SCOTT ROAD R6 – RAPIDBUS CORRIDOR

Figure 1: Scott Road Corridor Study Area



## 2.3 PROVINCIAL LEGISLATIVE CHANGES IMPACTING DEVELOPMENT

In November 2023, the BC Ministry of Municipal Affairs and the Ministry of Housing passed new bills that amend the Local Government Act, the legislation that provides local governments its authority to govern. This section highlights the key changes that will impact development opportunities. Bills 44 and 46 will have a partial impact on development opportunities along Scott Road, while Bill 47 has the biggest potential impact on the southern portion of the study area as it directly impacts the Scottsdale Exchange transit stop area.

### 2.3.1 BILL 44 – HOUSING STATUES (RESIDENTIAL DEVELOPMENT)

Bill 44 introduces changes intended to increase the supply of housing by requiring local governments to pre-zone land to permit small-scale multi-unit housing (SSMUH). It permits:

- One secondary suite or one accessory dwelling units on single-family lots
- Three to six units on single-family or duplex lots, depending on the lot size.

In addition, no parking requirement minimums are required for development projects within 400 metres of a transit stop.

### 2.3.2 BILL 46 – HOUSING STATUES (DEVELOPMENT FINANCING)

Bill 46 introduces a new development financing tool – the amenity cost charge (ACC) – to local governments with high growth communities. ACCs are intended to shift local governments away from negotiating community amenity contributions.

- ACCs allow local governments to pay for capital costs associated with providing or altering amenities for development projects which increased population.
- To impose ACCs, local governments must adopt a bylaw outlining location, land use, densities or other objective qualities.
- Development cost charges may be imposed for expanded amenities such as fire protection, police, solid waste, recycling facilities, and highway facilities that are cost-shared with Ministry of Transportation and Infrastructure (MOTI) (e.g. highway overpasses).

### 2.3.3 BILL 47 – HOUSING STATUES (TRANSIT-ORIENTED AREAS)

Bill 47 aims to encourage more housing around transit nodes. It requires local governments to designate transit-oriented areas (TOAs) which are defined as the land within 800 metres of rapid transit stations (e.g., Skytrain) and within 400 metres of major bus exchanges. For Metro Vancouver bus exchange areas, the minimum allowable densities and heights are as follows:

- **Within 200 metres of the bus exchange:** 4.0 floor space ratio (FSR) and 12 storeys in height
- **Within 400 metres of the bus exchange:** 3.0 floor space ratio (FSR) and eight (8) storeys in height

As it is too early to understand the full implications of each of the housing statues on potential development opportunities in communities across the province of BC, we provide commentary throughout the report on how the legislative changes may influence the market in the future.

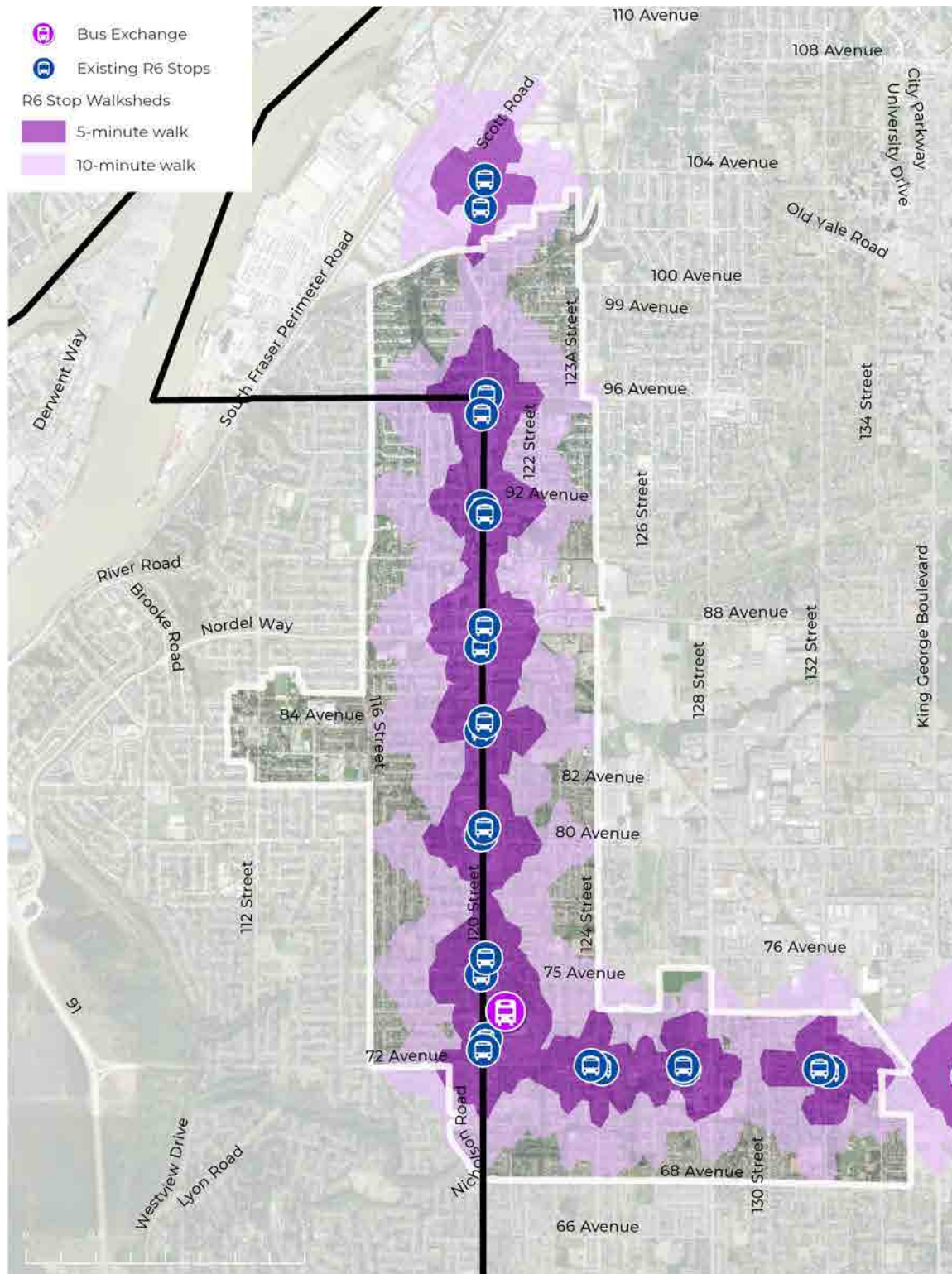
## 2.4 R6 SCOTT ROAD RAPIDBUS

The R6 RapidBus is a high frequency, limited-stop bus service connecting Scott Road SkyTrain Station with Newton Exchange. The major construction required to accommodate the new R6 bus stops was completed in 2023 and R6 bus service was initiated along Scott Road on January 4, 2024. During peak hours, the bus service is offered every 7.5 minutes and every 15 minutes during off-peak hours.

Introduction of R6 RapidBus service along the Scott Road Corridor sets the stage for a potential future Bus Rapid Transit (BRT) upgrade. To model walkability around the R6 bus stops and Scottsdale Exchange, **Figure 2** below highlights 5-minute and 10-minute walksheds and the encapsulated land area.

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Figure 2: Walksheds for the R6 RapidBus Stops and Scottsdale Exchange



## 2.5 SCOTTSDALE EXCHANGE

Scottsdale Exchange is a bus exchange located on the Surrey side of the Scott Road corridor, south of 75 Avenue. Under the new legislative changes brought on by Bill 47, the local government must designate this station as a transit-oriented development area.

Figure 3 shows the areas within 200 metres and 400 metres of Scottsdale Exchange. All land parcels within 200 metres of the station area are permitted to develop to a minimum of 4.0 FSR and 12 storeys in height, while all land parcels within 400 metres of the station area are permitted to be developed to a minimum of 3.0 FSR and eight (8) storeys in height. Parcels touching the perimeter of the next tier are permitted the corresponding density within that tier.<sup>2</sup>

Figure 3: Scottsdale Exchange Transit-Oriented Area, 400 and 200 Metre Tiers



<sup>2</sup> Note that the parcels are delineated based on information sourced from the land title.

### 3.0 ANTICIPATED DEVELOPMENT

This section reviews any major development applications proposing any new residential and commercial uses on either side of the Scott Road corridor.

Overall, the proposed number of residential units is currently higher on the Delta side than on the Surrey side, with 2,074 units being considered as shown below in **Table 1**. We assume that if these units are approved, they are likely to be brought to market on or before 2034.

#### 3.1 RESIDENTIAL UNITS IN THE DEVELOPMENT PIPELINE

*Table 1: Residential Development Applications, Delta*

Civic Address	Status	Development Type	Residential (Units)		
			Market	Market Rental	Non-market Rental
<b>8507 120 St</b>	Pre-Application	Apartment	225	99	0
<b>11805 89A Ave</b>	Under Review / Pre-Third Reading	Townhouse	31	0	0
<b>8037-8087 120 St</b>	Under Review / Pre-Third Reading	Mixed Use	793	66	
<b>7728 119A St</b>	Under Review / Pre-Third Reading	Apartment	291		
<b>7592, 7594 119A St / 7551, 7565, 7595, 7597 120 St</b>	Third Reading	Apartment with Townhouse	165	0	0
<b>11996 70 Ave</b>	Third Reading	Mixed Use	90		
<b>11959 – 11969 93A Ave / 9365 – 9383 120 St</b>	Building Permit Under Review	Mixed Use	264	40	10
<b>Total</b>			1,859	205	10

Source: City of Delta, September 2023

On the Surrey side of the Scott Road Corridor study area, there are 378 units under planning review and approval, as shown in **Table 2** below. We also assume that these units will be brought to market on or before 2034. Proposed development projects on the Surrey side are notably smaller in scale than those in process on the Delta side.

Table 2: Residential Development Applications, Surrey

Civic Address	Status	Development Type	Residential (Units)		
			Market	Market Rental	Non-market Rental
6998 120 St	Initial Review	Mixed Use	53		
9288 120 St	Initial Review	Mixed Use	32		
9609 120 St	Initial Review	Mixed Use	59		
6828 128 St	Initial Review	Mixed Use	98		
7070 128 St	Conditional Approval	Mixed Use		26	
7112 128 St	Conditional Approval	Mixed Use		47	
7091 134 St	Initial Review	Townhouse	8		
12140 96 Ave	Conditional Approval	Townhouse	4		
12156 96 Ave	Conditional Approval	Townhouse	4		
12149 80 Ave	Initial Review	Apartment	47		
<b>Total</b>			305	73	0

Source: City of Surrey, October 2023

### 3.2 COMMERCIAL SPACE IN THE DEVELOPMENT PIPELINE

In terms of proposed commercial-retail and office space, there is more commercial space proposed on the Delta side than on the Surrey side (Table 3) of the study area. The Surrey side has active development applications proposing a total 94,622 square feet of space (Table 4). This is lower than the proposed use of 192,552 square feet of retail and office space on the Delta side. Two of the major commercial development applications listed are south of 72<sup>nd</sup> and Scott Road in Surrey, each comprising 22,637 and 50,924 square feet, whereas Delta currently has one major commercial development application at 80<sup>th</sup> and 120 Street comprising 184,191 square feet and a smaller node at 11996 and 70 Avenue.



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Table 3: Commercial Development Applications, Delta

Civic Address	Commercial (sq. ft.)		Total Commercial Space
	Retail	Office	
<b>8507 120 St</b>	0	0	324
<b>11805 89A Ave</b>	0	0	31
<b>8037-8087 120 St</b>	70,637	113,554	184,191
<b>7728 119A St</b>	0	0	291
<b>7592, 7594 119A St / 7551, 7565, 7595, 7597 120 St</b>	0	0	165
<b>11996 70 Ave</b>	8,361	0	8,361
<b>11959 – 11969 93A Ave / 9365 – 9383 120 St</b>	0	0	314
<b>Total</b>	78,998	113,554	192,552

Source: City of Delta, September 2023

Table 4: Commercial Development Applications, Surrey

Civic Address	Status	Commercial (sq. ft.)		Total Commercial Space
		Retail	Office	
<b>6998 120 St</b>	Initial Review	50,924	0	50,924
<b>7002 120 St</b>	Initial Review	4,446	18,191	22,637
<b>9288 120 St</b>	Initial Review	7,137	0	7,137
<b>9609 120 St</b>	Initial Review	474	0	474
<b>7070 128 St</b>	Conditional Approval	5,690	0	5,690
<b>7112 128 St</b>	Conditional Approval	4,585	0	4,585
<b>12149 80 Ave</b>	Initial Review	3,175	0	3,175
<b>Total</b>		76,431	18,191	94,622

Source: City of Surrey, October 2023

## 4.0 PROJECTED RESIDENTIAL DEMAND

To understand future potential market demand for residential development along the Scott Road corridor, this section examines anticipated population growth for Delta and Surrey, respectively, over the short, medium, and long term. As mentioned previously, the planning timeframes referred to throughout this report are defined as:

- **Short term:** 2024 to 2029
- **Medium term:** 2029 to 2034
- **Long term:** 2034 to 2051

To inform land use planning policy over the next 27 years, Urban Systems presents a set of demand-driven population and household projections for the Delta side and Surrey side of the Scott Road corridor. These projections are informed by market data, or how residential and commercial development patterns are anticipated to trend over time.

While a more detailed land capacity model would identify what population growth is effectively possible through development typology change at a land parcel level, this level of analysis is outside the scope of this study.

As with any projection, projected population growth is subject to further uncertainty, such as new policies or unexpected changes in socio-economic conditions, as the time horizon expands. This makes the estimates for longer time horizons generally less reliable and therefore related implications must be considered with some caution. As such, the long-term projections included in this report are intended to guide land use planning with the understanding that conditions and trends are likely to shift as the market evolves in response to new legislated changes which introduce Small-Scale Multi-Unit Housing (SSMUH) and Transit-Oriented Development (TOD) Areas.

While we have captured a segment of this demand in the projections, it is recommended that regular market updates (say, 2 to 3 years) be undertaken as a “pulse check” on the market, which can impact both the provision and absorption of residential and commercial space and the ability of a land use plan to meet its long-term goals.

### 4.1 POPULATION AND HOUSEHOLD PROJECTIONS

The projected population of the Delta and Surrey sides of the Scott Road study area have been derived separately by applying a set of anticipated market shares of the study area population relative to the projected citywide populations as released by BC Statistics in December 2023 for the City of Delta, and City of Surrey projections, and then aggregated together. The citywide population projection by BC Stats covers future years from 2024 to 2046. For years beyond 2046, the projected population is extrapolated using the projected population growth trajectory from 2021 to 2045.

Both a “lower growth” scenario and a “higher growth” scenario have been modeled for both sides of the Scott Road corridor study area based on anticipated reasonable shares of city-wide population growth.<sup>3</sup> These are described below:

- **“Lower growth” scenario:** represents a case in which the population and household growth generally align with observed trends, factoring in the number of potential new residential units as observed in the development pipeline, as well as other competing residential-commercial nodes in each of the two subject cities, and the introduction of the R6 RapidBus service.
- **“Higher growth” scenario:** reflects a moderate increase in residential density and multi-family residential development activity relative to the base low-growth scenario, in large part due to the potential for significant redevelopment of existing single-purpose shopping centre sites and the longer-term potential for R6 Rapid Bus service to be upgraded to BRT (bus rapid transit) in the future.

*Table 5: Anticipated share of Scott Road Corridor population relative to City Population, 2021 to 2051*

	2021 (Census)	2024	2034		2051	
			Low Growth	High Growth	Low Growth	High Growth
<b>Delta</b>	19.7%	20.5%	23.0%	25.0%	24.0%	26.7%
<b>Surrey</b>	7.6%	7.6%	7.4%	7.6%	7.0%	7.6%

Source: Urban Systems adapted from Statistics Canada, Census 2021 and BC Statistics, 2024

#### Delta Side of Scott Road Study Area – Share of Delta Growth

- In the lower growth scenario, it is expected that the Delta-side study area share of the city-wide population increases from 19.7% in 2021 to 23.0% in 2034 in the medium term, reaching 24.0% by 2051.
- In the higher growth scenario, it is expected that the Delta-side corridor share of the citywide population increases from 19.7% in 2021 to 25.0% in 2034 in the medium term, reaching 26.7% in 2051.

#### Surrey Side of Scott Road Study Area – Share of Surrey Growth

- In the lower growth scenario, it is expected that the population share of the Surrey-side corridor population relative to the city gradually declines from 7.6% in 2021 to 7.4% in 2034, and further declines to 7.0% in 2051, due to the extent of anticipated

<sup>3</sup> A low and high population growth scenario was developed to understand market trends consistently across Surrey and Delta. Alternative growth scenarios may be developed by the local governments, such as in Delta’s OCP review which reviews a higher growth scenario than what is shown here.

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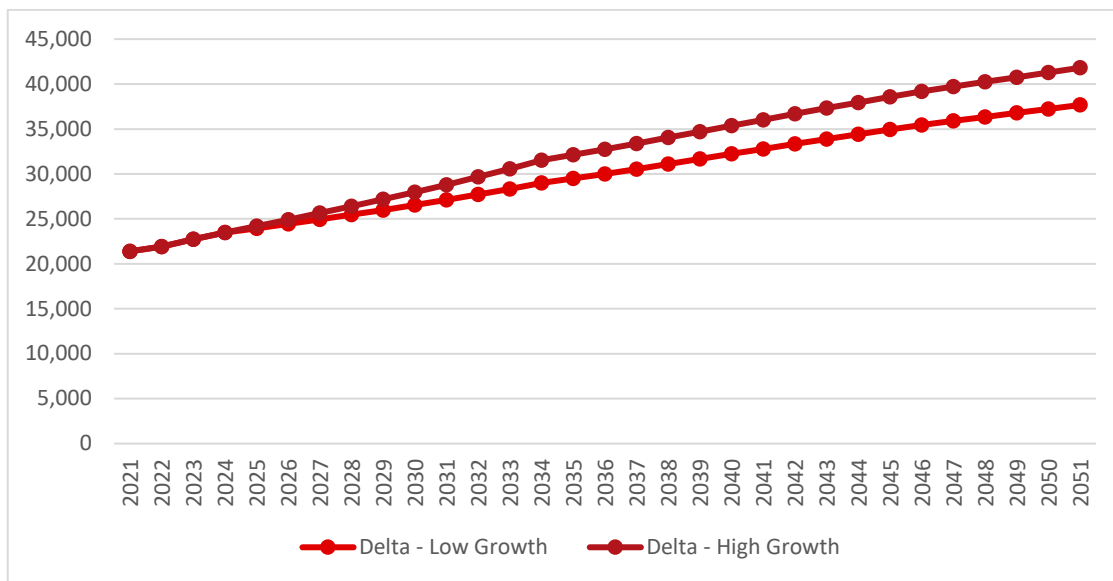
### SUPPLY AND DEMAND STUDY FOR SCOTT ROAD R6 – RAPIDBUS CORRIDOR

development in more numerous competitive residential-commercial nodes across the City, including those in Surrey Central, Newton, Guilford, and in the corridor along the Surrey to Langley Skytrain extension.

- In the higher growth scenario, it is assumed that the corridor population share relative to city population remains relatively constant after 2021. This share of city-wide population is less likely to materialize given the extent of competing density nodes across the City of Surrey, but is included for comparative planning purposes.

Figure 4 and **Figure 5** below show the projected population growth scenarios for the Scott Road corridor study area, for Delta and Surrey, respectively.

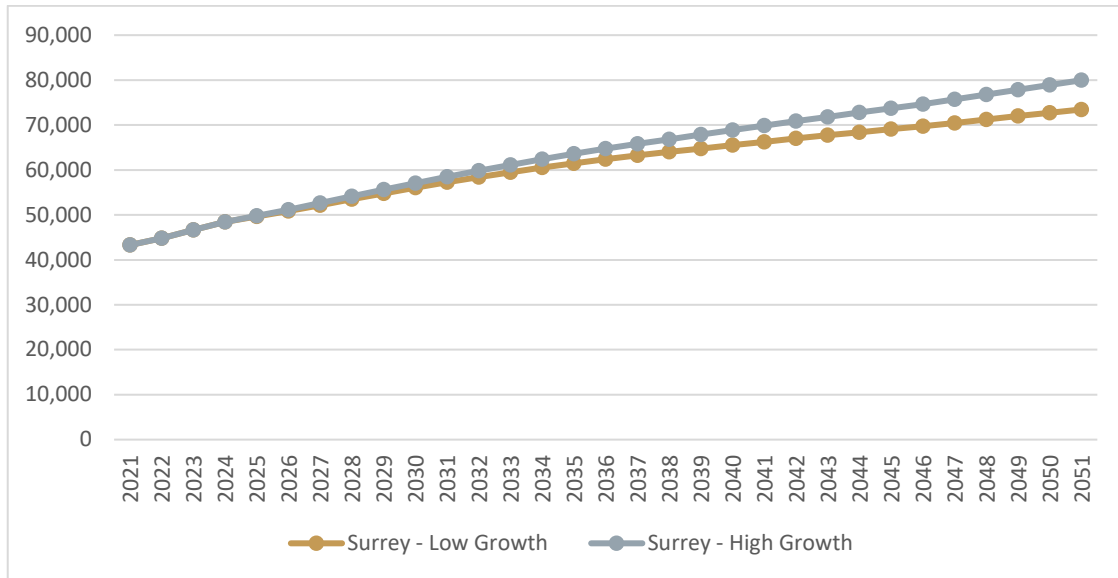
Figure 4: Population Projections, Delta-Side of Scott Road Corridor, 2021 to 2051



Source: Urban Systems adapted from Statistics Canada, Census 2021 and BC Statistics, 2024

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Figure 5: Population Projections, Surrey-Side of Scott Road Corridor, 2021 to 2051



Source: Urban Systems adapted from Statistics Canada, Census 2021 and BC Statistics, 2024

Table 6 below summarizes the projected lower and higher growth study area population increases anticipated over the 2021 to 2051 period. The Delta side population is projected to grow from 23,469 residents in 2024 to a low growth mark of 37,673 residents and a high growth figure of 41,811 residents by 2051. The Surrey side population is projected to grow from 48,463 residents in 2024 to a low growth number of 73,467 residents and a high growth figure of 79,964 residents by 2051.

Table 6: Population Projection by Community, Scott Road Corridor, 2021 to 2051

	2021 (Census)	2024	2029	2034	2051
<b>Low Growth – Total</b>	64,693	71,933	80,770	89,526	111,140
Delta	21,392	23,469	25,983	29,002	37,673
Surrey	43,301	48,463	54,787	60,525	73,467
<b>High Growth – Total</b>	64,693	71,933	82,803	93,926	121,776
Delta	21,392	23,469	27,179	31,524	41,811
Surrey	43,301	48,463	55,624	62,403	79,964

Source: Urban Systems adapted from Statistics Canada, Census 2021 and BC Statistics, 2024

Table 7 below shows the absolute growth and pace of growth for the Delta and Surrey sides over the three time horizons (short term to 2029, medium term to 2034 and longer term):

- In the low growth scenario, the pace of growth on the Delta side is expected to be generally higher over the short and medium terms. This reflects immediate unit

absorption for the sites already known to be in the planning and development pipeline and the implementation of the provincial housing targets, followed by a more moderate pace after 2034, as larger sites are expected to redevelop in phases over time.

- In the higher growth scenario, Delta’s pace of growth is assumed to be higher over the medium-term as more permissive land use plans and zoning are adopted to encourage and support redevelopment.

Similar to Delta, the pace of growth on the Surrey side is expected to be higher over the short to medium terms in both **the low and high growth scenarios**. This assumes the redevelopment of sites with high potential will be built out first if a future neighbourhood/sub-area plan permits the change. However, Surrey’s growth is expected to slow down more than Delta after 2034 as the development market becomes more competitive relative to other urban town centres, including Guildford, Fleetwood, and the City Centre.

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*Table 7: Population Projection Growth by Community, Scott Road Corridor, 2024 to 2051*

	Short Term (2024 to 2029)		Medium Term (2029 to 2034)		Long Term (2034 to 2051)	
	#	Avg Annual (%)	#	Avg Annual (%)	#	Avg Annual (%)
<b>Low Growth – Total</b>	8,837	2.3%	8,756	2.1%	21,614	1.3%
Delta	2,514	2.1%	3,019	2.2%	8,671	1.6%
Surrey	6,324	2.5%	5,738	2.0%	12,942	1.1%
<b>High Growth – Total</b>	10,870	2.9%	11,123	2.6%	27,850	1.5%
Delta	3,710	3.0%	4,345	3.0%	10,287	1.7%
Surrey	3,710	2.8%	6,779	2.3%	17,561	1.5%

Source: Urban Systems adapted from Statistics Canada, Census 2021 and BC Statistics, 2024

These projections are important to note as the development forms permitted in the land use plans, policies, regulations and supporting infrastructure can change this range of growth.

To project household growth, we apply the average household size for the respective areas. Household projections for the Scott Road corridor are derived from the population projections using the respective average household size exhibited on each side of the corridor. On the Delta side, this average is 3.1 persons per household, and on the Surrey side of the study area this average is 3.4 persons per household based on the 2021 Census. **Table 8** below summarizes the projected households of the Scott Road corridor by municipality.

*Table 8: Household Projections by Community, Scott Road Corridor, 2021 to 2051*

	2021 (Census)	2024	2029	2034	2051
<b>Low Growth – Total</b>	19,645	21,836	24,510	27,173	33,770
Delta	6,822	7,484	8,286	9,249	12,014
Surrey	12,823	14,352	16,224	17,924	21,756
<b>High Growth – Total</b>	19,645	21,836	25,139	28,533	37,014
Delta	6,822	7,484	8,667	10,053	13,334
Surrey	12,823	14,352	16,472	18,480	23,680

Source: Urban Systems adapted from Statistics Canada, Census 2021 and BC Statistics, 2024

**Table 9** below shows the absolute growth of households across the three timeframes. The growth rate is the same as the population projections for Delta and Surrey, as it follows the

same trendlines. Note that the household growth rate is assumed to be the same rate as projected population growth.

*Table 9: Household Projection Growth by Community, Scott Road Corridor, 2024 to 2051*

	Short Term (2024 to 2029)		Medium Term (2029 to 2034)		Long Term (2034 to 2051)	
	#	Avg Annual (%)	#	Avg Annual (%)	#	Avg Annual (%)
<b>Low Growth – Total</b>	2,675	2.3%	2,662	2.1%	6,598	1.3%
Delta	802	2.1%	963	2.2%	2,765	1.6%
Surrey	1,873	2.3%	1,699	2.0%	3,833	1.1%
<b>High Growth – Total</b>	3,304	2.1%	3,393	2.6%	8,482	1.5%
Delta	1,183	1.9%	2,569	3.0%	5,850	1.7%
Surrey	2,121	2.8%	4,128	2.3%	9,329	1.5%

Source: Urban Systems adapted from Statistics Canada, Census 2021 and BC Statistics, 2024

## HOUSING UNIT DEMAND

Based on current development market conditions and the development potential of the Scott Road corridor post the introduction of R6 RapidBus service, the distribution of housing structural types is likely to shift somewhat over the medium term. **Table 10** below shows the historical and projected change in overall housing typology distribution. The housing distribution takes into consideration three major trends:

- A moderate shift from single-detached housing to an apartment or flat in a duplex (e.g., addition of a secondary suite to a single-detached house or duplex) due to renovation and redevelopment pressures related to the SSMUH legislation and implementation;
- A slow, but increased uptake in semi-detached/duplex, and small-scale high density townhouse (rowhouse) developments due to the SSMUH legislation and related implementation<sup>4</sup>, having regard to the challenges associated with finding suitable sites for assembly (as outlined by developers in interviews); and
- Increased demand for 6-storey wood-frame or taller apartments, which are deemed to be the most suitable housing form for locations immediately adjacent

<sup>4</sup> In Delta, it is anticipated that the SSMUH legislation will be implemented as primarily single-detached and duplex with accessory dwelling units. As such, the market uptake on rowhouses would be attributed to townhouses permitted along 84<sup>th</sup> and 72<sup>nd</sup> Avenue rather than multiplexes.



to the corridor. Within at least the short-term, the most likely and achievable development forms are up to 6-storey wood-frame (with potential to include at-grade commercial uses) and 20 or more storeys of concrete apartments. Under current market conditions, the economics of building concrete residential towers do not allow for viability unless a certain height threshold allowing for economies of scale is reached.

Nonetheless, in the future, as market conditions evolve and financing rates for land and construction adjust downward, there is anticipated to be demand from developers to pursue development concrete towers. As indicated in Section 6.0 of this report, interested development groups are likely to be more experienced firms with some track record of multi-family tower development in their portfolio who have the capital needed to invest within higher density nodes along the Scott Road corridor. This would likely be a subset of developers, as the South of Fraser region has multiple competitive submarkets, and some developers have indicated a preference to developing high-rise concrete towers around Skytrain station areas for the time being.

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Table 10: Dwelling Structural Type, 2018 to 2034

	Delta						Surrey					
	2018	2021	2034		Projected Change (2018-2034)		2018	2021	2034		Projected Change (2018-2034)	
			Low Growth	High Growth	Low Growth	High Growth			Low Growth	High Growth	Low Growth	High Growth
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	-	-	<b>100%</b>	<b>99%*</b>	<b>100%</b>	<b>100%</b>	-	-
Detached Dwelling	70%	68%	55%	50%	-15%	-20%	41%	42%	35%	35%	-7%	-7%
Single-detached house	31%	29%	21%	18%	-10%	-13%	15%	15%	11%	11%	-5%	-5%
Apt or flat in a duplex	39%	39%	34%	32%	-5%	-7%	26%	27%	24%	24%	-2%	-2%
Townhouse/Row	8%	8%	10%	10%	3%	3%	18%	18%	16%	16%	-2%	-2%
Semi-detached house	2%	2%	3%	3%	1%	1%	2%	2%	3%	3%	0%	0%
Row house	6%	6%	7%	7%	1%	1%	15%	15%	13%	13%	-2%	-2%
Apartments	23%	24%	36%	40%	13%	17%	41%	40%	50%	50%	9%	9%
Less than five storeys	19%	19%	16%	16%	-3%	-3%	39%	38%	26%	26%	-13%	-13%
Five or more storeys	4%	5%	20%	25%	16%	20%	2%	2%	24%	24%	23%	23%

Source: Urban Systems adapted from Environics, 2018 and Statistics Canada, Census 2021

\*The remaining 0.5% are other dwelling types

For the Delta side of the Scott Road Corridor study area, two sets of dwelling typology distributions are assigned for each of the growth scenarios. In the high growth scenario, a higher share of apartments is allocated, corresponding to the higher population growth driven by increasing high-density development activities. By 2034, detached dwellings will still be the most common type of dwelling at a range of 50%-55%, while apartments will move to a range of 36%-40% and townhouse/row typology homes are expected to adjust to a proportion of 10%. The proportion of detached dwellings is projected to decline by 15%-20% after 2018, while apartments are likely to grow by 13%-17%, and townhouses/row can be expected to grow by roughly 3%.

On the Surrey side by 2034, it is projected that the proportion of detached dwellings will decline by 7%, townhouse/row homes will decline by 2%, and apartments will grow by 9%. Overall, apartments will become the most common type of residential dwelling at 50%, while detached dwellings will decline to 35%, and townhouse/row will decline slightly to 16%.

Based on the dwelling distributions in 2034 (Table 10 above), the projected housing demand over the short and medium terms are summarized below.

On the Delta side of the study area, housing demand from the low to high growth scenarios are as follows over the 2024 to 2034 period:

- **Detached Dwelling:** -49 to -63 net units<sup>5</sup>
- **Townhouse/Row:** 345 to 425 net units
- **Apartments:** 1,469 to 2,207 net units

*Table 11: Projected Housing Demand by Structural Type, Low Growth Scenario, Delta-side of Scott Road, 2021-2034*

	Delta				Projected Change (2024-2034)
	2021	2024	2029	2034	
<b>Total</b>	6,814	7,484	8,286	9,249	1,765
<b>Detached Dwelling</b>	4,637	5,090	5,076	5,041	-49
<b>Single-detached house</b>	2,004	2,200	2,067	1,896	-304
<b>Apt or flat in a duplex</b>	2,633	2,890	3,009	3,145	254
<b>Townhouse/Row</b>	528	580	735	925	345
<b>Semi-detached house</b>	124	136	200	277	141
<b>Row house</b>	404	444	536	647	204
<b>Apartments</b>	1,649	1,814	2,473	3,283	1,469
<b>Less than five</b>	1,324	1,453	1,447	1,434	-20
<b>Five or more floors</b>	325	361	1,026	1,850	1,489

Source: Urban Systems adapted from Environics, 2018 and Statistics Canada, Census 2021

Summary highlights for the lower growth scenario for the Delta side of the study area include:

- Decline in standard single-family homes, but with an increase in homes that include an apartment flat or suite
- Moderate increases in both semi-detached/duplex (+ 140 homes) and row homes/townhouses (+200 homes) to 2034
- Significant increase in apartment style homes (+nearly 1,500 homes), in formats of 5-6 or more storeys. Older wood-frame apartment stock will see its proportional share of total housing stock decline over time, as newer, more dense forms are introduced.

<sup>5</sup> The detached dwelling category may increase if the Delta SSMUH legislation is implemented as primarily single-detached and duplex with accessory dwelling units, however, it remains to be seen what the potential uptake of this is, and whether secondary suites or cottages would be more common.

*Table 12: Potential Market Delivery of Apartment Units by Structural Type, Delta-side of Scott Road, 2021-2034*

	Low	High
<b>Net Apartment Units</b>	1,469	2,207
Wood-Frame Up to 6 Storeys	940	1,412
Concrete/Alternative Building Technology* (7-20+ Storeys)	529	795

Source: Urban Systems

\*Based on current market conditions, these units will most likely be delivered in 20+ storey concrete towers over the short term. This breakdown of potential market delivery by structure type has been provided in the absence of a more detailed capacity review for areas along the Scott Road corridor. Additional analysis should be undertaken to explore potential for infill density throughout the study area.

*Table 13: Projected Housing Demand by Structural Type, High Growth Scenario, Delta-side of Scott Road, 2021-2034*

	Delta				Projected Change (2024-2034)
	2021	2024	2029	2034	
<b>Total</b>	6,814	7,484	8,667	10,053	2,569
<b>Detached Dwelling</b>	4,637	5,090	5,114	5,027	-63
<b>Single-detached house</b>	2,004	2,200	2,054	1,810	-390
<b>Apt or flat in a duplex</b>	2,633	2,890	3,060	3,217	327
<b>Townhouse/Row</b>	528	580	769	1,005	425
<b>Semi-detached house</b>	124	136	209	302	165
<b>Row house</b>	404	444	560	704	260
<b>Apartments</b>	1,649	1,814	2,782	4,021	2,207
<b>Less than five</b>	1,324	1,453	1,513	1,558	105
<b>Five or more floors</b>	325	361	1,268	2,463	2,102

Source: Urban Systems adapted from Environics, 2018 and Statistics Canada, Census 2021

Summary highlights for the higher growth scenario for the Delta side of the study area include:

- Slightly more decline in standard single-detached homes, but with an increase in homes that include an apartment flat or suite
- Moderately more substantial increases in both semi-detached/duplex (+165 homes) and row homes/townhouses (+260 homes) to 2034

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- More significant increase in apartment style homes (+2,100 homes), in formats of 5-6 or more storeys. Older wood-frame apartment stock will see its proportional share of total housing stock decline over time, as newer, more dense forms are introduced.

On the Surrey side, housing demand from the low to high growth scenarios is expected to be as follows over the 2024 to 2034 period:

- **Detached Dwelling:** 180 to 372 net units
- **Townhouse/Row:** 246 to 333 net units
- **Apartments:** 3,218 to 3,496 net units

Table 14: Projected Housing Demand by Structural Type, Low Growth Scenario, Surrey-side of Scott Road, 2021-2034

	Surrey				
	2021	2024	2029	2034	Projected Change (2024-2034)
<b>Total</b>	12,782	14,352	16,224	17,924	3,572
<b>Detached Dwelling</b>	5,374	6,003	6,176	6,184	180
<b>Single-detached house</b>	1,916	2,140	2,056	1,882	-258
<b>Apt or flat in a duplex</b>	3,458	3,864	4,120	4,302	438
<b>Townhouse/Row</b>	2,266	2,532	2,682	2,778	246
<b>Semi-detached house</b>	313	350	400	448	98
<b>Row house</b>	1,953	2,181	2,282	2,330	149
<b>Apartments</b>	5,142	5,744	7,284	8,962	3,218
<b>Less than five</b>	4,941	5,520	5,216	4,660	-860
<b>Five or more floors</b>	201	224	2,068	4,302	4,078

Source: Urban Systems adapted from Environics, 2018 and Statistics Canada, Census 2021

Summary highlights for the lower growth scenario for the Surrey side of the study area include:

- Slight decrease in standard single-family homes but with a significant increase in homes that include an apartment flat or suite
- Moderate increases in both semi-detached/, (+ 100 homes) and row homes/townhouses (+150 homes) to 2034
- Significant increase in apartment style homes (+net 3,200 homes), in formats of 5-6 or more storeys. Older wood-frame apartment stock will see its proportional share of total housing stock decline over time, as newer, more dense forms are introduced.

*Table 15: Projected Housing Demand by Structural Type, High Growth Scenario, Surrey-side of Scott Road, 2021-2034*

	Surrey				
	2021	2024	2029	2034	Projected Change (2024-2034)
<b>Total</b>	12,782	14,352	16,472	18,480	4,128
<b>Detached Dwelling</b>	5,374	6,003	6,271	6,375	372
<b>Single-detached house</b>	1,916	2,140	2,087	1,940	-199
<b>Apt or flat in a duplex</b>	3,458	3,864	4,183	4,435	572
<b>Townhouse/Row</b>	2,266	2,532	2,722	2,864	333
<b>Semi-detached house</b>	313	350	406	462	111
<b>Row house</b>	1,953	2,181	2,317	2,402	220
<b>Apartments</b>	5,142	5,744	7,395	9,240	3,496
<b>Less than five</b>	4,941	5,520	5,295	4,805	-714
<b>Five or more floors</b>	201	224	2,100	4,435	4,211

Source: Urban Systems adapted from Environics, 2018 and Statistics Canada, Census 2021

*Table 16: Potential Market Delivery of Apartment Units by Structural Type, Surrey-side of Scott Road, 2021-2034*

	Low	High
<b>Net Apartment Units</b>	3,218	3,496
Wood-Frame Up to 6 Storeys	2,220	2,412
Concrete/Alternative Building Technology* (7-20+ Storeys)	998	1,084

Source: Urban Systems

\*Based on current market conditions, these units will most likely be delivered in 20+ storey concrete towers over the short term. This breakdown of potential market delivery by structure type has been provided in the absence of a more detailed capacity review for areas along the Scott Road corridor. Additional analysis should be undertaken to explore potential for infill density throughout the study area.

Summary highlights for the higher growth scenario for the Surrey side of the study area include:

- Decline in standard single-family homes, but with a significant increase in homes that include an apartment flat or suite
- Moderate increases in both semi-detached/duplex (+ 110 homes) and row homes/townhouses (+220 homes) to 2034

- Significant increase in apartment style homes (+net 3,500 homes), in formats of 5-6 or more storeys. Older wood-frame apartment stock will see its proportional share of total housing stock decline over time, as newer, more dense forms are introduced.

If the trend of an increasing proportion of multi-family housing mid/high-density residential development continues through the defined longer term (year 2034 to 2051), the demand for new housing units by dwelling types on each side of the Scott Road corridor could potentially reach the following ranges summarized in **Table 15** below.

It is important to note that the household choice of typologies through the medium to longer term are subject to continued shifts in market conditions and household preferences, including location preferences relative to other potential higher density areas of the city or region. Therefore, these longer-term projections are naturally subject to increased levels of uncertainty and should be revisited periodically.

*Table 17: Projected Additional Housing Demand by Structural Type (Net Units), 2024-2034, and 2034-2051*

	Delta-side		Surrey-side	
	2024-2034 (Short to Medium Term)	2034-2051 (Medium to Long Term)	2024-2034 (Short to Medium Term)	2034-2051 (Medium to Long Term)
<b>Total</b>	<b>1,765 to 2,569</b>	<b>2,765 to 3,281</b>	<b>3,572 to 4,128*</b>	<b>3,833 to 5,201</b>
<b>Detached Dwelling</b>	-49 to -63	-235 to -360	180 to 372	240 to 616
<b>Townhouse/Row</b>	345 to 425	584 to 670	246 to 333	299 to 485
<b>Apartments</b>	1,469 to 2,207	2,416 to 2,971	3,218 to 3,496	3,294 to 4,100

Source: Urban Systems adapted from Environics, 2018, Statistics Canada, Census 2021, and BC Statistics, 2024

\*Including other dwelling types not listed in this table

#### 4.1.1 HOUSING DEMAND BY TENURE IN THE SCOTT ROAD STUDY AREA

This section highlights anticipated demand for housing units by tenure; however, this does not mean that all rental units could be provided by the primary rental market (i.e., developed as purpose-built rental). Historically in both Delta and Surrey, the majority of the renter households have tended to be served by the secondary rental market.

The 2021 household tenure split for the study area is projected into the future by assuming the proportion of renter households will remain relatively constant over the 2021 to 2051 period. In 2021, the proportion of renter households on the Delta side was estimated at 37%. On the Surrey side the proportion was closer to 38%. For the purposes of this planning level assessment, we assume that this proportion will generally remain stable through to 2051.

Owner-driven housing demand for the low to high growth scenarios is expected to be as follows for 2024 to 2034:

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- **Delta side:** 1,138 to 1,657 net units
- **Surrey side:** 2,164 to 2,502 net units

Rental housing demand<sup>6</sup> for the low to high growth scenarios is expected to be as follows for 2024 to 2034:

- **Delta side:** 627 to 912 net units
- **Surrey side:** 1,407 to 1,626 net units

A more detailed breakdown is provided in the tables below.

*Table 18: Projected Housing Demand – Home Ownership, Scott Road Corridor, 2024 to 2051*

	2021 (Census)	2024	2029	2034	2051	Change (2024- 2034)
<b>Low Growth – Total</b>	12,171	13,524	15,176	16,827	20,933	3,303
Delta	4,400	4,827	5,344	5,966	7,749	1,138
Surrey	7,771	8,697	9,832	10,862	13,184	2,164
<b>High Growth – Total</b>	12,171	13,524	15,572	17,683	22,951	4,159
Delta	4,400	4,827	5,590	6,484	8,600	1,657
Surrey	7,771	8,697	9,982	11,199	14,350	2,502

Source: Urban Systems adapted from Environics, 2018, Statistics Canada, Census 2021, and BC Statistics, 2024

*Table 19: Projected Housing Demand – Rental Tenure, Scott Road Corridor, 2024 to 2051*

	2021 (Census)	2024	2029	2034	2051	Change (2024- 2034)
<b>Low Growth – Total</b>	7,474	8,311	9,334	10,345	12,837	2,034
Delta	2,422	2,657	2,942	3,283	4,265	627
Surrey	5,052	5,655	6,392	7,062	8,572	1,407
<b>High Growth – Total</b>	7,474	8,311	9,567	10,850	14,064	2,538
Delta	2,422	2,657	3,077	3,569	4,734	912
Surrey	5,052	5,655	6,490	7,281	9,330	1,626

Source: Urban Systems adapted from Environics, 2018, Statistics Canada, Census 2021, and BC Statistics, 2024

<sup>6</sup> As previously highlighted, this does not mean that all rental units would be provided by the primary rental market (i.e., developed as purpose-built rental). Historically in both Delta and Surrey, the majority of renter households have been served by the secondary rental market.



## ADDITIONAL RENTAL DEMAND GENERATED FROM THE CITY-WIDE MARKET

The proportion of renter households along the Delta side of Scott Road is much higher than that observed at the city-wide level in 2021 (37% compared to 24%, respectively). In Delta, while the Housing Needs Report conducted in 2019 did not specify the number of rental units needed over the short-term across the City, the new ministerial Housing Targets Order<sup>7</sup> has indicated that the suggested 5 year rental target is 1,199 units for the 2023 to 2028 period (Table 18).

Using CMHC’s rental housing data to track historical progress, only 11 net new units have been built across Delta city-wide from 2018 to 2023 and none of the units were in North Delta. This historical development pattern, along with the upgrading of public transit service to R6-RapidBus service, indicates that there is potential to accommodate additional purpose-built rental housing in the study area.

*Table 20: Ministerial Housing Target Order, Guideline for Unit Tenure Split, Delta*

5 Year Rental Target (Guideline for 2023 to 2028)	
<b>Delta</b>	3,607
<b>Owner</b>	2,408
<b>Renter</b>	1,199

Source: Ministry of Housing

On the Surrey side of the Scott Road Corridor study area, the proportion of renter households is higher than that observed city-wide in 2021 – 38% compared to 31%. Using CMHC’s rental housing data to understand development progress, Surrey has gained 1,432 net new primary rental units city-wide from 2018 to 2023. Forty-seven (47% or 680 units) of these new units were built in the Whalley neighbourhood, and only 7% (97 units) were built in the Newton neighbourhood.

This growth represents less than half of the 5-year rental apartment demand of 3,900 units from 2021 to 2026 reported in the Surrey Housing Needs Report (2020). This indicates that there is significant potential to encourage more purpose-built rental apartment units along Scott Road Corridor on the Surrey side of the study area.

<sup>7</sup> Announced September 26, 2023.

## 5.0 PROJECTED RETAIL-COMMERCIAL DEMAND

With a clear understanding of residential redevelopment and related population growth potential along the Scott Road corridor study area, the Scott Road corridor’s potential from an incremental retail-commercial demand perspective can be reviewed. The following section provides a summary assessment of the corridor’s anticipated potential from an incremental (beyond current day commercial footprint) growth perspective, assuming that the study area attracts increased levels of redevelopment interest over the forecast study period.

### 5.1 SCOTT ROAD RETAIL COMMERCIAL TRADE AREA DELINEATION

The following retail trade area was delineated for the Scott Road study area, informed by input from the developer outreach interviews, the north south extent of the corridor, and the location and orientation of competitive retail-commercial nodes/corridors.

Particularly important drivers of retail spending patterns, and therefore trade area delineation, are the following:

- The sheer length of the Scott Road corridor, stretching from roughly 68<sup>th</sup> Avenue to the south and 99<sup>th</sup> Avenue to the north;
- Presence and orientation of competitive commercial corridors – particularly King George Highway to the east, which limits eastern extension of the trade area
- Physical and land use barriers – orientation of the Fraser River and riverfront industrial uses in the northern portion of the trade area
- Higher profile commercial nodes focused on key intersections (72<sup>nd</sup> Avenue, 80<sup>th</sup> Avenue, 88<sup>th</sup> Avenue/Nordel Way)

Generally speaking, one can expect relatively similar retail spending behaviour patterns within each of the defined trade area geographies, in part due to the nature, quality, and extent of existing retail-commercial centres and businesses.

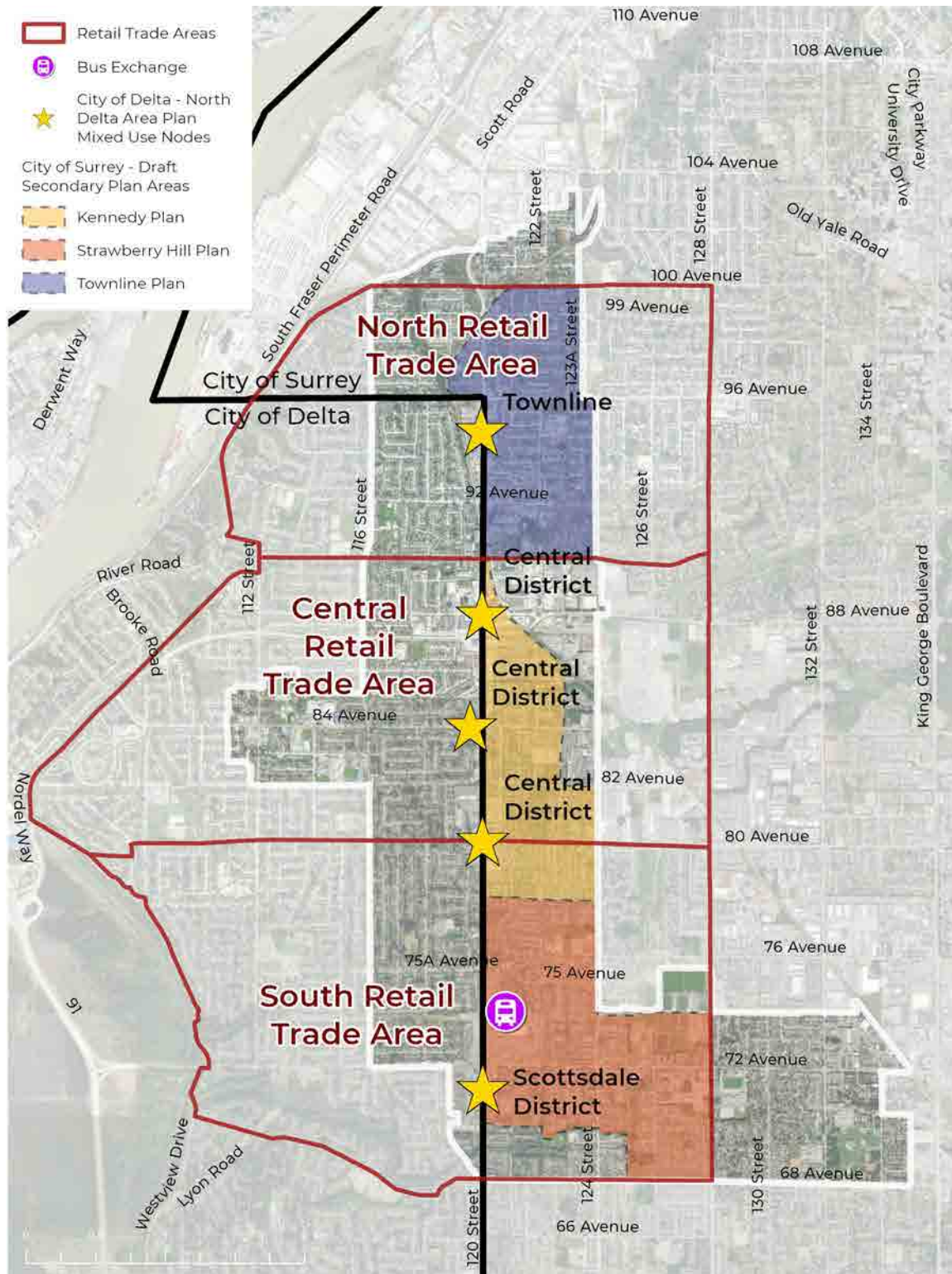
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Figure 6: Scott Road Corridor Retail-Commercial Trade Area Delineation



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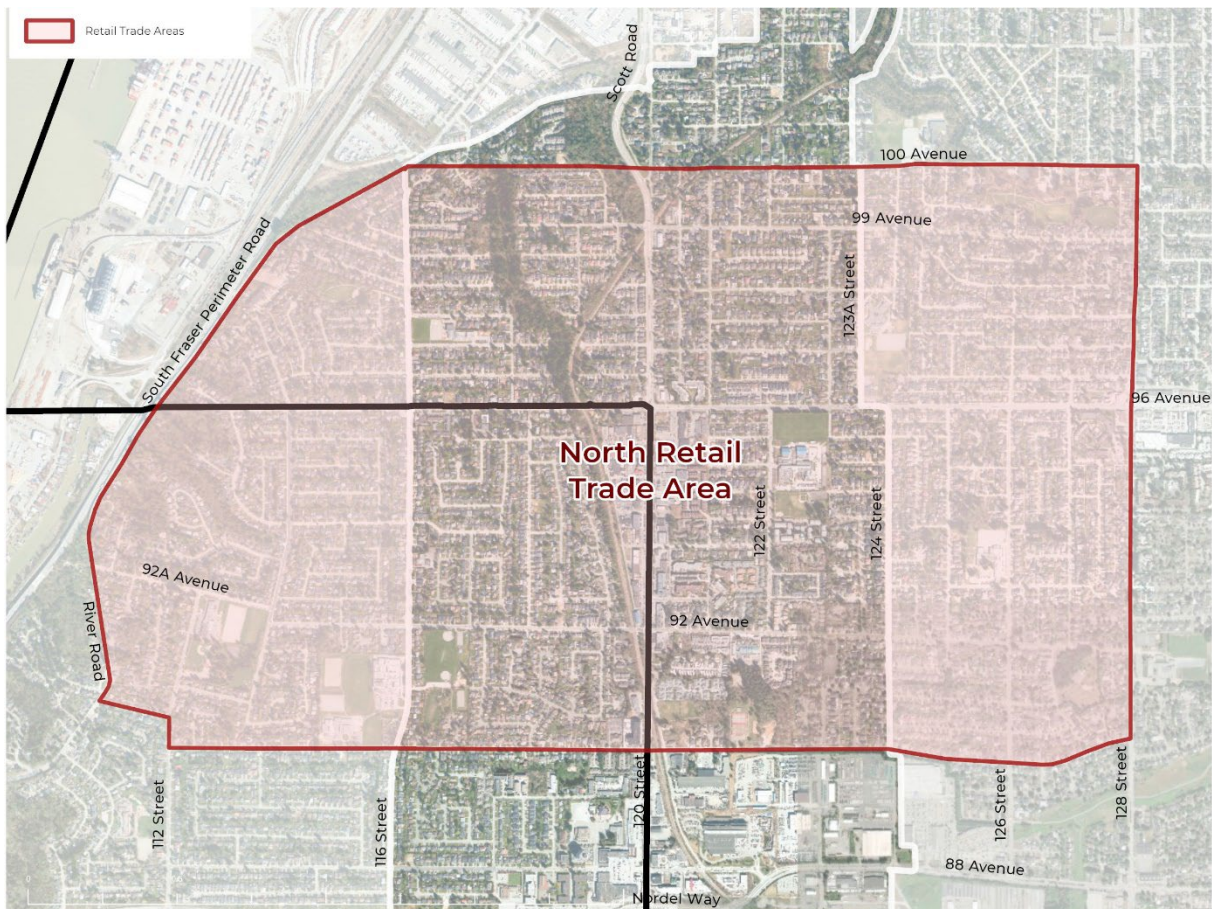
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The northern section of the Scott Road retail trade area is the least populated in terms of traditional retail-commercial offerings, with many of the corridor's larger enclosed shopping centre properties being situated closer to 80<sup>th</sup> Avenue (Central Scott Road) and 72<sup>nd</sup> Avenue (South Scott Road).

The North Scott Road portion of the retail trade area does include the following smaller neighbourhood commercial centre:

- **Scott Town Plaza (9500-9570 120<sup>th</sup> Street – Surrey)** – This roughly 58,000 sq. ft. commercial centre, including 26 commercial retail units (CRUs), was first opened in 1959. The site includes 202 parking stalls, which equates to a parking ratio of 3.49 stalls per 1,000 sq. ft. of gross leasable area (GLA). Representative commercial tenants include a 10,000 sq. ft. Dollarama general merchandise dollar store, a 4,200 sq. ft. Liquor Depot liquor store, and a 4,700 sq. ft. Pharmasave pharmacy.

Figure 7: Northern Retail Trade Area



The Central Scott Road portion of the trade area offers a denser array of competitive retail offerings, particularly on the Delta side of Scott Road, and includes the following major shopping centre properties:

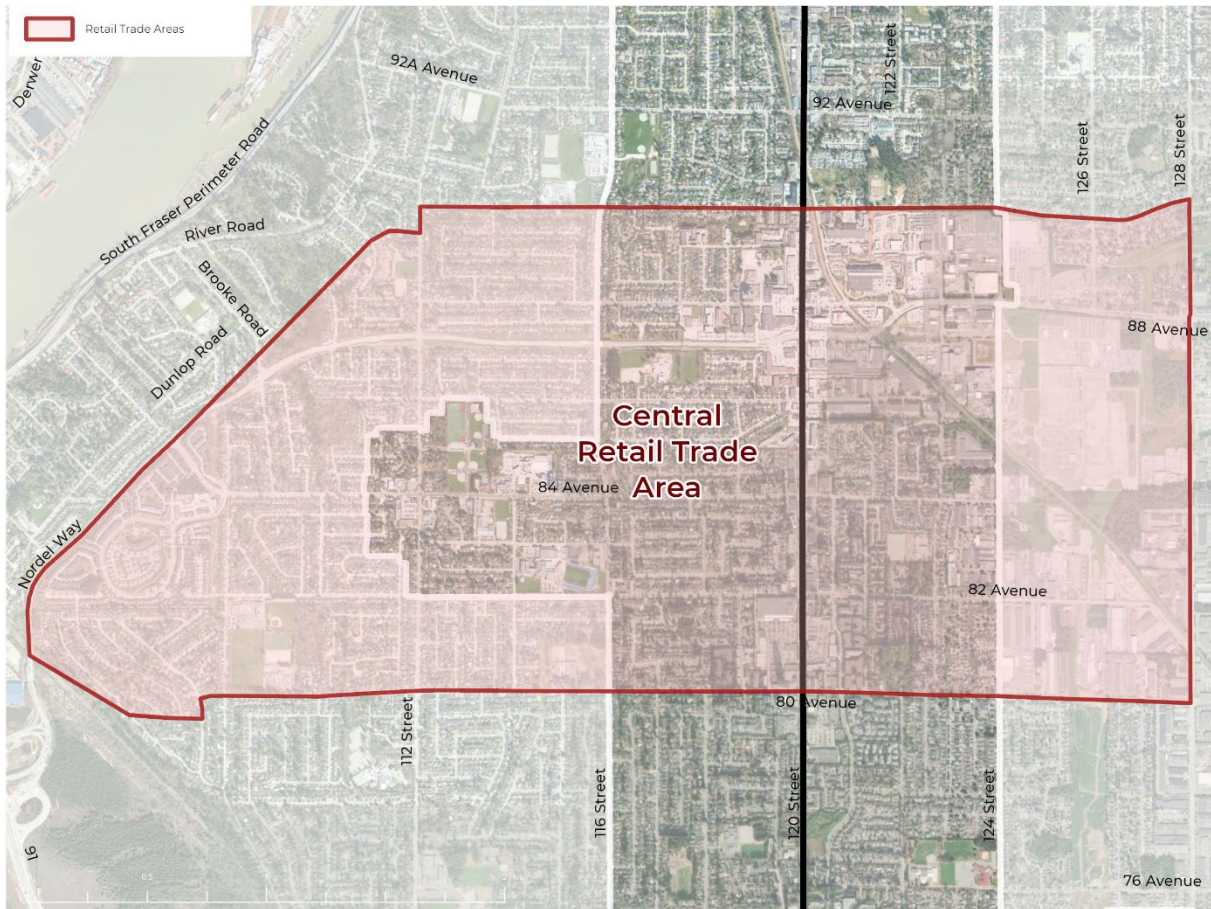
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- **Delta Shoppers Mall (8037-8087 120<sup>th</sup> Street – Delta)** – 187,000 sq. ft. open-format shopping centre on a 5.9-acre site, first opened in 1972; features 340 parking stalls for a parking ratio of only 1.82 stalls per 1,000 sq. ft. of gross leasable area (GLA). This is very low by traditional shopping centre standards, but the property is supported by high-frequency transit. The property is shadow-anchored by a 145,000 sq. ft. Real Canadian Superstore, located at 8195 120<sup>th</sup> Street. The site is also the subject of a recently approved redevelopment application which would see the site accommodate 876 new homes, including 643 market ownership condominiums, 150 market-rate seniors homes and 83 purpose-built rental apartments.
- **8195 120<sup>th</sup> Street (Delta)** – 153,600 sq. ft. open-format centre anchored by a 145,000 sq. ft. Real Canadian Superstore; also features a Dollarama dollar store (7,800 sq. ft.) and Domo gas bar. The site offers 363 parking stalls for a parking ratio of 2.36.
- **Kennedy Heights Shopping Centre (8821-8899 120<sup>th</sup> Street – Delta)** – 160,000 sq. ft. open-format centre first with 40 commercial retail units (CRUs) opened in 1960; features 579 parking stalls for a more substantial parking ratio of 3.61 stalls per 1,000 sq. ft. of GLA.
- **Scott Road Centre (8066-8112 120<sup>th</sup> Street – Surrey)** – 62,000 sq. ft. neighbourhood-oriented shopping centre with 12 CRUs, first opened in 1990; site offers 323 parking stalls for a parking ratio of 5.21. A 19,100 sq. ft. Salvation Army Thrift Store anchors the property.
- **Scott Road Crossing (12030-12048 80<sup>th</sup> Ave. – Surrey)** – 115,000 sq. ft. open-format shopping centre featuring 10 CRUs and 478 parking stalls for a ratio of 4.16. The centre is anchored by a 70,000 sq. ft. Canadian Tire general merchandise/auto store and a 25,700 sq. ft. Best Buy electronics store. Other notable tenants include The Keg Steakhouse & Bar (8,200 sq. ft.).

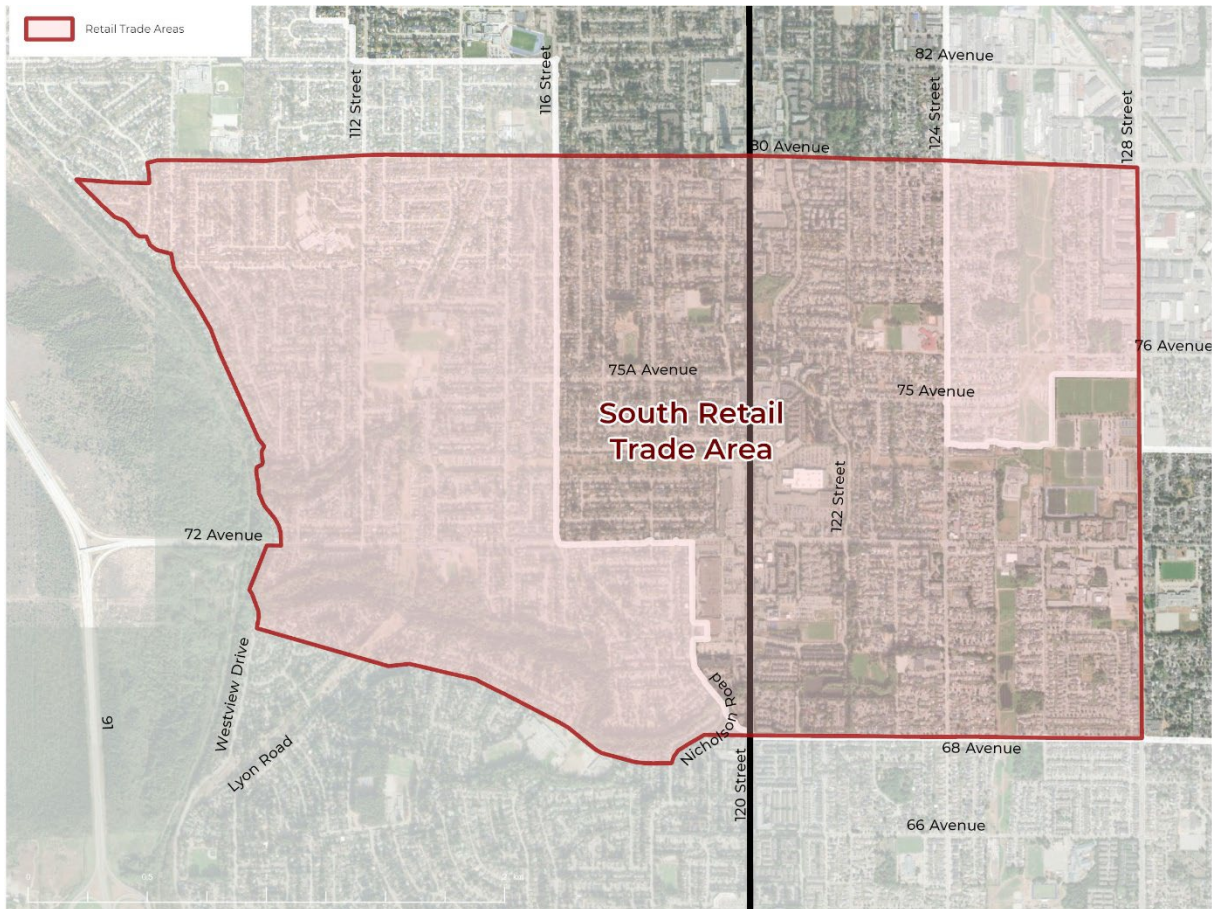
Figure 8: Central Retail Trade Area



The southern portion of the Scott Road trade area features the following significant retail properties:

- **Scott 72 Shopping Centre (7227 120<sup>th</sup> Street – Delta)** – 167,000 sq. ft. open-format shopping centre with 50 CRUs, featuring 826 parking stalls for a more traditional shopping centre parking ratio of 4.95.
- **Scottsdale Centre (7031 120<sup>th</sup> Street – Delta)** – 267,000 sq. ft. enclosed shopping centre including 42 CRUs on a 19-acre site; site offers 1,203 parking stalls, for a parking ratio of 4.51. The centre is anchored by a 114,600 sq. ft. Walmart general merchandise store and a full-service 72,900 sq. ft. Save-On-Foods supermarket.

Figure 9: Southern Retail Trade Area



## 5.2 SCOTT ROAD TRADE AREA DEMOGRAPHIC INDICATORS<sup>8</sup>

### 5.2.1 POPULATION GROWTH PROFILE

Population growth by trade area, as quantified through an evaluation of residential redevelopment potential throughout the study area, and a high growth scenario, could evolve as follows:

Table 21: Trade Area Population Growth Potential, 2021-2041

Trade Area	2021	2026	2031	2036	2041
North	28,514	33,541	38,467	42,969	46,668
Central	27,932	32,856	37,682	42,092	45,716
South	40,704	47,880	54,912	61,339	66,620

<sup>8</sup> Demographic data tables are based on Urban Systems-delineated geographic trade areas and Environics Analytics data as packaged within its SitewisePro platform.



Between 2021 and 2041, the total trade area population in this higher-growth scenario could reach 159,000 residents. This represents a potential increase of roughly 60% over a 20-year period. A higher growth scenario has been selected to better evaluate potential incremental retail-commercial demand over the study period given the extensive inventory of existing shopping and service clusters throughout the study area.

## 5.2.2 HOUSEHOLD SIZE PROFILE

The Scott Road study area is characterized by significantly larger average household sizes relative to provincial figures, which is driven in large part by the prevalence of larger single-family home structures and multi-generational households. While the study area is likely to see an increase in higher-density multi-family housing forms closer to Scott Road over the course of the study period, the extent of lower-density neighbourhoods and larger households will moderate downward shifts in average household size at the trade area level.

Table 22: Private Households by Household Size, 2021

2021 Census Households	North		Central		South		British Columbia	
		%		%		%		%
<b>Private Households by Household Size</b>	<b>8,300</b>		<b>8,947</b>		<b>12,004</b>		<b>2,041,835</b>	
1 person	1,274	15%	1,651	18%	1,811	15%	600,705	29%
<b>2 persons</b>	<b>1,923</b>	<b>23%</b>	<b>2,314</b>	<b>26%</b>	<b>2,834</b>	<b>24%</b>	<b>719,865</b>	<b>35%</b>
3 persons	1,454	18%	1,587	18%	2,105	18%	296,200	15%
4 persons	1,602	19%	1,705	19%	2,298	19%	256,700	13%
<b>5 or more persons</b>	<b>2,061</b>	<b>25%</b>	<b>1,706</b>	<b>19%</b>	<b>2,923</b>	<b>24%</b>	<b>168,355</b>	<b>8%</b>
<b>Persons per household</b>	<b>3.42</b>		<b>3.11</b>		<b>3.39</b>		<b>2.41</b>	

Source: SiteWise based on Statistics Canada, Census 2021

## 5.2.3 HOUSEHOLD TENURE AND TYPE PROFILE

Trade area housing tenure proportions are fairly consistent across the defined trade areas and reflect home ownership and renter rates similar to those evident at the provincial level. The highest proportion of renter households reside in the North Scott Road area, followed by South and Central Scott Road.

Table 23: Household Tenure & Type, 2021

2021 Census Dwellings	North		Central		South		British Columbia	
		%		%		%		%
<b>Private Households by Tenure</b>	<b>8,333</b>		<b>8,965</b>		<b>11,938</b>		<b>2,041,835</b>	
Owner	5,199	62%	6,136	68%	7,994	67%	1,363,190	67%
Renter	3,113	37%	2,832	32%	3,929	33%	669,450	33%
Dwelling provided by the local government, First Nation or Indian band	0	0%	0	0%	0	0%	9,190	0%
<b>Occupied Private Dwellings by Structure Type</b>	<b>8,297</b>		<b>8,949</b>		<b>11,982</b>		<b>2,041,835</b>	
Single-detached house	2,734	33%	3,012	34%	3,395	28%	866,340	42%
Semi-detached house	186	2%	205	2%	178	1%	62,890	3%
Row house	635	8%	1,040	12%	972	8%	168,590	8%
Apartment or flat in a duplex	3,315	40%	2,659	30%	3,597	30%	249,835	12%
Apartment in a building that has fewer than five storeys	1,176	14%	1,912	21%	3,578	30%	417,475	20%
Apartment in a building that has five or more storeys	180	2%	105	1%	240	2%	221,845	11%
Other single-attached house	0	0%	5	0%	20	0%	3,760	0%
Movable dwelling	40	0%	0	0%	0	0%	51,100	3%

Source: SiteWise based on Statistics Canada, Census 2021

As discussed in the housing demand section of this report, a decrease in the proportion of single-family detached homes in the study area should be observed over time, as redevelopment opportunities for lower and medium to higher density residential development forms are introduced into the study area. Given the market outlook, as characterized through developer outreach interviews, a significant proportion of anticipated multi-family redevelopment activity over the short term along Scott Road is likely to be 6-storey wood-frame construction, with at-grade retail-commercial uses primarily serving local neighbourhood and community needs.

## 5.2.4 INDIVIDUAL INCOME PROFILE (2021)

Trade area individual incomes average between \$41,000 and \$45,000 per annum, well below the provincial mark of \$54,500. These income levels, coupled with an anticipated broader array of housing options, including rental apartments, are likely to support increases in transit mode share over the course of the study period. This strong alignment with public transit as a commuting option is evident in the transit route ridership volumes between the Scott Road and King George Highway corridors.

Table 24: Individual Income Levels, 2021

2021 Census Individual Income by Sex	North		Central		South		British Columbia	
		%		%		%		%
<b>Population 15 years and over with Total Income</b>	<b>23,053</b>		<b>22,478</b>		<b>32,653</b>		<b>4,076,350</b>	
Under \$20,000	5,957	26%	5,310	24%	8,644	26%	859,475	21%
<b>\$20,000 to \$40,000</b>	<b>7,477</b>	<b>32%</b>	<b>6,896</b>	<b>31%</b>	<b>10,288</b>	<b>32%</b>	<b>1,143,675</b>	<b>28%</b>
\$40,000 to \$60,000	4,833	21%	4,778	21%	6,629	20%	805,465	20%
\$60,000 to \$80,000	2,546	11%	2,728	12%	3,530	11%	505,885	12%
\$80,000 to \$100,000	1,148	5%	1,355	6%	1,703	5%	308,295	8%
<b>\$100,000 to \$149,999</b>	<b>845</b>	<b>4%</b>	<b>1,130</b>	<b>5%</b>	<b>1,387</b>	<b>4%</b>	<b>297,440</b>	<b>7%</b>
<b>\$150,000 and over</b>	<b>255</b>	<b>1%</b>	<b>298</b>	<b>1%</b>	<b>429</b>	<b>1%</b>	<b>156,105</b>	<b>4%</b>
<b>Average Income</b>	<b>\$ 40,901</b>		<b>\$ 44,840</b>		<b>\$ 41,419</b>		<b>\$ 54,450</b>	
Median Income	\$ 34,168		\$ 36,942		\$ 33,954		\$ 40,792	

Source: SiteWise based on Statistics Canada, Census 2021

## 5.2.5 COMMUTING TO WORK MODE PROFILE (2021)

As can be expected in a high frequency transit corridor, Scott Road corridor trade area commuting patterns reflect a significantly higher propensity to leverage public transit options for commuting to work. As noted in the table below, public transit usage is highest in the northern portion of the study area (19%), followed by South Scott Road at 15% and Central Scott Road at 14%. This compares to a province-wide proportion of only 9%.

Table 25: Commuting to Work Mode, 2021

2021 Census Mode of Commuting	North		Central		South		British Columbia	
		%		%		%		%
<b>Employed Labour Force aged 15 years and over with a usual place of work or no fixed workplace address by Main Mode of Commuting</b>	<b>13,248</b>		<b>12,687</b>		<b>18,024</b>		<b>1,873,690</b>	
Car, truck, van - as a driver	9,083	69%	9,254	73%	12,912	72%	1,376,410	73%
Car, truck, van - as a passenger	1,297	10%	1,126	9%	1,551	9%	121,350	6%
<b>Public transit</b>	<b>2,538</b>	<b>19%</b>	<b>1,733</b>	<b>14%</b>	<b>2,629</b>	<b>15%</b>	<b>174,045</b>	<b>9%</b>
Walked	100	1%	328	3%	417	2%	121,550	6%
Bicycle	0	0%	10	0%	15	0%	36,790	2%
Other method	101	1%	130	1%	245	1%	43,535	2%

Source: SiteWise based on Statistics Canada, Census 2021

\*Note: In the official Census reporting, respondents are permitted to self-report on their preferred mode of commuting to work. A bicycle-focused commute to work share of 0% is more likely due to non-reporting residents than to accurate local mode share estimates.

With the introduction of R6 Rapid bus service into the corridor early in 2024, and an anticipated uptick in multi-family redevelopment activity over time, these proportions can be expected to increase moderately over the forecast study period.

## 5.2.6 ANNUAL HOUSEHOLD EXPENDITURE PROFILE

The following table provides a comparison of annual household expenditures by category, as collected by Statistics Canada in its household survey. Variations in spending levels across the defined trade areas are captured in subsequent demand modeling, which estimates per capita retail trade spending by category and household based on variations in key demographic characteristics, including household income levels and category-specific elasticities of demand.

Table 26: Annual Household Expenditures by Category and Trade Area

2023 Household Spend Summary	North			Central			South		
	Total Expenditure	Expenditure per Household	%	Total Expenditure	Expenditure per Household	%	Total Expenditure	Expenditure per Household	%
<b>Total Expenditure</b>	<b>\$ 1,153,856,637</b>	<b>\$ 138,885</b>		<b>\$ 1,272,330,199</b>	<b>\$ 135,834</b>		<b>\$ 1,678,149,522</b>	<b>\$ 140,987</b>	
Shelter	\$ 248,624,471	\$ 29,926	22%	\$ 269,163,991	\$ 28,736	21%	\$ 360,466,192	\$ 30,284	21%
<b>Food</b>	<b>\$ 126,670,758</b>	<b>\$ 15,247</b>	<b>11%</b>	<b>\$ 139,580,659</b>	<b>\$ 14,902</b>	<b>11%</b>	<b>\$ 177,399,920</b>	<b>\$ 14,904</b>	<b>11%</b>
Household operation	\$ 51,882,370	\$ 6,245	4%	\$ 56,844,091	\$ 6,069	4%	\$ 73,599,996	\$ 6,183	4%
Health care	\$ 43,458,662	\$ 5,231	4%	\$ 48,840,016	\$ 5,214	4%	\$ 65,317,218	\$ 5,488	4%
Household furnishings and equipment	\$ 37,375,259	\$ 4,499	3%	\$ 42,476,447	\$ 4,535	3%	\$ 53,365,498	\$ 4,483	3%
Transportation	\$ 125,721,701	\$ 15,133	11%	\$ 137,540,332	\$ 14,684	11%	\$ 181,232,776	\$ 15,226	11%
Recreation	\$ 49,667,537	\$ 5,978	4%	\$ 53,039,587	\$ 5,662	4%	\$ 71,925,807	\$ 6,043	4%
<b>Personal care</b>	<b>\$ 21,547,994</b>	<b>\$ 2,594</b>	<b>2%</b>	<b>\$ 23,360,256</b>	<b>\$ 2,494</b>	<b>2%</b>	<b>\$ 29,750,453</b>	<b>\$ 2,499</b>	<b>2%</b>
Clothing	\$ 46,584,250	\$ 5,607	4%	\$ 48,401,929	\$ 5,167	4%	\$ 68,445,579	\$ 5,750	4%
<b>Education</b>	<b>\$ 28,285,132</b>	<b>\$ 3,405</b>	<b>2%</b>	<b>\$ 28,223,064</b>	<b>\$ 3,013</b>	<b>2%</b>	<b>\$ 40,666,553</b>	<b>\$ 3,417</b>	<b>2%</b>
Reading materials and other printed matter	\$ 1,464,255	\$ 176	0%	\$ 1,752,924	\$ 187	0%	\$ 2,091,604	\$ 176	0%
Tobacco products and alcoholic beverages	\$ 28,763,307	\$ 3,462	2%	\$ 33,007,923	\$ 3,524	3%	\$ 40,507,425	\$ 3,403	2%
Games of chance	\$ 9,483,685	\$ 1,142	1%	\$ 12,012,149	\$ 1,282	1%	\$ 11,116,292	\$ 934	1%
Miscellaneous expenditures	\$ 21,663,380	\$ 2,608	2%	\$ 23,281,532	\$ 2,486	2%	\$ 32,786,028	\$ 2,754	2%

Source: SiteWise based on Statistics Canada, Census 2021

## 5.2.7 SCOTT ROAD ANNUAL EXPENDITURE POTENTIAL

Total gross annual spending potential for each of the defined trade areas was projected over the 2021 to 2041 study period and combined to show total growth in annual spending power by category<sup>9</sup> for the Scott Road trade area as a whole. While some portion of this spending potential may be captured by study area businesses, the majority of spending will continue to flow to a wide variety of competitive nodes throughout the Metro Vancouver region. This is particularly true for comparison retail shopping categories (such as clothing and household furniture and furnishings), which tend to agglomerate in larger traditional shopping centre nodes.

<sup>9</sup> As defined by the 3-digit code North American Industry Classification System (NAICS), 2022.

Table 27: Scott Road Trade Area Expenditure Potential Growth (2021-41)

SCOTT ROAD TRADE AREA Gross Spending (x1,000)	2021	2026	2031	2036	2041	Change 2021-41	Change (%)
Retail trade - All categories	1,402,602	1,708,694	2,030,531	2,351,420	2,648,872	1,246,271	89%
Furniture and home furnishings stores	47,914	56,916	65,944	74,447	81,753	33,839	71%
Electronics and appliances	47,822	54,378	60,104	64,486	67,010	19,188	40%
Building materials, garden equipment, supplies	85,768	106,846	129,717	153,329	176,153	90,385	105%
Supermarkets and Other Grocery	235,315	278,649	321,801	362,081	396,241	160,926	68%
Convenience Stores	11,721	14,052	16,436	18,734	20,776	9,055	77%
Specialty Food Stores	18,106	21,767	25,529	29,181	32,452	14,346	79%
Liquor stores	75,777	93,954	113,560	133,669	152,960	77,183	102%
Clothing Stores	65,590	80,849	97,177	113,780	129,545	63,956	98%
Shoe Stores	8,689	10,285	11,872	13,352	14,605	5,916	68%
Jewellery, Luggage, Leather Goods Stores	9,690	12,116	14,761	17,505	20,172	10,482	108%
Sporting goods, hobby, book, and music stores	36,219	42,524	48,672	54,255	58,797	22,578	62%
General merchandise stores	157,021	192,707	230,654	268,975	305,060	148,039	94%
Miscellaneous store retailers	42,381	53,350	65,402	78,006	90,372	47,992	113%
Health and personal care	92,352	114,919	139,374	164,582	188,906	96,554	105%

Source: Urban Systems

Trade area expenditure potential growth is vital as it offers a clear understanding of incremental growth in spending power over the defined period. Some notable highlights:

- **Building materials, garden equipment** – growth of \$90.4M by 2041 or 105%
- **Supermarkets and grocery stores** – growth of \$160.9M by 2041 or 68%
- **Liquor stores** – growth of \$77.2M or 102%
- **General merchandise stores<sup>10</sup>** – growth of \$148.0M or 94%
- **Health and personal care stores** – growth of \$96.6M or 105%

## 5.2.8 SCOTT ROAD MARKET CAPTURE RATES (INCREMENTAL POTENTIAL)

Projecting likely net spending capture of incremental growth within the defined Scott Road study area requires assessing the potential for new Scott Road study area businesses to attract incremental spending growth. As this is not a site-specific evaluation, but rather a study-area wide assessment, market shares by category have, for the purposes of this review, been assumed to be similar throughout the trade area. The following market shares are reasonable and achievable, as they allow for the continued natural flow of spending to competitive shopping districts, shopping centres and nodes in other areas of the region.

<sup>10</sup>General Merchandise Stores comprise of establishments primarily engaged in retailing a general line of merchandise that may, or may not, include a general line of grocery items. This differs from Miscellaneous Store Retailers, which includes florists; office supplies, stationary and gift retailers; used merchandise retailers; and other miscellaneous store retailers.

**METRO VANCOUVER, CITY OF DELTA, AND CITY OF SURREY**  
 SUPPLY AND DEMAND STUDY FOR SCOTT ROAD R6 – RAPIDBUS CORRIDOR

Table 28: Anticipated Retail Market Shares by Category (share of incremental growth)

<b>Retail-Commercial Category</b>	<b>North</b>	<b>Central</b>	<b>South</b>
Furniture and home furnishings stores	20%	20%	20%
Electronics and appliances	30%	30%	30%
Building materials, garden equipment, supplies	30%	30%	30%
<b>Supermarkets and Other Grocery</b>	30%	30%	30%
<b>Convenience Stores</b>	30%	30%	30%
<b>Specialty Food Stores</b>	30%	30%	30%
<b>Liquor stores</b>	20%	20%	20%
Clothing Stores	20%	20%	20%
Shoe Stores	20%	20%	20%
Jewellery, Luggage, Leather Goods Stores	20%	20%	20%
Sporting goods, hobby, book, and music stores	20%	20%	20%
<b>General merchandise stores</b>	15%	15%	15%
Miscellaneous store retailers	20%	20%	20%
<b>Health and personal care</b>	30%	30%	30%
<b>Food &amp; Beverage</b>	<b>20%</b>	<b>20%</b>	<b>20%</b>

Source: Urban Systems

In addition to market shares of incremental growth in trade area resident spending, there will also naturally be inflow spending into the trade area, generated by visitors from the broader region, daytime workers living outside the trade area and tourists. Inflow spending factors assumed by category are shown below:

Table 29: Inflow Spending Factors by Category

<b>Scott Road Retail-Commercial Category</b>	<b>Inflow</b>
Furniture and home furnishings stores	2%
Electronics and appliances	2%
Building materials, garden equipment, supplies	15%
Supermarkets and Other Grocery	15%
Convenience Stores	25%
Specialty Food Stores	20%
Liquor stores	10%
Clothing Stores	10%
Shoe Stores	10%
Jewellery, Luggage, Leather Goods Stores	5%
Sporting goods, hobby, book, and music stores	5%
General merchandise stores	25%
Miscellaneous store retailers	25%
Health and personal care	15%
Food & Beverage	30%

Source: Urban Systems

These are also deemed to be reasonable given the relative popularity of Scott Road’s offerings in this range of spending categories.

### 5.2.9 SCOTT ROAD INCREMENTAL RETAIL-COMMERCIAL FLOOR AREA (2024-2041)

After applying realistic and achievable market shares to incremental growth potential in the Scott Road Corridor study area, along with reasonable assumptions regarding the extent of likely inflow spending (from non-trade area residents), the following summary of anticipated additional market-supportable floor area estimates by category have been assessed.

*Table 30: Incremental Retail-Commercial Floor Area Demand by Category (2024 to 2041)*

<b>Scott Road Corridor</b>				
<b>Incremental Retail-Commercial Demand (2024 to 2041)</b>				
<b>Retail-Commercial Category</b>	<b>2026</b>	<b>2031</b>	<b>2036</b>	<b>2041</b>
Furniture and home furnishings stores	1,500	5,600	9,200	12,100
Electronics and appliances	400	1,300	1,900	2,200
<b>Building materials, garden equipment, supplies</b>	<b>6,700</b>	<b>25,100</b>	<b>43,100</b>	<b>59,500</b>
<b>Supermarkets and Other Grocery</b>	<b>6,400</b>	<b>23,300</b>	<b>38,200</b>	<b>49,900</b>
<b>Convenience Stores</b>	<b>400</b>	<b>1,500</b>	<b>2,400</b>	<b>3,200</b>
<b>Specialty Food Stores</b>	<b>400</b>	<b>1,500</b>	<b>2,500</b>	<b>3,300</b>
<b>Liquor stores</b>	<b>1,500</b>	<b>5,700</b>	<b>9,700</b>	<b>13,400</b>
Clothing Stores	2,600	9,600	16,500	22,600
Shoe Stores	200	900	1,400	1,900
Jewellery, Luggage, Leather Goods Stores	200	900	1,600	2,200
Sporting goods, hobby, book, and music stores	800	2,800	4,600	5,900
<b>General merchandise stores</b>	<b>7,100</b>	<b>26,200</b>	<b>44,600</b>	<b>60,900</b>
<b>Miscellaneous store retailers</b>	<b>2,800</b>	<b>10,600</b>	<b>18,400</b>	<b>25,600</b>
<b>Health and personal care</b>	<b>3,700</b>	<b>13,700</b>	<b>23,500</b>	<b>32,400</b>
<b>Food &amp; Beverage</b>	<b>3,300</b>	<b>12,200</b>	<b>20,900</b>	<b>28,700</b>
<b>TOTAL - ABOVE RETAIL-COMMERCIAL</b>	<b>38,200</b>	<b>141,000</b>	<b>238,500</b>	<b>323,800</b>
<b>TOTAL - Net of Building Materials, General Merch.</b>	<b>24,400</b>	<b>89,700</b>	<b>150,800</b>	<b>203,400</b>

Source: Urban Systems

As noted, if the market shares assumed above hold, there is potential for the Scott Road Study area to see an increase in market-supportable floorspace of roughly 141,000 sq. ft. by 2031 and 324,000 sq. ft. by 2041. As some key categories, notable building materials/garden supply and general merchandise stores are not likely to land within the study area (due to the extent and pattern of competitive offerings in these categories and limited company rosters), the extent of incremental growth opportunity is likely to be more focused on categories less reliant on a short list of major operators.

While a more detailed breakdown of potential CRU sizes on a category-by-category basis is beyond the scope of this study, the following inferences can be drawn from the above floor area market support table:

- **Building materials, garden equipment and supply stores** – given sufficient market coverage in the home improvement category from a supply perspective, this is

most likely to materialize in the study area in the form of a larger (30,000 + sq. ft.) garden and supply centre, with the aim of better serving a growing study area population. This the most box-retail oriented category likely to be supportable from a market perspective over the foreseeable future.

- **Supermarkets and grocery stores** – this is a retail category which could see the addition of several smaller to medium-scale specialty supermarkets (10,000 to 15,000 sq ft.) over time, or the addition of a single larger full-scale supermarket (of 35,000 sq. ft. or more) over the medium term.
- **General merchandise stores** – While an additional large-scale general merchandiser such as Walmart is not likely supportable within the study area given the extent of realistic market support, what is more likely is the addition, over time, of smaller-scale general merchandise businesses such as dollar stores and significant general merchandise components of businesses in other categories (e.g. specialty supermarkets offering some general merchandise).
- **Other retail categories** – Other listed retail categories will likely see study area additions in CRUs ranging from 800 to 3,000 sq. ft.
- **Restaurant Food & Beverage** – This important category includes business types comprising a wide arrange of commercial floor area sizes, from 300 sq. ft. kiosks, to 800-1,000 sq. ft. street front CRUs, neighbourhood restaurants ranging from 1,500 to 3,000 sq. ft., and, periodically, the addition of larger destination restaurants (typically chain operated) requiring larger 3,500 to 5,000 sq. ft. floorplates.

As such, the likely extent of incremental demand is likely to be modest – 90,000 sq. ft. by 2031 and 203,000 sq. ft. by 2041.

### **5.2.10 IMPLICATIONS OF INCREMENTAL RETAIL-COMMERCIAL FLOOR AREA DEMAND**

Despite assuming a high growth scenario for retail-trade evaluation purposes, the extent of incremental opportunity for the Scott Road study area from a retail-commercial perspective is expected to be modest and best suited to delivery in mixed-use redevelopment formats over time.

Though the study area offers considerable opportunities for significant redevelopment intensification and integration of higher-density residential uses in particular, developers are most likely to seek development plans that either maintain current commercial footprints or, in some cases, move to rationalize current commercial space into a slightly more modest amount of new commercial floorspace. As newer (relative to older) commercial spaces require more in the way of sales dollars per sq. ft. per year to ensure healthy operations and bottom lines, and given the ease with which current and future trade area residents can access competitive facilities in neighbouring markets, developers and property owners are likely to be cautious in terms of provision of additional commercial floorspace (beyond current levels).



## 6.0 INSIGHTS FROM DEVELOPER OUTREACH

Between November 22, 2023 and January 25, 2024, representatives from Urban Systems conducted nine (9) interviews with development firms. The organizations represented in the following notes and highlights are outlined below in Table 29.

Table 31: Scott Road Interview Participants

Company	Interviewee	Date
<b>Wesgroup</b>	Dean Johnson	November 22, 2023
<b>Beedie</b>	Carl Funk	November 24, 2023
<b>Fifth Ave</b>	Scott Brown	November 28, 2023 and January 15, 2024
<b>RioCan REIT</b>	Stuart Craig	November 28, 2023
<b>Sutton Group Alliance</b>	Tanvir Sooch	December 4, 2023
<b>Marathon Group</b>	Jas Gill	December 5, 2023
<b>Mosaic Homes</b>	Alec Katchur-Marsh	December 7, 2023
<b>Choice Properties REIT</b>	David Major	January 17, 2024
<b>Headwater Projects</b>	Veronique Turner, Caitlin Clark, McGregor Wark	January 25, 2024

The interviewees were selected, within the scope of this study, to represent a reasonable cross-section of development industry stakeholders on either side of Scott Road, including property owners and developers familiar with either side of the Scott Road Corridor (e.g., Surrey or Delta) or developers who are not currently active in the Corridor but are active in Surrey and Delta and the surrounding region. Note that not all invited organizations participated in the requested interviews.

### 6.1 DEVELOPMENT INTERVIEW FINDINGS

At the request of several interviewees, the individual developer outreach interview notes have been synthesized into a series of broader insights related to market drivers, challenges, and development market trends. This section presents the strengths, limitations, and opportunities that developers and property owners are observing in terms of pursuing redevelopment potential along the Scott Road Corridor.

#### 6.1.1 NODES OF DEVELOPMENT OPPORTUNITY

In terms of development opportunity, the Scott Road Corridor was noted as a great development opportunity for Delta as it is an area that is considered, relative to other surrounding jurisdictions, to be overdue for increased densification. Interviewees identified the following nodes as offering particularly strong redevelopment opportunities.

*Primary Nodes of Opportunity*

- **72<sup>nd</sup> Avenue and Scott Road:** Many interviewees agreed that development opportunities radiate out from this intersection due to its east-west corridor connection, the quality and size of existing shopping centres (e.g., Strawberry Hill Shopping Centre, Scottsdale Mall), and established, higher income residential neighbourhoods to the south.
- **80<sup>th</sup> Avenue and Scott Road:** is a place of frequent visitation for both vehicular and pedestrian traffic, anchored by the Scott Road Centre and the first residential high rise on the corridor – the “Delta Rise”. This central area of the Scott Road Corridor can also potentially serve as a catalyst for further redevelopment activity in areas to the north and south.
- **88<sup>th</sup> Avenue and Scott Road:** was also mentioned as a major node, however, its existing surrounding low-density built form currently encourages more vehicle-oriented patterns than do other major nodes of opportunity along the corridor.

*Secondary Nodes of Opportunity*

- **75<sup>th</sup> Avenue and Scott Road:** This intersection offers strong connections to the busy 72<sup>nd</sup> Avenue intersection, which promotes walkability to commercial uses.
- **84<sup>th</sup> Avenue and Scott Road:** was noted as a busier intersection, however, some new commercial development has already taken place and this built form is likely to persist through at least the medium term.
- **96<sup>th</sup> Avenue and Scott Road:** was noted as a quieter area relative to the rest of the Corridor with less established east-west connections. There are fewer commercial uses and more single-detached dwellings along the main corridor.

*Development Areas In Between “Nodes of Opportunity”*

- Interviewees suggested that Surrey and Delta should consider distributing the infill development opportunity across the length of the entire corridor (i.e., allow medium density in areas between key high-density nodes). Areas in between the nodes are very important for encouraging smaller scale projects, as a wider array of potential redevelopment sites provide a higher degree of market accessibility to a broader range of potential development firms. This flexibility will be important given the extent of infill development opportunities in TOA areas surrounding existing and future SkyTrain stations.
- Some interviewees shared that the average developer (e.g., smaller to medium sized organization) cannot realistically compete with larger developers at the scale being pursued for larger town centre nodes, as the scale of development is beyond their experience and financing capabilities.
- Some sites along Scott Road are small in size, and reducing parking requirements throughout the study area could alleviate the costs associated with building many levels of underground parking.

### 6.1.2 EASE OF DEVELOPMENT

- Two interviewees shared their experience and perception that it was easier to develop on the Delta side of Scott Road due to an approachable and interactive development approvals process (e.g., preliminary workshops with Council and staff prior to application – e.g. North Area Delta Plan).
- One interviewee shared that exploration of potential development opportunities was better supported in Surrey due to the number of existing neighbourhood community plans in place, additional sub-area plans to come, a larger more varied geography which offers more options to choose sites from, and significantly higher overall population growth.
- On the Surrey side, one interviewee noted that development permit and development variance permitting processes are easy to navigate and relatively quick in terms of approvals.
- Several interviewees spoke about their increased interest in the development potential for Scott Road corridor after the new R6 RapidBus transit announcement.
- One interviewee mentioned that the Scott Road corridor has a strong cultural component (e.g., York Gurdwara Sahib Society, ethnic businesses) close to the residential uses, with few industrial uses, and that there is a natural link between local-serving business types and residents of various cultural backgrounds.

### 6.1.3 BARRIERS TO DEVELOPMENT

#### *Development Approvals Process*

- Two interviewees noted that Surrey’s current land use plans and policies along Scott Road are not yet aligned with the higher densities required to support mixed-use shopping centre redevelopment under current and evolving market conditions.
- For phased development of larger shopping centres, lot severance was identified by one interviewee as an area for improvement on the Surrey side. It was noted that the current City development policies trigger servicing improvements required for the entirety of the site.
- Interviewees on both sides of the corridor noted that there is a perception of significant community opposition against intensification. They noted that the municipalities should give a balanced view to benefits of intensification and related planning trade-offs to better educate local community groups and residents.

#### *Current Market Conditions Are Challenging*

- Two interviewees noted that the timing of tenant lease end dates presents significant challenges with respect to considering shopping centre redevelopment, and under today’s market conditions of high interest rates and bank financing

requirements, developers do not necessarily have the funds or incentives to buy the leases out early.

- Some developers indicated their development interest is focused more intently on higher profile rail corridors (e.g., SkyTrain station areas) where major development projects and higher-density residential and office components can be better supported given the array of existing and planned amenities. Several submarkets specifically mentioned include: North Road corridor in Coquitlam and Lougheed, Metrotown and Brentwood in Burnaby, Surrey City Centre and Surrey Fraser Highway.
- Two developers noted that any potential development site along the Scott Road corridor requires relative ease of land assembly. Currently, other submarkets can command higher redeveloped multi-family sales prices in comparison to Scott Road, which serves as an immediate-term disincentive for development along the corridor. A good example of this is the Oakdale area in Coquitlam, where for similar costs of single-family site assembly, higher sales per sq. ft. can be secured for new multi-family homes, in part due to the presence of SkyTrain access and related amenities.
- Concrete tower construction costs are high and projects are not financially viable until a certain density threshold is met. In the current market context, this is typically 20 storeys or more (varies depending on the site size). Many interviewees indicated that, due to construction costs, building forms between 7 and 12 storeys and between 12 and 18 storeys are difficult to pencil out given the increased costs associated with required building technologies.
- Townhouse sites are better suited in other areas in Delta or Surrey (e.g., greenfield development rather than infill development) as a larger lot size is typically required (ideally 3 to 4 acres to allow for double loading and access to parking), and the cost and identification of suitable land assembly sites along Scott Road is challenging.

#### **6.1.4 OPPORTUNITIES TO ENCOURAGE MORE DEVELOPMENT**

##### *Land Use Policies, Plans and Regulations*

- Two interviewees noted that, given land use legislation and regulations changing at the provincial level, an interim municipal land use policy for the Scott Road corridor would be beneficial for developers to reduce development uncertainty. This could be especially beneficial on the Surrey side, as the land use plans and zoning could better reflect development opportunities with a functioning R6 RapidBus service.

##### *Market Rental Housing*

- One developer noted that building purpose-built market rental housing is becoming more difficult due to rent controls and increasing operational costs.

- Two interviewees suggested that Delta and Surrey should better align their land use policies along Scott Road corridor, especially when it comes to housing affordability policies (e.g., integration of market rental, below market rental, etc.) to ensure balanced development potential.
- One interviewee noted that while there is a GST exemption for market rental developments, it is unclear whether it applies to buildings with a mix of market rental and strata units. These exemptions also only apply to projects which are primarily rental, which significantly limits potential impact given the need for most developers to provide a mix of housing tenure options in their projects.

*Sense of Public Realm*

- Two interviewees recognized that Scott Road Corridor covers a large area of geography, and the extent of land on either side of the corridor tends to create a perception that there are no clear recognizable landmarks or focal points to draw attention or interest. A more intentional focus on improving the public realm which radiates out from key priority nodes, would be more attractive to developers, homebuyers and renters.

## 6.2 DENSITY NODES / AREAS IN BETWEEN DENSITY NODES

To inform the market-based commentary heard through interviews with developers, a series of maps were produced using several datasets, along with developer interviews to demonstrate where the density nodes are likely to occur, what scale of development is likely to be market-supportable, and to provide a clearer idea of timing of redevelopment.

Figure 10 below shows patterns with respect to higher likelihood of redevelopment by combining 5- and 10- minute walksheds to the R6 RapidBus stop locations and improvement (i.e. building value) to total assessment ratios. Areas where there is low improvement to total assessment value ratios, all else being equal, indicate areas which are more likely to redevelop earlier in the study period. This redevelopment potential is likely to increase if the parcel is located within a 5- or 10- minute walkshed of the R6 RapidBus, which provides end-users with increased ease of access to frequent transit.

### 6.2.1 DENSITY NODES

Based on the patterns outlined in **Figure 10**, the major density nodes along Scott Road are likely to occur in the following intersections:

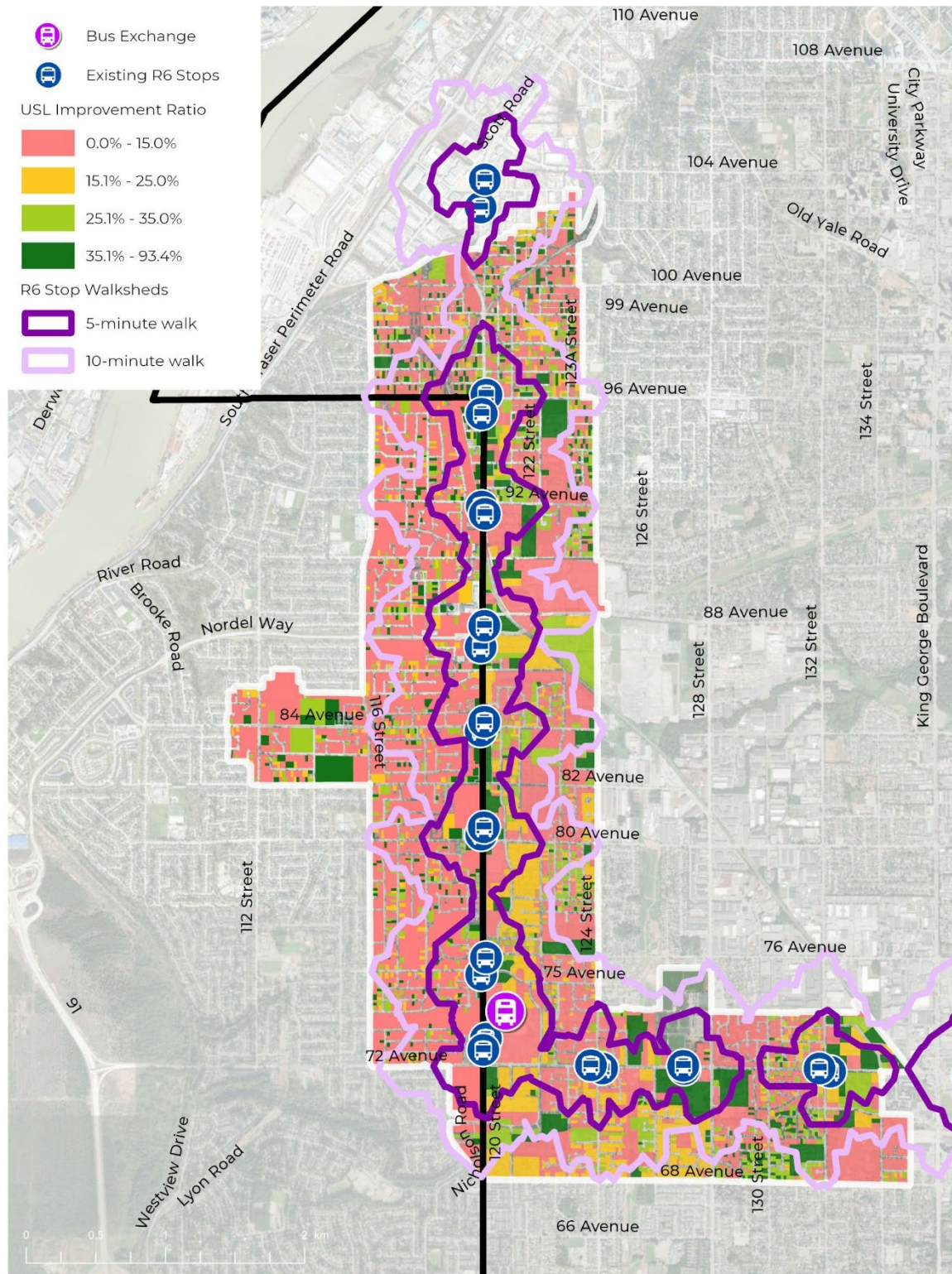
- **72<sup>nd</sup> Avenue and Scott Road:** three large shopping centres in the Northeast, Southwest, and Northwest are showing lower range improvement to total assessment ratios. While not necessarily indicative of income-generation, RioCan's interest in exploring redevelopment options for the site previous to its sale of the site is a good indicator of the likelihood that the site is ultimately best suited for mixed-use redevelopment. This intersection also contains the future TOD area, Scottsdale Exchange, which is intended to permit higher density uses.

- **80<sup>th</sup> Avenue and Scott Road:** shows low improvement to total assessment ratio around some parcels with high improvement to total assessment ratios indicating more recent development. This indicates that some parcels have already been redeveloped or were recently redeveloped, which could trigger further redevelopment on surrounding parcels.
- **88<sup>th</sup> Avenue and Scott Road:** some parcels show high improvement to total assessment ratios, but there are remaining large parcels around the R6 RapidBus stops that show low improvement to total assessment ratios.
- **92<sup>nd</sup> Avenue and Scott Road:** most parcels around this intersection show lower improvement to assessment ratios and are located around the R6 bus stop.

96<sup>th</sup> Avenue, 84<sup>th</sup> Avenue and 75<sup>th</sup> Avenue at Scott Road are the remaining intersections with R6 RapidBus stops. These intersections do not show large areas with low improvement to total assessment ratios, however, there may still be smaller sites with high redevelopment potential. These are likely able to accommodate or become medium nodes of density due to the existing built form.

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Figure 10: R6 Stops, Improvement to Total Assessment Ratio (2023), and Walksheds



### 6.3 DENSITY TIERS

Based on the findings from the earlier sections in this report, it is anticipated that the following density patterns could be accommodated by the market, as shown in **Figure 11** (note: a full size of the map is available in Appendix B) and described below. These areas are shown to reflect likely market-support over the forecast study period and to inform future land use planning as Delta and Surrey may have further adjustments based on additional considerations (e.g., ownership parcel delineation, transition away from the corridor, etc.).

While current industry building practices and market conditions have centered on either wood-frame construction (townhomes and low-rise apartment buildings up to 6-storeys) or larger concrete multi-family apartment buildings, the time frame of this Scott Road study also covers the longer term market outlook - 2034 and to 2051. As such, and supported by outreach conversations to some local builders and architects, it is worth considering the potential for introduction of a broader array of building materials, technologies and methods that could yield changes to the viability of certain built forms (e.g., hybrid building materials for constructing 7 to 12 storeys).

*Figure 11: Timber-Hybrid CREE 12 Storey Mixed Use Building in Toronto, Ontario,*



Source: CREE Buildings

While any new technology would need to be regulated by the BC Building Code, forward looking land use planning and policies should anticipate the potential for alternative building formats given the longer planning horizon. Though current market conditions



indicate the predominance of viable two to three-level townhouse, 5 to 6 storey wood-frame apartments and larger concrete apartment buildings, additional building formats may become more viable over the medium to longer terms. Figure 11 above is an example of a 12-storey mixed use building anticipated to start construction in December 2024, which uses a timber-hybrid construction material developed by CREE.

### **6.3.1 MORE THAN 12 STOREYS**

The areas highlighted in brown have the potential to accommodate developments of more than 12 storeys in height. There are three (3) areas suitable for developments taller than 12 storeys: 70<sup>th</sup> to 75A Avenue, 78B Avenue to 82<sup>nd</sup> Avenue, and 86<sup>th</sup> Avenue to 90<sup>th</sup> Avenue. Within the foreseeable future, and as supported by outreach to developers active in the regional and local markets, only concrete multi-family buildings of 20 storeys or more are likely to meet base development viability thresholds.

The intersections in these areas represent major east-west road connections. In the current development market, concrete is the most common building construction material for buildings taller than 12 storeys. Along the Scott Road corridor, developers clearly indicated that 20+ storeys is a critical threshold under current market conditions in supporting the viability of concrete tower projects.

### **6.3.2 UP TO 12 STOREYS**

The areas shaded in light orange have the potential to accommodate developments of up to 12 storeys in height. There are three (3) areas suitable for up to 12 storeys areas along Scott Road: between 90<sup>th</sup> and 92<sup>th</sup> Avenue, between 82<sup>th</sup> and 86<sup>th</sup> Avenue, and between 75A Avenue and 78B Avenue.

Within the current development market, the most common multi-family building forms are wood-frame – which readily supports up to 6 storeys – or a mix of concrete at base and 5 storeys of wood-frame residential on floors 2 to 6. It was noted by one developer that additional building technologies are being used outside of Canada which could potentially be feasible for use in Canada within the foreseeable future (e.g. the medium term) and which would allow for non-concrete construction for 7+ storey structures (e.g., Finnish Peikko system, or timber hybrid forms by CREE). While it will take time for the local market to adjust to such advancements in building technology and to incorporate them appropriately into market pricing, it is appropriate to allow for such forms given the potential for building technology advancement over the medium to longer term.

### **6.3.3 MULTI-FAMILY UP TO 6 STOREYS**

The areas highlighted in yellow have the potential to accommodate multi-family developments of up to 6 storeys in height. There are two (2) areas suitable for multi-family development forms up to 6 storeys along Scott Road: on the north end, encompassing the

Townline Plan (Surrey) / Townline (Delta), and on the southeast end of the study area, encompassing the Strawberry Hill Plan (Surrey)<sup>11</sup>.

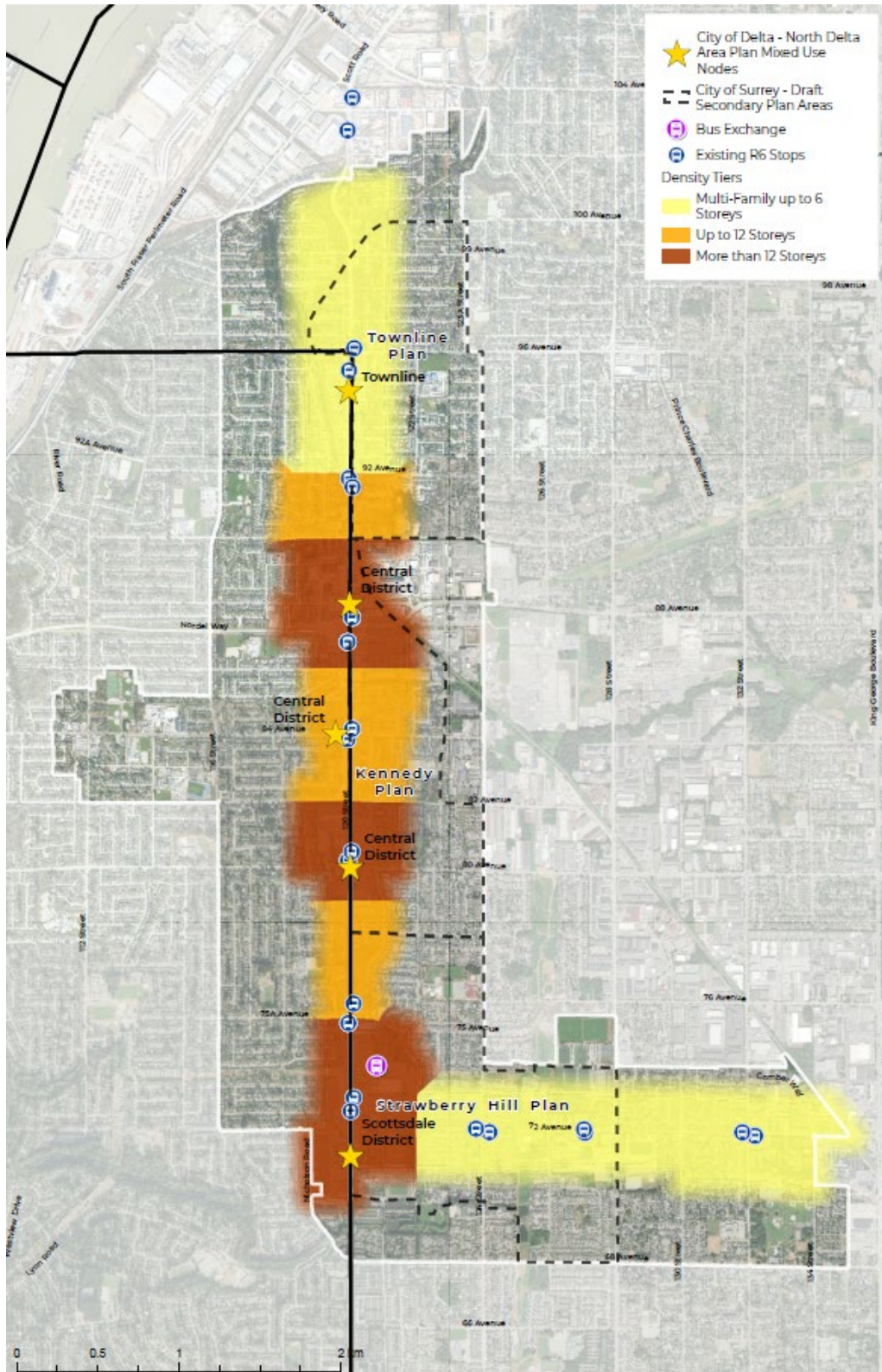
Given the relatively weaker connections to key retail areas, institutional facilities, and the existing built form, the future uses will likely support lower density development, especially with the introduction of the SSMUH legislative changes. The range of market-supportable housing typologies could include ground-oriented housing, including housing with an accessory dwelling unit, multiplexes, townhouses, and wood-frame apartments of up to 6 storeys in height.

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<sup>11</sup> We note that Kwantlen Polytechnic University is included in the Strawberry Hill Plan, and the institution's development needs will be driven by faculty, staff and student market demand which is not included within the scope of work for this report.

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Figure 12: Density Tiers



## 6.4 TIMING CONSIDERATIONS FOR LAND USE PLANS AND POLICIES

This section highlights considerations related to likely development timing within each of the identified density nodes along the Scott Road Corridor and areas between priority density nodes. The parcels that would likely be redeveloped first will have the fewest barriers to development, and this will be determined by a range of factors, including individual site characteristics<sup>12</sup>, complexities related to surrounding site context, and local vs. regional market conditions (including development costs and achievable sales per sq. ft. rates for new-build).

As of early 2024, market conditions create a challenging environment for developers due to higher financing interest rates and a short-term slowing of market absorption, which means developers are likely to err on the side of caution and invest in properties that are less risky (i.e., more certain development approvals process and more predictable returns on investment).

At the core, redevelopment opportunities are likely to occur when there is incentive for the developer to purchase the land and for the property owner to sell the land:

1. **Developer's incentive** - As in, the site's permitted density and use, and sales revenue will yield a residual land value that is attractive enough for developers to invest their capital dollars and financing leverage to pursue redevelopment.
2. **Property owner's incentive** - As in, the property owner can achieve their ideal selling price, which needs to be higher than the net revenue generated from the current site activities (e.g., from retail and/or housing tenants).

To encourage future development, the adoption of land use plans and policies can be timed to align with areas with the most immediate potential and to focus on permitting a range of development typologies within these areas. Based on one actively selling concrete residential tower in North Delta on Scott Road ("Walker House"), the market absorption is 10.6 units per month meaning an estimated 72% of the units were sold over a period of 18 months. On the other hand, a recent 6-storey wood-frame apartment project ("Village at Sunshine Hills"), located just outside of the study area, sold out more quickly, with market absorption of 90 units per month, meaning the project was 100% sold out within a month.

This data shows that the market requires time to absorb the units, and this timing will differ by housing typology. To encourage development throughout periods of economic change, having land use plans and policies that encourage a range of housing densities and

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<sup>12</sup> Insights from the developer outreach revealed that additional factors which delay development potential on Scott Road include land assembly costs, severance of lots (applicable to the Surrey side), and existing tenant agreements on a given site, which provide income-generating opportunities.

typologies will provide flexibility for the market to provide housing that is most suitable based on demand at any given time.

### **6.4.1 SHORT TERM**

The development typologies deemed to be most viable under current market conditions, and depending on site context, are 6-storey wood-frame apartments (including potential for at-grade commercial uses) and concrete towers, which are supported by the market to be accommodated in the “Up to 12 Storeys” areas and “More than 12 Storeys” areas.

While these two typologies are dispersed along the Scott Road corridor, the segment with the most immediate market demand is the Central District (Delta) and Kennedy Plan (Surrey). This segment of the study area comprises a mix of shopping centre sites and land parcels of smaller sizes which would be of redevelopment interest to a sliding scale of development firm sizes. On the Delta side, a 37-storey residential building exists at 80<sup>th</sup> Avenue and the recently approved Delta Shoppers Mall development application on a site north of the intersection will bring 876 units onto the market.

Due to the recently approved project, the multi-phase Delta Shoppers Mall development can potentially serve as a catalyst for residential development in this segment of the study area. The level of success achieved on this project will influence nearby property owners, who may become more interested in selling their site as the market becomes tried and tested, and this area becomes more walkable over time with the addition of an improved public realm (including street furniture, lighting, transit shelters, and other amenities). As the Delta Shoppers Mall will be constructed in phases, the units will be released in phases which will leave uptake room in the market for other development project units in this area to be absorbed.

### **6.4.2 MEDIUM TERM**

In the medium term, the market will trend towards redevelopment of larger shopping centres, many of which are anchored by big box stores. These large-scale redevelopment plans are anticipated to take time to construct as developers will time the release of units with anticipated market absorption rates and the conclusion of lease terms, wherever possible. For example, a 900-unit project at a constant monthly absorption rate of 10.6 units will take roughly seven (7) years to completely sell out.

Within the Strawberry Hill Plan, the Scottsdale Exchange TOD area will likely spur development interest, particularly as the Strawberry Hill Shopping Centre was sold to a new owner recently for \$155M<sup>13</sup>. On the Delta side, planning should consider aligning with the TOD area densities on the Surrey side. These large development sites will likely be developed in phases as tenant agreements come to an end, and will support high-intensity,

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<sup>13</sup> <https://renx.ca/riocan-sell-surrey-vancouver-strawberry-hill-shopping-centre-155m>

mixed use towers. In more established neighbourhoods, the market could support 6-storey wood-frame apartments and other multi-family housing units up to 6 storeys.

Within the northern segment of the corridor, the market for the Townline (Delta) and Townline Plan (Surrey) is similar to the yellow area in the Strawberry Hill Plan and will trend towards 6-storey wood-frame apartments and other multi-family housing units up to 6 storeys. While there is an approved high-rise residential building on the Delta side (e.g., Walker House), our findings indicated that this form may be better suited to clusters along Scott Road where the density can be supported by nearby amenities.

### **6.4.3 LONG TERM**

It is anticipated that, as the prime development sites are built out (likely in phases), the Scott Road corridor will likely become more attractive as the sense of public realm and identity is defined through increased population, walkability, increased land values and sales prices, and a growing number and quality of services/amenities to serve the resident population. This may begin to draw attention towards the shopping centres which have not been redeveloped until now, and towards some of the less ideal redevelopment sites across the three segments of the corridor. Some property owners who were not interested in selling previously may become more motivated to sell as the land values change and tenants begin to seek newer and improved spaces.

## **6.5 DEVELOPMENT FEES**

Based on the current active development applications, there are 2,064 dwelling units on the Delta side of Scott Road and 378 dwellings units on the Surrey side. While the interview findings pointed to competitive markets and some degree of misalignment between permitted densities and market opportunity as two reasons for lower development interest, a review of local development fees was conducted, as covered in the scope of work.

### **6.5.1 COMMUNITY AMENITY CONTRIBUTIONS**

This review of Community Amenity Contributions (CACs) and density bonusing policies is intended to better understand whether there are any major development cost differences in Delta or Surrey that could be influencing development trends along Scott Road corridor. CACs are a tool adopted by some municipalities in British Columbia to secure community amenities in exchange for a change in use, change in density, or both.

CACs are an agreed-upon contribution obtained by the local government at the time of rezoning. It is optional in that development could be undertaken under as-of-right conditions without a CAC.

#### *CAC Policies in City of Surrey*

The CAC program in City of Surrey is implemented in the form of a density bonus program as part of the Zoning Bylaw. In 1996, the City began utilizing density bonus legislation to assist in the provision of community amenities and continues to do so today. The approach

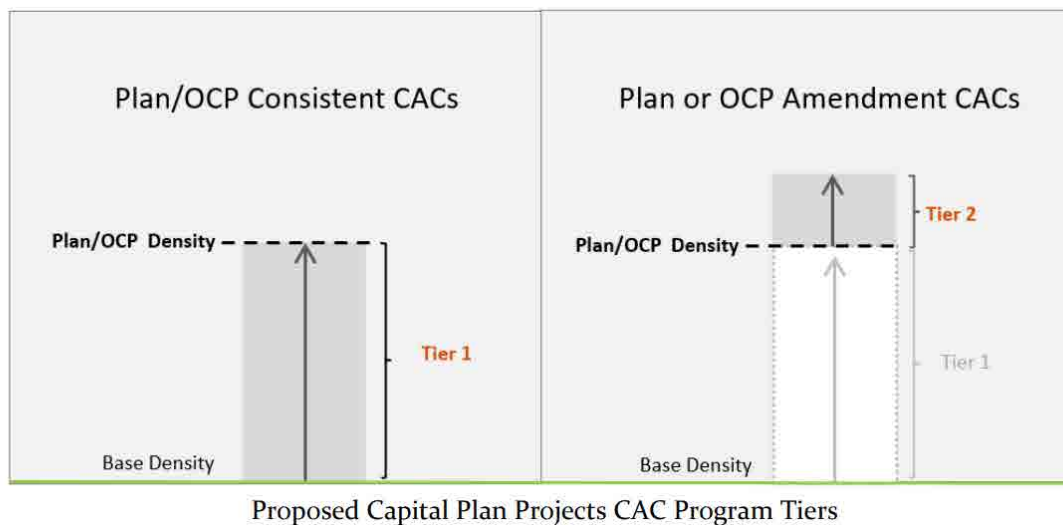
began with the City’s Secondary Land Use Plans, whereby increased density was exchanged through fixed-rate contributions through a Secondary Plan and several infill area CACs to fund the provision of community facilities, amenities and services such as park development, police, fire and library materials.

Currently, Surrey’s Density Bonus Program consists of two tiers of fixed-rate Capital Project CACs based on the community and whether the site is inside Secondary Plan Area, along with other universally applicable CAC contribution.

**Capital Projects CACs**

The Capital Project CAC consists of two program tiers based on the proposed density relative to the base density and density allowed by the Official Community Plan (OCP). The details are summarized as follows in Figure 13 below. The rates reported are based on the latest City CACs rates in March 2024.

*Figure 13: Surrey Community Amenity Contribution Tiers*



Source: Surrey Corporate Report R224, 2019

**Tier 1 Capital Projects CACs** apply to all residential development<sup>14</sup> seeking increased density and are applicable to **the portion of units that are consistent** with the density of an existing Secondary Plan identified in Section E of Schedule G of the Zoning Bylaw or the Official Community Plan (OCP). A fixed Tier 1 CAC rate of \$4,455.70 per additional dwelling unit (beyond base density) is applied on projects outside Secondary Plan Area, while the rate for

<sup>14</sup> Excluding secondary suites, purpose-built rental (with a Housing Agreement), social or non-market affordable housing dwelling units or dwelling units used as a caretaker’s residence, and non-residential uses.

projects inside Secondary Plan Area is half of the rate for non-Secondary Plan Area project (i.e. \$2,227.85 per dwelling unit).

The **Tier 2 Capital Projects CACs** apply to the Tier 2 density bonus developments in areas of the City where development density increases are proposed greater than those identified in the Official Community Plan. In most cases, a flat-rate community-specific capital project CAC would apply, except for projects involving major Official Community Plan (OCP) amendment where negotiated CACs at a targeted rate of 75% of land lift would apply.

#### **Universally applicable CAC contribution**

Other universal applicable CACs in the City of Surrey are listed as follows:

- **Affordable Housing CACs:** The Affordable Housing CACs are applied to any city-wide re-zoning or subdivision that permits an additional residential dwelling unit in excess of the minimum density permitted in that Zone. The fee for the affordable housing CACs is \$1,113.92 per residential unit.
- **Secondary Plan and Infill Area CACs:** The Secondary Plan and Infill Area CACs is applied to any rezoning for additional bonus density within a Secondary Plan or Infill area identified in Surrey Zoning Bylaw in Schedule G - Section D. In the Scott Road corridor, none of the areas fall within the Secondary Plan or Infill area identified.
- **Public Art Contribution:** The Public Art Contribution applies to re-zoning that includes more than 10 dwelling units, and/or any rezoning for Commercial or Industrial with a total floor area of greater than 1,000 square metres. The Public Art contribution is a fixed rate of 0.50% of the total project construction cost. Public Art Contributions may also include (in-kind) contributions towards public art.

#### ***CAC Policies in City of Delta***

In 2021, the City of Delta implemented Parks, Recreation and Culture Amenity Contributions (PRCAC) Policy to fund community amenities, where the priority amenities to be funded are primarily Parks, Recreation and Culture projects.

A blended methodology with both a flat rate as well as a negotiated project-specific land lift analysis approach is applied for new multi-unit and/or mixed-use developments except the Ladner Village Exempt Area in the Ladner Village Renewal Area. On April 22, 2024, the new Delta OCP passed third reading at Council which requires a community amenity contribution for all new development along Scott Road corridor and in other urban centres with buildings taller than 6 storeys in building height. Projects over 18 storeys are expected to include a rental and non-market housing contribution.

A city-wide flat rate PRCAC of \$1,000 per unit is applicable for all typical multi-unit residential and mixed-use rezoning applications involving more than three units which are consistent with existing Official Community Plan land use designations. For unique large projects that involve rezoning for buildings more than six storeys or Official Community Plan amendments, the City negotiate a project-specific amenity contribution with developers at a targeted rate of 25 percent of the calculated land lift.



Purpose-built rental housing<sup>15</sup>, townhouses, affordable non-profit housing and institutional developments (i.e. civic, educational, faith-based or care facilities, etc.) are exempt from providing a PRCAC.

## 6.5.2 DEVELOPMENT COST CHARGES (DCC)

Both the City of Delta and the City of Surrey implement Development Cost Charges (DCC) at a municipal level. On top of municipal DCCs, developments are also subject to Metro Vancouver DCCs and Translink DCCs.

The following table summarizes the DCCs for both the City of Surrey and the City of Delta. Under the 2023 DCC Program of the City of Delta which has been approved in 2024 January, the change in rates will come in two stages: changes in rates for the Date of Adoption (Stage 1) and 366 days after the Date of Adoption (Stage 2), so both the Stage 1 and 2 DCCs rates have been included.

Surrey <sup>16</sup> (Based on 2024 approved rates)		Dwelling Type	Delta	
			Approved, Stage 1	Approved, Stage 2
<b>Low Density (RM-10, RM-15, RM-30, RC(III))</b>	\$29.63/unit sq. ft. (Maximum \$51,847/unit)	<b>Townhomes</b>	\$9,873/unit	\$13,413/unit
<b>Mid-density (RM-45, RM-70)</b>	\$33.47/unit sq. ft. (Maximum \$45,191/unit)	<b>Apartment</b>	\$7,202/unit	\$9,822/unit
<b>Medium-High Density (RM-135, RMC-135, RMC-150)</b>	\$33.18/unit sq. ft. (Maximum \$41,473/unit)			

Source: Urban Systems based on City of Surrey and City of Delta

Two hypothetical development examples are listed to compare the difference in DCCs between City of Surrey and City of Delta.

### Example 1: 6-storey Wood-frame Apartment

Assuming the site has a size of 0.8-acre, a floor space ratio (FSR) of 2.6 and 56% site coverage, an average unit size of 654 square feet (sq. ft.) with a total of 118 units.

- DCC for City of Surrey (Based on Medium-high density rates)  
 $= \$33.18 \times 654 \times 118 = \$2,560,567$

<sup>15</sup> Purpose-built market rentals over six storeys may require the provision of on-site amenities above zoning requirements.

<sup>16</sup> Non-City Centre rates are applied in correspondence to the geographical location of the Scott Road Corridor.

- DCC based on Delta’s approved Stage 2 rate =  $\$9,822 \times 118 = \$1,158,996$

The DCC expenditure for this hypothetical apartment project in Surrey is roughly double that in Delta based on the proposed new Stage 2 DCC rates.

### **Example 2: Townhouse Development at 0.68 FSR**

Assuming the site is 0.8 acre in land area, has a floor space ratio (FSR) of 0.68, with an average unit size of 1,500 square feet (sq. ft.) with a total of 16 units.

- DCC for City of Surrey (Based on Low density rates)  
=  $\$29.63 \times 1,500 \times 16 = \$711,120$
- DCC based on current City of Delta rate =  $\$8,252 \times 16 = \$132,032$   
DCC based on Delta’s proposed Stage 2 rate =  $\$13,413 \times 16 = \$214,608$

The DCC expenditure for this hypothetical apartment project in Surrey is over three times that of Delta based on the proposed new Stage 2 DCC rates.

## **7.0 TEST SITES**

As part of this study, we evaluated six hypothetical but high potential redevelopment sites from a high-level market-driven development perspective to better understand what development typologies might occur and when the market would be well aligned with development. These reviews were informed by our assessment of market trends, market demand as well as developer outreach. There are three sites for Delta and three sites for Surrey, distributed across the three segments of the Scott Road corridor. Our review of trends, interviews with developers, and retail modelling are not showing significant amounts of incremental retail opportunity for this corridor, but there is clear untapped potential for significantly more intensive residential development.

These test sites do not represent actual development applications, nor have they been explicitly tested for more detailed financial viability, as this more detailed site-specific analysis – including development proforma analysis – would need to be undertaken as a separate, complementary piece of work.

### **7.1 NORTH END – TOWNLINE / TOWNLINE PLAN**

#### **7.1.1 DELTA SITE 1**

- Address: 9441-9465 120 St, Delta, BC
- Existing use: Commercial strip mall built in 1971.
- Site size: 28,000 square feet in site size
- Site Assembly Required for Redevelopment: No

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The market supportable redevelopment use for this site would likely be 6-storey wood-frame apartments with underground parking. To the immediate west of the site are light industrial uses (e.g., warehousing, storage, etc.) backed against a rail corridor which does not facilitate high amounts of vehicle or foot traffic. As such, at-grade retail uses would be limited to local serving businesses. In addition, parking requirements could be difficult to meet on this site unless an additional site is acquired.

Based on our research, the market would support the development of these sites over the short to medium term (5 to 10 years) given the appropriate land use plans and zoning are in place to support the use, especially if any nearby properties are redeveloped first.

This site falls within the “multi-family up to 6 storeys” density tier (in the Townline District), as shown previously in **Figure 12**.

*Figure 14: Delta Site 1*



#### 7.1.2 SURREY SITE 1

- Address: 9412, 9430, 9444, 9450, 9470 120 St, Surrey, BC
- Existing use: Commercial strip mall built in 1977
- Site size: 158,343 square feet in site size
- Site Assembly Required for Redevelopment: Yes

This site offers challenges from a development perspective due to the number of distinct properties and related ownership (e.g., 4 individual properties and 1 stratified property) and the shared surface parking lot. The market supportable redevelopment use for this site would likely be 6-storey wood-frame apartments with a shared underground parkade. Immediately adjacent properties include townhouses to the east and light industrial uses to the north and west.

If this site were to be assembled and redeveloped, the resulting retail footprint in a mixed-use development format would likely be at – or slightly below – the current commercial footprint.

*Figure 15: Surrey Site 1*



Based on the existing ownership structure of the lot, this site would likely be redeveloped over a longer period (10+ years). Typically, a significant price premium over assessed value is required to incent property owners to vend land into a land assembly for development (often 20%+ over assessed value).

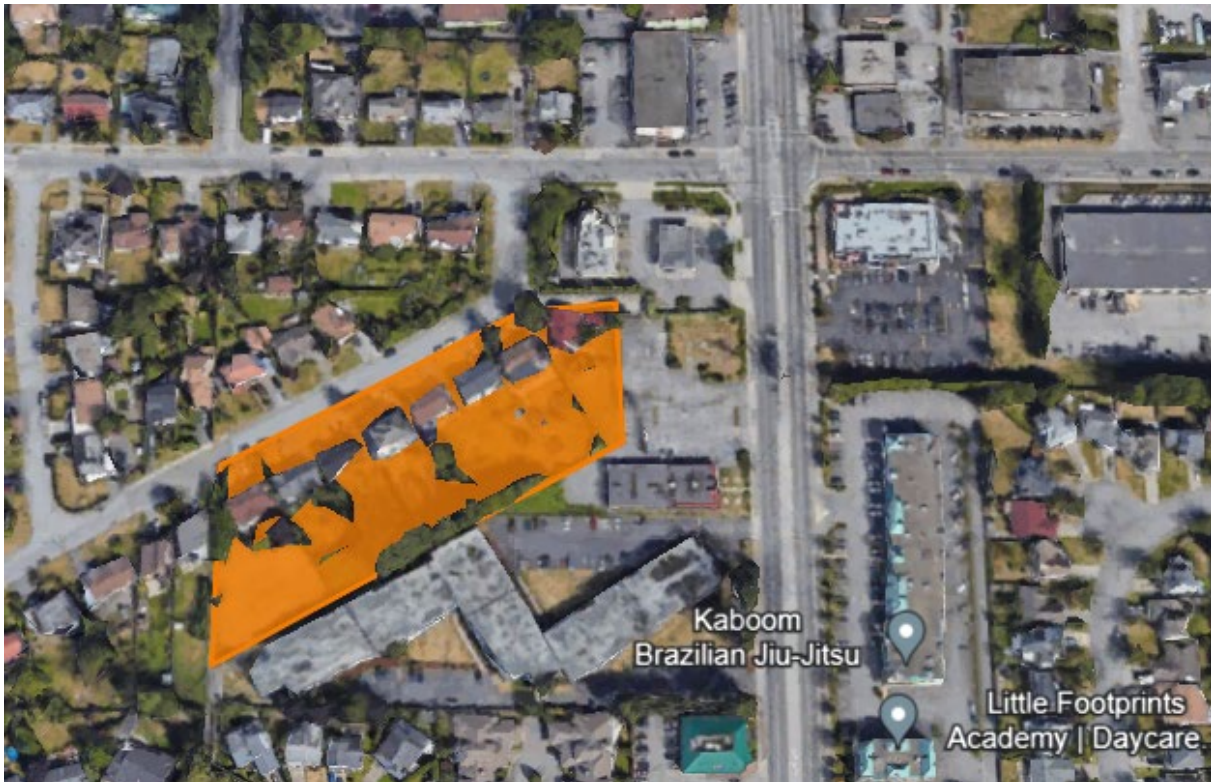
This site falls within the “multi-family up to 6 storeys” density tier (in the draft Townline Plan area), as shown previously in **Figure 12**.

## 7.2 CENTRAL – CENTRAL DISTRICT / KENNEDY PLAN

### 7.2.1 DELTA SITE 2

- Address: 11902-72 85A Avenue, Delta, BC
- Existing use: Eight (8) single-detached dwelling units
- Site size: 91,000 square feet in site size
- Site Assembly Required for Redevelopment: Yes

Figure 16: Delta Site 2



The market supportable redevelopment typology for this site would likely be primarily 6-storey wood-frame apartments with shared underground parking, with potential for site edge townhouses. The site would be too small to allow for townhouse-only development unless additional sites are acquired, as developers stated a strong preference for sites of three (3) to four (4) acres with sufficient site depth to allow for double-loaded townhouse rows. Furthermore, a BC Hydro Corridor runs along the back end of the properties so these sites would be limited for future development.

If a similar and larger site area could be acquired that is nearby to this site, there is potential for it to be developed into a larger, phased development project with a larger mixed-use building adjacent to the corridor and 6-storey wood-frame apartments tucked behind the corridor. The immediate surrounding areas include a range of development typologies,

including single-detached houses, low-rise apartments and some commercial uses with low site coverage.

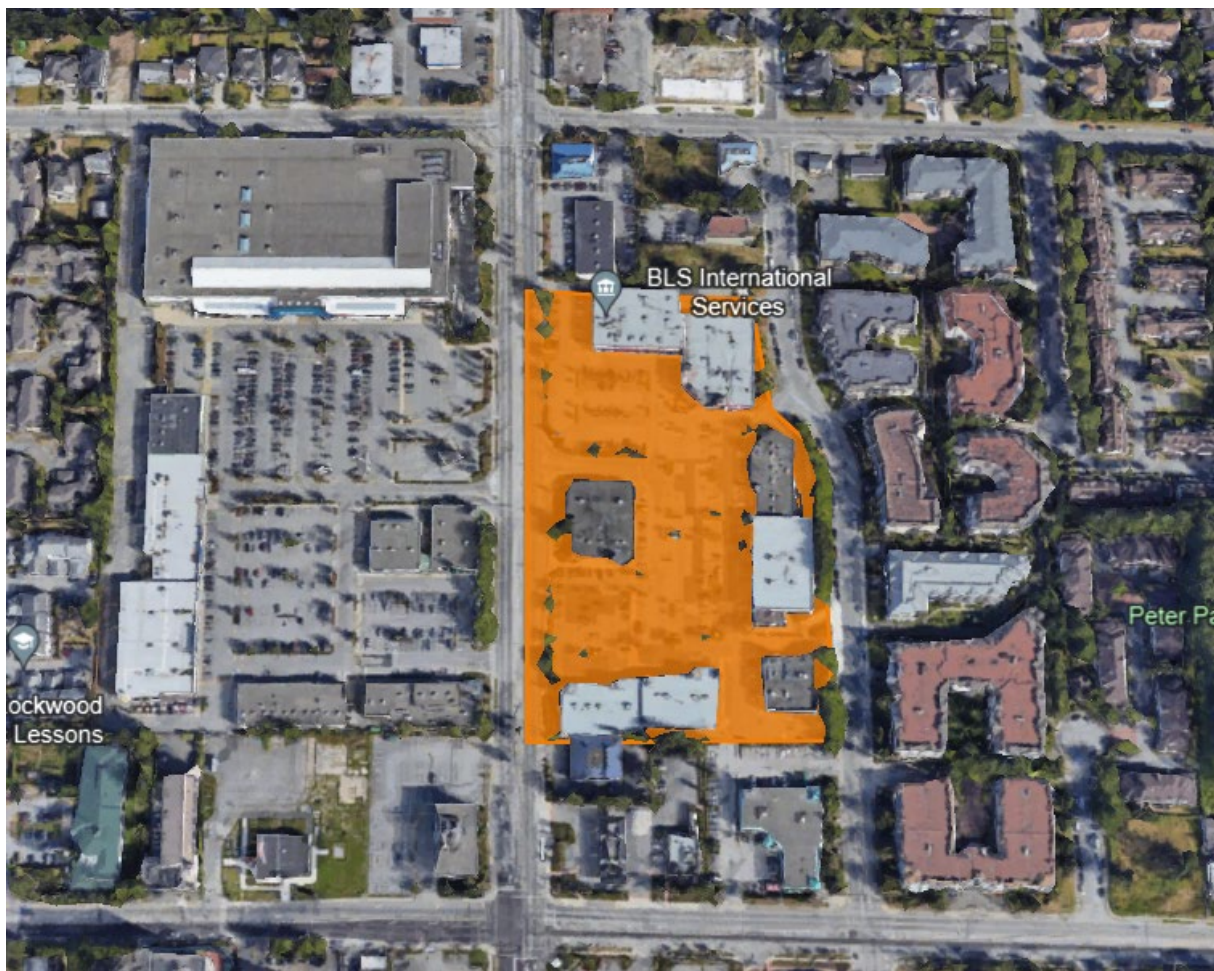
Based on our research, the market would support the development of these sites over the short to medium term (5 to 10 years) given the appropriate land use plans and zoning are in place to support the use.

This site falls within the “up to 12 storeys” density tier (in the Central District), as shown previously in Figure 12.

## 7.2.2 SURREY SITE 2

- Address: 8066-8080 120 Street
- Existing use: Scott Road Centre built in 1989 and 1990
- Site size: 320,000 square feet in site size
- Site Assembly Required for Redevelopment: No

Figure 17: Surrey Site 2



The redevelopment use of this site would need to generate higher value than the current use of the site as a commercial strip mall. The market supportable use for this site would be a large scale, phased development including high-rise mixed-use buildings along the corridor and 6-storey mixed-use wood-frame apartments tucked behind the corridor, transitioning down to the existing 4-storey apartments. Other surrounding land uses on the Delta side are commercial shopping centres, one high-rise building and a recently approved master-plan development of just under 900 units (Delta Shoppers Mall).

Based on our research, the market would support the development of these sites to begin in the medium term (10 years) given the appropriate land use plans and zoning are in place to support the use.

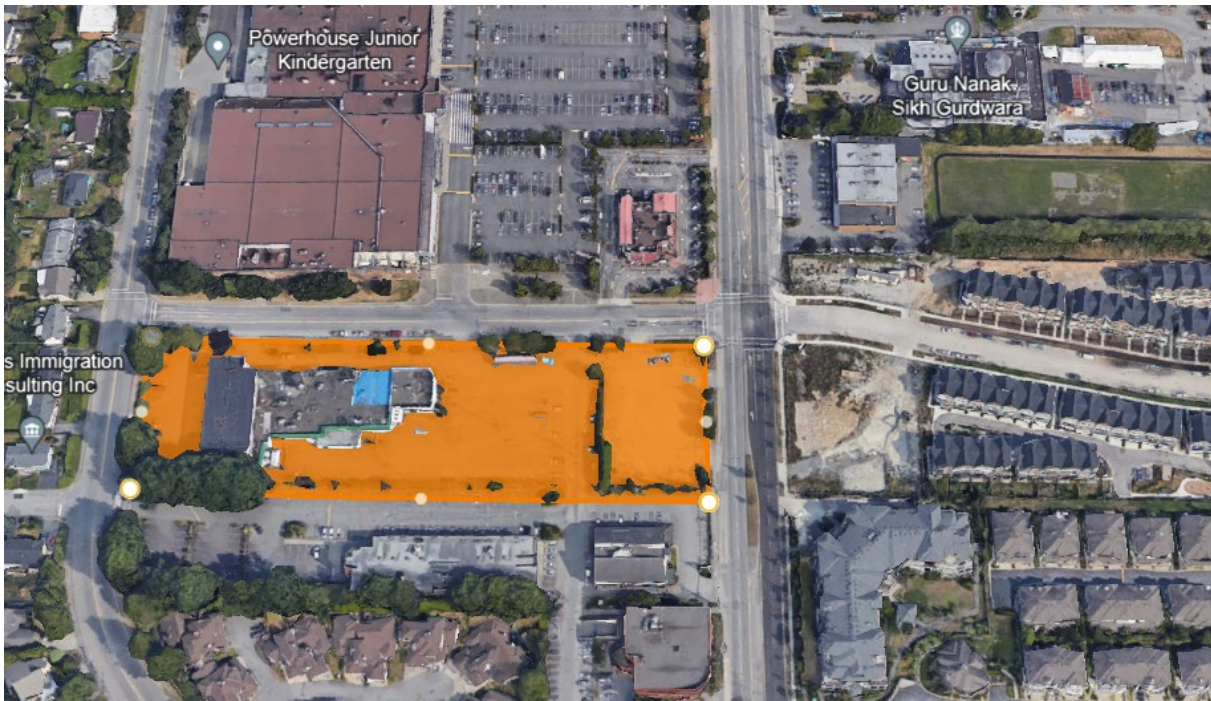
This site falls within the “more than 12 storeys” density tier (in the draft Kennedy Plan area), as shown previously in **Figure 12**.

## **7.3 SOUTH END – SCOTTSDALE DISTRICT / STRAWBERRY HILL PLAN**

### **7.3.1 DELTA SITE 3**

- Address: 11920 70 Avenue, Delta
- Existing use: Vacant lot
- Site size: 93,650 square feet in site size
- Site Assembly Required for Redevelopment: No

Figure 18: Delta Site 3



Note: The satellite image above shows a building which has since been demolished.

Over the short term, the market supportable redevelopment for this site would most likely support 6-storey wood-frame apartments with shared underground parking. Over the medium to longer term, more dense, mid-rise (or higher) residential buildings are likely supportable (12 storeys or taller). It would be situated north of a recent 6-storey wood-frame apartment and just south of site. Given its proximity to Scottsdale Mall, developers of this site are likely to approach at-grade commercial opportunities with caution.

Based on our research, the market would support the development of these sites over the short to medium term (5 to 10 years) given the appropriate land use plans and zoning are in place to support the use.

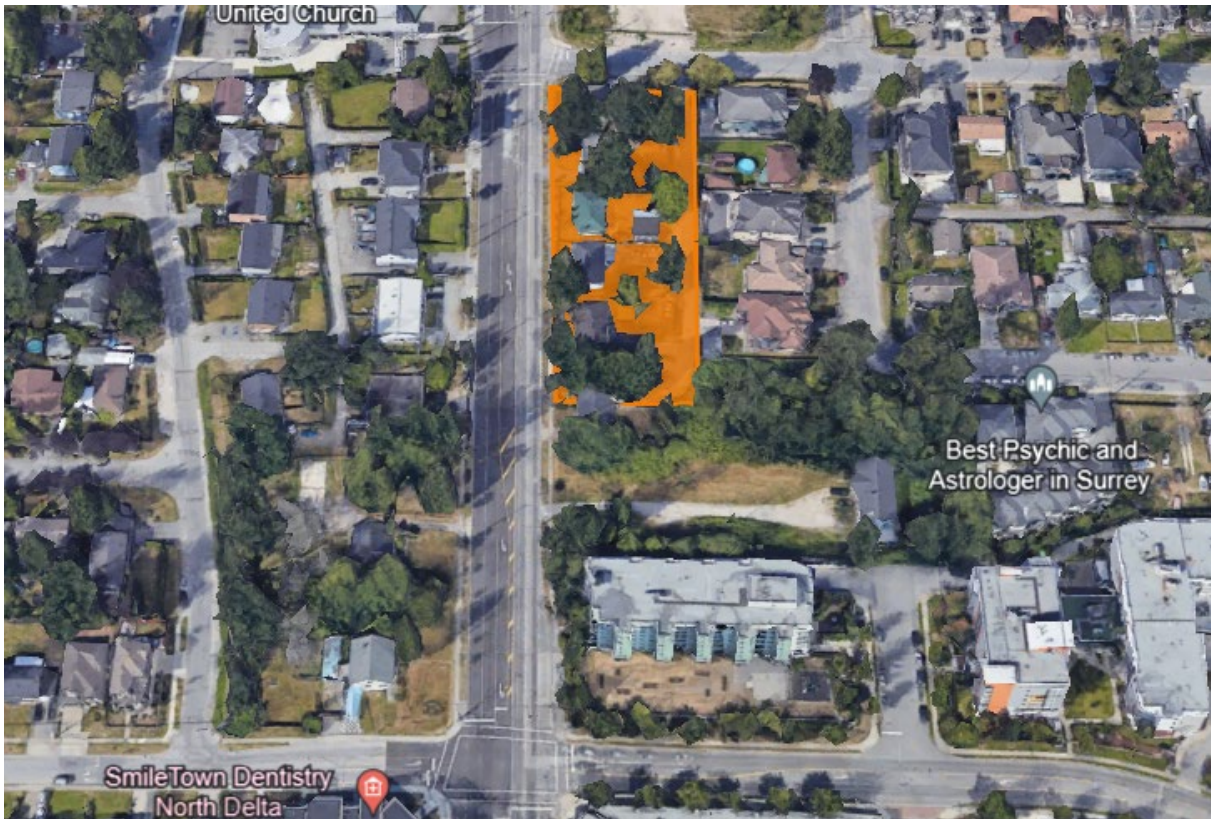
This site falls within the “more than 12 storeys” density tier (Scottsdale District), as shown previously in Figure 12.

### 7.3.2 SURREY SITE 3

- Address: 7626 120 Street, Surrey
- Existing use: Five (5) single-detached dwellings
- Site size: 52,000 square feet
- Site Assembly Required for Redevelopment: Yes



Figure 19: Surrey Site 3



The market supportable redevelopment use for this site would likely be 6-storey wood-frame apartment with shared underground parking. The market is not likely to support any additional commercial-retail uses on site given the extent of commercial-retail space currently in the South Scott Road retail trade area. Immediate surrounding land uses on the Surrey side are single-detached dwellings and a mid-rise wood-frame apartment.

Based on our research, the market would support the development of these sites over the medium term (10 years) given the appropriate land use plans and zoning are in place to support the use.

This site falls within the “up to 12 storeys” density tier (in the draft Strawberry Hill Plan area), as shown previously in Figure 12.

## 8.0 FINDINGS

The introduction of the R6 RapidBus service along Scott Road has increased the walkability, multi-modal accessibility, and general market appeal of the Scott Road corridor. In turn, increased transit access and frequency generally supports higher redevelopment potential opportunities along the corridor, with higher density nodes to be located at key intersections with important east-west road connections. Key findings from the report are summarized below, arranged by common theme.

### Aligning Land Use Plans and Policies

- The Scott Road corridor offers an opportunity for Delta and Surrey to better align their planning objectives for key priority nodes along the corridor.
- The market wants to provide increased density throughout the corridor, including higher density redevelopment opportunities within the major density nodes and more modest levels of density in areas between these higher priority locations.
- Development fees are not a significant factor in terms of relative overall development attractiveness on either side of the corridor, however, land use plans and policies need to be balanced on both sides when it comes to introducing policies around market rental or below-market rental housing requirements, as these requirements could impact development viability.

### Providing Flexibility to Accommodate Residential and Commercial Development Market Demand

- Scott Road corridor is ideally suited to provide a wider array of housing typologies and tenures, which would more directly support increased transit usage. This also provides flexibility for developers to meet market demand.
- While our analysis has modelled “low growth” and “high growth” demand projection scenarios, it is possible that the extent of higher density nodes within and outside of the corridor offer more intensive competition than is currently being recognized. Under this condition, there could be potential for a slightly lower market demand scenario which would shift our projections presented here to “medium growth” and “high growth” scenarios.
- There are several high-performing single-use shopping centres on both sides along the corridor which are likely to persist as income-generating properties through at least the medium term.
- Given the extent and quality of retail-commercial supply along the corridor, developers are likely to approach redevelopment scenarios with considerable caution with respect to provision of at-grade commercial floor area.

### Building on Development Activity Momentum

- Current development activity levels (as measured by proposed units under planning approvals) are higher on the Delta side than on the Surrey side of the corridor. This provides an opportunity for Delta and Surrey to complement their planning initiatives at key density nodes and to build on recent levels of development interest.
- There is more market uncertainty around the redevelopment timing of the Strawberry Hill Shopping Centre, as the site has recently changed ownership. Due to this, the development of the Strawberry Hill Plan should be prioritized after the development of the Kennedy Plan.

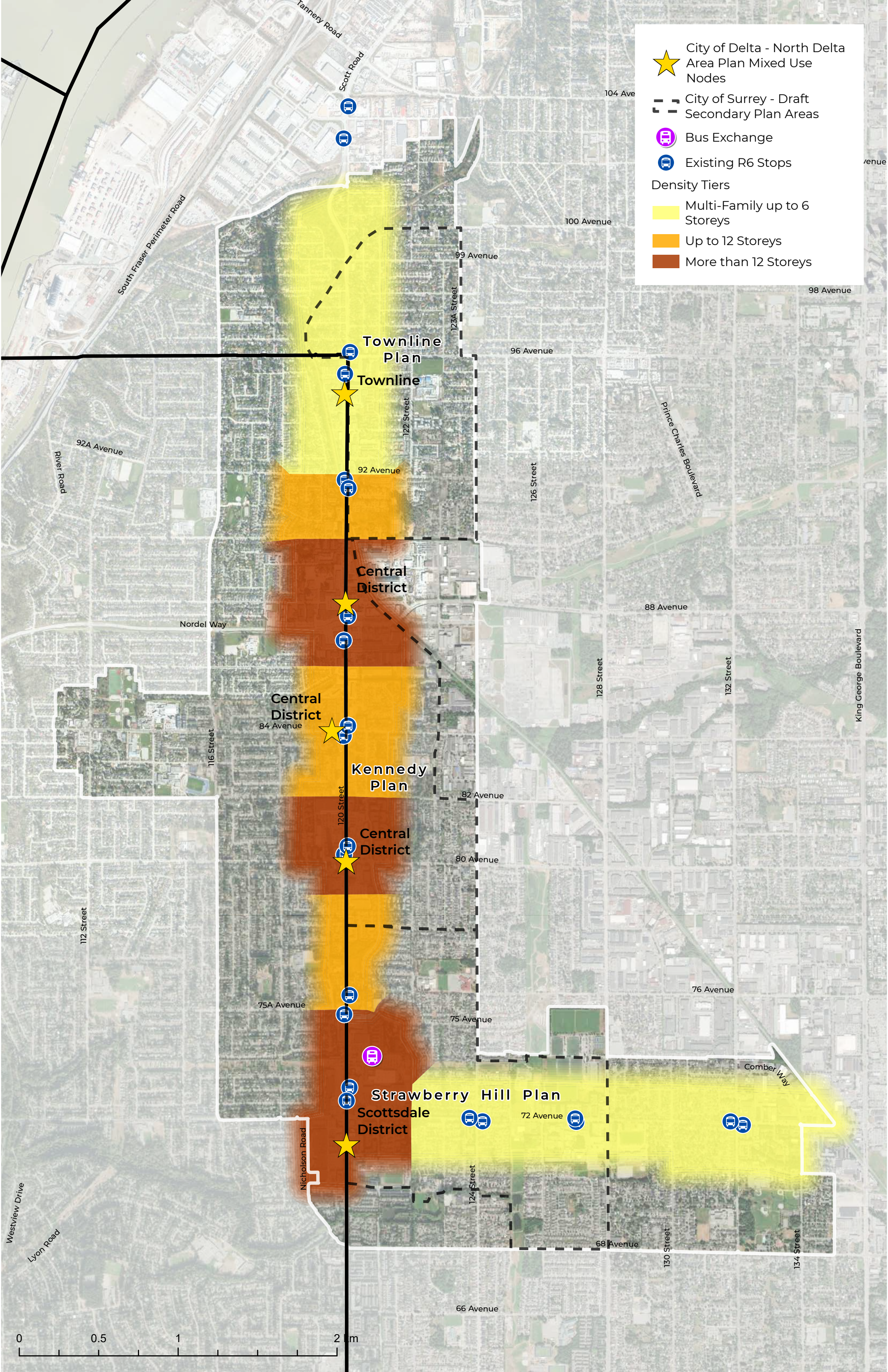
### Phasing of Neighbourhood Plans

- Due to the high development activity levels on the Delta side in the Central District (on the Delta side), it would be worthwhile for Surrey to consider prioritizing the development of the Kennedy Plan first.
- A review of market conditions and current land use patterns suggests that Surrey could undertake the development of the Townline Plan following both the Kennedy Plan and Strawberry Hill Plan.

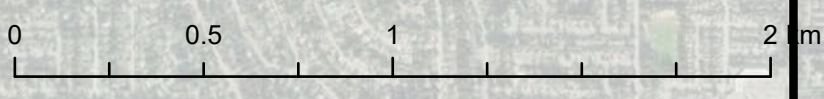
The background of the page is a dark gray map showing a street grid and a winding waterway. A red rectangular box is overlaid on the bottom left portion of the map.

# APPENDIX

## Density Tiers (Full Size)



★ City of Delta - North Delta Area Plan Mixed Use Nodes  
  City of Surrey - Draft Secondary Plan Areas  
  Bus Exchange  
  Existing R6 Stops  
**Density Tiers**  
 Multi-Family up to 6 Storeys  
 Up to 12 Storeys  
 More than 12 Storeys



Townline Plan

Townline

Central District

Central District

Kennedy Plan

Central District

Strawberry Hill Plan

Scottsdale District

92A Avenue

Nordel Way

84 Avenue

75A Avenue

99 Avenue

96 Avenue

82 Avenue

80 Avenue

75 Avenue

72 Avenue

66 Avenue

100 Avenue

98 Avenue

88 Avenue

76 Avenue

104 Ave

Scott Road

Nicholson Road

South Fraser Perimeter Road

Prince Charles Boulevard

Comber Way

123A Street

122 Street

92 Avenue

126 Street

128 Street

132 Street

120 Street

112 Street

116 Street

124 Street

68 Avenue

130 Street

134 Street

Westview Drive

Lyon Road

King George Boulevard

# Imagine Scott Road

Engagement Summary  
January 2023

# | Where We Are

## Introduction

The City is conducting a visioning study to better understand the area and how we can plan for growth over the next 30 years. With the introduction of RapidBus and development plans on the west side of Scott Road in Delta, change is going to happen along this corridor.

The R6 – RapidBus is coming to Scott Road. The new RapidBus route will run along Scott Road and 72 Avenue, connecting Newton Town Centre to Scott Road SkyTrain Station. These public transit improvements make the corridor a smart place for growth. Businesses can thrive in areas that are well served by transit. Transit also means people can live, work, and meet more of their daily needs without a vehicle.

Fall/Winter 2022

Spring 2023

Fall 2023



# | What We Did

## Initiating the Study

Engagement for Step 1 began in October 2022. It consisted of a variety of opportunities for people to provide feedback including a survey, mapping exercises, big ideas, Q&A, as well as a pop-up event at Kwantlen Polytechnic University.





## By The Numbers...

Approximately,

**817 Engaged Residents**

*An engaged resident is defined as an individual or group that has contributed to the project website, attended a pop-up event, connected through phone or email, completed the survey or attended a stakeholder meeting*

### 5 ways residents were engaged:



-  **611** Website Interactions\*  
*\*survey, questions, mapping, "Big Ideas"*
-  **150** Kwantlen Polytechnic University Pop-up Event
-  **50** Email and Phone Calls
-  **6** Stakeholder Meetings

Approximately,

**29,767 Informed Residents**

*An informed resident is defined as an individual or group that has made at least one single visit to the project website, received a postcard, or engaged in the project through social media.*

### 3 ways residents were informed:

-  **16,651** Mail Out Postcards to Plan Area Residents
-  **3,400** Website Page Views
-  **9,716** Social Media Engagements\*  
*\*clicks, reactions, comments and shares*



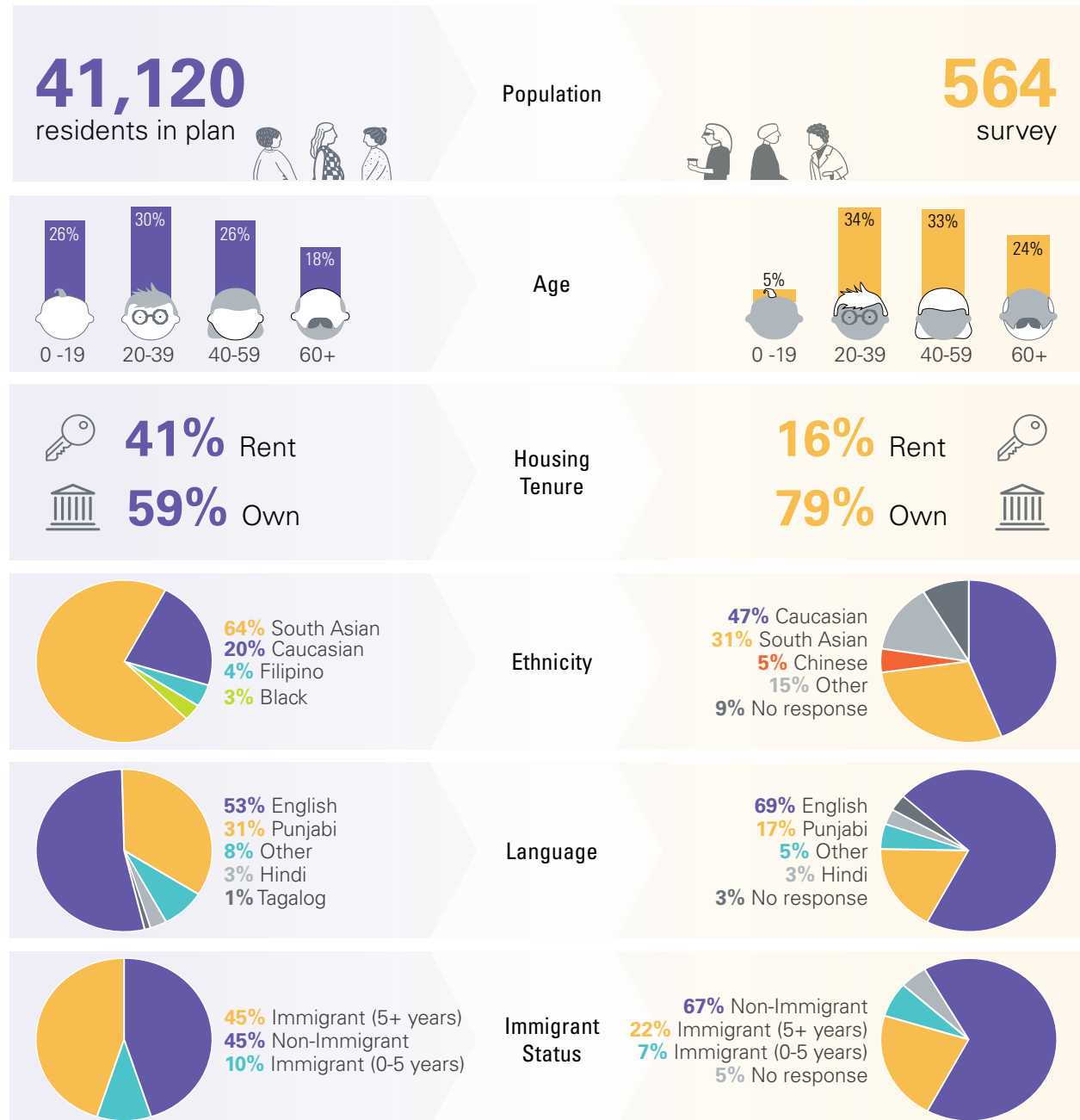
# I Who We Reached

The Scott Road - 72 Avenue Study Area is a diverse community. Key community demographics are shown in the left column of the graphic below. The City of Surrey's Public Engagement Strategy strives to achieve representative participation. Demographic information is collected in surveys to evaluate who is participating and which voices may be over or under represented. These statistics are shown in the right column of the graphic below.

This phase of engagement likely underrepresented the views of renters, South Asians, Punjabi speakers, and immigrants. Future engagement will prioritize outreach and engagement with these groups.

## Community Profile

## Survey Respondents





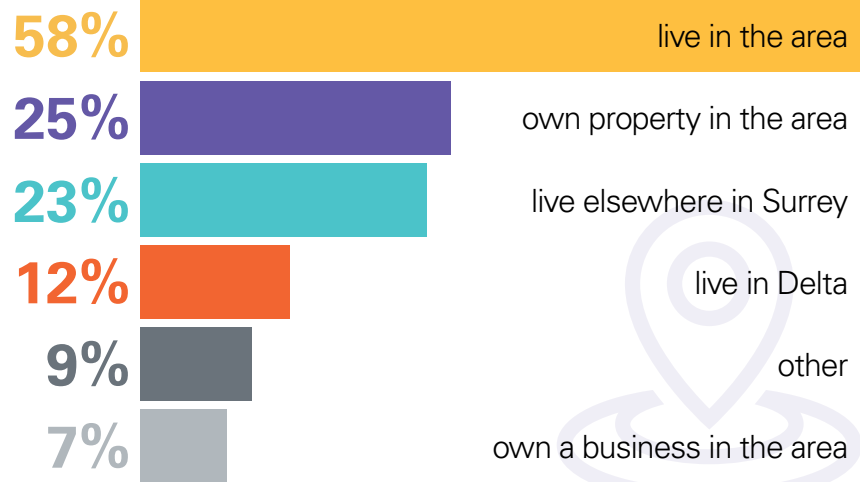
# Survey Responses

## 1. We asked respondents about their relationship to Scott Road and 72 Avenue. (564 responses)

**58%**

live in the area

“Other” responses included those who “wished to move to the area” or “lived elsewhere in Metro Vancouver”.

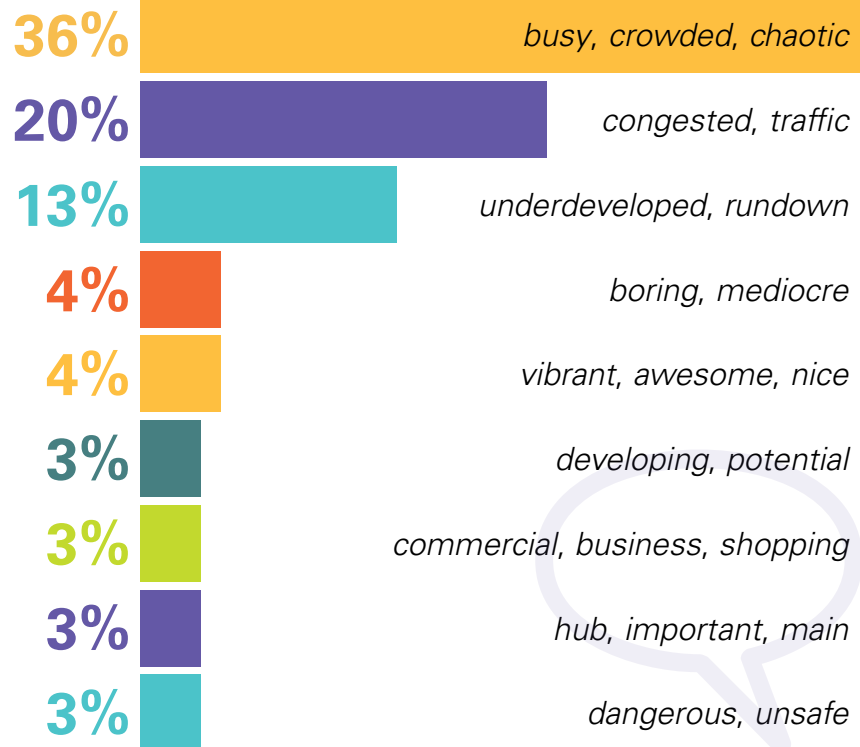


## 2. We asked respondents to choose one word they would use to describe Scott Road and 72 Avenue today. (561 responses)

**36%**

said *busy* or *crowded* or *chaotic*

Responses were grouped into categories of similarity. The most common word responses have been displayed.

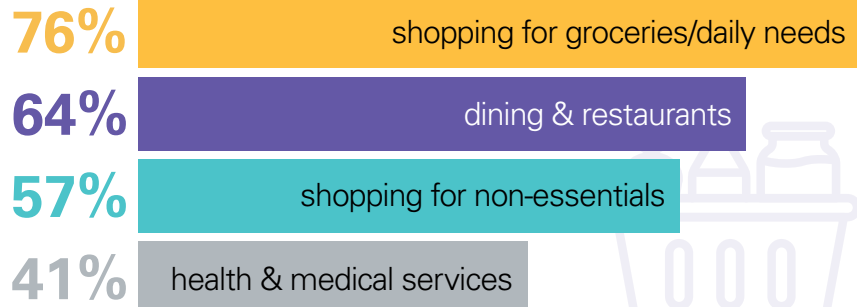


# Survey Responses

## 3. We asked respondents why they visit or spend time in Scott Road and 72 Avenue.\* (564 responses)

76%

said shopping for groceries/daily needs

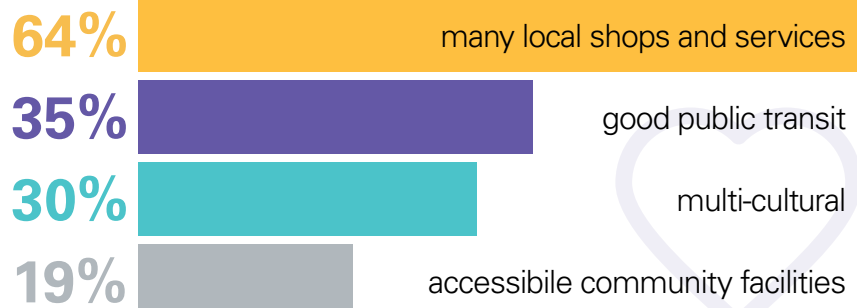


*\*Respondents were able to select all that applied. Listed are the top four responses.*

## 4. We asked respondents to identify the top three things they love about Scott Road and 72 Avenue today. (564 responses)

64%

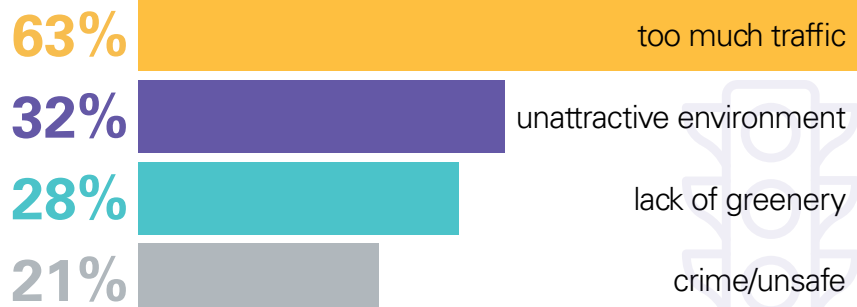
said many local shops and services



## 5. We asked respondents to identify the top three challenges along Scott Road and 72 Avenue. (564 responses)

63%

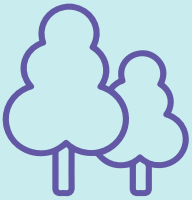
said too much traffic



# I Survey Responses

## 6. We asked respondents if there were any unique heritage features important to them or their community along Scott Road and 72 Avenue. (338 responses)

*Key themes that emerged:*



### **Trees and Park Space**

“Old trees in parks”  
“Cougar Creek Park”  
“Serpentine Greenway”

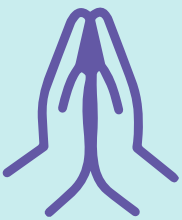
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### **Kennedy Hall**

“Kennedy Hall, stories of parent’s attending dances there”  
“The name Kennedy is very important to me as they were names after my 3x great grandfather”

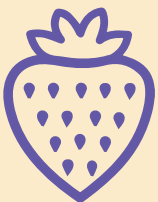
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### **Religious Spaces**

“The Guru Nanak Sikh Gurdwara...”  
“The houses of worship on Scott Road”

---



### **Strawberry Hill Hall**

“Strawberry Hill community hall - this was potentially a heritage site, but it was destroyed in a fire”  
“The heritage hall that burn down in 2021 should be rebuilt”

---

# I Survey Responses

## 7. We asked respondents to envision Scott Road and 72 Avenue in 25 years and to describe it in a few words. (521 responses)

*Key themes that emerged:*



### **Higher Density Mixed Use Buildings**

“High density, transit orientated mixed-use neighbourhood of condos and retail services”

“High density area with employment uses, restaurants at grade and residential towers”

---



### **Transit Accessible**

“Lots of transit, few cars”

“More transit will help make the area more accessible”

---



### **Parks, Greenery and Community Facilities**

“Park and community area for local residents”

“More parks and community facilities”

---



### **Vibrant Community**

“Vibrant and fast and fun”

“Vibrant and bustling”

---

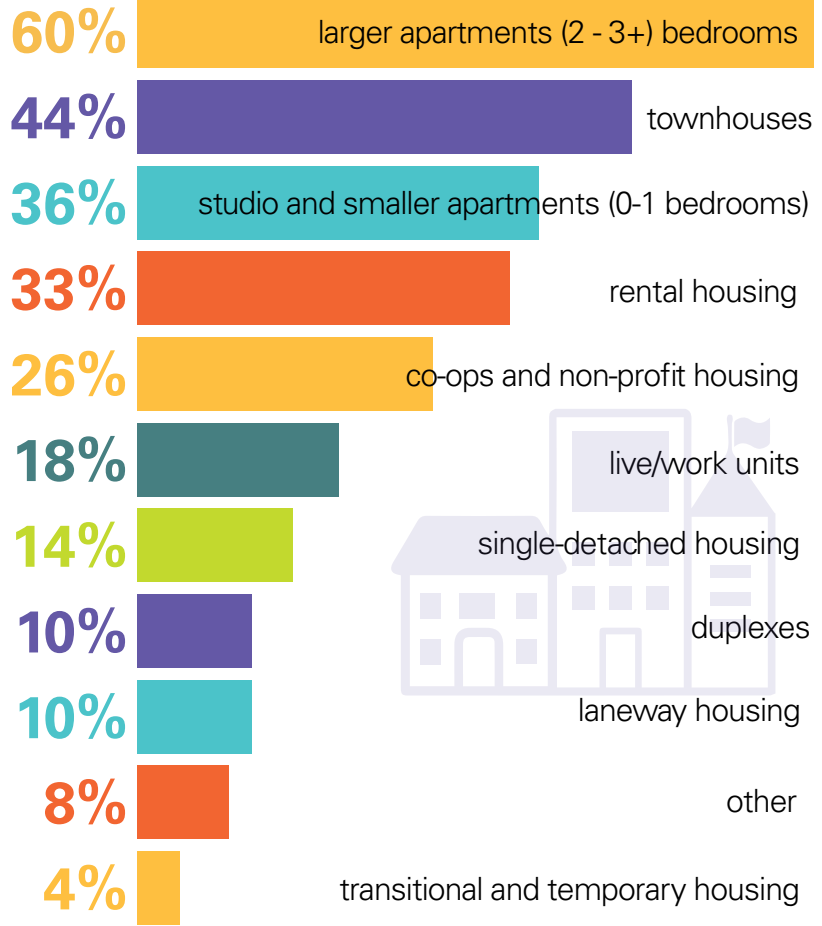
# Survey Responses

## 8. We asked respondents what types of new housing are needed as the community grows.\* (562 responses)

**60%**

said larger apartments (2-3+ bedrooms)

"Other" responses included "high rise apartments", "smaller single-detached homes", and "student residents".

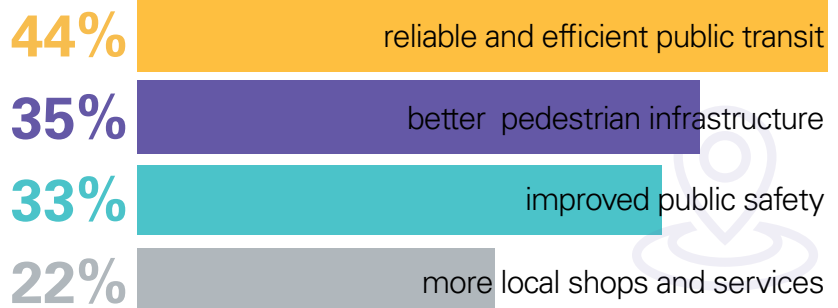


\*Respondents were asked to select the top three.

## 9. We asked respondents to select what is most important to make Scott Road and 72 Avenue a great place to live, work, and play.\* (562 responses)

**44%**

said reliable and efficient public transit



\*Respondents were asked to select the top three.

# | Survey Responses

**10. We asked respondents if there was anything else that could make Scott Road and 72 Avenue a great place to live, work, and play. (292 responses)**



More Regular  
Garbage Pick-up



More Green Space,  
Parks and Plazas



Better Traffic Flow  
and SkyTrain



More Arts and  
Cultural Amenities



Closer Health Care  
Facilities



More Housing

Responses were grouped into categories of similarity. The most common word responses have been displayed.

# Survey Responses

**11. We asked respondents to select which of the proposed areas for growth were most appropriate to accommodate higher-density growth.\* (512 responses)**

## 1st

Strawberry Hill was identified as the most appropriate area

**1st** Strawberry Hill

**2nd** Townline

**3rd** Kennedy

**4th** 80 Avenue

**5th** Kwantlen

**6th** 134 Street



\* Respondents were asked to place the options in order of priority, with 1 being the highest priority and 6 being the lowest priority.

**12. We asked respondents to identify any other areas that should be prioritized for growth. (182 responses)**

North of Townline  
on Scott Road

84 Avenue at Scott  
Road

64 Avenue and  
South at Scott  
Road

Responses were grouped into categories of similarity. The most common word responses have been displayed.

# Survey Responses

13. We asked respondents to identify where the heart of Scott Road and 72 Avenue should be.\* (562 responses)

**53%**

identified  
Strawberry Hill

**53%** Strawberry Hill

**12%** Kennedy

**12%** 80 Avenue

**10%** Townline

**6%** Kwantlen

**5%** 134 Street

**2%** Other



\* Respondents were asked to select one option.

"Other" responses included "Between 75th and 80th Ave" and "Should be located where crossroads meet and there is enough developable land".



# Interactive Mapping

## Map Your Scott Road and 72 Avenue

Participants were able to contribute to a mapping exercise on the engagement site. Using our online mapping tool, participants could pin various places on the map and add comments. We asked participants to place pins on places they love, unique heritage features, where they would like to see more parks and public spaces, what they would change, and what they wish the area had. *\*no responses were recorded for unique heritage features*

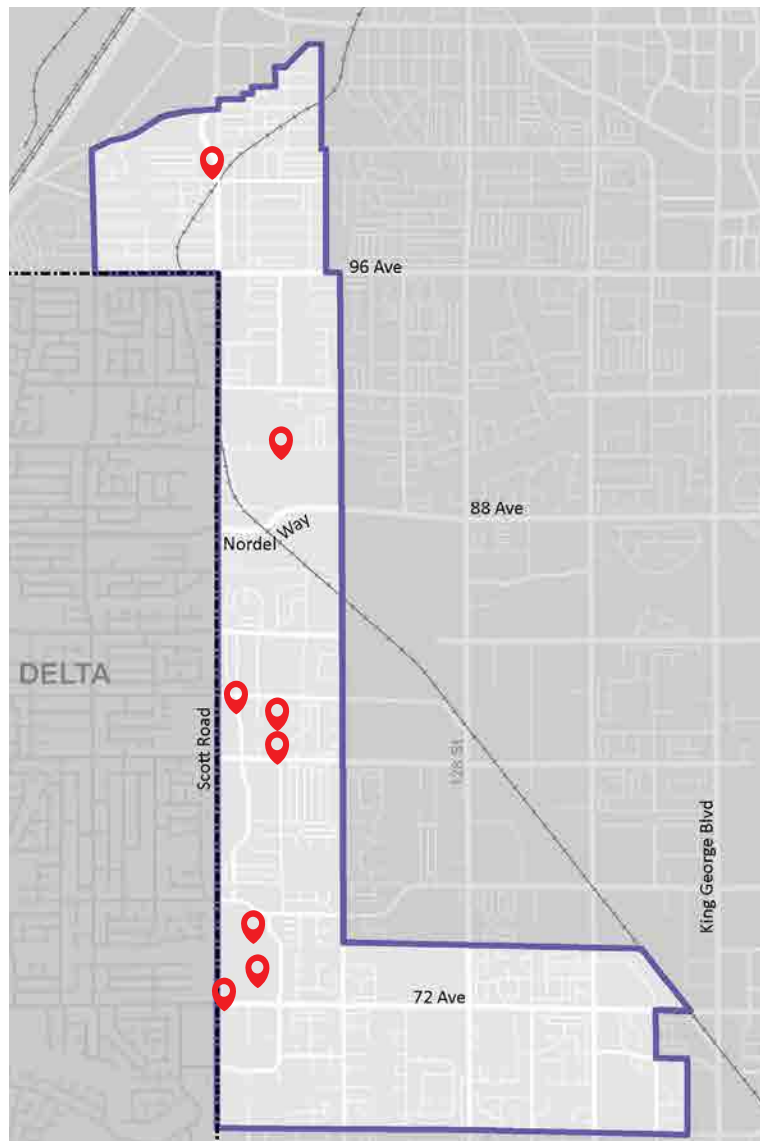
### What do you love?

8

identified places and features they love within the area

#### Responses included:

- *“Family orientated community”*
- *“The social events/sense of community”*
- *“Shopping in this area is convenient for us”*
- *“We enjoy living on a quiet street and hope it can stay that way”*



# I Interactive Mapping

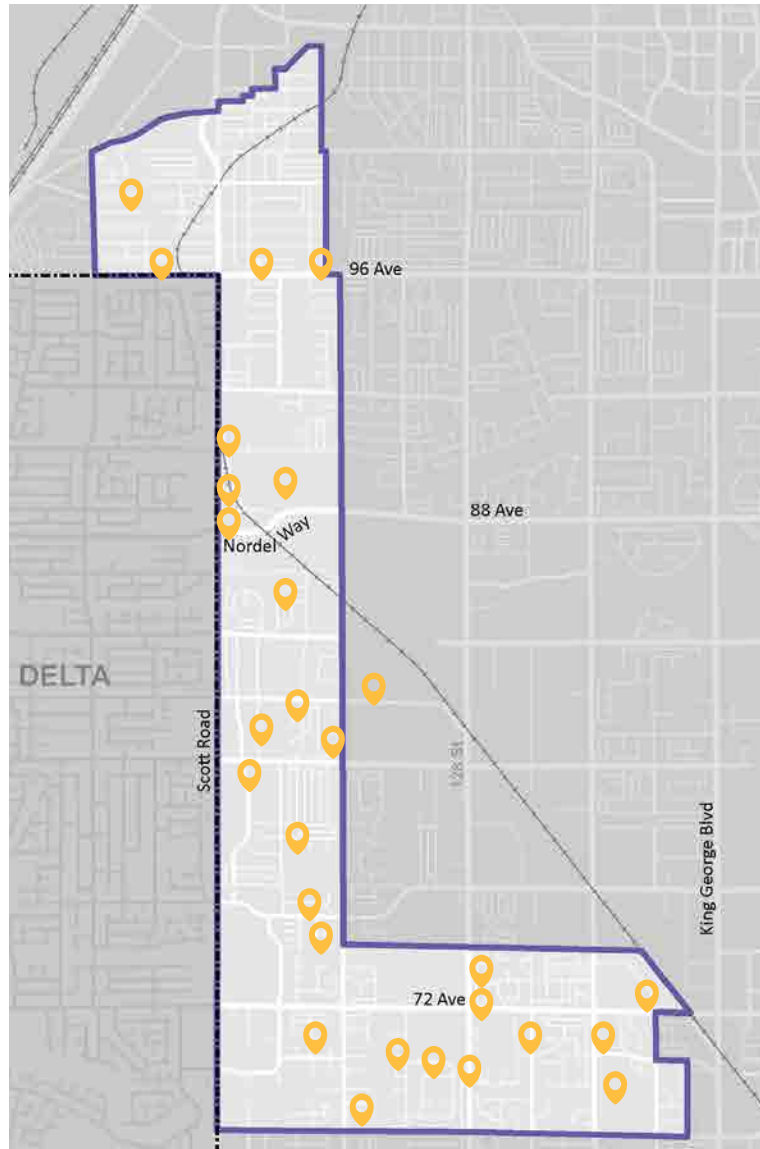
## What do you wish the area had?

27

identified places and features they wished the area had

### Responses included:

- *“Protected cycling”*
- *“Connection across railway for people cycling and walking”*
- *“120A Street should be a bike route”*
- *“Multi-use path between Scott Road and 124 St”*
- *“Unwin {park} needs a walking path ALL the way around”*



# I Interactive Mapping

## Where would you like to see more parks and public spaces?

2

identified places where they wanted to see more or improved parks/ public spaces

### Responses included:

- *"I hope this {Peter Pan Park} could be turned into a nice park with a playground where family can have picnics and hangout"*
- *"This is an empty green space that has become a dumping ground. It would be the perfect place to turn into a dog park or something like it. Maybe a community garden?"*



# I Interactive Mapping

## What would you change?

2

identified places they would like to change in the area

### Responses included:

- *“Rail crossing is unsafe for pedestrians, causes traffic jams when trains are crossing. Poor pedestrian connections to park along Holt Rd.”*
- *“The rapid bus should take 96 ave to the city centre...”*



# I Big Ideas

Participants were able to post their “Big Ideas” for Scott Road and 72 Avenue on our engagement site. Other participants could indicate their support for their idea by “liking” it. Below are all the Big Idea responses with corresponding “like” counts.

13

SkyTrain along Scott Road as density increases

4

High density mixed use development to support rapid transit

3

Higher density along corridor promoting cycling infrastructure

2

The corner of Scott Road and 72 Ave should be formally recognized as a site for events and gatherings

2

Extend the R6 Bus further South to 64th and Highway 10

1

Park with playground for families to enjoy

0

High Density the whole way except for Townline.

0

Higher density mixed with commercial development. Green space and open air parks. Pedestrian and cyclist friendly

0

At least one new park, perhaps at Scott Rd. and 76A Ave



# I Next Steps

City Staff will incorporate the findings of this phase of engagement into a Draft Visioning Study Document. The community will be invited to review and provide input on the draft document before it is finalized for consideration by Council.

## Project Timeline



## Questions?

If you have any additional questions about this Engagement Summary or the Visioning Study in general please contact [ImagineScottRoad@surrey.ca](mailto:ImagineScottRoad@surrey.ca).

